Market Research – Eastern Europe

Industrial footwear in Poland
Proexport – Colombia
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Estimado Empresario:

La búsqueda de acuerdos comerciales que nos permitan como país ampliar los escenarios y mercados de exportación, nos reta como PROEXPORT a apoyar en forma directa a los empresarios en sus iniciativas exportadoras, ofreciendo servicios dentro de un modelo del gestión comercial y compartiendo un conocimiento más detallado sobre los mercados y sus oportunidades.

Para lograr lo anterior, PROEXPORT, con inversión de recursos propios y de cooperación técnica no-reembolsables del BID-FOMIN, emprendió una labor de recolección y análisis de información de primera mano en los principales mercados de interés a través de la contratación de consultorías internacionales especializadas en investigaciones de mercados. Los resultados de estos trabajos permitieron analizar y conocer la dinámica comercial de los sectores en los cuales existe un potencial para nuestras exportaciones, así como detallar aspectos de competitividad, información valiosa para la orientación de las iniciativas exportadoras de nuestros empresarios.

La información que contiene este estudio, sobre la dinámica del sector, la demanda y consumo, la situación competitiva de los productos, estructura y características de la comercialización y logística de acceso al mercado, es una contribución e invitación a profundizar y conocer aspectos que nos permitan avanzar en la realización de negocios en escenarios internacionales.

Cordialmente,

[Signature]

Luis Guillermo Plata P.
Presidente PROEXPORT
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1. Introduction

1.1 Introduction

This report aims at providing in depth information on the industrial footwear sector in Poland for PROEXPORT Colombia. The report has been drawn up in accordance with the project specification.

The main objective of the project is to offer detailed information about the Polish industrial footwear market to Colombian entrepreneurs. This involves the gathering and analyzing of market information about sector development, product requirements, legal affairs and product competitiveness through the comprehensive market research process. Both first hand information and secondary sources were studied in order to have a complete analysis of the market.

All these steps enable identifying export opportunities for Colombian entrepreneurs in Poland. The report provides Colombia exporters not only with statistical information and legal requirements but also with a practical guidebook on how to approach the Polish market. It gives an extensive overview on practices and prices prevailing on the market and other relevant aspects regarding market entry.

1.2 Methodology

Information for the research was gathered by means of official information sources in Poland, such as the Ministry of Finance, the Ministry of Infrastructure, the Central Statistical Office, the Foreign Trade Database, internet sites of branch organizations (Polish Chamber of the Shoe and Leather Industry), internet sites of companies present on the market, field research as well as information from our personal contacts.

The presented data on footwear is as diverse as possible. General information concerning this market is mostly obtained from official sources such as the Central Statistical Office or the Ministry of Finance. With regard to the industrial footwear market, valuable information was gathered from the Polish Chamber of the Shoe and Leather Industry.

More detailed information is presented by branch organizations and professional reports, like analyzes prepared by Boss Informacje Ekonomiczne periodic. This
information is usually based on estimations and knowledge of professionals active in the footwear market.

Industrial footwear is studied as a sub sector and additional data on specific personal protective equipment is given as often as possible. Though the information supply on this topic is rather limited and is therefore really an addition to the information about the general footwear sector.

Where possible this report combines data both from both nationwide institutions and professional organizations, sometimes showing the difference in figures given by these two sources. Some requested information was neither possible to gather or to estimate, however the biggest of efforts was made to provide as much information as possible.

All numbers stated in the report are in EUR. On 20 September 2005 the average exchange rates amounted to: 1 EUR = 3,90700 PLN
2. General sector data

2.1 Current market developments within the specified sector

There are about 8,000 entities in the Polish footwear sector. However only about 100 companies, that produce shoes, employ more than 50 employees\(^1\). The industry is strongly dominated by private capital, which means that many companies have Polish owners. Many previously state-owned companies were taken over by private entrepreneurs. Currently they use modern machines and technology and pay much attention to design. Therefore Polish shoe production has a good reputation in terms of quality and durability.

The majority of shoes bought in Poland are imported, mainly inexpensive shoes from China. In general Poland exports its footwear products to other European countries. This reflects the high quality of Polish shoes, because these markets are demanding in terms of quality and type of materials used.

2.2 Sector’s participation in total GDP

Data on Poland’s GDP are presented in Table 2.2.1. and Table 2.2.2.

Table 2.2.1. GDP in Poland 2002-2004 (current prices million EUR)

<table>
<thead>
<tr>
<th></th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP</td>
<td>198779,2</td>
<td>207336,6</td>
<td>224620,9</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

Table 2.2.2. Dynamic of GDP growth in Poland 2002-2004 (annual average prices from previous year)

<table>
<thead>
<tr>
<th></th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP</td>
<td>101,4</td>
<td>103,8</td>
<td>105,3</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

The footwear sector as such is not detailed in national accounts. The only information on general participation in GDP of the “manufacturing” sector is given by the statistical office. The share of “manufacturing” sector in total GDP amounted to 30305,2 mln EUR in 2002 and 33647,7 mln EUR in 2003.

In 2003 the value of sold footwear production was 3638,6 mln EUR. This amount has been decreasing over the last year.

---

\(^1\) Boss Informacje Gospodarcze
2.3 Sector’s participation in employment

General figures concerning employment in Poland are given in Table 2.3.1.

Table 2.3.1. Employed persons as of 31 December (in thous.)

<table>
<thead>
<tr>
<th>Employed persons as of 31 December</th>
<th>2000</th>
<th>2002</th>
<th>2003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>15488,8</td>
<td>14923,7</td>
<td>14802</td>
</tr>
<tr>
<td>Manufacturing (as part of industry)</td>
<td>2674,7</td>
<td>2440,8</td>
<td>2446,8</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

There has been a significant fall in employment in the Polish footwear sector since 1995. Competition from abroad has only gotten stronger since ’95 and producers have been trying to cut production costs by working with less employees. Work productivity has grown considerably and is now comparable to the EU average. The best Polish companies have an average production of 7-8 pairs of shoes daily per worker. This however still means that in a list published in 2003 the manufacturing of leather and its products ranked last among all production sectors in terms of dynamics of sold production and work productivity.

Table 2.3.2. Employment, remuneration and work productivity in Polish footwear sector

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average employment (in thous. persons)</td>
<td>43,6</td>
<td>42,7</td>
<td>42,0</td>
<td>36,6</td>
<td>28,3</td>
<td>24,9</td>
<td>22,4</td>
<td>19,4</td>
<td>18,3</td>
</tr>
<tr>
<td>Dynamics (previous period = 100)</td>
<td>93,2</td>
<td>98,0</td>
<td>98,4</td>
<td>87,1</td>
<td>77,3</td>
<td>89,2</td>
<td>90,2</td>
<td>86,5</td>
<td>94,3</td>
</tr>
<tr>
<td>Average monthly gross salary (EUR)</td>
<td>129,1</td>
<td>165,2</td>
<td>194,2</td>
<td>210,3</td>
<td>287,3</td>
<td>316,3</td>
<td>328,8</td>
<td>334,8</td>
<td>337,4</td>
</tr>
<tr>
<td>Dynamics (previous period = 100)</td>
<td>135,7</td>
<td>128,0</td>
<td>117,5</td>
<td>108,3</td>
<td>111,0</td>
<td>110,0</td>
<td>104,0</td>
<td>101,8</td>
<td>100,8</td>
</tr>
<tr>
<td>Work productivity (thous. EUR per 1 employed)</td>
<td>7,6</td>
<td>10,3</td>
<td>11,8</td>
<td>11,5</td>
<td>14,5</td>
<td>16,9</td>
<td>17,6</td>
<td>19,3</td>
<td>19,9</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)
### 2.4 Developments in production

#### Table 2.4.1 Comparison of production in years 2001 - 2004 by GUS (mln pairs):

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>+increase %</th>
<th>-decrease %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production by GUS</td>
<td>50,3</td>
<td>52,5</td>
<td>48,6</td>
<td>37,5</td>
<td>-22,8</td>
<td></td>
</tr>
<tr>
<td>(companies with more than 49 employees)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>including:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-footwear with leather upper</td>
<td>18,9</td>
<td>19,2</td>
<td>17,8</td>
<td>16,3</td>
<td>-8,03</td>
<td></td>
</tr>
</tbody>
</table>

*Source: Polish Chamber of the Shoe and Leather Industry*

In 2002, after a period of stagnation, the footwear industry recorded a 5% increase in production. However, in 2003 a significant fall in production occurred. This decreasing tendency was also visible during 2004, when the production fell with another 4 million pair. Over the period 2001-2004 this led to a total 22.8% decrease in production

However it is important to realize that of the ten countries who just joined the European Union, Poland is by far the biggest footwear producer. The country manufactured 52 million pairs of shoes in 2004, compared to 14 million in Hungary and 8 million in the Czech Republic.

#### Table 2.4.2 Footwear production according to upper types in years 2003 and 2004 in 22 factories (in thousand pairs):

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2004</th>
<th>+increase %</th>
<th>-decrease %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Footwear in all including:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-leather footwear</td>
<td>3413,4</td>
<td>3243,4</td>
<td>- 5,0</td>
<td></td>
</tr>
<tr>
<td>-plastic footwear</td>
<td>226,5</td>
<td>237,8</td>
<td>+5,0</td>
<td></td>
</tr>
<tr>
<td>-textile footwear</td>
<td>2821,8</td>
<td>2669,9</td>
<td>- 5,4</td>
<td></td>
</tr>
</tbody>
</table>

*Source: Polish Chamber of the Shoe and Leather Industry*

Table 2.4.2 also shows that total footwear production went down. However there is one category that saw an increase in production; plastic footwear. This development is mainly due to the fact that plastic footwear is more able to compete with products coming from Asia. They are generally of a lesser quality than leather footwear and can therefore be sold at lower prices.
2.5 Sales-, import- and export activities

Table 2.5.1. Production and sales direction (in thousand pairs):

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2004</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Footwear production in all including sale:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- for internal market</td>
<td>6461,7</td>
<td>6151,1</td>
<td>- 4,8</td>
</tr>
<tr>
<td>- for export</td>
<td>5193,1</td>
<td>4814,8</td>
<td>-7,3</td>
</tr>
<tr>
<td></td>
<td>1365,1</td>
<td>1329,3</td>
<td>-2,6</td>
</tr>
</tbody>
</table>

Source: Polish Chamber of the Shoe and Leather Industry

As visible in table 2.5.1 and shown above, the total production of footwear in Poland decreased over the past years. The production for the internal market decreased even more than the production destined for export; the first one with 7.3% and the latter with 2.6%.

Leather shoes dominate the Polish footwear exports – they have a 30% share in the total volume of exports and a 50% share in the total value. In terms of the volume of purchases textile shoes play the most important role in the Polish footwear imports – they amount for 70% of the total volume of imports. However, considering the value of Polish imports, leather shoes amount for 60% share.

Table 2.5.2. Exports of footwear, headgear and articles thereof, January - September 2004

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Participation of the EU in the total exports of footwear in Poland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Footwear</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In pairs</td>
<td>16562234</td>
<td>12633380</td>
</tr>
<tr>
<td>I-IX 2003=100</td>
<td>80,8</td>
<td>83,8</td>
</tr>
<tr>
<td>In thous. PLN</td>
<td>593234,2</td>
<td>430986,5</td>
</tr>
<tr>
<td>I-IX 2003=100</td>
<td>93,0</td>
<td>94,5</td>
</tr>
<tr>
<td>In thous. USD</td>
<td>157742</td>
<td>114285</td>
</tr>
<tr>
<td>I-IX 2003=100</td>
<td>96,5</td>
<td>97,7</td>
</tr>
<tr>
<td>In thous. EUR</td>
<td>127323</td>
<td>92135</td>
</tr>
<tr>
<td>I-IX 2003=100</td>
<td>86,1</td>
<td>87,0</td>
</tr>
<tr>
<td>Parts of footwear; in-soles, heel cushions, gaiters, leggings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In thous. PLN</td>
<td>172305,3</td>
<td>140449,9</td>
</tr>
<tr>
<td>I-IX 2003=100</td>
<td>89,9</td>
<td>89,7</td>
</tr>
</tbody>
</table>
Table 2.5.2. gives the amount of exports of footwear during the period January-September 2004. The figures are given in pairs as well as in values. The latter are presented in PLN, USD and EUR to facilitate the comparison of respective numbers for other countries. Figures are also presented as indexes with basic period I-IX 2003. The particular focus is on exports to the EU – the third column presents participation of the EU in the total exports of footwear in Poland.

Table 2.5.3. Imports of footwear, headgear and articles thereof, January - September 2004

Similarly, Table 2.5.3. gives the amount of imports of footwear during the period January-September 2004. The figures are given in pairs as well as in values. The latter are presented in PLN, USD and EUR to facilitate the comparison of respective numbers for other countries. Figures are also presented as indexes with basic period I-IX 2003. The particular focus is on imports to the EU – the third column presents participation of the EU in the total imports of footwear in Poland.
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In 2003, Polish exports decreased mainly due to the fall in German demand (the main importer of Polish shoes). Export to Russia is still below the potential because this country is still perceived as risky and not transparent. Polish producers that look for niche markets within the EU, often act as subcontractors under other company’s brand name.

Table 2.5.4. Exports of footwear, January - September 2004 – major countries to where Poland exports its footwear

<table>
<thead>
<tr>
<th>Country</th>
<th>Footwear In thous. PLN</th>
<th>Footwear In thous. EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>123207.1</td>
<td>31305.2</td>
</tr>
<tr>
<td>Ukraine</td>
<td>123207.1</td>
<td>31305.2</td>
</tr>
<tr>
<td>Denmark</td>
<td>40620.8</td>
<td>10322</td>
</tr>
<tr>
<td>Italy</td>
<td>31743.7</td>
<td>8067.7</td>
</tr>
<tr>
<td>Lithuania</td>
<td>24005.4</td>
<td>6101</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>20800.7</td>
<td>5286.1</td>
</tr>
<tr>
<td>Slovakia</td>
<td>14104.4</td>
<td>3584</td>
</tr>
<tr>
<td>Netherlands</td>
<td>13962.7</td>
<td>3548.4</td>
</tr>
<tr>
<td>UK</td>
<td>11755.7</td>
<td>2987.5</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>9527.2</td>
<td>2422.2</td>
</tr>
<tr>
<td>Estonia</td>
<td>8024.2</td>
<td>2039.4</td>
</tr>
<tr>
<td>Sweden</td>
<td>7157.3</td>
<td>1821</td>
</tr>
<tr>
<td>Hungary</td>
<td>5843.8</td>
<td>1486.8</td>
</tr>
<tr>
<td>USA</td>
<td>5315.2</td>
<td>1352.6</td>
</tr>
<tr>
<td>France</td>
<td>5132.5</td>
<td>1305.3</td>
</tr>
<tr>
<td>Latvia</td>
<td>4835.9</td>
<td>1229.7</td>
</tr>
<tr>
<td>San Marino</td>
<td>4665.5</td>
<td>1185.8</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

Table 2.5.5. Imports of footwear, January - September 2004 – major countries exporting to Poland

<table>
<thead>
<tr>
<th>Country</th>
<th>Footwear In pairs</th>
<th>Footwear In thous. PLN</th>
<th>Footwear In thous. EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>41036807</td>
<td>275688.5</td>
<td>70094.9</td>
</tr>
<tr>
<td>Italy</td>
<td>1817377</td>
<td>104073.0</td>
<td>26479.4</td>
</tr>
<tr>
<td>Vietnam</td>
<td>1595225</td>
<td>66637.3</td>
<td>16947.1</td>
</tr>
<tr>
<td>Indonesia</td>
<td>440621</td>
<td>23354.5</td>
<td>5942.3</td>
</tr>
<tr>
<td>Spain</td>
<td>273070</td>
<td>22756.5</td>
<td>5790.2</td>
</tr>
<tr>
<td>Thailand</td>
<td>311362</td>
<td>20133.0</td>
<td>5120.2</td>
</tr>
<tr>
<td>Romania</td>
<td>315932</td>
<td>17156.2</td>
<td>4360.9</td>
</tr>
<tr>
<td>Germany</td>
<td>461163</td>
<td>11904.4</td>
<td>3025.9</td>
</tr>
<tr>
<td>Portugal</td>
<td>92489</td>
<td>9409.4</td>
<td>2392.4</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)
Table 2.5.6. Imports of footwear with uppers of leather and soles of leather or other materials, January - September 2004 – major countries exporting to Poland

<table>
<thead>
<tr>
<th>Footwear with uppers of leather and soles of leather or other materials</th>
<th>In pairs</th>
<th>In thous. PLN</th>
<th>In thous. EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>1017984</td>
<td>84064,1</td>
<td>21374,2</td>
</tr>
<tr>
<td>China</td>
<td>2761372</td>
<td>82321,8</td>
<td>20932,9</td>
</tr>
<tr>
<td>Vietnam</td>
<td>510683</td>
<td>33073,0</td>
<td>8412</td>
</tr>
<tr>
<td>Spain</td>
<td>200569</td>
<td>19692,9</td>
<td>5005,7</td>
</tr>
<tr>
<td>Romania</td>
<td>169093</td>
<td>14473,6</td>
<td>3679</td>
</tr>
<tr>
<td>Indonesia</td>
<td>173409</td>
<td>11539,6</td>
<td>2933,1</td>
</tr>
<tr>
<td>Portugal</td>
<td>83780</td>
<td>8869,5</td>
<td>2256,6</td>
</tr>
<tr>
<td>Thailand</td>
<td>106921</td>
<td>8529,1</td>
<td>2170,3</td>
</tr>
<tr>
<td>Slovakia</td>
<td>81575</td>
<td>7459,6</td>
<td>1898,2</td>
</tr>
<tr>
<td>India</td>
<td>120244</td>
<td>7407,4</td>
<td>1884,2</td>
</tr>
<tr>
<td>Germany</td>
<td>69031</td>
<td>6293,5</td>
<td>1600,8</td>
</tr>
<tr>
<td>Macau</td>
<td>94991</td>
<td>5464,6</td>
<td>1390</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

China is an unquestionable leader among footwear exporters. Shoes from that country are offered on a mass scale in markets, supermarket chains and chains specialized in cheap shoes. Chinese shoes have a predominant advantage, namely the price. Polish companies find it very hard to compete with Asian shoes because the production costs are incomparable higher. Moreover, as price is the main criterion for Poles when buying shoes, there are many buyers of cheap, Chinese shoes.

2.6 Available data about the sub-sectors

There are four distinctive segments in the footwear market in Poland. These are: the premium segment, medium-priced segment, standard segment and the cheapest segment.

**Premium segment**

The premium segment consists of the most expensive shoes, usually imported from Italy, Germany, Spain and Portugal. There are also Polish producers who follow a long-term strategy aiming at establishing trademarks that will be associated with luxury, top quality and fashion. Well-established trademarks are for example: Salamander (sold by Salamander Polska, a subsidiary of German Salamander AG), Ecco, Bata. Shoes costing more than PLN 200 (EUR 50).

**The medium-priced segment**

The medium-priced segment is dominated by domestic firms that often emerged from former stated-owned companies. These companies offer a reasonable
combination of quality and price, and due to that they win a stable group of customers. Shoes costing over PLN 150 (EUR 40).

**The standard segment**

The standard segment comprises to a large extent of cheap import. Besides there are Polish companies producing shoes for a lower-price shelf. The representatives of this segment are: CCC, Ambra

**The lower segment**

Finally, the cheapest shoes costing less than PLN 40 (EUR 10) are often described as “shoe-like” products. They are often of unknown origin and are sold through the hyper- and supermarkets chains.

**Industrial footwear**

Industrial footwear represents a segment on its own. Recently its face in Poland has changed quite a lot. This was mainly due to the entry of Poland to the European Union (EU). The single Europe and market, with its free movement of goods, puts product safety and quality at the top of the agenda. Many of the requirements laid down in international standards, directives and other laws must be met by the Polish economy in order to be able to join the market's mechanisms.

Protective clothing, including footwear, is one group within the category of so-called personal protective equipment (PPE). PPE can be placed on the EU market provided that they have satisfied all the requirements of Directive 89/686/EEC. The ultimate result of applying the conformity assessment procedures is the CE marking conferred on a product. The CE marking has to be affixed to every and each article of personal protective equipment placed on the Polish market.

Before entry to the EU, Poland used to have another mandatory marking, called the B-safety marking. This has however become voluntary and largely ineffective after 1st May 2004. This situation means that over the past year as well as the coming year, those producers which are most competitive and best prepared for these new challenges will remain on the market, whereas less efficient producers will have to quit their business.

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2 For more information see section 6.8
3 Date of entry of Poland to the EU

16 Proexport Colombia
2.7 Recommendations

This chapter provides the reader with basic information on the footwear sector in Poland. The production and employment in the footwear industry have been decreasing. That is mainly due to import of inexpensive shoes from China which is the biggest foreign supplier on the Polish market. On the other hand Polish footwear gains recognition on the European markets as being of high quality. Therefore almost half of domestic production is being exported.

Of great importance is the division of the Polish market into four groups. This segmentation is made on the basis of shoes’ prices and thereby quality of products. The higher end of the market is dominated by stable and affluent customers who pay much attention to trademarks and quality, and can afford buying the most expensive products. This segment is however small compared to the three others and especially compared to the lowest segment.

Where it concerns the industrial footwear market, it is important to keep up with all the latest requirements to protective gear as stated by the European Union.
3. Market composition and characteristics

3.1 Market size

As presented in Table 3.1.1., domestic production has seen a decreasing trend whereas import is rising. It is estimated that in 2004 the share of imported footwear in the total supply amounted to 95%. Over the last years import was almost twice as big as domestic production. The increase in import is caused by huge differences in import prices and domestic prices; import prices for Chinese footwear are 2-3 times lower than domestic prices. Almost half of the Polish production is exported, mainly to European countries.

Table 3.1.1. Supply of footwear on the Polish market (in million pairs)

<table>
<thead>
<tr>
<th></th>
<th>1998</th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production</td>
<td>57,1</td>
<td>50,4</td>
<td>48,7</td>
<td>50,3</td>
<td>52,5</td>
<td>48,6</td>
<td>92,6</td>
</tr>
<tr>
<td>+ Import</td>
<td>103,8</td>
<td>63,5</td>
<td>54,1</td>
<td>68,3</td>
<td>94,6</td>
<td>92,5</td>
<td>97,8</td>
</tr>
<tr>
<td>- Export</td>
<td>28,3</td>
<td>30,0</td>
<td>29,5</td>
<td>31,1</td>
<td>31,1</td>
<td>27,2</td>
<td>87,5</td>
</tr>
<tr>
<td>Balance</td>
<td>132,6</td>
<td>83,9</td>
<td>73,3</td>
<td>87,5</td>
<td>116,0</td>
<td>113,9</td>
<td>98,2</td>
</tr>
</tbody>
</table>

Source: Polish Chamber of the Shoe and Leather Industry

Given the fact that the above figures do not reflect the actual market size, according to the Polish Chamber of the Shoe and Leather Industry, the black economy supplies an additional 30-40% to the official market. This black economy comprises both unregistered import and domestic production. In 2003 the footwear market reached a production of more than 160 million pairs or 114 million as claimed by official statistics. Keeping that in mind, the share of Polish producers in the total market supply can be even smaller.

The dynamics of the domestic production as well as the total employment in the sector is shrinking⁴.

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⁴ For detailed figures see respectively Table 2.4.1. and Table 2.3.2.
3.2 Analysis of the apparent consumption dynamics

Below please find the basic data concerning the demographic situation in Poland.

Table 3.2.1. Population based on balances (in thous.)

<table>
<thead>
<tr>
<th>Population</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>38242</td>
<td>38219</td>
<td>38191</td>
</tr>
<tr>
<td>Of which females</td>
<td>19717</td>
<td>19712</td>
<td>19704</td>
</tr>
<tr>
<td>Urban population</td>
<td>23627</td>
<td>23571</td>
<td>23514</td>
</tr>
<tr>
<td>Rural population</td>
<td>14615</td>
<td>14648</td>
<td>14677</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

Urban population makes up 61,6% - 61,8% of the total population, a figure which has remained stable since 1995. In 2003 21,6% of total population lived in towns inhabited by 200,000 and more people, 4,4% of total population in the Capital city Warsaw and 5,8% in towns below 10,000 inhabitants.

The index females per 100 males has grown from 106 to 107 since 1995.

In 2003 the total natural increase was -0,4 (per 1000 population) and there is a downward tendency visible in 2002 -0,1 and in 2002 0,1. Urban areas are mostly affected by minus natural increase – in 2002 and 2003 it amounted to -0,7. Whereas rural areas have a slight positive natural increase - in 2002 and 2003 it amounted to respectively: 0,7 and 0,2.

There is a stable increase in wages and salaries of Poles during the last years.

Table 3.2.2. Indices of nominal wages and salaries, process of consumer goods and services and real wages and salaries 1997 – 2003 (previous year = 100)

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average monthly gross nominal wages and salaries</td>
<td>121,9</td>
<td>115,7</td>
<td>112,5</td>
<td>111,1</td>
<td>108,0</td>
<td>102,6</td>
<td>104,9</td>
</tr>
<tr>
<td>Prices of consumer goods and services</td>
<td>115,1</td>
<td>112,0</td>
<td>107,4</td>
<td>110,0</td>
<td>105,4</td>
<td>101,9</td>
<td>100,8</td>
</tr>
<tr>
<td>Average monthly gross real wages and salaries</td>
<td>105,9</td>
<td>103,3</td>
<td>104,7</td>
<td>101,0</td>
<td>102,5</td>
<td>100,7</td>
<td>104,1</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

Average monthly expenditures per capita in households increased from EUR 156 in 2001 to EUR 159 in 2002, of which consumer goods and services amounted to respectively: EUR 149 and EUR 152,25.
Expenditures of households sector on clothing and footwear account for 4.5% of total consumption expenditure of households sector. Table 3.2.3. gives the exact figures about expenditures on clothing and footwear.

Table 3.2.3. Individual consumption expenditure of households sector

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>current prices, in mln EUR</td>
<td>constant prices, previous year = 100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>49,905.4</td>
<td>115,806.6</td>
<td>123,714.5</td>
<td>129,897.1</td>
<td>102,1</td>
<td>103,3</td>
</tr>
<tr>
<td>Clothing and footwear</td>
<td>2,914</td>
<td>2,914</td>
<td>5,738.4</td>
<td>5,910.6</td>
<td>101,8</td>
<td>103,2</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

As can be seen in this table the rise in monthly expenditures also had a positive effect on clothing and footwear sales. Between 1995 and 2002 the amount of money spent on shoes and clothes more than doubled from 2,914 million PLN to 5,910.6 million. At the same time GDP is growing at a rate of 4% and this, together with the slowly rising average rate of consumption as well as employment has led economists to create long term positive forecasts. Growth is also expected to be strengthened as a result of Poland’s membership of the European Union in May 2004.

On the short term however unemployment is still alarmingly high with rates varying between 18% and 19%. This has created a large group of people who lack a constant source of income. In addition many Polish consumers are unable to afford the more expensive clothing or footwear products.

Domestic manufacturers are very aware of the weak spending power of Polish consumers. According to their assessments, 85% to 90% of clients usually consider price a very important factor when deciding to purchase clothing or footwear. Only 10-15% of Poles are guided by genuine needs when shopping and can afford premium-priced products. However, the significance of brand-name products or modern eye-catching designs is increasing. More and more producers involved in the Polish clothing and footwear industry have noticed a trend where it is not just functionality that is expected from their products, but consumers are now also beginning to demand quality and style. Leading domestic companies such as LPP SA, Redan SA, Gino Rossi SA or BUT-S SA not only follow the world’s fashion trends, but also employ designers to create their own unique style to encourage potential buyers.

Consumers between 15 and 25 years of age seem to be the best target group for companies operating in the Polish clothing and footwear industry. On the whole,
this consumer group displays much more concern about dress sense and often treats brand-name clothing or eye-catching modern footwear as determinants of position among peers. Leading domestic manufacturers have indicated that they achieve the most successes selling short-term, frequently diversified clothing and footwear ranges designed for younger consumers. The fashion trends that prevail among Polish youth change quite often. However, manufacturers promoting strong brands offering loose, comfortable products generally sell well and win larger shares of the industry as a consequence.

3.3 Governmental plans and programs

In Poland the Ministry of Economic Affairs and Labor does not have a policy to promote export of leather industry. Many countries such as Spain, Portugal, France, Italy and Germany organize national stands at trade fairs with support of branch organizations, however the Polish Ministry does not participate in such events. Footwear producers from the EU member countries would like to benefit from protection of their production/ product protection. On 15 June 2005 about 300 European footwear producers demonstrated in Brussels with postulate to protect this industry.

In the industrial footwear sector many government initiatives originate in Brussels. The European Agency for Safety and Health at Work annually organizes a European Week for Safety and Health at Work. The Safety week is an information campaign designed to raise awareness and promote activities to make Europe a safe and healthy place to work. This year it will take place from 24-28 October and it will run in all member states. The official launch data was on 20 April 2005 on the International Noise Awareness Day. This is not a coincidence, because the annually changing theme this year is: “Stop that Noise!”, to make everyone more aware of the dangers of noise nuisance.

3.4 Demand in the market

Price remains still the main criterion as far as purchase of shoes is concerned whereas the quality plays the additional role. Shoes are usually bought when they are necessary, impulse buying is of insignificant importance. Although there are 4 different seasons in Poland, the average Polish woman buys no more than 2,5 pairs of shoes yearly. By comparison, Italian woman buys almost 10 pairs annually. Because of weather conditions the average Pole should buy at least 4 pairs of shoes annually, therefore the potential of Polish market amounts to 120
million pairs each year. The value of this market can reach 3,6 billion EUR. However currently this value can be 2-3 times lower\textsuperscript{5}.

Even the demand for children’s shoes is lower than expected and amounts to 3 pairs for a child annually.

Although price is the dominant criterion for buying shoes the influence of trademarks has already appeared. That concerns footwear from medium-priced and premium segments. This group of customers is quite stable and is used to brand products. Footwear from the higher end of the market is purchased by about 10-15\% of the Poles, of this group 5-7\% buy premium products.

\section*{3.5 Recommendations}

The (industrial) footwear market is a difficult market to enter and then compete in. The demand is not big and expenditures of households sector on clothing and footwear have increased at a slow pace during the last years. Potential entrants have to compete with low cost Chinese shoes or with expensive leather shoes from well-established companies. The very lively black economy (unregistered import and production) worsened the situation. New entrants must also keep in mind that price is the main criterion while buying shoes.

\textsuperscript{5} Boss Informacje Ekonomiczne
4. Competition analysis

4.1 Main trademarks available in the market

Fagum-Stomil S.A.
ul. Wersalska 47/75
91-212 Łódź
Poland

Fagum-Stomil joint-stock company specializes in the production of protective and working footwear made of rubber and PVC and is one of the biggest enterprises doing so within Poland. Their produced footwear protects the feet from humidity, water and low temperature and it ensures the protection of feet in the conditions of increased hazards. Their offers are directed to the people employed in the processing, chemical, mining, building industries, transport, forestry, fishing, chemical service, fire brigades, town cleaning service and medical service.

The majority of its produced footwear has received the certificates, which allow the products to be marked with sign B, issued by Central Institute For Labour Protection. The safety footwear is approved and tested according to European CE standards. The waterproof footwear for children, which is the supplement of the firm's trade offer, has received the permission to use the sign HEALTHY FEET- 'the footwear, which ensures the correct development of the child's feet and it is given by The Central Laboratory of Footwear Industry

Fagum-Stomil won a Gold Medal in the category ‘Personal Protection’ at the prestigious SAWO fair, with their PILARZ – safety rubber boots providing protection against chain saw cuts. The boots comply with the requirements of standard PN-EN 345-2 SB, 2 class of resistance to chain saw cuts. The legs of the boots are protected against cuts by multi-layer textile and rubber. The boots are equipped with toecaps to protect feet against impact and are resistant to vegetable and mineral oils.
Kadimex
ul. Wólczyńska 290
01-919 Warszawa
tel./fax. (+48) 22 864-99-66

Agent for Zeman, huge Czech producer of industrial footwear, in Poland.
Examples of assortement:

Walesta S.p. Z.o.o
ul. Kolejowa 34, 58-160 Świebodzicy
mail: walesta@interia.pl Tel/Fax (48) 74-857-81-99
website: http://www.walesta.glt.pl

Walesta is a company located in both Belarus and Poland. They produce boots, overalls, waders for fishing and hunting, all made of German PVC leather.

Products:
Main trademarks from the regular footwear sector premium segment and medium-priced segment are: Salamander, Ecco, Bata, Gino Rossi, Rylko, Kazar, Criss, NORD (rather medium-priced).

Main trademarks from the standard segment are: CCC, Deichman, But Hala, Ambra, Street Max, Max&Max.

A practice worth noticing, which appeared in recent years, is the promotion of foreign sounding brands (e.g. Boticelli, Via Venezia, Cesare Virace) by certain footwear producers. According to marketing experts, brands which sound Italian or French are aimed at obtaining a wealthier and snobby clientele.

### 4.2 Features of the commercialized products

Shoes are packed in cardboard boxes which have the name of producers on them. The outlook of boxes from one producer is often the same, with the same range of colors, arrangements of brand name and mark. Labels contain the following information: name of producer, place of production, size, color, quality, bar code, name and address of a distributor.

Shoe sizes may differ from one country to another, therefore the sizes of (industrial) footwear are given below:
### Table 4.2.1 Footwear sizes

<table>
<thead>
<tr>
<th></th>
<th>french</th>
<th>english</th>
<th>[cm]</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>21 8(^\text{1/2})</td>
<td>6 8(^\text{1/2})</td>
<td>13 8(^\text{1/2})</td>
</tr>
<tr>
<td>22</td>
<td>22 8(^\text{1/2})</td>
<td>6 8(^\text{1/2})</td>
<td>14 8(^\text{1/2})</td>
</tr>
<tr>
<td>23</td>
<td>24 8(^\text{1/2})</td>
<td>7 8(^\text{1/2})</td>
<td>15 8(^\text{1/2})</td>
</tr>
<tr>
<td>24</td>
<td>25 8(^\text{1/2})</td>
<td>8 8(^\text{1/2})</td>
<td>15 8(^\text{1/2})</td>
</tr>
<tr>
<td>25</td>
<td>26 8(^\text{1/2})</td>
<td>9 8(^\text{1/2})</td>
<td>16 8(^\text{1/2})</td>
</tr>
<tr>
<td>26</td>
<td>27 8(^\text{1/2})</td>
<td>10 8(^\text{1/2})</td>
<td>17 8(^\text{1/2})</td>
</tr>
<tr>
<td>27</td>
<td>28 8(^\text{1/2})</td>
<td>11 8(^\text{1/2})</td>
<td>18 8(^\text{1/2})</td>
</tr>
<tr>
<td>28</td>
<td>29 8(^\text{1/2})</td>
<td>12 8(^\text{1/2})</td>
<td>19 8(^\text{1/2})</td>
</tr>
<tr>
<td>29</td>
<td>30 8(^\text{1/2})</td>
<td>13 8(^\text{1/2})</td>
<td>19 8(^\text{1/2})</td>
</tr>
<tr>
<td>30</td>
<td>31 8(^\text{1/2})</td>
<td>14 8(^\text{1/2})</td>
<td>20 8(^\text{1/2})</td>
</tr>
<tr>
<td>31</td>
<td>32 8(^\text{1/2})</td>
<td>15 8(^\text{1/2})</td>
<td>21 8(^\text{1/2})</td>
</tr>
<tr>
<td>32</td>
<td>33 8(^\text{1/2})</td>
<td>16 8(^\text{1/2})</td>
<td>22 8(^\text{1/2})</td>
</tr>
<tr>
<td>33</td>
<td>34 8(^\text{1/2})</td>
<td>17 8(^\text{1/2})</td>
<td>31 8(^\text{1/2})</td>
</tr>
</tbody>
</table>

Source: Fagum Stomil

### 4.3 Marketing and advertising strategies

Producers and traders of footwear use typical ways of advertising shoes. There are advertisements in magazines for women and men, not only in those devoted entirely to fashion but also in those having sections with the latest fashion trends. There are also TV commercials and billboards, often with movie stars or famous singers.

The most important association of producers and traders operating in the leather and footwear industry is the Polish Chamber of the Shoe and Leather Industry *(pl. Polska Izba Przemysłu Skórzanego)*. It represents its members in relation with state authorities, and other domestic and foreign organizations. It takes part in the professional lobbying, as well as in participation in fairs and exhibitions, organization of trade missions. The Chamber is an observing member of the CEC and participates in the works of the COTANCE.

Advertising in magazines related to the footwear sector is a popular way of promoting footwear products. Table 4.3.1. presents magazines devoted to the footwear market.

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6 See web page www.pips.pl, also available in English
Table 4.3.1. Footwear market - magazines

| Name / WWW                        | Address of editor’s office                                      |  |
|-----------------------------------|-----------------------------------------------------------------|--
| SWIAT BUTOW http://www.unit.com.pl/run/tytuly/9&EN (published monthly, the leading Polish shoe trade magazine. It is addressed to managers and employees of polish industry, wholesalers and retailers working in the Polish shoe branch) | WYDAWNICTWO UNIT Sp. z o.o. 02-903 WARSAWA ul. Bonifacego 100 editor-in-chief: jbanakiewicz@unit.com.pl T: (48 22) 32 01 528 F: (48 22) 32 01 540 |  |
| SWIAT SKOR http://www.unit.com.pl/run/tytuly/28&EN (branch magazine for the polish leather industry, highlighting information about tanneries, leather, components, machines, accessories and leather clothes and products) | UNIT Sp. z o.o. 02-903 WARSAWA ul. Bonifacego 100 editor-in-chief: jbanakiewicz@unit.com.pl T: (48 22) 32 01 528 F: (48 22) 32 01 540 |  |
| PRZEGLĄD SKÓRZANY (under the auspices of Polish Chamber of the Shoe and Leather Industry) | SKÓRIMEX-PRESS Sp. z o.o. 91-204 ŁODZ ul. Traktorowa 128 skorimex_press@21net.pl T: (48 42) 640 59 52 (extension) 147, 316 F: (48 42) 650 92 96 |  |


The above mentioned Wydawnictwo Unit Sp. z o.o. (www.unit.com.pl, English version available) distributes ‘The Shoe Catalogue’ (pl. Katalog Rynek Obuwniczy ) annually\(^7\). It is a compendium with updated data concerning all companies present at the Polish shoe industry and trade sector. The Shoe Catalogue is distributed to selected shops, wholesalers and producers all over Poland, as well as at national and international fairs and sent to members of ESPA (European Shoe Press Association)\(^8\).

Participation in trade fairs and exhibitions is also a common way of promoting companies and their products. A list of the biggest events related to the footwear market in Poland is printed below.

- **SAWO International Fair of Work Protection, Rescue and Fire-Fighting**
  28-30 March 2006 at the Poznan International Fair grounds, located in the West of Poland. The fair has many exhibitors of personal protective equipment and especially leg and foot protection. Last year there were about 40 foreign exhibitors and over a 100 Polish participants. Of the foreign companies none were from South- or Central America. ([http://sawo.mtp.pl/en](http://sawo.mtp.pl/en))

\(^7\) For the cover page of The Shoe Catalogue 2005 see Annexes
\(^8\) For more information on advertising rates. visit www.unit.com.pl/run/tytuly/18&EN
• The 3rd European Conference on Protective Clothing (ECPC) 10-12 May 2006 at Gdynia in the North of Poland near the Baltic Sea. Sponsored by the Polish Central Institute for Labor Protection and organized once every three years by the European Society of Protective clothing (www.ciop.pl)

• The Fair of Shoes, Leather and Leather Goods, autumn edition; 6 - 8 September 2005 at the Poznań International Fair grounds; www.shoes.mtp.pl/en/; last edition 1-3 March 2005; fair for domestic and foreign traders, held simultaneously with the Fair of Clothing and Fabrics and the Gifts and Ornaments Trade Fair, the biggest fair event for the footwear sector;

• Trade Fair of the Leather Industry; Lodz International Fair Ltd., www.mtl.lodz.pl, last edition October 2004;

• Macierzyństwo EXPO XII, in 9 cities in Poland, www.expo.macierzynstwo.pl; fair concerning family issues: cosmetics, clothing, footwear for children, women and men, toys, stationery goods and others.

4.4 Participation in the market and segments that are served

There are four segments in footwear market in Poland. These are: the premium segment, medium-priced segment, standard segment and the cheapest segment.

The industrial footwear segment is usually divided according to the types of industrial shoes. Traders and producers offer the following types of workmen and protective shoes: low shoe, ankle boot, half-knee boot, knee-height boot, thigh boot.

There are also shoes for specific professional groups, such as fireman shoes, bodyguard shoes, medium-height shoes for welders etc. Industrial shoes have special features: steel toe-box, heel counter, mechanical punch-resistant sole, anti electrostatic, waterproof, oil- and frost-resistant, protection from cold and frost.

For more information see paragraph 2.6
others. This footwear serves many companies, heavy industry factories, railway repair departments, security agencies and many more.

4.5 Quality of the product

Legal requirements concerning quality and labeling of footwear are presented in chapter 6.7-6.9. For photo material and a general description of the industrial footwear products sold on the Polish market, we refer to chapter 4.1.

In general the quality of the products is in line with the price. Shoes made of the best materials, in accordance with the latest design are available at a higher price and belong to the premium or medium-priced segment. These shoes are produced by both Polish and foreign companies. The quality of inexpensive shoes (less than PLN 40) is usually poor. These shoes are described by market experts as “shoe-like” products.

Because of the large variety of shoes and the large variety in consumer preferences, it is difficult to mention anything about the typical characteristics of the Polish shoes. These vary from slippers and boots, to pumps and sneakers. Examples of various shoe sizes are given in section 4.2.

Where it concerns the features of industrial footwear, recent research has shown that an important feature of work boots for over half of the industrial footwear customers is that is has a membrane lining, such as Sympatex or Gore-Tex.

4.6 Expansion plans

Expansion plans concern further investment in expanding distribution channels. There are distribution channels for both expensive and inexpensive footwear. Companies build up their own distribution chains because Poland is lacking well-organized distribution channels. Sometimes, one company offers in its chain a collection of other companies in order to have a wide range of products. The following companies (Polish and foreign) offering brand products have distribution channels in Poland: Gino Rossi, Inblu, Rylko, But-S, Wojtas, Bartel, Bata, Salamander and Kazar Shoes. Concerning cheaper shoes there are the following distribution chains: CCC, Ambra, Multisoft, Deichman, Andre Poska.

Leading companies consider cooperation on building retail chains together and joining already existing ones.

Many companies invest in promotion of their trademarks in order to acquire entry to the higher end of the market. These companies have a well-defined strategy with an identified target group. Building own retail chains is in line with such a strategy. It positively influences the sale and enables direct contact with clients and makes it easier to trace new trends.
4.7 Pricing strategy

Pricing strategy depends on the segment in which the company operates. The highest prices are quoted by the premium segment and amount to over PLN 200 (EUR 50). These companies are aiming at the richest but most limited group of customers. On the other end of the market there are the cheapest shoes costing less than PLN 40 (EUR 10) – producers and traders aim at the least affluent group of clients, often unemployed to whom price is the only criterion when buying shoes. In the middle there are the medium-priced and standard segments whose customers are looking for a favorable relation between price and quality.

The tables presented below give an overview of the changes in retail prices of selected footwear items during the period 1995 – March 2005. In order to present real changes of prices, price indices are presented in Table 4.7.3.

Table 4.7.1. Retail prices of selected footwear items 1995 – 2003 (in EUR)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Men’s low leather shoes with non-leather sole - per pair</td>
<td>16.01</td>
<td>19.69</td>
<td>23.33</td>
<td>27.12</td>
<td>29.95</td>
<td>31.79</td>
<td>33.37</td>
<td>35.37</td>
<td>36.28</td>
</tr>
<tr>
<td>Women’s low leather shoes with non-leather sole - per pair</td>
<td>14.03</td>
<td>17.22</td>
<td>20.86</td>
<td>24.48</td>
<td>27.21</td>
<td>29.24</td>
<td>29.48</td>
<td>33.15</td>
<td>33.95</td>
</tr>
<tr>
<td>Resoling men’s shoes - per pair</td>
<td>2.75</td>
<td>3.30</td>
<td>3.81</td>
<td>4.38</td>
<td>4.88</td>
<td>5.36</td>
<td>5.80</td>
<td>6.14</td>
<td>6.34</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

Table 4.7.2. Retail prices of selected footwear items December 2004 – March 2005 (in EUR)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Men’s low leather shoes with non-leather sole – per pair</td>
<td>37.06</td>
<td>37.05</td>
<td>36.85</td>
<td>36.91</td>
</tr>
<tr>
<td>Women’s plastic pumps with non-leather sole – per pair</td>
<td>19.74</td>
<td>19.74</td>
<td>19.76</td>
<td>19.81</td>
</tr>
<tr>
<td>Children’s low leather shoes with non-leather sole – per pair</td>
<td>25.57</td>
<td>25.50</td>
<td>25.44</td>
<td>25.45</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)
Table 4.7.3. Prices indices of clothing and footwear

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Previous month = XII 2004 = 100</td>
<td>XII 2004 = 100</td>
<td>II 2005</td>
<td>III 2004 = 100</td>
</tr>
<tr>
<td>Clothing and footwear</td>
<td>98,2</td>
<td>98,5</td>
<td>99,4</td>
<td>96,1</td>
</tr>
<tr>
<td>Clothing</td>
<td>98,4</td>
<td>98,8</td>
<td>99,5</td>
<td>96,8</td>
</tr>
<tr>
<td>of which:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>garments</td>
<td>98,4</td>
<td>98,7</td>
<td>99,5</td>
<td>96,6</td>
</tr>
<tr>
<td>cleaning, repair and hire of clothing</td>
<td>100,1</td>
<td>99,9</td>
<td>100,2</td>
<td>100,2</td>
</tr>
<tr>
<td>Footwear</td>
<td>97,5</td>
<td>97,9</td>
<td>99,0</td>
<td>94,5</td>
</tr>
<tr>
<td>of which repair, shoe cleaning services and hire of footwear</td>
<td>100,3</td>
<td>100,2</td>
<td>99,9</td>
<td>100,4</td>
</tr>
</tbody>
</table>

Source: Central Statistical Office (GUS)

Concerning the import prices, the cheapest products are from China – prices of Chinese footwear is 3 times lower than for non-Chinese shoes. For example in 2002, the average import price for Chinese shoes amounted to PLN 6,11 (EUR 1,56) and for shoes outside China PLN 21,81 (EUR 5,56)\(^{10}\). Between the various member states of the European Union prices of footwear can differ extensively as well:

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\(^{10}\) Boss Informacje Ekonomiczne
Table 4.7.4 Price level index for clothing and footwear goods (€ 25 =100)

Table 4.7.4 shows that the disparities in the price level index between countries are remarkable and range between 55% (Romania) and 149% (Iceland) from the total level of clothing and footwear goods. This means that a comparable basket of clothing and footwear goods in the most expensive country, Iceland, costs about 2.7 times more than in the least expensive country, Romania. Iceland is followed by two other EFTA countries: Norway (134%) and Switzerland (117%). Although more than half of the EU Member States are not far from the EU average, there are considerable disparities between the EU Member States ranging from 78% (Poland) to 114% (Sweden).

**Industrial footwear**

Prices for industrial footwear vary with the types of shoes. Certified (norm EN-345)\(^{11}\) protective shoes that are not produced by Polish manufacturers may cost EUR 30.8 – 52 (net prices, without 22% VAT), whereas shoes produced by Polish companies are slightly cheaper and prices can be even below EUR 25. Prices of protective medium-height shoes range between EUR 18-65, depending

\(^{11}\) For information about certifications, please see chapter 6.7 & 6.8

**Proexport Colombia**
on the producer and shoes’ features\textsuperscript{12}. Protective shoes with steel toe-box are slightly cheaper than shoes with more protective features, such as anti electrostatic or frost-resistant shoes.

### 4.8 Segmentation of enterprises by sectors and its categorization

Footwear producers are spread throughout the whole country, however there are a few regions where production is concentrated – these are in the following cities/towns: Lodz, Slupsk, Radom, Czestichowa and Kalwaria Zebrzydowska. Many of these companies produce for foreign companies.

Currently private manufacturers dominate on the Polish market (99\% of all producers), and according to the Polish Leather Industry Chamber (PIPS), they supply over 80\% of total domestic production. According to PIPS data, at the end of 1999 there were 9492 footwear companies registered in Poland. As many as 8730 of these companies (92\%) are small firms employing less than six workers. Only 101 footwear manufacturers were large companies, each with over 100 employees.

#### Table 4.8.1 Organization of footwear industry

<table>
<thead>
<tr>
<th>Number of employees</th>
<th>&lt; 6</th>
<th>6-20</th>
<th>21-100</th>
<th>101-250</th>
<th>&gt; 250</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of producers</td>
<td>8730</td>
<td>469</td>
<td>192</td>
<td>65</td>
<td>36</td>
<td>9492</td>
</tr>
</tbody>
</table>

Source: PIPS

In the segment for ladies shoes, companies with significant market positions include: But-S from Konstantynów Łódzki, Eksbut from Mawa, Juna from Sieradz, and the manufacturing plant of Stanisaw Ryko from Kalwaria Zebrzydowska.

As for producers of mens footwear, companies which count include: Alka, Mefir and Nord from Supsk, Lesta from Olenica, and Wojas from Nowy Targ.

Producers of childrens footwear which stand out from the rest include Bartek from Mińsk Mazowiecki, Robin and Escott from Skarysko-Kamienna, Lemigo from Grudzicz, Befado from Bielsko Biaa and Junior from Nowa Sola.

\textsuperscript{12} Exchange rate as on 16 September 2005, 1 EUR = 3.8936 PLN, National Bank of Poland
4.9 Recommendations

This chapter focuses on presenting well-known shoes' trademarks, major companies operating on the Polish footwear market, as well as their marketing and price strategies. These strategies depend on the market segment which is served. The cheapest products, “shoe-like” do not have advertising campaigns whereas more expensive products are advertised, mainly in magazines, sometimes in TV commercials. Good way to get familiar with the market is to participate in trade fairs, especially the biggest one in Poznan. This certainly goes for industrial footwear since it serves a smaller, more select market segment consisting of quite critical consumers.
5. **Distribution channels**

5.1 **Distribution channels**

The Polish footwear market is considerably fragmented. Distribution chains are being established but still the absence of specialized distribution associations is noticeable. Therefore the main outlets for the cheapest imported shoes are supermarkets. They have a 30-40% share in this segment of the footwear market.

In Poland there are several hundred wholesalers and they supply about 20,000 shops. As a rule, Polish shoe shops are small and financially weak, which is why they cannot afford to make bigger orders and maintain a broad range of shoes. Because of the weak condition of the retail outlets, these do also not fulfil the role of linking the footwear producers and the consumers. As a result, shops give the producers little information on the most popular product groups amongst their customers. Such a situation is unfavorable both for Polish footwear manufacturers, which receive no information on consumer preferences from the traders and get insufficiently large orders to make a cost reduction or improve profitability, and for the customers who have a more limited choice.

The difficulty with distribution is caused by the growing costs of financing the shoe trade. Shops would like to take 60-80% of goods for commission sale. This causes a lot of delays in payments for producers. Another thing is that it does not encourage the retailers to sell the shoes promptly.

Even if it all should be enough of an incentive for the producers to create their own distribution chains, the costs of such an undertaking are too high. But Polish shoe manufacturers do not have an offer diversified enough to meet the requirements of a picky customer. Very often the producers choose to sell most of their products through the wholesalers and the other part through several shops in order to learn about the market.

The leaders in the Polish footwear business develop their own chains of shops and locate them in new shopping centers and galleries, around hypermarkets. Some of the leaders though have the strategy of direct cooperation with several hundred shops. The new trend on the Polish market shows that wholesalers start operating on the internet (market). They open internet shops which become more and more popular among the customers.

Cheap shoes remain most popular in Poland. The dynamic development of shops selling shoes from the lower price segment is noticeable on the Polish market. The largest chains distributing inexpensive footwear are those operated by CCC of Polkowice, AMBRA of Święcice and MULTISOFT S.A. of Reguły.
The companies' strategy is also participating in the production of footwear and control over the manufacturing process. They cooperate with both domestic and foreign factories. The companies locate their shops in the busy points of the cities and that ensures usually high sales which is crucial to obtain substantial discounts in the purchase of large batches of product. This also leads to reductions in the margins of producers with whom they place orders. That is why they are able to offer competitive prices even in the sector of the least expensive footwear.

CCC was established in 1999. It operates on a franchise standard with approximately 300 shops. They all use the CCC logo. It ensures a diversified offer, the lowest prices, and a maximally high rate of rotation of stocks in the wholesale and retail trade. The company sells Polish shoes and has been also importing from Asia and Western Europe.

Multisoft’s chain of shops is called U Szewczyka and Max&Max. They are not only cheaper by half than the other shops but they even cost less than shoes sold by supermarkets. U Szewczyka is a chain of small shops situated in the busiest streets of cities and Max&Max consists of larger outlets located in shopping centers. Multisoft has been operating in the footwear sector since 1998.

Ambra has been operating on the market for 14 years. At first it was a chain of wholesale facilities, now a chain of shops that runs under franchise agreements, with the same logo and interior decoration.

Also the international concern Deichmann has been present on the Polish market since 1997. Now it runs over 50 shops in Poland. It offers brand products at attractive prices. The concern imported shoes from 40 countries.

Industrial shoes are often sold directly by the producers, both domestic and foreign. These producers often have their web pages which present their assortment and prices so buyers can purchase these shoes on-line. Besides there are distributors that offer products manufactured by one or several industrial footwear producers. Margins and detailed terms of cooperation are treated as inside information and are subject to individual negotiation.
Distributors concerned with industrial footwear are less present in the Polish market. However there is a recommendable one:

**Centrum Artykułów BHP i Ochrony Przeciwpożarowej**
Mirosław Wiśnik
Ul. Przędzalniana 14
90-034 Łódź
Poland

This distributor deals with all kinds of personal protective equipment and was voted ‘most effective distributor’ at the SAWO International Fair of Work Protection, Rescue and Fire-Fighting in June 2005.

### 5.2 Recommendations

This chapter presents possible channels of (industrial) footwear distribution in Poland. The channels for footwear are wholesale, retail, internet shops, producer’s individual shops.

It is recommendable for Colombian suppliers of footwear to establish a form of cooperation with wholesalers and in that way enter the Polish market. An additional possibility for Colombian exporters is to use the internet channel and introduce their offer through it. Therefore contacting Polish internet shops and presentation of Colombian industrial footwear patterns would be crucial.

As Poles generally prefer cheap shoes over the more expensive ones, we advise Colombian exporters to focus on the lower segment primarily. Most industrial shoes in Poland are bought in supermarkets and low-budget retail shops. Internet shops have a small market share, which however is growing steadily the past few years.

Even while approaching the Polish potential partner for the first time, it is important to introduce a price offer. The management of Polish companies is often very technically oriented and without a price offer, the negotiations may lead to a deadlock, not producing any tangible results and being to no avail to either party.

6.1 Preferential tariffs

All goods entering the EU are subject to import duties. External trade conditions are mostly determined by EU regulations. Poland also uses the EU’s Harmonized Tariff Schedule (Nomenclature) on the TARIC (Integrated Tariff of the European Community), which is issued by the Commission and the Member States for the purpose of applying Community measures relating to import and exports. The level of the tariffs depends on the country of origin and the product. If there is not a special trade agreement in force, the general import tariff (conventional duty) applies.

In January 2005 Commission Regulation (EC) No 1810/2004 entered in force and is binding in all Member States. In its Part “Schedule of Customs Duties”, Chapter 64 deals with; “Footwear, gaiters and the like; parts of such articles”. The subcategories 640340, 640110 contain industrial footwear products relevant for this report.

Colombia is included in the general system of preferences – GSP. This agreement allows products originating in the countries concerned to be imported at preferential tariffs or, for the least developed countries, duty-free. A “Certificate of Origin Form A” has to be filled in by the exporter and issued by the competent authorities. Tariff contingents and tariff ceilings do not exist anymore.

According to international agreements Colombia is included in the SPGE group of preferences and therefore benefits from 0% tariff preference on the basis on Regulation (EC) No 2501/2001 and Commission Regulation (EC) No 2331/2003. Until July 1st 2005, this meant that Colombian exporters could introduce so-called “non-sensitive” products at a 0% tariff rate and “sensitive” products, such as all products under nomenclatures code 640340, 640440 at a 3.5% reduced rate.

However since July 1st 2005, Colombia is a member of the GSP Plus program, which assists the countries of the Andean Community, such as Colombia, in their battle against drugs. The GSP Plus will officially enter into force on the 1st January 2005, but has already started to run in its preliminary form for 14 countries on the 1st July 2005. Exporters based in one of the GSP Plus programs are also exempt from duties on sensitive products. Therefore all footwear can be imported into the European Union from Colombia duty free.
### Table 6.1.1. Third country duty - extract from the EU Common Customs Tariff

<table>
<thead>
<tr>
<th>CN code</th>
<th>Description</th>
<th>Conventional rate of duty (%)</th>
<th>Supplementary unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>6401</td>
<td>Waterproof footwear with outer soles and uppers of rubber or of plastics, the uppers of which are neither fixed to the sole nor assembled by stitching, riveting, nailing, screwing, plugging or similar processes:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6401 10</td>
<td>- Footwear incorporating a protective metal toecap:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6401 10 10</td>
<td>- - With uppers of rubber</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6401 10 90</td>
<td>- - With uppers of plastics</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6401 90</td>
<td>- Other footwear:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6401 91 00</td>
<td>- - Covering the knee</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6401 92</td>
<td>- Covering the ankle but not covering the knee:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6401 92 10</td>
<td>- - - With uppers of rubber</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6401 92 90</td>
<td>- - - With uppers of plastics</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6401 99 00</td>
<td>- - Other</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402</td>
<td>Other footwear with outer soles and uppers of rubber or plastics:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6402 12</td>
<td>- Sports footwear:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6402 12 10</td>
<td>- - Ski-boots, cross-country ski footwear and snowboard boots:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6402 12 90</td>
<td>- - - Snowboard boots</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 19 00</td>
<td>- - - Other</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 20 00</td>
<td>- Footwear with upper straps or thongs assembled to the sole by means of plugs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6402 30 00</td>
<td>- Other footwear, incorporating a protective metal toecap</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 91 00</td>
<td>- - Covering the ankle</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 99</td>
<td>- Other:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6402 99 10</td>
<td>- - - With uppers of rubber</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 99 90</td>
<td>- - - With uppers of plastics</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 99 31</td>
<td>- - - - - With sole and heel combined having a height of more than 3 cm</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 99 39</td>
<td>- - - - - Other</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 99 50</td>
<td>- - - - - Slippers and other indoor footwear</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 99 91</td>
<td>- - - - - Other, with insoles of a length:</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 99 93</td>
<td>- - - - - - Footwear which cannot be identified as men's or women's footwear</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6402 99 96</td>
<td>- - - - - - - Other</td>
<td>17</td>
<td>pa</td>
</tr>
</tbody>
</table>
### CN code | Description | Conventional rate of duty (%) | Supplementary unit
--- | --- | --- | ---
1 2 | 3 | 4
| 6402 99 98 | For women | 17 | pa
| 6403 | Footwear with outer soles of rubber, plastics, leather or composition leather and uppers of leather: | | |
| 6403 12 00 | Sports footwear: | 8 | pa
| 6403 19 00 | Other | 8 | pa
| 6403 20 00 | Footwear with outer soles of leather, and uppers which consist of leather straps across the instep and around the big toe | 8 | pa
| 6403 30 00 | Footwear made on a base or platform of wood, not having an inner sole or a protective metal toecap | 8 | pa
| 6403 40 00 | Other footwear, incorporating a protective metal toecap | 8 | pa
| 6403 51 | Other footwear with outer soles of leather: | | |
| 6403 51 11 | Covering the ankle: | | |
| 6403 51 15 | For men | 8 | pa
| 6403 51 19 | For women | 8 | pa
| 6403 51 91 | Other, with insoles of a length: | | |
| 6403 51 95 | For men | 8 | pa
| 6403 51 99 | For women | 8 | pa
| 6403 59 | Other: | | |
| 6403 59 11 | Footwear with a vamp made of straps or which has one or several pieces cut out: | | |
| 6403 59 31 | Of less than 24 cm | 8 | pa
| 6403 59 35 | Of 24 cm or more: | 8 | pa
| 6403 59 39 | For women | 8 | pa
| 6403 59 50 | Slippers and other indoor footwear | 8 | pa
| 6403 59 91 | Other, with insoles of a length: | | |
| 6403 59 95 | Of less than 24 cm | 8 | pa
| 6403 59 99 | Of 24 cm or more: | 8 | pa
| 6403 91 | Other footwear: | | |
| 6403 91 11 | Covering the ankle: | | |
| 6403 91 15 | Covering the ankle but no part of the calf, with insoles of a length: | 8 | pa
| 6403 91 19 | Of less than 24 cm | | |
| 6403 91 19 | Of 24 cm or more: | 8 | pa

**Proexport Colombia**
<table>
<thead>
<tr>
<th>CN code</th>
<th>Description</th>
<th>Conventional rate of duty (%)</th>
<th>Supplementary unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>6403 91 13</td>
<td>Footwear which cannot be identified as men's or women's footwear.</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 91 16</td>
<td>For men</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 91 18</td>
<td>For women</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 91 91</td>
<td>Of less than 24 cm</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 91 93</td>
<td>Footwear which cannot be identified as men's or women's footwear.</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 91 96</td>
<td>For men</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 91 98</td>
<td>For women</td>
<td>5</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99  9</td>
<td>Other:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6403 99 11</td>
<td>With sole and heel combined having a height of more than 3 cm</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99 31</td>
<td>Of less than 24 cm</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99 33</td>
<td>Footwear which cannot be identified as men's or women's footwear.</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99 36</td>
<td>For men</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99 38</td>
<td>For women</td>
<td>5</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99 50</td>
<td>Slippers and other indoor footwear</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99 91</td>
<td>Of less than 24 cm</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99 93</td>
<td>Footwear which cannot be identified as men's or women's footwear.</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99 96</td>
<td>For men</td>
<td>8</td>
<td>pa</td>
</tr>
<tr>
<td>6403 99 98</td>
<td>For women</td>
<td>7</td>
<td>pa</td>
</tr>
<tr>
<td>6404</td>
<td>Footwear with outer soles of rubber, plastics, leather or composition leather and uppers of textile materials:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6404 11 00</td>
<td>Sports footwear; tennis shoes, basketball shoes, gym shoes, training shoes and the like</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6404 19</td>
<td>Other:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6404 19 10</td>
<td>Slippers and other indoor footwear</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6404 19 90</td>
<td>Other …/</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6404 20</td>
<td>Footwear with outer soles of leather or composition leather:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6404 20 10</td>
<td>Slippers and other indoor footwear</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6404 20 90</td>
<td>Other …/</td>
<td>17</td>
<td>pa</td>
</tr>
</tbody>
</table>
## 6.2 Tariffs imposed on major competitors

The example of import tariffs for footwear in Poland according to EU tariff schedule (TARIC):

<table>
<thead>
<tr>
<th>CN code</th>
<th>Description</th>
<th>Conventional rate of duty (%)</th>
<th>Supplementary unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>6405 10 00</td>
<td>With uppers of leather or composition leather</td>
<td>3,5</td>
<td>pa</td>
</tr>
<tr>
<td>6405 20 10</td>
<td>With outer soles of wood or cork</td>
<td>3,5</td>
<td>pa</td>
</tr>
<tr>
<td>6405 20 91</td>
<td>Slippers and other indoor footwear</td>
<td>4</td>
<td>pa</td>
</tr>
<tr>
<td>6405 20 99</td>
<td>Other</td>
<td>4</td>
<td>pa</td>
</tr>
<tr>
<td>6405 90 10</td>
<td>With outer soles of rubber, plastics, leather or composition leather</td>
<td>17</td>
<td>pa</td>
</tr>
<tr>
<td>6405 90 90</td>
<td>With outer soles of other materials</td>
<td>4</td>
<td>pa</td>
</tr>
<tr>
<td>6406 10</td>
<td>Uppers and parts thereof, other than stiffeners:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6406 10 11</td>
<td>Of leather</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>6406 10 19</td>
<td>Parts of uppers</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>6406 10 90</td>
<td>Of other materials</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>6406 20</td>
<td>Outer soles and heels, of rubber or plastics:</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>6406 20 10</td>
<td>Of plastics</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>6406 20 90</td>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6406 91 00</td>
<td>Of wood</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>6406 99</td>
<td>Of other materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6406 99 10</td>
<td>Gaiters, leggings and similar articles and parts thereof</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>6406 99 30</td>
<td>Assemblies of uppers affixed to inner soles or to other sole components, but without outer soles</td>
<td>3</td>
<td>pa</td>
</tr>
<tr>
<td>6406 99 50</td>
<td>Removable insoles and other removable accessories</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>6406 99 60</td>
<td>Outer soles of leather or composition leather</td>
<td>3</td>
<td>-</td>
</tr>
<tr>
<td>6406 99 80</td>
<td>Other</td>
<td>3</td>
<td>-</td>
</tr>
</tbody>
</table>
The tariffs for different countries are according their membership in the group. In some cases there are exceptions and the preferences are not valid for certain countries, in which case the full amount of these tariffs has to be paid. The types of tariffs for countries similar to Colombia or for potential competitors to Colombia are described in the following table.

Table 6.1. EU tariff schedule

<table>
<thead>
<tr>
<th>The code in EU Tariff schedule</th>
<th>Description of footwear type</th>
<th>General tariffs</th>
<th>Tariff in % RGSP</th>
</tr>
</thead>
<tbody>
<tr>
<td>64.01</td>
<td>Waterproof footwear. (including footwear with steel noses)</td>
<td>17</td>
<td>11.9</td>
</tr>
<tr>
<td>64.02</td>
<td>Footwear with uppers of rubber or artificial plastic material.</td>
<td>17</td>
<td>11.9</td>
</tr>
<tr>
<td>64.03</td>
<td>Footwear with leather uppers.</td>
<td>8</td>
<td>4.5</td>
</tr>
<tr>
<td>With the exception of:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>64.03.5911</td>
<td>Footwear, not covering the ankle, upper and outer sole of leather, with vamp of straps or with pieces cut out, heel including soles more than 3 cm.</td>
<td>5</td>
<td>1.5</td>
</tr>
<tr>
<td>64.03.9198</td>
<td>Footwear, covering the ankle, outer sole of rubber, plastic or synthetic leather, upper of leather, inner soles 24 cm or more, for women.</td>
<td>5</td>
<td>1.5</td>
</tr>
<tr>
<td>64.03.9938</td>
<td>Footwear, not covering the ankle, upper of leather, outer sole of rubber, plastic or synthetic leather, with vamp of straps or pieces cut out, inner sole 24 cm or more, heel incl. soles 3 cm or less, for women.</td>
<td>5</td>
<td>1.5</td>
</tr>
<tr>
<td>64.03.9998</td>
<td>Footwear, not covering the ankle, upper of leather, outer sole of rubber, plastic or synthetic leather, inner sole 24 cm or more, for women.</td>
<td>7</td>
<td>3.5</td>
</tr>
<tr>
<td>64.04</td>
<td>Footwear with textile uppers.</td>
<td>17</td>
<td>11.9</td>
</tr>
<tr>
<td>64.05</td>
<td>Footwear with synthetic leather uppers.</td>
<td>3.5</td>
<td>0</td>
</tr>
<tr>
<td>with exception of:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>64.05.2091</td>
<td>Footwear, upper of textile, outer sole of wood or cork.</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>64.05.2099</td>
<td>Other footwear, upper of textile, outer sole of other material.</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>64.05.9010</td>
<td>Other footwear upper of other material, outer sole of rubber, plastic or (synthetic) leather.</td>
<td>17</td>
<td>11.9</td>
</tr>
<tr>
<td>64.05.9090</td>
<td>Other footwear, upper and outer sole of other material.</td>
<td>4</td>
<td>0</td>
</tr>
</tbody>
</table>

Source: EU tariff schedule - TARIC
Table 6.2. Tariff schedule with full tariffs for third countries and with preferential tariffs

<table>
<thead>
<tr>
<th>Country</th>
<th>Group of preferences according to international agreements</th>
<th>Tariff for the third countries in %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>17 (max. tariff)</td>
</tr>
<tr>
<td>Colombia</td>
<td>SPGE</td>
<td>0</td>
</tr>
<tr>
<td>Argentina</td>
<td>SPGL</td>
<td>11,9</td>
</tr>
<tr>
<td>Bolivia</td>
<td>SPGE</td>
<td>0</td>
</tr>
<tr>
<td>Brazil</td>
<td>SPGL</td>
<td>11,9</td>
</tr>
<tr>
<td>Chile</td>
<td>CL</td>
<td>0</td>
</tr>
<tr>
<td>China</td>
<td>SPGL&lt;sup&gt;13&lt;/sup&gt;</td>
<td>17</td>
</tr>
<tr>
<td>EU countries Italy, Germany, Portugal</td>
<td>EEA</td>
<td>0</td>
</tr>
<tr>
<td>India</td>
<td>SPGL</td>
<td>11,9</td>
</tr>
<tr>
<td>Indonesia</td>
<td>SPGL</td>
<td>17</td>
</tr>
<tr>
<td>Mexico</td>
<td>MX, Latin America</td>
<td>0</td>
</tr>
<tr>
<td>Peru</td>
<td>SPGE</td>
<td>0</td>
</tr>
<tr>
<td>Romania</td>
<td>RO</td>
<td>0</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>SPGL</td>
<td>11,9</td>
</tr>
<tr>
<td>Thailand</td>
<td>SPGL</td>
<td>11,9</td>
</tr>
<tr>
<td>USA</td>
<td>No Preferences</td>
<td>17</td>
</tr>
<tr>
<td>Venezuela</td>
<td>SPGE</td>
<td>0</td>
</tr>
<tr>
<td>Vietnam</td>
<td>SPGL</td>
<td>11,9</td>
</tr>
</tbody>
</table>

Source: EU tariff schedule - TARIC

6.3 **Norms of origin**

Footwear cannot enter the Polish market without a certificate of origin. This is a document testifying the origin of a product through a statement made by the exporter of the beneficiary country, certified by an authorized organ.

6.4 **Barriers**

There are no barriers that would protect the Polish footwear market from excessive import from Colombia. However, the European Union imposed a safeguard mechanism on the People’s Republic of China. A prior surveillance that was already described in 6.2 has been in force since February 2005.

<sup>13</sup> The preferential tariffs for footwear are not applicable to these countries.
according to Commission Regulation (EC) No 117/2005. This mechanism concerns only China and is a successor of a much stronger barrier concerning import from that country; an import quota.

### 6.5 Licenses

There are no particular licenses required from/of Colombian footwear exporters.

### 6.6 Quotas

There are no quotas imposed on the import of Columbian footwear.

Columbia as a member of the Andean Community of Nation (CAN) has a special relationship with European Union. EU trade relations with CAN take place in the framework of the EU’s General System of Preferences (GSP).

### 6.7 Approvals & 6.8 Technical standards


Council Directive 89/686/EEC of 21 December 1989 on the approximation of the laws of the Member States relating to personal protective equipment applies to specialist industrial footwear. Based on this regulation specialist footwear used at work has to obtain a special certificate to be admitted to the European market. The certificate is issued by special authorities in all countries of the European Union. In Poland the organ authorized to issue such a certificate is the Institute of Leather Industry ([www.ips.lodz.pl](http://www.ips.lodz.pl)). The Institute has two laboratories respected by the Polish Laboratory of Accreditation. It is the Laboratory of Tanning Industry and Laboratory of Footwear. The Certification Center, operated by this Institute, has all the adequate entitlements to grant different kinds of certificates.

The marking needed for all industrial footwear to be admitted to the EU-market is called the CE marking. The CE Mark is a conformity marking consisting of the letters "CE". The CE Marking applies to products regulated by certain European health, safety and environmental protection legislation. The CE Marking is obligatory for the products it applies to: the manufacturer affixes the marking in order to be allowed to sell his product in the European market.
For testing the following items are required:

- min. 3 pairs of footwear from 3 different sizes
- technical description, technical conditions of footwear
- photograph of the relevant footwear items
- an instruction for the use and service of footwear in the Polish language
- test reports about hygienic properties of materials of footwear (can be done in Columbia)
- name of the footwear or number of type of footwear in the column “Type/model” of the “Application...”  
- The importer gets the invoice before the testing and has to pay it ahead of time. The price for testing can range from 300 to 3000 EUR depending on the type of materials.

*Industrial footwear*

As of 1st July, 1995 the EU introduced harmonized standards for footwear, i.e. EN 345-1+A1:1998 for safety footwear and EN 347-1+A1:1998 for footwear without safety toe caps for professional use.

All safety shoes and footwear without steel toe cap have to be approved according to EN 345-1+A1:1998 and EN 347-1+A1:1998 and meet the EU directive 89/686 concerning personal protection. According to this directive, all footwear for professional use must be approved according to the common European standards.

<table>
<thead>
<tr>
<th>CSN EN 347 standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specifies working boots for professional uses marked by letter &quot;O&quot;. The basic feature of working boots is that boots have no in-built toe puff.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The working boots are further divided into the following categories:</th>
</tr>
</thead>
<tbody>
<tr>
<td>O - boots comply with basic requirements only</td>
</tr>
<tr>
<td>O1 - antistatic properties, outsole resistant to oils and fuels, energy absorbed in heels</td>
</tr>
<tr>
<td>O2 - same as O1 + water penetration and absorption</td>
</tr>
<tr>
<td>O3 - same as O2 + puncture-proof and tread pattern</td>
</tr>
</tbody>
</table>

14 see Annex I
CSN EN 346 standard

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PB</td>
<td>boots comply with basic requirements only</td>
</tr>
<tr>
<td>P1</td>
<td>antistatic properties, outsole resistant to oils and fuels, energy absorbed in heels</td>
</tr>
<tr>
<td>P2</td>
<td>same as P1 + water penetration and absorption</td>
</tr>
<tr>
<td>P3</td>
<td>same as P2 + puncture-proof and tread pattern</td>
</tr>
</tbody>
</table>

The protective boots are further divided into the following categories:

Boots for professional use must comply with the demands specified in the standard **CSN EN 344**. Moreover, they also need to obtain a CE-mark, which will be explained below.

CE is an abbreviation for 'Conformité Européenne', French for 'European Conformity'. The CE Mark indicates that the product it is affixed to conforms to all relevant essential requirements and other applicable provisions that have been imposed upon it by means of European directives, and that the product has been subject to the appropriate conformity assessment procedure(s). The essential requirements refer, among other things, to safety, public health and consumer protection. For the full text of the directive and the detailed requirements see annex 1.

The CE-marking is quite complex and we therefore advise potential Colombian exporters to thoroughly examine all the requirements, possibly with the support of a specialized European agency. To give a small indication of what is needed, please view part of the working paper, article 8, on the Directive below. To decide which category is applicable to certain products, check the table with leg and foot and anti-slip protection.
Figure 6.7.1 CE-mark requirements

Article 8

Procedures before placing on the market and/or putting into service of PPE

The manufacturer or his authorised representative shall, before placing PPE on the market and or/ putting PPE into service:

(a) On the basis of a risk analysis, determine the relevant Category of the PPE in view of the nature and level of risk(s) against which the intended user will be protected.

(b) Establish a list of the Basic Requirements applicable to the PPE to be manufactured and to which the PPE must comply.

(c) for Category 1 PPE,

apply the procedure of internal control of production provided for at Annex V;

(d) for Category 2 PPE,

apply

(i) the EC type-examination procedure provided for at Annex VI

or

(ii) the full quality insurance procedure provided for at Annex IX
(e) for Category 3 PPE,

apply

(i) the EC-type examination procedure provided for at Annex VI; coupled with either

the provisions as set by Annex VII; or,

the production quality assurance procedure provided for at Annex

VIII (a); or,

the product quality assurance procedure provided for at Annex VIII (b)

or:

(ii) the full quality assurance procedure provided for at Annex IX.”

(f) Draw up the technical documentation referred to in Annex III so that this can, if necessary, be submitted to the competent authorities. The technical documentation must enable the traceability and the conformity of the product with the requirements of the Directive to be assessed.

(g) draws up an EC Declaration of Conformity using the form laid down in Annex XII declaring that the PPE placed on the market is in conformity with the provisions of this Directive with a view to its submission to the competent authorities on a reasoned request;

(h) affix the CE marking to all PPE according to the obligations specified in Article 12;

(i) provide user information with each PPE in accordance with the requirements at Annex II, 1.4. This user information is considered an integral part of the PPE itself.

(j) PPE sold in bulk shall be accompanied by at least one information leaflet per smallest commercial package intended to be placed on the market and/or put into service by the manufacturer or authorised representative where this package is intended for one user.
Industrial footwear in Poland

8. EQUIPMENT FOR LEG AND/OR FOOT AND ANTI-SLIP PROTECTION

<table>
<thead>
<tr>
<th>TYPE OF PPE</th>
<th>Certification category</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.1 All equipment and/or accessories (whether or not detachable) designed and manufactured specifically to protect the foot and/or the leg and to provide anti-slip protection</td>
<td>II</td>
<td></td>
</tr>
<tr>
<td>Except:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.2 Equipment and/or accessories (whether or not detachable) designed and manufactured to provide protection against electrical risks for work involving dangerous voltages, or used to provide insulation against high voltages</td>
<td>III 3.3.7</td>
<td></td>
</tr>
<tr>
<td>8.3 Equipment and/or accessories (whether or not detachable) designed and manufactured for use in high-temperature environments the effects of which are comparable to those of an air temperature of 100°C or more and which may or may not be characterized by the presence of infra-red radiation, flames or the projection of large amounts of molten material</td>
<td>III 3.3.4</td>
<td></td>
</tr>
<tr>
<td>8.4 Equipment and/or accessories (whether or not detachable) designed and manufactured for use in low-temperature environments the effects of which are comparable to those of an air temperature of -50°C or less</td>
<td>III 3.3.5</td>
<td></td>
</tr>
<tr>
<td>8.5 Equipment and/or accessories (whether or not detachable) designed and manufactured to provide only limited protection against chemical attack, or ionising radiation</td>
<td>III 3.3.3</td>
<td></td>
</tr>
<tr>
<td>8.6 Sports equipment (in particular sports shoes) and/or accessories (whether or not detachable) designed and manufactured to protect against external impacts</td>
<td>I 3.1.5</td>
<td></td>
</tr>
</tbody>
</table>

Source: Official site of the EU: [www.europa.eu.int](http://www.europa.eu.int)

The skin of all footwear is marked with a stamp. This is a mandatory requirement specified by the EU. This stamp states the name of the manufacturer, part number, date of production, country of origin, numbers of standards observed, and category to which the footwear has been approved. Each pair of footwear is accompanied by instructions for use, telling the users what kind of footwear they buy and how to treat it.
**Labelling**

*Regular footwear*

The placing on the market of footwear, or its main parts when marketed separately, must comply with the following European Union (EU) labelling regulations:

**Contents**

The labelling must describe the materials of the three main parts of the footwear (the upper, the lining and sock, and the outer sole), stating in each case whether the material is “leather”, “coated leather”, “textile” or “other”. If no single material accounts for at least 80% of the product, the label should convey information on the two main materials used.

For this purpose the manufacturer can choose between the use of pictograms or written indications in the language/s established by the Member State where intended to be marketed.

**Table 6.7.2 Overview of footwear pictograms**

![Pictograms](source)


**Placement**

The labelling must be conveyed on the footwear. It has to be placed, at least, on one article of footwear in each pair. This can be done by printing, sticking, embossing or using an attached label. The labelling must be visible, securely...
attached and accessible, and the dimensions of the pictograms must be sufficiently large to make it easy to understand.

**Compliance responsibility**

The person in charge of supplying the labelling and assuring its accuracy will be:
1. the manufacturer, when established in the EU, or
2. the authorised agent, when the manufacturer is not established in the EU, or
3. the person responsible for first placing the footwear on the EU market, if neither the manufacturer nor the agent are established in the EU,
4. the retailer will remain responsible for ensuring that the footwear sold bears the appropriate labelling.

**Industrial footwear**

Personal Protective Equipment (PPE), such as industrial footwear, needs to bear one or more identification or recognition marks directly or indirectly relating to health and safety.

The identification or recognition marks directly or indirectly relating to health and safety affixed to these types or classes of PPE must preferably take the form of harmonized pictograms or ideograms and must remain perfectly legible throughout the foreseeable useful life of the PPE. In addition, these marks must be complete, precise and comprehensible so as to prevent any misinterpretation; in particular, when such marks incorporate words or sentences, the latter must appear in the official language(s) of the Member State where the equipment is to be used. If PPE (or a PPE component) is too small to allow all or part of the necessary marking to be affixed, the relevant information must be mentioned on the packing and in the manufacturer's notes.

**Table 6.7.3 PPE marking**

<table>
<thead>
<tr>
<th>Nature of the marking</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Natural rubber</td>
<td>- Resistant to extremely low temperatures - 40°C</td>
</tr>
<tr>
<td>- Water resistant</td>
<td>- Oil resistant outsoles</td>
</tr>
<tr>
<td>- Slip resistant</td>
<td>- Antistatic footwear</td>
</tr>
<tr>
<td>- Energy absorption in the heel region</td>
<td>- Electrically insulating footwear for low voltage installation works</td>
</tr>
<tr>
<td>- Steel toe box</td>
<td>- Protection against risk of cutting with a motor saw</td>
</tr>
<tr>
<td>- Puncture resistant</td>
<td>- Heat resistant soles - 250 °C</td>
</tr>
<tr>
<td>- Low temperature resistant</td>
<td>- Increased resistance of outsole to abrasion</td>
</tr>
</tbody>
</table>

*Source: EUNITE The Hague*
6.9 Packaging

The legal basis that concerns the standards of marking and labeling the packing of footwear is Directive 94/11/EC of the European Parliament and the Council of 23 March 1994 on the approximation of the laws, regulations and administrative provisions of the Member States relating to labelling of the materials used in the main components of footwear for sale to the consumer. Regulations included in that Directive are present in Polish law in Directive of the Council of Ministers on the Additional Conditions Concerning the Marking of Shoes dated 19 October 2004. According to this Directive the marking and graphic signs are introduced:

1. Top of the shoe
2. Lining

3. Outer sole

The directive also regulates the graphic signs for the materials of which the shoes are produced:

1. Leather
2. Leather covered

3. Textile material
4. Other material
The graphic signs should be fixed to the packaging and directly to the shoes, the forms can be: seals, prints, sticks, embossments, badges. Where it concerns industrial footwear, these are the symbols most commonly used:

- B - boots certified by Central Institute For Labour Protection
- CE - the certificate of conformity with The Directive of European Union
- Anti-static (electric resistance $10^5 - 10^9$ Ohms)
- Resistant to electric shock of up to 1 kV
- Steel toe cap (200 J)
- Steel midsole (1100 N)
- Saw protection
- High temperature resistance
- Chemical agents in food industry resistance
- Concentrated acids and alkali resistance

Specifically for packaging the following part of the working paper on the EC marking Directive applies:

“PPE sold in bulk shall be accompanied by at least one information leaflet per smallest commercial package intended to be placed on the market and/or put into service by the manufacturer or authorized representative where this package is intended for one user.”

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Proexport Colombia

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**6.10 Required documentation for import &
6.11 Import modalities or regimes involved in the process**

Documents requested to export footwear to Poland are: invoice and certificate of origin issued by the Columbian authorities per instance by Superintendencia de Industria y Comercio – Division de Control de Normas y Calidades. The certificate of origin is required as Columbia is included in the General System of Preferences (GSP).

**6.12 Requirements for import of samples and accompanied luggage**

The legal basis that concerns the requirements for import of samples is the Council Regulation (EEC) No 918/83 of 28 March 1983 setting up a Community system of relieves from customs duty. According to articles 95 of this regulation the following shall be admitted free of import duties:

- Small representative samples of goods manufactured outside the customs territory of the Community intended for a trade fair or similar event

- Printed matter, catalogues, prospectuses, price lists, advertising posters, calendars, whether or not illustrated, unframed photographs and other articles supplied free of charge in order to advertise goods manufactured outside the customs territory of the Community and displayed at a trade fair or similar event

"Trade fair or similar events" are defined as: exhibitions, fairs, shows and similar events connected with trade, industry, agriculture or handicrafts. But not exhibitions staged for private purposes in commercial stores or premises to sell goods of a third country.

According to article 97 of the same regulation the relief referred to in article 95 shall be limited to goods which are appropriate in their total value and quantity to the nature of the exhibition, the number of visitors and the extent of the exhibitor’s participation.

The regulation also defines the conditions that goods imported for examination, analysis or test purposes have to meet to be admitted free of import duties (articles 100 – 107 of the regulation).
6.13 Website links to rules and regulations

European Union special site on Personal Protective Equipment; 
http://europa.eu.int/comm/enterprise/mechan_equipment/ppe/index.htm

Chamber of Leather Industry (Polska Izba Przemysłu Skórzanego); www.pips.pl

Institute of Leather Industry (Instytut Przemysłu Skórzanego); www.ips.lodz.pl

Customs Service of the Republic of Poland (Służba Celna Rzeczypospolitej Polskiej); www.mf.gov.pl

Ministry of Economic Affairs and Labor (Ministerstwo Gospodarki i Pracy); www.mgip.gov.pl

Sejm of Republic of Poland (Sejm Rzeczypospolitej Polskiej); www.sejm.gov.pl

Euro Lex; www.europa.eu.int

6.14 Recommendations

Documents requested to export footwear to Poland are: invoice, certificate of origin issued by Colombian authorities. On the Polish customs clearance all the documents will be verified and necessary customs duties and taxes will be calculated. VAT rate for footwear amounts to 22 %, information on tariffs is given in paragraph 6.2.

The customs office has the right to take samples for testing. The procedure of custom clearance is finished when all taxes and tariffs are paid. Colombian entrepreneurs should be aware of special labeling and marking requirements as stated in paragraph 6.8 and 6.9.
7. Physical Access

7.1 Available transportation infrastructure & Identification of ports, airports, roads – border passes – railways, waterways

Poland possesses all types of transportation infrastructure: roads network, railways, airports connections as well as sea ports.

Polish roads network
Polish roads - January 2005

Polish roads – executed projects and plans
Industrial footwear in Poland

Polish railroads network

Source: PKP (Polish State Railroads)
Airports in Poland

International airport im. Fryderyka Chopina in Warsaw
ul. Żwirki i Wigury
Warszawa
tel.: +48 (22) 650 42 20
www.lotnisko-chopina.pl

International airport im. Jana Pawła II Kraków - Balice Sp. z o.o.
ul. Kpt. M. Medweckiego 1
32-083 Balice
tel.: +48 (12) 639 30 00
fax: +48 (12) 411 79 77
www.lotnisko-balice.pl

Górnośląskie Towarzystwo Lotnicze S.A. Internation Airport Katowice
Al. Korfantego 38
40-161 Katowice
tel.: +48 (32) 201 06 33
fax: +48 (32) 201 06 34
www.gtl.com.pl

Airport Poznań-Ławica Sp. z o.o.
ul. Bukowska 285
60-189 Poznań
tel.: +48 (61) 849 20 00
fax: +48 (61) 849 23 17
www.airport-poznan.com.pl

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Industrial footwear in Poland

Airport Gdańsk Sp. z o.o.
ul. Słowackiego 200
80-298 Gdańsk
tel.: +48 (58) 348 11 54
fax: +48 (58) 345 22 83
www.airport.gdansk.pl

Airport „Mazury-Szczytno” Sp. z o.o. w Szczytnie
Port Lotniczy Szczytno-Szymany
ul. Wielbarska 5
12-100 Szczytno
tel.: +48 (89) 624 32 81
fax: +48 (89) 624 22 94
www.airport.szczytno.pl

Airport Wrocław S.A.
ul. Skarżyńskiego 36
54-530 Wrocław
tel.: +48 (71) 358 11 00, 358 13 10
fax: +48 (71) 357 39 73
www.airport.wroclaw.pl

Airport Lublinek Sp. z o.o.
ul. Gen. S. Maczka 35
94-328 Łódź
tel.: +48 (42) 688 84 14
fax: +48 (42) 688 83 84
www.airport.lodz.pl

Airport Zielona Góra-Babimost
skr. pocztowa 4
6-110 Babimost
tel.: +48 (68) 351 23 00
fax: +48 (68) 351 27 29

Airport Rzeszów-Jasionka
36-002 Jasionka 942
tel.: +48 (17) 852 00 81
fax: +48 (17) 852 07 09

Airport Bydgoszcz S.A.
ul. Grodzka 12
85-109 Bydgoszcz
tel.: +48 (52) 345 95 96
fax: +48 (52) 322 52 32

Proexport Colombia
Market Researches in Eastern Europe

Airport Szczecin-Goleniów Sp. z o. o.
72-100 Goleniów
tel.: +48 (91) 418 28 64
fax: +48 (91) 418 33 83
www.airport.com.pl

Marine Ports

There are 4 big marine ports in Poland: Gdańsk, Gdynia, Świnoujście, Szczecin and 8 small ones: Darłowo, Elbląg, Hel, Kołobrzeg, Łeba, Police, Władysławowo, Ustka.

Table 7.1.1 Cargo handling in Polish marine ports

Cargo handling 2003 [thous. tons]

Coal:

<table>
<thead>
<tr>
<th>Port</th>
<th>Cargo Handling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gdańsk</td>
<td>5926</td>
</tr>
<tr>
<td>Gdynia</td>
<td>1442</td>
</tr>
<tr>
<td>Szczecin i Świnoujście</td>
<td>5943</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>13311</strong></td>
</tr>
</tbody>
</table>

Ore:

<table>
<thead>
<tr>
<th>Port</th>
<th>Cargo Handling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gdańsk</td>
<td>99</td>
</tr>
<tr>
<td>Gdynia</td>
<td>0</td>
</tr>
<tr>
<td>Szczecin i Świnoujście</td>
<td>2008</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2107</strong></td>
</tr>
</tbody>
</table>

Other mass:

<table>
<thead>
<tr>
<th>Port</th>
<th>Cargo Handling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gdańsk</td>
<td>2582</td>
</tr>
<tr>
<td>Gdynia</td>
<td>1776</td>
</tr>
<tr>
<td>Szczecin i Świnoujście</td>
<td>1974</td>
</tr>
</tbody>
</table>

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## Industrial footwear in Poland

<table>
<thead>
<tr>
<th></th>
<th>Gdańsk</th>
<th>Gdynia</th>
<th>Szczecin i Świnoujście</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total: 6332</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Corn:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gdańsk</td>
<td>397</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gdynia</td>
<td>872</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Szczecin i Świnoujście</td>
<td>979</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total: 2248</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Wood:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gdańsk</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gdynia</td>
<td>162</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Szczecin i Świnoujście</td>
<td>33</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total: 197</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Package freight:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gdańsk</td>
<td>2295</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gdynia</td>
<td>7107</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Szczecin i Świnoujście</td>
<td>4584</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total: 13986</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Liquid fuels:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gdańsk</td>
<td>9991</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gdynia</td>
<td>297</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Szczecin i Świnoujście</td>
<td>125</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total: 10413</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Source: GUS (*Rocznik statystyczny Rzeczpospolitej Polskiej* 2003)*
Chart 7.1.2. Ships entering Polish marine ports in 2002

<table>
<thead>
<tr>
<th>Port</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gdańsk</td>
<td>2506</td>
</tr>
<tr>
<td>Gdynia</td>
<td>3483</td>
</tr>
<tr>
<td>Kołobrzeg</td>
<td>353</td>
</tr>
<tr>
<td>Police</td>
<td>269</td>
</tr>
<tr>
<td>Szczecin</td>
<td>3493</td>
</tr>
<tr>
<td>Świnoujście</td>
<td>9950</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>30212</strong></td>
</tr>
</tbody>
</table>

7.2 Description of status, operation, security, costs, distances, transportation arrangements and intercommunity customs

The goods may be transported from Colombia to Poland by air, by sea, combined air/sea or air/truck. In case of (industrial) footwear, sea transportation will be most efficient, since the product cannot spoil and freight costs for sea cargo are relatively low.\(^{16}\)

Transportation by sea is very popular and there are about twenty national and international shipping lines operating. The vast majority of trade, approximately 80 percent, leaves from Pacific ports of Buenaventura and Tumaco and the Caribbean ports of Barranquilla, Cartagena and Santa Marta. The most important shipping lines are the FLOTA MERCANTE GRANCOLOMIANA, AGROMAR S.A., COLOMENARES LTDA and GERMEINCO. The transportation to Polish ports: Gdansk, Gdynia and Swinoujscie takes approximately 27 days.

The combined transportation to Poland would involve the goods to be shipped to Rotterdam or Amsterdam in the Netherlands and then transported by air, ship or truck to Poland. There are many possibilities to enter Poland from other European countries.

<table>
<thead>
<tr>
<th>Method of Transportation</th>
<th>Time of delivery</th>
<th>Security Factor</th>
<th>Cost</th>
<th>Freight Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air freight</td>
<td>2 days</td>
<td>Excellent</td>
<td>Very expensive</td>
<td>Often difficult</td>
</tr>
<tr>
<td>Sea freight</td>
<td>28-30 days</td>
<td>Insufficient</td>
<td>Cheap</td>
<td>Sufficient</td>
</tr>
<tr>
<td>By sea/air</td>
<td>18-20 days</td>
<td>Excellent</td>
<td>Expensive</td>
<td>Not always</td>
</tr>
</tbody>
</table>

Source: [www.usergioarboleda.edu.co](http://www.usergioarboleda.edu.co)

\(^{16}\) For more detailed information please see chapter 7.7

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European competitors mainly use roads and rails to transport their goods. The transportation infrastructure in Poland is below the level of Western countries, however still reliable and secure.

Transportation by trucks is very popular due to the low costs. The transportation from the Netherlands to Poland takes approximately two days. Dutch and Polish truckers operate a vast network of trucks with numerous daily departures.

**Figure 7.2.2.1 Distances from the most important logistic places in the Netherlands to Warsaw.**

<table>
<thead>
<tr>
<th>Place</th>
<th>Country</th>
<th>Distance to Warsaw (km)</th>
<th>Driving time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amsterdam (airport)</td>
<td>The Netherlands</td>
<td>1272</td>
<td>13 h. 06 min</td>
</tr>
<tr>
<td>Rotterdam (port)</td>
<td>The Netherlands</td>
<td>1301</td>
<td>13 h. 35 min</td>
</tr>
</tbody>
</table>

Another very popular and cheap way for importers is via the port of Hamburg:

**Figure 7.2.3.2 Distances from the most important logistic places in Germany to Warsaw.**

<table>
<thead>
<tr>
<th>Place</th>
<th>Country</th>
<th>Distance to Warsaw (km)</th>
<th>Driving time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hamburg</td>
<td>Germany</td>
<td>747</td>
<td>7 h. 43 min</td>
</tr>
<tr>
<td>Bremerhaven</td>
<td>Germany</td>
<td>840</td>
<td>8 h. 36 min</td>
</tr>
<tr>
<td>Wilhelmshaven</td>
<td>Germany</td>
<td>883</td>
<td>9 h. 19 min</td>
</tr>
</tbody>
</table>

Prices of transportation within Europe by road depend on the offer made by a transporting company. It is quite difficult to obtain a price indication from any of these companies, when quantity, distance and requirements cannot be specifically given. Competition in the transport world after the accession of the new member states has been increasing and therefore prices and rates are guarded as company secrets to protect them from exposure to competing companies. For a rough estimate of the transportation prices, we refer to chapter 7.6.

### 7.3 Identification of other handling and distribution infrastructure from Colombia

There is also an option of air transportation from Colombia to Poland. However, the costs involved are very high and there is at least one transshipment necessary during the transit.
LOT, Polish National Airline

LOT, the Polish airlines company is able to arrange all the flights from Colombia to Poland. The air freight would approximately take 17 to 26 hours to deliver goods from Bogotá, via New York to Warsaw or Krakow. The loading takes place in one of the two (available) airports in NY: JFK Airport or EWR Newark Airport. The shortest recommended operating time needed for the transit in NY is 4 hours. The transshipment is organized by handling agents, specialized companies who deal with the loading and direct it further. The transportation order should be delivered to the company that deals with the logistics. This is usually a Cargo Agent or Airfreight Forwarder. The route of transportation should be included in the order, with the indication of each involved carrier. The sender, as well as the receiver, of the transported goods are both obliged to possess permissions, export/import licenses that are subject to customs law and sanitary rules in each country of transit.

Rates and charges published by the airline are based on the units of measurement. They cover only the carriage of consignment between airports. Such charges do not include the following services and charges: pick-up and delivery, storage, insurance, customs clearance, disbursements, airport taxes and charges, expenses for the repairing of faulty packing and other similar advanced charges.

These arrangements and costs are negotiated separately on the basis of individual order. Price depends on the amount of the transported goods, weight, frequency of orders, also on the person negotiating the rates. Agents from the logistics centers are the most suitable to arrange these rates.

Other airlines

The other airline, KLM Cargo, is operating on the route Amsterdam – Warsaw. KLM as well as LOT offers flights from Amsterdam to Warsaw 3 times a day. The rates and general conditions from KLM Cargo are valid on the services within the current KLM Cargo network. All shipments are governed by the General Conditions of KLM Cargo. KLM states that the amount of goods transported from Amsterdam to Poland by air is very limited due to the high air cargo transport cost versus the low trucking costs. The trucking cost is less than 25% of the air cargo cost. Furthermore, there is no container air cargo capacity between Amsterdam and Warsaw, only loose belly capacity. The operating time by air is 2 hours.
7.4 Identification of carriers that transport goods imported from Colombia

The sea connections from Colombia to Poland:

The sea service is provided by domestic companies only for the route Poland-Colombia. It is the international operators that deal with the transportation from Colombia to Europe.

Table. 7.4.1. Navigation connections from Gdańsk port to Colombia

<table>
<thead>
<tr>
<th>Destination</th>
<th>Carrier</th>
<th>Frequency</th>
<th>Type of cargo</th>
<th>Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barranquilla</td>
<td>Venbulk Service</td>
<td>Every 6th week</td>
<td>Containers/package freight</td>
<td>MAG</td>
</tr>
<tr>
<td></td>
<td>GmbH</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: www.portgdansk.pl

Table. 7.4.2. Navigation connections from Gdynia port to Colombia

<table>
<thead>
<tr>
<th>Destination</th>
<th>Carrier</th>
<th>Frequency</th>
<th>Type of cargo</th>
<th>Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cartagena</td>
<td>Conti Lines</td>
<td>Month</td>
<td>Conv.</td>
<td>Okmarit</td>
</tr>
<tr>
<td>Barranquilla</td>
<td>Spliethoff</td>
<td>Month</td>
<td>Conv.</td>
<td>Pomorscy Maklerzy Okrętowien</td>
</tr>
<tr>
<td>Turbo</td>
<td>Spliethoff</td>
<td>Month</td>
<td>Conv.</td>
<td>Pomorscy Maklerzy Okrętowien</td>
</tr>
</tbody>
</table>

Source: www.port.gdynia.pl

Transportation by sea from Colombia to Poland is offered by:

- **Maersk Sealand.** As a leading, world-class ocean carrier, they offer second to none door-to-door transportation service. With more than 300 container vessels, one million containers and own terminals, trucks and trains they ensure getting a reliable worldwide coverage. Their offices in more than 125 countries ensure that the cargo will receive an excellent service in all corners of the world.
Table 7.4.3. Transit time and possible schedule from Cartagena to Gdynia

<table>
<thead>
<tr>
<th>LOCATIONS</th>
<th>SCHEDULE 1</th>
<th>SCHEDULE 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dep.:</td>
<td>30.Jun.05(Thu)</td>
</tr>
<tr>
<td></td>
<td>By:</td>
<td>AURETTE A</td>
</tr>
<tr>
<td></td>
<td>Lloyds no.:</td>
<td>9242285</td>
</tr>
<tr>
<td></td>
<td>Voyage no.:</td>
<td>0520</td>
</tr>
<tr>
<td></td>
<td>Build year:</td>
<td>2002</td>
</tr>
<tr>
<td>Cartagena, CO</td>
<td>Arr.:</td>
<td>02.Jul.05(Sat)</td>
</tr>
<tr>
<td></td>
<td>Dep.:</td>
<td>04.Jul.05(Mon)</td>
</tr>
<tr>
<td></td>
<td>By:</td>
<td>JEPPESEN</td>
</tr>
<tr>
<td></td>
<td>Lloyds no.:</td>
<td>MAERSK</td>
</tr>
<tr>
<td></td>
<td>Voyage no.:</td>
<td>9215165</td>
</tr>
<tr>
<td></td>
<td>Build year:</td>
<td>0510</td>
</tr>
<tr>
<td>Manzanillo, PA</td>
<td>Arr.:</td>
<td>02.Jul.05(Sat)</td>
</tr>
<tr>
<td></td>
<td>Dep.:</td>
<td>04.Jul.05(Mon)</td>
</tr>
<tr>
<td></td>
<td>By:</td>
<td>JEPPESEN</td>
</tr>
<tr>
<td></td>
<td>Lloyds no.:</td>
<td>MAERSK</td>
</tr>
<tr>
<td></td>
<td>Voyage no.:</td>
<td>9215165</td>
</tr>
<tr>
<td></td>
<td>Build year:</td>
<td>0510</td>
</tr>
<tr>
<td>Bremerhaven, DE</td>
<td>Arr.:</td>
<td>20.Jul.05(Wed)</td>
</tr>
<tr>
<td></td>
<td>Dep.:</td>
<td>26.Jul.05(Tue)</td>
</tr>
<tr>
<td></td>
<td>By:</td>
<td>FELICITAS</td>
</tr>
<tr>
<td></td>
<td>Lloyds no.:</td>
<td>FELICITAS</td>
</tr>
<tr>
<td></td>
<td>Voyage no.:</td>
<td>0523</td>
</tr>
<tr>
<td></td>
<td>Build year:</td>
<td>1996</td>
</tr>
<tr>
<td>Gdynia, PL</td>
<td>Arr.:</td>
<td>28.Jul.05(Thu)</td>
</tr>
<tr>
<td></td>
<td>Transit time:</td>
<td>28 days</td>
</tr>
<tr>
<td></td>
<td>Container type:</td>
<td>Dry, Reefer</td>
</tr>
</tbody>
</table>

Chart 7.4.4. The route from Colombia to Poland

Source: www.maersksealand.com
• **MSC** Mediterranean Shipping Company S.A., of Geneva, Switzerland is a privately owned shipping line, founded in 1970, which has rapidly grown from a small conventional ship operator to become one of the leading global shipping lines of the world. During recent years MSC's maritime fleet has expanded substantially to consolidate its position in 2003 as the 2nd largest carrier in respect of container slot capacity and of the number of container vessels operated. MSC operates in excess of 255 container vessels with an intake capacity of 670,000 TEUs. MSC provides an unparalleled service network via dedicated own offices throughout the world and remains a truly independent and private company able to respond quickly to market changes and implement long-term plans, without unnecessary interference or delay. With a streamlined management structure in Geneva, MSC has become a leading customer focused and cost effective global transportation solution for many shippers.

### 7.5 Alternatives of transport and carriers providing services from Colombia

The providers of air connections from Colombia to Poland and from the Netherlands to Poland are:

- **LOT** – Polish Airlines
- **KLM** – Royal Dutch Airlines

The providers of road connections from the Netherlands to Poland are:

- **Raben-Group** - has been operating on the European market for over 70 years offering logistic services of the highest quality. The main customers are small, medium-size and big companies which have decided to take advantage of the outsourcing of logistic services. For them and together with them the company has created and implemented modern solutions optimizing processes relating to transport, storage and distribution. For more information please see: [www.raben-group.com](http://www.raben-group.com)

- **Cargo Sped** - Cargo Sped specializes in the forwarding of all types of freights. They offer road, railway and sea transportation services for export, import, transit and domestic traffic. Trans-shipment service at the borders, in the ports and terminals is also offered. It also provides agency services in customs and administrative matters, cargo insurance and customs securities.

- **AXA** – AXA was established in the year 1991, and since then it developed and improved the quality of services that are offered to customers. The experienced personnel and the variety of transportation which might be suitable to the individual needs of clients are some of the features they
provide. Known as a reliable, dynamic company. Promptness in picking up the cargo from loading up places and delivering it to their destinations is the company’s aim. It specializes in the transportation all over Europe and CIS countries.

7.6 International Freight or Transportation Costs

Sea transportation

The cost of transportation is based on the container’s size. Maersk Sealand offers containers as follows:

Table 7.6.1 Description of containers

<table>
<thead>
<tr>
<th>Dry/steel</th>
<th>Type</th>
<th>Size</th>
<th>m³</th>
<th>ft³</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20' standard</td>
<td>20' x 8' x 8'6&quot;</td>
<td>33</td>
<td>1,170</td>
</tr>
<tr>
<td></td>
<td>40' standard</td>
<td>40' x 8' x 8'6&quot;</td>
<td>67</td>
<td>2,390</td>
</tr>
<tr>
<td></td>
<td>40' high</td>
<td>40' x 8' x 9'6&quot;</td>
<td>76</td>
<td>2,714</td>
</tr>
<tr>
<td></td>
<td>45' high</td>
<td>45' x 8' x 9'6&quot;</td>
<td>85</td>
<td>3,040</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dry/aluminium</th>
<th>Type</th>
<th>Size</th>
<th>m³</th>
<th>ft³</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>45' high</td>
<td>45' x 8' x 9'6&quot;</td>
<td>86</td>
<td>3,071</td>
</tr>
</tbody>
</table>

Source: www.maersksealand.com
Maersk Sealand's dry containers come in several sizes and designs:

- 20' with a payload of up to 28.3 metric tonnes
- 40' - both 8'6" and 9'6" high cube - with a payload of up to 30.4 metric tonnes
- 45' - 9'6" high cube - with a total capacity of 86 cubic metres

Table 7.6.2.: The base freight for the routes from Colombia to Poland for 20’ container

<table>
<thead>
<tr>
<th>Siz.</th>
<th>Base Freight</th>
<th>Orig</th>
<th>Dest</th>
<th>Comm</th>
<th>Exp. Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>1690.00USD</td>
<td>BARRANQUILLA (port), COLOMBIA</td>
<td>GDYNIA (port), POLAND</td>
<td>DRY CARGO : CLASS 1 COMMODITIES</td>
<td>31Jul2005</td>
</tr>
<tr>
<td>20</td>
<td>1700.00USD</td>
<td>CARTAGENA (port), COLOMBIA</td>
<td>GDYNIA (port), POLAND</td>
<td>DRY CARGO : CLASS 1 COMMODITIES</td>
<td>31Jul2005</td>
</tr>
<tr>
<td>20</td>
<td>1800.00USD</td>
<td>CARTAGENA (port), COLOMBIA</td>
<td>GDANSK (port), POLAND</td>
<td>DRY CARGO : CLASS 1 COMMODITIES</td>
<td>31Jul2005</td>
</tr>
<tr>
<td>20</td>
<td>1800.00USD</td>
<td>BUENAVENTURA (port), COLOMBIA</td>
<td>GDYNIA (port), POLAND</td>
<td>DRY CARGO : CLASS 1 COMMODITIES</td>
<td>31Jul2005</td>
</tr>
<tr>
<td>20</td>
<td>1700.00USD</td>
<td>BARRANQUILLA (port), COLOMBIA</td>
<td>SZCZECIN (port), POLAND</td>
<td>DRY CARGO : CLASS 1 COMMODITIES</td>
<td>31Jul2005</td>
</tr>
<tr>
<td>20</td>
<td>1900.00USD</td>
<td>BUENAVENTURA (port), COLOMBIA</td>
<td>GDANSK (port), POLAND</td>
<td>DRY CARGO : CLASS 1 COMMODITIES</td>
<td>31Jul2005</td>
</tr>
<tr>
<td>20</td>
<td>1770.00USD</td>
<td>BARRANQUILLA (port), COLOMBIA</td>
<td>GDANSK (port), POLAND</td>
<td>DRY CARGO : CLASS 1 COMMODITIES</td>
<td>31Jul2005</td>
</tr>
<tr>
<td>20</td>
<td>1700.00USD</td>
<td>CARTAGENA (port), COLOMBIA</td>
<td>SZCZECIN (port), POLAND</td>
<td>DRY CARGO : CLASS 1 COMMODITIES</td>
<td>31Jul2005</td>
</tr>
<tr>
<td>20</td>
<td>1800.00USD</td>
<td>BUENAVENTURA (port), COLOMBIA</td>
<td>SZCZECIN (port), POLAND</td>
<td>DRY CARGO : CLASS 1 COMMODITIES</td>
<td>31Jul2005</td>
</tr>
</tbody>
</table>

Source: [maersksealand.com](http://www.maersksealand.com)

Table 7.6.3.: Additional charges

<table>
<thead>
<tr>
<th>Freight</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ocean Freight</td>
<td>1,700.00USD per Container</td>
</tr>
<tr>
<td>Redefining Basic Ocean Freight</td>
<td>TLI Rate</td>
</tr>
<tr>
<td>CARRIER SECURITY CHARGE</td>
<td>6.00USD</td>
</tr>
<tr>
<td>BAF-NCSA To Europe (BAF)</td>
<td>70.00USD</td>
</tr>
<tr>
<td>PORT SECURITY CHARGE</td>
<td>3.00USD</td>
</tr>
<tr>
<td>DOCUMENTATION FEE - DESTINATION</td>
<td>15.00EUR</td>
</tr>
<tr>
<td>DOCUMENTATION FEE - ORIGIN</td>
<td>50.00USD</td>
</tr>
<tr>
<td></td>
<td>= =======</td>
</tr>
<tr>
<td>Total Charges</td>
<td>1,847.16 USD</td>
</tr>
<tr>
<td>(1,511.48 EUR17)</td>
<td></td>
</tr>
</tbody>
</table>

Source: [maersksealand.com](http://www.maersksealand.com), charges as of 5 July 2005

Rate quote may not include local destination charges such as but not limited to: Cleaning, Port fees, Primage, Overweight charges, Documentation fees, or

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17 Exchange rate of 20 September 2005, 1 USD = 0,818273 EUR
Customs inspections. These fees may be assessed to and settled locally by the cargo receiver."

**Seagoing vessels in Gdańsk port:**

Tonnage Dues for Seagoing Vessels in Gdańsk port are described below: (for more information see [http://www.portgdansk.pl/index.php?id=charges&lg=en](http://www.portgdansk.pl/index.php?id=charges&lg=en))

Tonnage dues for entry of seagoing ship to port and departure of ship from port, transit through port area, and assurance of ship waste reception for recycling or treatment per 1 GT:

<table>
<thead>
<tr>
<th>No.</th>
<th>Ship size and type</th>
<th>Fee (EUR/1 GT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Car carrier</td>
<td>0.14</td>
</tr>
<tr>
<td>2</td>
<td>General cargo vessel</td>
<td>0.45</td>
</tr>
<tr>
<td>3</td>
<td>Reefer carrier</td>
<td>0.52</td>
</tr>
<tr>
<td>4</td>
<td>Container vessel</td>
<td>0.22</td>
</tr>
<tr>
<td>5</td>
<td>&quot;Ro-Ro&quot; ship</td>
<td>0.20</td>
</tr>
<tr>
<td>6</td>
<td>Bulk carrier</td>
<td>0.51</td>
</tr>
<tr>
<td>7</td>
<td>Passenger ship</td>
<td>0.13</td>
</tr>
<tr>
<td>8</td>
<td>Ferry</td>
<td>0.09</td>
</tr>
<tr>
<td>9</td>
<td>Passenger - cargo ship</td>
<td>0.09</td>
</tr>
<tr>
<td>10</td>
<td>Tanker up to 38.000 GT</td>
<td>0.57</td>
</tr>
<tr>
<td>11</td>
<td>Tanker over 38.000 GT</td>
<td>0.64</td>
</tr>
<tr>
<td>12</td>
<td>Towing and pushing vessels</td>
<td>0.48</td>
</tr>
<tr>
<td>13</td>
<td>Other seagoing ships</td>
<td>0.45</td>
</tr>
</tbody>
</table>

*Tonnage dues for line shipping and ferries entering Gdansk port*

- at least 8 times a week amount to 40%
- at least 6 times a week amount to 45%
- at least 4 times a week amount to 50%
- 3 times a week amount to 60%
- 2 times a week amount to 65%
- 1 once a week amount to 70%
- less than once a week amount to 75% of the pertinent fee rate specified.
Tonnage Dues for Seagoing Vessels in Gdynia port

Tonnage Dues for Seagoing Vessels in Gdynia port are described below (for more information see www.port.gdynia.pl)

1) The following are the tonnage dues charged for:

<table>
<thead>
<tr>
<th>No.</th>
<th>Type and size of vessel</th>
<th>Amount of due [EUR/1 GT]</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Car carriers</td>
<td>0,18</td>
</tr>
<tr>
<td>2.</td>
<td>General cargo vessels</td>
<td>0,49</td>
</tr>
<tr>
<td>3.</td>
<td>Reefer vessels</td>
<td>0,49</td>
</tr>
<tr>
<td>4.</td>
<td>Container vessels</td>
<td>0,31</td>
</tr>
<tr>
<td>5.</td>
<td>&quot;Ro-ro&quot; vessels</td>
<td>0,26</td>
</tr>
<tr>
<td>6.</td>
<td>Bulk carriers</td>
<td>0,52</td>
</tr>
<tr>
<td>7.</td>
<td>Passenger and cruise vessels</td>
<td>0,13</td>
</tr>
<tr>
<td>8.</td>
<td>Ferries</td>
<td>0,13</td>
</tr>
<tr>
<td>9.</td>
<td>Tankers</td>
<td>0,59</td>
</tr>
<tr>
<td>10.</td>
<td>Tugs, pusher-tugs, push trains and towing trains</td>
<td>0,40</td>
</tr>
<tr>
<td>11.</td>
<td>Fishing vessels and boats less than 35 m</td>
<td>0,00</td>
</tr>
<tr>
<td>12.</td>
<td>Other seagoing vessels</td>
<td>0,49</td>
</tr>
</tbody>
</table>

2) Tonnage dues for seagoing liners and ferries entering port:

a) at least 8 times a week amount to 40%,
b) at least 6 times a week amount to 45%,
c) at least 4 times a week amount to 50%,
d) 3 times a week amount to 60%,
e) twice a week amount to 65%,
f) once a week amount to 70%,
g) less than once a week (but not less than once a month) amount to 75% of the relevant rate of due specified.

Air transportation from Western-Europe to Poland

The arrangements and costs are negotiated separately on the basis of individual order. General costs of air freight in LOT Cargo, from Amsterdam to Warsaw are calculated in the following way:

Based cost B is EUR 34,03 which is a fixed cost
Each kilogram of the parcel is counted EUR 1,56.

In the case of long-term partnership there is a possibility to negotiate the prices.
Road transportation

Following prices (per truck) and time of the delivery for the distance from the Netherlands to Poland:

- **Amsterdam – Warsaw EUR 1.000**
- **Amsterdam – Poznań EUR 1.200**

### 7.7 Other costs involved in international physical distribution

The additional fees for international physical distribution in the main ports of Germany (Hamburg/Bremerhaven) and the Netherlands (Rotterdam) are presented below.

**Table 7.7.1 Additional distribution costs**

<table>
<thead>
<tr>
<th></th>
<th>Hamburg/Bremerhaven</th>
<th>Rotterdam</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sluice fee</td>
<td>EUR 80</td>
<td>EUR 36-120</td>
</tr>
<tr>
<td>Container return</td>
<td>EUR 180-290/20’</td>
<td>EUR 430-509/20’</td>
</tr>
<tr>
<td></td>
<td>EUR 330-510/40’</td>
<td>EUR 690-840/40’</td>
</tr>
<tr>
<td>Drop off</td>
<td>EUR 100-330 cont.</td>
<td>EUR 100-330/cont.</td>
</tr>
<tr>
<td>THC in the port</td>
<td>EUR 170</td>
<td>EUR 170</td>
</tr>
<tr>
<td></td>
<td>+ the costs for processing the container approx. 100 Euro</td>
<td></td>
</tr>
</tbody>
</table>

### 7.8 Modes and systems of transport used for carrying merchandises from the main competing foreign countries.

**Table 7.8.1 Systems of transport used by mayor competitors**

<table>
<thead>
<tr>
<th>Country</th>
<th>Transport Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>Sea transport to the main European ports (see 7.2), than road transport to Poland</td>
</tr>
<tr>
<td>Italy</td>
<td>Road transport to Poland</td>
</tr>
<tr>
<td>Vietnam</td>
<td>Sea transport to the main European ports (see 7.2), than road transport to Poland</td>
</tr>
<tr>
<td>Indonesia</td>
<td>Sea transport to the main European ports (see 7.2), than road transport to Poland</td>
</tr>
</tbody>
</table>
7.9  **Physical distribution services address book**

SERVICES ADDRESS BOOK:

SEA TRANSPORTATION:

1. MSC Poland
   Plac Kaszubski 8
   81-350 Gdynia
   Phone: +48 58 666 1000
   Fax: +48 58 666 1001
   E-mail: gdy@medship.pl
   www.mscgva.ch/index.html

   The worldwide agents may be found at:
   www.mscgva.ch/contact/contact_page.html

<table>
<thead>
<tr>
<th>City</th>
<th>Company</th>
<th>Phone</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bogota</td>
<td>MSC Colombia</td>
<td>+57 1 611 2787</td>
<td>+57 1 610 7347</td>
</tr>
<tr>
<td>Buenaventura</td>
<td>MSC Colombia</td>
<td>+57 2 241 8926</td>
<td>+57 2 241 7809</td>
</tr>
<tr>
<td>Cartagena</td>
<td>MSC Colombia</td>
<td>+57 5 667 1111</td>
<td>+57 5 667 0953</td>
</tr>
</tbody>
</table>

2. Maersk Sealand
   Ul. Kwiatkowskiego 60
   81-127 Gdynia
   Phone: +48 58 660 39 39
   Fax: +48 58 660 39 38
   E-mail: gdysal@maersk.com
   www.maersksealand.com

<table>
<thead>
<tr>
<th>City</th>
<th>Company</th>
<th>Phone</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bogota</td>
<td>Maersk Colombia S.A</td>
<td>+57 1-6449600</td>
<td>+57 1-3760960</td>
</tr>
<tr>
<td>Cali</td>
<td>Maersk Colombia S.A</td>
<td>+57 2-6618217</td>
<td>+57 2-6534871</td>
</tr>
<tr>
<td>Medellin</td>
<td>Maersk Colombia S.A</td>
<td>+57 4-3134865</td>
<td>+57 4-3136884</td>
</tr>
<tr>
<td>Buenaventura</td>
<td>Maersk Colombia S.A</td>
<td>+57 2-2411400</td>
<td>+57 2-2418683</td>
</tr>
<tr>
<td>Cartagena</td>
<td>Maersk Colombia S.A</td>
<td>+57 5-6502405</td>
<td>+57 5-6502407</td>
</tr>
<tr>
<td>Barranquilla</td>
<td>Maersk Colombia S.A</td>
<td>+57 5-3602936</td>
<td>+57 5-3607315</td>
</tr>
</tbody>
</table>

_Proexport Colombia_
<table>
<thead>
<tr>
<th>City</th>
<th>Company</th>
<th>Phone</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gdynia</td>
<td>Maersk Polska Sp. z o.o.</td>
<td>+48 58 6603939</td>
<td>+48 58 6603938</td>
</tr>
<tr>
<td>Krakow</td>
<td>Maersk Polska Sp. z o.o.</td>
<td>+48 12 4212006</td>
<td>+48 12 4228727</td>
</tr>
<tr>
<td>Warsaw</td>
<td>Maersk Polska Sp. z o.o.</td>
<td>+48 22 5414250</td>
<td>+48 22 5414251</td>
</tr>
</tbody>
</table>

**Polish sea operators:**

3. MAG (Morska Agencja Gdynia Sp. z o.o.)

ul. T. Wendy 15  
81-341 Gdynia  
Phone: (+48 58) 661 41 41  
Fax: (+48 58) 621 06 08  
E-mail: mag@mag.gdynia.pl  
www.mag.gdynia.pl

4. Okmarit Sp. z o.o.

Armii Krajowej 30 street  
81-366 Gdynia  
Phone: (+48 58) 661 22 61  
Fax: (+48 58) 661 69 65  
E-mail: okmarit@itnet.pl;  
www.okmarit.com.pl

5. Pomorscy Maklerzy Okrętowi Sp. z o.o.

ul. Chopina 6  
81-752, Sopot  
Phone: (+48 58) 550 20 62  
Fax: (+48 58) 550 20 18  
E-mail: psb@transnet.info.pl

**AIR TRANSPORTATION:**

6. LOT Cargo agent in the Netherlands:  
www.lot.com

**Zygene European Freight Consult BV.**  
Flamingoweg 31, room 316,
1118 EE Schiphol-Zuid, The Netherlands.
Tel: 31-(0)-20-6530007
Fax: 31-(0)-20-6530581
E-Mail: jos@zygene.nl
www.zygene.nl

7. KLM Cargo in the Netherlands:
www.klmcargo.com

Schiphol Airport
Building 551
PO Box 7700
1177 ZL Schiphol
Tel.: (31) 206498000
Fax.: (31) 206494553
E-mail: Customer-Service.SPL@KLMCARGO.COM

Rotterdam
Arlandabaan platformzijde 52 3045 AB
PO Box 12039
3004 GA Rotterdam
Tel.: (31) 104379455
Fax.: (31) 104370731
E-mail: Customer-Service.RTM@KLMCARGO.COM

ROAD TRANSPORTATION:

8. Raben Transport Spółka z o.o.
ul. Poznańska 71
62-023 Gdańsk k/Poznania
tel.: +48 (61) 650 65 00
fax: +48 (61) 650 65 01
e-mail: transport@raben-group.com
www.raben-group.com

9. Cargo Sped
ul. Bokserska 66
02-690 Warszawa
tel.: +48 22 455 76 00
e-mail: warszawa@cargosped.pl
www.cargosped.com.pl
8. Recommendations to the exporter

On the basis of the information presented above the following conclusions can be drawn. Domestic production of footwear does not cover Polish demand. The majority of shoes sold on the Polish market originates from abroad and is imported, mainly from China. Polish production is generally considered to be of a high quality and Polish shoes are winning terrain within the European markets.

Polish footwear can become a leading sector due to relatively low costs of production in comparison to other European countries. Poland has the lowest production costs of all EU member states, except for Portugal. However, local production faces harsh competition from mainly Asian produce and Polish companies are often still relatively small and financially weak. The future will show which national companies are strong enough to survive.

Quality and packaging conditions as well as technical standards are outlined by the common EU law. These requirements must be met in case of all footwear entering each EU member country. Tariff arrangements are also set by the customs tariffs being in force in the EU. Colombia takes advantage of tariff preferences. Import of footwear is subject to the standard import procedure. The cheapest way is sea transportation. It is arranged in containers so the quality is maintained.

According to professionals from the footwear market, Colombian products can enter the Polish market either because of a competitive price or because of a very high quality. Experts claim that entering the Polish market is difficult. In case of low-cost products, there are many cheap products from Asia. Concerning high quality shoes Colombia exporters should keep in mind that Italian design is the most popular one in Poland. Therefore Colombian entrepreneurs should adjust their offer to European trends. Still the overall demand in Poland is relatively low and price remains the dominant criterion.

With regards to the industrial footwear sector the picture is a bit more complex. The market is relatively small, with a few main producers and a few specialized distributors. Due to the fairly recent CE marking which is required for every item of industrial footwear entering the EU market, a relatively large group of Polish producers that could not keep up with current safety requirements had to abandon the market. This however creates new possibilities for foreign producers, who can comply with the CE requirements, to enter the Polish market.

International and local fairs are by far the best option to gain entry to the world of Polish industrial footwear. A market in which both buyers and distributors are
quite critical and choose quality over price. They want to see and feel a product, before they expose their employees to it. CE marking might tell something about the safety of your product, but not necessarily of the quality. That is a feature that Colombian industrial footwear has to prove by itself.

As a last recommendation, it might be wise to not try to enter the EU market alone. Many rules concerning the safety of European workers, make the requirements applicable to industrial footwear very unclear to inexperienced outsiders. Hiring an European agency experienced in dealing with CE marking applications might therefore be a sensible thing to do.

For the Spanish version we would like to refer you to:


COUNCIL DIRECTIVE
of 21 December 1989

on the approximation of the laws of the Member States relating to personal protective equipment

(89/686/EEC)

THE COUNCIL OF THE EUROPEAN COMMUNITIES,

Having regard to the Treaty establishing the European Economic Community, and in particular Article 100a thereof,

Having regard to the proposal from the Commission (1),

In cooperation with the European Parliament (2),

Having regard to the opinion of the Economic and Social Committee (3),

Whereas it is necessary to adopt measures with the aim of progressively establishing the internal market over a period expiring on 31 December 1992; whereas the internal market comprises an area without internal frontiers in which the free movement of goods, persons, services and capital is guaranteed;

Whereas various Member States have, over recent years, adopted provisions covering numerous items of personal protective equipment with a view in particular to safeguarding public health, improving safety at work and ensuring user protection;

Whereas these national provisions are often very detailed as regards the requirements relating to the design, manufacture, quality level, testing and certification of personal protective equipment with a view to the protection of individuals against injury and illness;
Whereas, in particular, the national provisions relating to safety at work make the use of personal protective equipment compulsory; whereas many requirements oblige employers to make appropriate personal protective equipment available to their staff in the absence or inadequacy of priority public protection measures;

Whereas national provisions relating to personal protective equipment differ significantly from one Member State to another; whereas they may thus constitute a barrier to trade with direct consequences for the creation and operation of the common market;

Whereas it is necessary to harmonize these different national provisions in order to ensure the free movement of these products, without in any way reducing the valid levels of protection already required in the Member States, and to provide for any necessary increase therein;

Whereas the provisions governing the design and manufacture of personal protective equipment laid down in this Directive which are fundamental, in particular, to attempts to ensure a safer working environment are without prejudice to provisions relating to the use of such equipment and the organization of the health and safety of workers at the workplace;

Whereas this Directive defines only the basic requirements to be satisfied by personal protective equipment; whereas, in order to facilitate proof of conformity with those basic requirements, it is essential that harmonized European standards be available relating, in particular, to the design and manufacture of, and the specifications and test methods applicable to, personal protective equipment, since compliance therewith confers on these products a presumption of conformity with the abovementioned basic requirements; whereas such harmonized European standards are drawn up by private bodies and must retain the status of non-mandatory texts; whereas, to this end, the European Committee for Standardization (CEN) and the European Committee for Electrotechnical Standardization (Cenelec) are the competent bodies which have been authorized to adopt harmonized standards in accordance with the general guidelines governing cooperation between the Commission and those two institutions ratified on 13 November 1984; whereas, for the purposes of this Directive, a harmonized standard is a text containing technical specifications (a European standard or a harmonization document) which has been adopted by one or both of the abovementioned bodies at the instigation of the Commission in accordance with Council Directive 83/189/EEC of 28 March 1983 laying down a procedure for the provision of information in the field of technical standards and regulations (4), as amended by Directive 88/182/EEC (5), and pursuant to the abovementioned general guidelines;

Whereas, pending the adoption of harmonized standards, which will be very numerous because of the broad scope of application and the preparation of which within the deadline set for the creation of the internal market will involve a great deal of work, it would be advisable to maintain, on a transitional basis and
subject to the requirements of the Treaty, the status quo as regards conformity with existing national standards for personal protective equipment not covered by a harmonized standard at the date of adoption of this Directive;

Whereas, given the general and horizontal nature of the role played by the Standing Committee set up pursuant to Article 5 of Directive 83/189/EEC in Community standardization policy and, more particularly, its part in the preparation of standardization applications and the operation of the existing European standardization agreements, this Standing Committee is especially suited to the task of assisting the Commission in monitoring the conformity of harmonized standards throughout the Community;

Whereas compliance with these technical requirements must be monitored in order to ensure adequate user and third-party protection; whereas existing monitoring procedures may differ appreciably from one Member State to another; whereas, in order to avoid numerous checks which merely impede the free movement of personal protective equipment, provision should be made for the mutual recognition of inspections conducted by the Member States; whereas, in order to facilitate such recognition, it is necessary, in particular, to lay down harmonized Community procedures and to harmonize the criteria to be taken into account in selecting the bodies responsible for examination, monitoring and verification;

Whereas the legislative framework should be improved so that both sides of industry will make an effective and appropriate contribution to the process of standardization,

HAS ADOPTED THIS DIRECTIVE:

CHAPTER I

SCOPE, PLACING ON THE MARKET AND FREE MOVEMENT

Article 1

1. This Directive applies to personal protective equipment, hereinafter referred to as 'PPE'.

It lays down the conditions governing its placing on the market and free movement within the Community and the basic safety requirements which PPE must satisfy in order to ensure the health protection and safety of users.

2. For the purposes of this Directive, PPE shall mean any device or appliance designed to be worn or held by an individual for protection against one or more health and safety hazards.

PPE shall also cover:
(a) a unit constituted by several devices or appliances which have been integrally combined by the manufacturer for the protection of an individual against one or more potentially simultaneous risks;

(b) a protective device or appliance combined, separably or inseparably, with personal non-protective equipment worn or held by an individual for the execution of a specific activity;

(c) interchangeable PPE components which are essential to its satisfactory functioning and used exclusively for such equipment.

3. Any system placed on the market in conjunction with PPE for its connection to another external, additional device shall be regarded as an integral part of that equipment even if the system is not intended to be worn or held permanently by the user for the entire period of risk exposure.

4. This Directive does not apply to:

- PPE covered by another directive designed to achieve the same objectives as this Directive with regard to placing on the market, free movement of goods and safety,

- the PPE classes specified in the list of excluded products in Annex I, independently of the reason for exclusion mentioned in the first indent.

Article 2

1. Member States shall take all appropriate measures to ensure that the PPE referred to in Article 1 may be placed on the market and brought into service only if it preserves the health and ensures the safety of users without prejudice to the health or safety of other individuals, domestic animals or goods, when properly maintained and used for its intended purpose.

2. This Directive shall be without prejudice to the right of Member States to lay down - in conformity with the Treaty - any requirements which they consider necessary to ensure user protection, provided that this does not give rise to modifications to PPE which could result in its non-conformity with the provisions of this Directive.

3. Member States shall not prevent the presentation at trade fairs, exhibitions and the like of PPE which is not in conformity with the provisions of this Directive, provided that an appropriate notice is displayed drawing attention to this fact and the prohibition on its acquisition and/or use for any purpose whatsoever until it has been brought into conformity by the manufacturer or his representative established in the Community.
Article 3

The PPE referred to in Article 1 must satisfy the basic health and safety requirements laid down in Annex II.

Article 4

1. Member States shall not prohibit, restrict or hinder the placing on the market of PPE or PPE components which satisfy the provisions of this Directive and which bear the EC mark.

2. Member States shall not prohibit, restrict or impede the placing on the market of PPE components which do not bear the EC mark, and which are intended to be incorporated in PPE, provided that they are not essential to its satisfactory functioning.

Article 5

1. Member States shall regard as in conformity with the basic requirements referred to in Article 3 the PPE referred to in Article 8 (3) bearing the EC mark with respect to which the manufacturer is able to produce, on demand, the declaration of conformity referred to in Article 12.

2. Member States shall presume that the PPE referred to in Article 8 (2) satisfies the basic requirements referred to in Article 3 if it bears the EC mark with respect to which the manufacturer is able to produce, on demand, not only the declaration referred to in Article 12 but also the certificate issued by the body of which notification has been given in accordance with Article 9 attesting to their conformity to the relevant national standards, transposing the harmonized standards, assessed at the EC type examination level in accordance with the first indent of Article 10 (4) (a) and (b).

Where a manufacturer has not applied or has only partly applied the harmonized standards or where there are no such standards the certificate issued by the body of which notification has been given must state the conformity to the basic requirements in accordance with the second indent of Article 10 (4) (a) and (b).

3. The PPE referred to in Article 8 (2) for which harmonized standards are not available may continue on a transitional basis, until 31 December 1992 at the latest, to be subject to national arrangements already in force on the date of adoption of this Directive, provided that such arrangements are compatible with the provisions of the Treaty.

4. The Commission shall publish the references of the harmonized standards in the Official Journal of the European Communities. Member States shall publish the references of the national standards transposing the harmonized standards.

5. Member States shall ensure that by 30 June 1991 appropriate steps are taken to enable both sides of industry to have an influence at national level on the
process of formulating the harmonized standards and keeping them under review.

Article 6

1. Should a Member State or the Commission consider that the harmonized standards referred to in Article 5 do not completely satisfy the relevant basic requirements referred to in Article 3, the Commission or the Member State concerned shall refer the matter to the committee created pursuant to Directive 83/189/EEC (1), setting out its reasons. The committee shall deliver an opinion without delay.

In the light of the committee's opinion, the Commission shall notify Member States of whether or not it is necessary to withdraw the standards concerned from publications made pursuant to Article 5.

2. The Standing Committee set up by Article 6 (2) of Directive 89/392/EEC (2) may be apprised, in accordance with the procedure described below, of any matter to which the implementation and practical application of this Directive give rise.

The representative of the Commission shall submit to the committee a draft of the measures to be taken. The committee shall deliver its opinion on the draft, within a time limit which the chairman may lay down according to the urgency of the matter, if necessary by taking a vote.

The opinion shall be recorded in the minutes; in addition, each Member State shall have the right to ask to have its position recorded in the minutes.

The Commission shall take the utmost account of the opinion delivered by the committee. It shall inform the committee of the manner in which its opinion has been taken into account.

Article 7

1. If a Member State discovers that PPE bearing the EC mark and used in accordance with its intended purpose could compromise the safety of individuals, domestic animals or property, it shall take all necessary measures to remove that equipment from the market and prohibit the marketing or free movement thereof.

The Member State concerned shall immediately inform the Commission of such action, indicating the reasons for its decision and, in particular, stating whether non-conformity is due to:

(a) failure to comply with the basic requirements referred to in Article 3;
(b) the unsatisfactory application of the standards referred to in Article 5;
(c) a shortcoming in the standards referred to in Article 5.
2. The Commission shall initiate discussions with the parties concerned as soon as possible. If, after such consultation, the Commission decides that the action taken was justified, it shall immediately inform the Member State concerned and all the other Member States to that effect. If, after such consultation, the Commission decides that the action taken was not justified, it shall immediately inform the Member State concerned and the manufacturer or his authorized representative established in the Community to that effect. If the decision referred to in paragraph 1 is in response to a shortcoming in the standards, the Commission shall refer the matter to the Committee referred to in Article 6 (1) if the Member State concerned intends to adhere to its decision and shall initiate the procedure referred to in Article 6 (2).

3. If PPE which is not in conformity with the relevant requirements bears the EC mark, the Member State concerned shall take the appropriate measures with regard to those responsible for affixing the mark and shall inform the Commission and the other Member States accordingly.

4. The Commission shall ensure that the Member States are kept informed of the progress and results of the procedure provided for in this Article.

CHAPTER II
CERTIFICATION PROCEDURES

Article 8

1. Before placing a PPE model on the market, the manufacturer or his authorized representative established in the Community shall assemble the technical documentation referred to in Annex III so that this can, if necessary, be submitted to the competent authorities.

2. Prior to the series production of PPE other than those referred to in paragraph 3, the manufacturer or his authorized representative established in the Community shall submit a model for EC type-examination as referred to in Article 10.

3. EC type-examination shall not be required in the case of PPE models of simple design where the designer assumes the user can himself assess the level of protection provided against the minimal risks concerned the effects of which, when they are gradual, can be safely identified by the user in good time.

This category shall cover exclusively PPE intended to protect the wearer against:

- mechanical action whose effects are superficial (gardening gloves, thimbles, etc.),

- cleaning materials of weak action and easily reversible effects (gloves affording protection against diluted detergent solutions, etc.).
- risks encountered in the handling of hot components which do not expose the user to a temperature exceeding 50 gC or to dangerous impacts (gloves, aprons for professional use, etc.),

- atmospheric agents of a neither exceptional nor extreme nature (headgear, seasonal clothing, footwear, etc.),

- minor impacts and vibrations which do not affect vital areas of the body and whose effects cannot cause irreversible lesions (light anti-scalping helmets, gloves, light footwear, etc.),

- sunlight (sunglasses).

4. Production of PPE shall be subject:

(a) according to the manufacturer's choice, to one of the two procedures referred to in Article 11 in the case of PPE of complex design intended to protect against mortal danger or against dangers that may seriously and irreversibly harm the health, the immediate effects of which the designer assumes the user cannot identify in sufficient time. This category shall cover exclusively:

- filtering respiratory devices for protection against solid and liquid aerosols or irritant, dangerous, toxic or radiotoxic gases,

- respiratory protection devices providing full insulation from the atmosphere, including those for use in diving,

- PPE providing only limited protection against chemical attack or against ionizing radiation,

- emergency equipment for use in high-temperature environments the effects of which are comparable to those of an air temperature of 100 gC or more and which may or may not be characterized by the presence of infra-red radiation, flames or the projection of large amounts of molten material,

- emergency equipment for use in low-temperature environments the effects of which are comparable to those of an air temperature of 50 gC or less,

- PPE to protect against falls from a height,

- PPE against electrical risks and dangerous voltages or that used as insulation in high-tension work,

- motor cycle helmets and visors;

(b) the EC declaration of conformity referred to in Article 12 for all PPE.
Article 9

1. Each Member State shall inform the Commission and the other Member States of the approved bodies responsible for the execution of the certification procedures referred to in Article 8. For information purposes, the Commission shall publish in the Official Journal of the European Communities and keep up to date a list giving the names of these bodies and the distinguishing numbers it has assigned to them.

2. Member States shall apply the criteria laid down in Annex V in assessing the bodies to be indicted in such notification. Bodies meeting the assessment criteria laid down in the relevant harmonized standards shall be presumed to fulfil those criteria.

3. A Member State shall withdraw its approval from such a body if it establishes that the latter no longer satisfies the criteria referred to in Annex V. It shall inform the Commission and the other Member States of its action forthwith.

EC TYPE-EXAMINATION

Article 10

1. EC type-examination is the procedure whereby the approved inspection body establishes and certifies that the PPE model in question satisfies the relevant provisions of this Directive.

2. Application for EC type-examination shall be made by the manufacturer or his authorized representative to a single approved inspection body in respect of the model in question. The authorized representative shall be established in the Community.

3. The application shall comprise:

   - the name and address of the manufacturer or his authorized representative and of the PPE production plant in question,
   - the manufacturer's technical file referred to in Annex III.

It shall be accompanied by the appropriate number of specimens of the model to be approved.

4. The inspection body of which notification has been given shall conduct the EC type-examination in accordance with the undermentioned procedures:

   (a) Examination of the manufacturer's technical file

   - It shall examine the manufacturer's technical file to establish its suitability with respect to the harmonized standards referred to in Article 5.
- Where a manufacturer has not applied, or has only partly applied, the harmonized standards or where there are no such standards, the body of which notification has been given must check the suitability of the technical specifications used by the manufacturer with respect to the basic requirements before examining the manufacturer's technical file to establish its suitability with respect to these technical specifications.

(b) Examination of the model

- When examining the model, the inspection body shall verify that it has been produced in accordance with the manufacturer's technical file and can be used in complete safety for its intended purpose.

- It shall conduct the necessary examinations and tests to establish the conformity of the model with the harmonized standards.

- Where a manufacturer has not applied or has only partly applied the harmonized standards or where there are no such standards the body of which notification has been given shall conduct the necessary examinations and tests to establish the conformity of the model with the technical specifications used by the manufacturer, subject to their being suitable with respect to these basic requirements.

5. If the model satisfies the relevant provisions, the inspection body shall draw up an EC type-examination certificate and shall notify the applicant to this effect. This certificate shall reproduce the findings of the examination, indicate any conditions attaching to its issue and incorporate the descriptions and drawings necessary for the identification of the approved model.

The Commission, the other approved inspection bodies and the other Member States may obtain a copy of the certificate and, in response to a reasoned request, a copy of the manufacturer's technical file and the reports of the examinations and tests conducted.

The file shall be held at the disposal of the competent authorities for 10 years following the placing of the PPE on the market.

6. Any inspection body which refuses to issue an EC type-examination certificate shall inform the other approved inspection bodies of this fact. An inspection body withdrawing an EC type-examination certificate shall inform the Member State which approved it, to this effect. That Member State shall then inform the other Member States and the Commission, setting out the reasons for the decision.

CHECKING OF PPE MANUFACTURED

Article 11

A. 'EC' quality control system for the final product
1. A manufacturer shall take all steps necessary to ensure that the manufacturing process, including the final inspection of PPE and tests, ensures the homogeneity of production and the conformity of PPE with the type described in the EC type-approval certificate and with the relevant basic requirements of this Directive.

2. A body of which notification has been given, chosen by a manufacturer, shall carry out the necessary checks. Those checks shall be carried out at random, normally at intervals of at least one year.

3. An adequate sample of PPE taken by the body of which notification has been given shall be examined and appropriate tests defined in the harmonized standards or necessary to show conformity to the basic requirements of this Directive shall be carried out to check the conformity of PPE.

4. Where a body is not the body that issued the relevant EC type-approval certificate it shall contact the body of which notification has been given in the event of difficulties in connection with the assessment of the conformity of samples.

5. The body of which notification has been given shall provide the manufacturer with a test report. If the report concludes that production is not homogeneous or that the PPE examined do not conform to the type described in the EC type-approval certificate or the relevant basic requirements, the body shall take measures appropriate to the nature of the fault or faults recorded and inform the Member State which gave notification thereof accordingly.

6. The manufacturer must be able to present, on request, the report of the body of which notification has been given.

B. System for ensuring EC quality of production by means of monitoring

1. The system

(a) Under this procedure the manufacturer submits an application for the approval of his quality-control system to a body of which notification has been given, of his choice.

That application shall include:

- all the information relating to the category of PPE concerned, including, where appropriate, documentation relating to the model approved,

- documentation on the quality-control system,

- the undertaking to maintain the obligations arising from the quality-control system and to maintain its adequacy and efficiency.
(b) Under the quality-control system, each PPE shall be examined and the
appropriate tests referred to in Section A paragraph 3 shall be carried out to
check their conformity to the relevant basic requirements of this Directive.

The documentation on the quality-control system shall in particular include an
adequate description of:

- the quality objectives, the organization chart, the responsibilities of executives
  and their powers in respect of product quality,
- the checks and tests which must be carried out after manufacture,
- the means to be employed to check the efficient operation of the quality-control
  system.

(c) The body shall assess the quality-control system to determine whether it
satisfies the provisions referred to in paragraph 1 (b). It shall assume that quality-
control systems applying the relevant harmonized standard satisfy those
provisions.

The body carrying out audits shall make all necessary objective evaluations of
the components of the quality-control system and shall check in particular
whether the system ensures conformity of PPE manufactured with the approved
model.

The decision shall be communicated to the manufacturer. It shall include the
conclusions of the check and the reasoned assessment decision.

(d) The manufacturer shall inform the body which approved the quality-control
system of any plan to alter the quality-control system.

The body shall examine the proposed changes and decide whether the altered
quality-control system satisfies the relevant provisions. It shall communicate its
decision to the manufacturer. The communication shall include the conclusions of
the check and the reasoned assessment decision.

2. Supervision

(a) The purpose of supervision is to ensure that a manufacturer correctly fulfils
the obligations arising from the approved quality-control system.

(b) The manufacturer shall authorize the body to have access, for purposes of
inspection, to PPE inspection, testing and storage sites and shall provide the
body with all requisite information, in particular:

- documentation on the quality-control system,
- technical documentation,
- quality control manuals.

(c) The body shall periodically carry out audits to ensure that the manufacturer is maintaining and applying the approved quality-control system and shall provide the manufacturer with a copy of the audit report.

(d) In addition, the body may make unannounced visits to the manufacturer. In the course of such visits the body shall provide the manufacturer with a report of the visit and, if appropriate, with an audit report.

(e) The manufacturer must be able to present, on request, the report of the body of which notification has been given.

EC DECLARATION OF PRODUCTION CONFORMITY

Article 12

The EC declaration of conformity is the procedure whereby the manufacturer:

1. draws up a declaration using the form laid down in Annex VI certifying that the PPE placed on the market are in conformity with the provisions of this Directive with a view to its submission to the competent authorities;

2. affixes the EC mark of conformity provided for by Article 13 to each PPE.

CHAPTER III

EC MARK

Article 13

1. The EC mark consists of the letters 'CE' followed by the last two figures of the year in which the mark was affixed and, in the event of the involvement of a notified body having carried out an EC examination of the type referred to in Article 10, its distinguishing number shall be added.

The form of the mark to be used is shown in Annex IV.

2. The EC mark shall be affixed to each production PPE and its packaging so as to be visible, legible and indelible throughout the foreseeable useful life of that PPE.

3. Marks or inscriptions which could be confused with the EC mark may not be affixed to PPE.

CHAPTER IV

FINAL PROVISIONS

Article 14
Any decision taken in implementation of this Directive and leading to restrictions on the marketing of PPE shall be accompanied by a detailed explanation of the grounds on which it is based. The interested party shall be notified of the decision without delay and informed of the possibilities for appeal under the legislation in force in the Member State concerned and of the deadlines for lodging such appeals.

Article 15

The Commission shall take the necessary steps to ensure that data concerning all the relevant decisions in connection with the management of this Directive are made available.

Article 16

1. By 31 December 1991, Member States shall adopt and publish the laws, regulations and administrative provisions necessary to comply with this Directive. They shall forthwith inform the Commission thereof.

They shall apply those provisions from 1 July 1992.

2. Member States shall communicate to the Commission the texts of the provisions of national law which they adopt in the field governed by this Directive.

Article 17

This Directive is addressed to the Member States.

Done at Brussels, 21 December 1989.

For the Council

The President

E. CRESSON

(2) OJ N° C 12, 16. 1. 1989, p. 109,
(5) OJ N° L 81, 26. 3. 1988, p. 75.

ANNEX I
EXHAUSTIVE LIST OF PPE CLASSES NOT COVERED BY THIS DIRECTIVE

1. PPE designed and manufactured specifically for use by the armed forces or in the maintenance of law and order (helmets, shields, etc.).

2. PPE for self-defence (aerosol canisters, personal deterrent weapons, etc.).

3. PPE designed and manufactured for private use against:
   - adverse atmospheric conditions (headgear, seasonal clothing, footwear, umbrellas, etc.),
   - damp and water (dish-washing gloves, etc.),
   - heat (gloves etc.).

4. PPE intended for the protection or rescue of persons on vessels or aircraft, not worn all the time.

ANNEX II

BASIC HEALTH AND SAFETY REQUIREMENTS

1. GENERAL REQUIREMENTS APPLICABLE TO ALL PPE

PPE must provide adequate protection against all risks encountered.

1.1. Design principles

1.1.1. Ergonomics

PPE must be so designed and manufactured that in the foreseeable conditions of use for which it is intended the user can perform the risk-related activity normally whilst enjoying appropriate protection of the highest possible level.

1.1.2. Levels and classes of protection

1.1.2.1. Highest level of protection possible

The optimum level of protection to be taken into account in the design is that beyond which the constraints imposed by the wearing of the PPE would prevent its effective use during the period of exposure to the risk or normal performance of the activity.
1.1.2.2. Classes of protection appropriate to different levels of risk

Where differing foreseeable conditions of use are such that several levels of the same risk can be distinguished, appropriate classes of protection must be taken into account in the design of the PPE.

1.2. Innocuousness of PPE

1.2.1. Absence of risks and other 'inherent' nuisance factors

PPE must be so designed and manufactured as to preclude risks and other nuisance factors under foreseeable conditions of use.

1.2.1.1. Suitable constituent materials

PPE materials and parts, including any of their decomposition products, must not adversely affect user hygiene or health.

1.2.1.1. Satisfactory surface condition of all PPE parts in contact with the user

Any PPE part in contact or in potential contact with the user when such equipment is worn must be free of roughness, sharp edges, projections and the like which could cause excessive irritation or injuries.

1.2.1.3. Maximum permissible user impediment

Any impediment caused by PPE to movements to be made, postures to be adopted and sensory perception must be minimized; nor must PPE cause movements which endanger the user or other persons.

1.3. Comfort and efficiency

1.3.1. Adaptation of PPE to user morphology
PPE must be so designed and manufactured as to facilitate correct positioning on the user and to remain in place for the foreseeable period of use, bearing in mind ambient factors, movements to be made and postures to be adopted. For this purpose, it must be possible to optimize PPE adaptation to user morphology by all appropriate means, such as adequate adjustment and attachment systems or the provision of an adequate size range.

1.3.2.

Lightness and design strength

PPE must be as light as possible without prejudicing design strength and efficiency.

Apart from the specific additional requirements which they must satisfy in order to provide adequate protection against the risks in question (see 3), PPE must be capable of withstanding the effects of ambient phenomena inherent under the foreseeable conditions of use.

1.3.3.

Compatibility of different classes or types of PPE designed for simultaneous use

If the same manufacturer markets several PPE models of different classes or types in order to ensure the simultaneous protection of adjacent parts of the body against combined risks, these must be compatible.

1.4.

Information supplied by the manufacturer

In addition to the name and address of the manufacturer and/or his authorized representative established in the Community, the notes that must be drawn up by the former and supplied when PPE is placed on the market must contain all relevant information on:

(a) storage, use, cleaning, maintenance, servicing and disinfection. Cleaning, maintenance or disinfectant products recommended by manufacturers must have no adverse effect on PPE or users when applied in accordance with the relevant instructions;

(b) performance as recorded during technical tests to check the levels or classes of protection provided by the PPE in question;

(c) suitable PPE accessories and the characteristics of appropriate spare parts;
(d) the classes of protection appropriate to different levels of risk and the corresponding limits of use;

(e) the obsolescence deadline or period of obsolescence of PPE or certain of its components;

(f) the type of packaging suitable for transport;

(g) the significance of any markings (see 2.12).

These notes, which must be precise and comprehensible, must be provided at least in the official language(s) of the Member State of destination.

2.

ADDITIONAL REQUIREMENTS COMMON TO SEVERAL CLASSES OR TYPES OF PPE

2.1.

PPE incorporating adjustment systems

If PPE incorporates adjustment systems, the latter must be so designed and manufactured as not to become incorrectly adjusted without the user's knowledge under the foreseeable conditions of use.

2.2.

PPE 'enclosing' the parts of the body to be protected

As far as possible, PPE 'enclosing' the parts of the body to be protected must be sufficiently ventilated to limit perspiration resulting from use; if this is not the case, it must if possible be equipped with devices which absorb perspiration.

2.3.

PPE for the face, eyes and respiratory tracts

Any restriction of the user's field of vision or sight by PPE for the face, eyes or respiratory tract must be minimized.
The degree of optical neutrality of the vision systems of these PPE classes must be compatible with the type of relatively meticulous and/or prolonged activities of the user.

If necessary, they must be treated or provided with facilities to prevent moisture formation.

PPE models intended for users requiring sight correction must be compatible with the wearing of spectacles or contact lenses.

2.4.

PPE subject to ageing

If it is known that the design performances of new PPE may be significantly affected by ageing, the date of manufacture and/or, if possible, the date of obsolescence, must be indelibly inscribed on every PPE item or interchangeable component placed on the market in such a way as to preclude any misinterpretation; this information must also be indelibly inscribed on the packaging.

If a manufacturer is unable to give an undertaking with regard to the useful life of PPE, his notes must provide all the information necessary to enable the purchaser or user to establish a reasonable obsolescence date, bearing in mind the quality level of the model and the effective conditions of storage, use, cleaning, servicing and maintenance.

Where appreciable and rapid deterioration in PPE performance is likely to be caused by ageing resulting from the periodic use of a cleaning process recommended by the manufacturer, the latter must, if possible, affix a mark to each item of PPE placed on the market indicating the maximum number of cleaning operations that may be carried out before the equipment needs to be inspected or discarded; failing that, the manufacturer must give this information in his notes.

2.5.

PPE which may be caught up during use

Where the foreseeable conditions of use include in particular the risk of the PPE being caught up by a moving object thereby creating a danger for the user, the PPE must possess an appropriate resistance threshold above which a constituent part will break and eliminate the danger.

2.6.

PPE for use in explosive atmospheres
PPE intended for use in explosive atmospheres must be so designed and manufactured that it cannot be the source of an electric, electrostatic or impact-induced arc or spark likely to cause an explosive mixture to ignite.

2.7.

PPE intended for emergency use or rapid installation and/or removal

These PPE classes must be so designed and manufactured as to minimize the time required for attachment and (or) removal.

Any integral systems permitting correct positioning on, or removal from, the user must be susceptible of rapid and easy operation.

2.8.

PPE for use in very dangerous situations

The information notes supplied by the manufacturer together with PPE for use in the very dangerous situations referred to in Article 8 (4) (a) must include, in particular, data intended for the exclusive use of competent trained individuals who are qualified to interpret them and ensure their application by the user.

They must also describe the procedure to be adopted in order to verify that PPE is correctly adjusted and functional when worn by the user.

If PPE incorporates an alarm which is activated in the absence of the level of protection normally provided, this must be so designed and accommodated as to be perceived by the user in the conditions of use for which the PPE is marketed.

2.9.

PPE incorporating components which can be adjusted or removed by the user

Any PPE components which can be adjusted or removed by the user for the purpose of replacement must be so designed and manufactured as to facilitate adjustment, attachment and removal without tools.

2.10.

PPE for connection to another, external complementary device

If PPE incorporates a system permitting connection to another, complementary, device, the attachment mechanism must be so designed and manufactured as to enable it to be mounted only on appropriate equipment.

2.11.

PPE incorporating a fluid circulation system
If PPE incorporates a fluid circulation system, the latter must be so chosen, or designed, and incorporated as to permit adequate fluid renewal in the vicinity of the entire part of the body to be protected, irrespective of user gestures, posture or movement under the foreseeable conditions of use.

2.12.

PPE bearing one or more identification or recognition marks directly or indirectly relating to health and safety

The identification or recognition marks directly or indirectly relating to health and safety affixed to these types or classes of PPE must preferably take the form of harmonized pictograms or ideograms and must remain perfectly legible throughout the foreseeable useful life of the PPE. In addition, these marks must be complete, precise and comprehensible so as to prevent any misinterpretation; in particular, when such marks incorporate words or sentences, the latter must appear in the official language(s) of the Member State where the equipment is to be used.

If PPE (or a PPE component) is too small to allow all or part of the necessary marking to be affixed, the relevant information must be mentioned on the packing and in the manufacturer's notes.

2.13.

PPE in the form of clothing capable of signaling the user's presence visually

PPE in the form of clothing intended for foreseeable conditions of use in which the user's presence must be visibly and individually signaled must have one (or more) judiciously positioned means of or devices for emitting direct or reflected visible radiation of appropriate luminous intensity and photometric and colorimetric properties.

2.14.

'Multi-risk' PPE

All PPE designed to protect the user against several potentially simultaneous risks must be so designed and manufactured as to satisfy, in particular, the basic requirements specific to each of those risks

(see 3).

3.

ADDITIONAL REQUIREMENTS SPECIFIC TO PARTICULAR RISKS

3.1.

Protection against mechanical impact
3.1.1. Impact caused by falling or projecting objects and collision of parts of the body with an obstacle

Suitable PPE for this type of risk must be sufficiently shock-absorbent to prevent injury resulting, in particular, from the crushing or penetration of the protected part, at least up to an impact-energy level above which the excessive dimensions or mass of the absorbing device would preclude effective use of the PPE for the foreseeable period of wear.

3.1.2. Falls

3.1.2.1. Prevention of falls due to slipping

The outsoles for footwear designed to prevent slipping must be so designed, manufactured or equipped with added elements as to ensure satisfactory adhesion by grip and friction having regard to the nature or state of the surface.

3.1.2.2. Prevention of falls from a height

PPE designed to prevent falls from a height or their effects must incorporate a body harness and an attachment system which can be connected to a reliable anchorage point. It must be designed so that under the foreseeable conditions of use the vertical drop of the user is minimized to prevent collision with obstacles and the braking force does not, however, attain the threshold value at which physical injury or the tearing or rupture of any PPE component which might cause the user to fall can be expected to occur.

It must also ensure that after braking the user is maintained in a correct position in which he may await help if necessary.

The manufacturer's notes must specify in particular all relevant information relating to:

- the characteristics required for the reliable anchorage point and the necessary minimum clearance below the user,
- the proper way of putting on the body harness and of connecting the attachment system to the reliable anchorage point.

3.1.3. Mechanical vibration
PPE designed to prevent the effects of mechanical vibrations must be capable of ensuring adequate attenuation of harmful vibration components for the part of the body at risk.

Under no circumstances must the effective value of the accelerations transmitted to the user by those vibrations exceed the limit values recommended in the light of the maximum foreseeable daily exposure of the part of the body at risk.

3.2.
Protection against (static) compression of part of the body

PPE designed to protect part of the body against (static) compressive stress must be sufficiently capable of attenuating its effects to prevent serious injury or chronic complaints.

3.3.
Protection against physical injury (abrasion, perforation, cuts, bites)

PPE constituent materials and other components designed to protect all or part of the body against superficial injury caused by machinery, such as abrasion, perforation, cuts or bites, must be so chosen or designed and incorporated as to ensure that these PPE classes provide sufficient resistance to abrasion, perforation and gashing (see also 3.1) under the foreseeable conditions of use.

3.4.
Prevention of drowning (lifejackets, armbands and lifesaving suits)

PPE designed to prevent drowning must be capable of returning to the surface as quickly as possible, without danger to his health, a user who may be exhausted or unconscious after falling into a liquid medium, and of keeping him afloat in a position which permits breathing while awaiting help.

PPE may be wholly or partially inherently buoyant or may be inflated either by gas which can be manually or automatically released or orally.

Under the foreseeable conditions of use:

- PPE must, without prejudice to its satisfactory operation, be capable of withstanding the effects of impact with the liquid medium and the environmental factors inherent in that medium,

- inflatable PPE must be capable of inflating rapidly and fully.

Where particular foreseeable conditions of use so require, certain types of PPE must also satisfy one or more of the following additional requirements:

- it must have all the inflation devices referred to in the second subparagraph, and/or a light or sound-signaling device,
- it must have a device for hitching and attaching the body so that the user may be lifted out of the liquid medium,

- it must be suitable for prolonged use throughout the period of activity exposing the user, possibly dressed, to the risk of falling into the liquid medium or requiring his immersion in it.

3.4.1.

Buoyancy aids

Clothing which will ensure an effective degree of buoyancy, depending on its foreseeable use, which is safe when worn and which affords positive support in water. In foreseeable conditions of use, this PPE must not restrict the user's freedom of movement but must enable him, in particular, to swim or take action to escape from danger or rescue other persons.

3.5.

Protection against the harmful effects of noise

PPE designed to prevent the harmful effects of noise must be capable of attenuating the latter to such an extent that the equivalent sound levels perceived by the user do not under any circumstances exceed the daily limit values laid down by Council Directive 86/188/EEC of 12 May 1986 on the protection of workers from the risks related to exposure to noise at work (1).

All PPE must bear labeling indicating the noise attenuation level and the value of the comfort index provided by the PPE; should this not be possible, the labeling must be fixed to the packaging.

3.6.

Protection against heat and/or fire

PPE designed to protect all or part of the body against the effects of heat and/or fire must possess thermal insulation capacity and mechanical strength appropriate to foreseeable conditions of use.

3.6.1.

PPE constituent materials and other components

Constituent materials and other components suitable for protection against radiant and convective heat must possess an appropriate coefficient of transmission of incident heat flux and be sufficiently incombustible to preclude any risk of spontaneous ignition under the foreseeable conditions of use.
Where the outside of these materials and components must be reflective, its reflective power must be appropriate to the intensity of the heat flux due to radiation in the infra-red range.

Materials and other components of equipment intended for brief use in high-temperature environments and of PPE which may be splashed by hot products such as large quantities of molten material must also possess sufficient thermal capacity to retain most of the stored heat until after the user has left the danger area and removed his PPE.

PPE materials and other components which may be splashed by large amounts of hot products must also possess sufficient mechanical-impact absorbency (see 3.1).

PPE materials and other components which may accidentally come into contact with flame and those used in the manufacture of fire-fighting equipment must also possess a degree of non-flammability corresponding to the risk class associated with the foreseeable conditions of use. They must not melt when exposed to flames nor contribute to flame propagation.

3.6.2.

Complete PPE ready for use

Under the foreseeable conditions of use:

1. the quantity of heat transmitted by PPE to the user must be sufficiently low to prevent the heat accumulated during wear in the part of the body at risk from attaining, under any circumstances, the pain or health impairment threshold;

2. PPE must if necessary prevent liquid or steam penetration and must not cause burns resulting from contact between its protective integument and the user.

If PPE incorporates refrigeration devices for the absorption of incident heat by means of liquid evaporation or solid sublimation, their design must be such that any volatile substances released are discharged beyond the outer protective integument and not towards the user.

If PPE incorporates a breathing device, the latter must adequately fulfil the protective function assigned to it under the foreseeable conditions of use.

The manufacturer’s notes accompanying each PPE model intended for brief use in high-temperature environments must in particular provide all relevant data for the determination of the maximum permissible user exposure to the heat transmitted by the equipment when used in accordance with its intended purpose.

3.7.

Protection against cold
PPE designed to protect all or part of the body against the effects of cold must possess thermal insulating capacity and mechanical strength appropriate to the foreseeable conditions of use for which it is marketed.

(;) OJ N° L 137, 24.5.1986, p. 28.

3.7.1.

PPE constituent materials and other components

Constituent materials and other components suitable for protection against cold must possess a coefficient of transmission of incident thermal flux as low as required under the foreseeable conditions of use. Flexible materials and other components of PPE intended for use in a low-temperature environment must retain the degree of flexibility required for the necessary gestures and postures.

PPE materials and other components which may be splashed by large amounts of cold products must also possess sufficient mechanical-impact absorbency (see 3.1).

3.7.2.

Complete PPE ready for use

Under the foreseeable conditions of use:

1. the flux transmitted by PPE to the user must be sufficiently low to prevent the cold accumulated during wear at any point on the part of the body being protected, including the tips of fingers and toes in the case of hands or feet, from attaining, under any circumstances, the pain or health-impairment threshold;

2. PPE must as far as possible prevent the penetration of such liquids as rain water and must not cause injuries resulting from contact between its cold protective integument and the user.

If PPE incorporates a breathing device, this must adequately fulfil the protective function assigned to it under the foreseeable conditions of use.

The manufacturer’s notes accompanying each PPE model intended for brief use in low-temperature environments must provide all relevant data concerning the maximum permissible user exposure to the cold transmitted by the equipment.

3.8.

Protection against electric shock

PPE designed to protect all or part of the body against the effects of electric current must be sufficiently insulated against the voltages to which the user is likely to be exposed under the most unfavorable foreseeable conditions.
To this end, the constituent materials and other components of these PPE classes must be so chosen or designed and incorporated as to ensure that the leakage current measured through the protective integument under test conditions at voltages correlated with those likely to be encountered in situ is minimized and, at all events, below a maximum conventional permissible value which correlates with the tolerance threshold.

Together with their packaging, PPE types intended exclusively for use during work or activities in electrical installations which are or may be under tension must bear markings indicating, in particular, their protection class and (or) corresponding operating voltage, their serial number and their date of manufacture; a space must also be provided outside the protective integument of such PPE for the subsequent inscription of the date of entry into service and those of the periodic tests or inspections to be conducted.

The manufacturer's notes must indicate, in particular, the exclusive use for which these PPE types are intended and the nature and frequency of the dielectric tests to which they are to be subjected during their useful life.

3.9.
Radiation protection

3.9.1.
Non-ionizing radiation

PPE designed to prevent acute or chronic eye-damage from sources of non-ionizing radiation must be capable of absorbing or reflecting the majority of the energy radiated in the harmful wavelengths without unduly affecting the transmission of the innocuous part of the visible spectrum, the perception of contrasts and the ability to distinguish colors where required by the foreseeable conditions of use.

To this end, protective glasses must be so designed and manufactured as to possess, for each harmful wave, a spectral transmission factor such that the radiant-energy illumination density capable of reaching the user's eye through the filter is minimized and, under no circumstances, exceeds the maximum permissible exposure value.

Furthermore, the glasses must not deteriorate or lose their properties as a result of the effects of radiation emitted under the foreseeable conditions of use and all marketed specimens must bear the protection-factor number corresponding to the spectral distribution curve of their transmission factor.

Glasses suitable for radiation sources of the same type must be classified in the ascending order of their protection factors and the manufacturer's notes must indicate, in particular, the transmission curves which make it possible to select...
the most appropriate PPE bearing in mind such inherent factors of the effective conditions of use as distance to source and the spectral distribution of the energy radiated at that distance.

The relevant protection-factor number must be marked on all specimens of filtering glasses by the manufacturer.

3.9.2.

Ionizing radiation

3.9.2.1.

Protection against external radioactive contamination

PPE constituent materials and other components designed to protect all or part of the body against radioactive dust, gases, liquids or mixtures thereof must be so chosen or designed and incorporated as to ensure that this equipment effectively prevents the penetration of the contaminants under the foreseeable conditions of use.

Depending on the nature or condition of these contaminants, the necessary leak-tightness can be provided by the impermeability of the protective integument and/or by any other appropriate means, such as ventilation and pressurization systems designed to prevent the back-scattering of these contaminants.

Any decontamination measures to which PPE is subject must not prejudice its possible re-use during the foreseeable useful life of these classes of equipment.

3.9.2.2.

Limited protection against external irradiation

PPE intended to provide complete user protection against external irradiation or, failing this, adequate attenuation thereof, must be designed to counter only weak electron (e.g. beta) or weak photon (e.g. X, gamma) radiation.

The constituent materials and other components of these PPE classes must be so chosen or designed and incorporated as to provide the degree of user protection required by the foreseeable conditions of use without leading to an increase in exposure time as a result of the impedance of user gestures, posture or movement (see 1.3.2).

PPE must bear a mark indicating the type and thickness of the constituent material(s) suitable for the foreseeable conditions of use.

3.10.

Protection against dangerous substances and infective agents
3.10.1.

Respiratory protection

PPE intended for the protection of the respiratory tract must make it possible to supply the user with breathable air when the latter is exposed to a polluted atmosphere and/or an atmosphere having inadequate oxygen concentration.

The breathable air supplied to the user by the PPE must be obtained by appropriate means, for example after filtration of the polluted air through the protective device or appliance or by a piped supply from an unpolluted source.

The constituent materials and other components of these PPE classes must be so chosen or designed and incorporated as to ensure appropriate user respiration and respiratory hygiene for the period of wear concerned under the foreseeable conditions of use.

The leak-tightness of the face piece and the pressure drop on inspiration and, in the case of the filtering devices, purification capacity must be such as to keep contaminant penetration from a polluted atmosphere low enough not to be prejudicial to the health or hygiene of the user.

The PPE must bear the manufacturer's identification mark and details of the specific characteristics of that type of equipment which, in conjunction with the instructions for use, will enable a trained and qualified user to employ the PPE correctly.

The manufacturer's notes must also in the case of filtering devices, indicate the deadline for the storage of filters as new and kept in their original packaging.

3.10.2.

Protection against cutaneous and ocular contact

PPE intended to prevent the surface contact of all or part of the body with dangerous substances and infective agents must be capable of preventing the penetration or diffusion of such substances through the protective integument under the foreseeable conditions of use for which the PPE is placed on the market.

To this end, the constituent materials and other components of these PPE classes must be so chosen, or designed and incorporated as to ensure, as far as possible, complete leak-tightness, which will allow where necessary prolonged daily use or, failing this, limited leak-tightness necessitating a restriction of the period of wear.

Where, by virtue of their nature and the foreseeable conditions of their use, certain dangerous substances or infective agents possess high penetrative power which limits the duration of the protection provided by the PPE in question, the latter must be subjected to standard tests with a view to their classification on
the basis of efficiency. PPE which is considered to be in conformity with the test specifications must bear a mark indicating, in particular, the names or, failing this, the codes of the substances used in the tests and the corresponding standard period of protection. The manufacturer's notes must also contain, in particular, an explanation of the codes (if necessary), a detailed description of the standard tests and all appropriate information for the determination of the maximum permissible period of wear under the different foreseeable conditions of use.

3.11.

Safety devices for diving equipment

1. Breathing equipment

The breathing equipment must make it possible to supply the user with a breathable gaseous mixture, under foreseeable conditions of use and taking account in particular of the maximum depth of immersion.

2. Where the foreseeable conditions of use so require, the equipment must comprise:

(a) a suit which protects the user against the pressure resulting from the depth of immersion

(see 3.2) and/or against cold (see 3.7);

(b) an alarm designed to give the user prompt warning of an approaching failure in the supply of breathable gaseous mixture (see 2.8);

(c) a life-saving suit enabling the user to return to the surface (see 3.4.1).

ANNEX III

TECHNICAL DOCUMENTATION SUPPLIED BY THE MANUFACTURER

The documentation referred to in Article 8 (1) must comprise all relevant data on the means used by the manufacturer to ensure that a PPE complies with the basic requirements relating to it.

In the case of PPE models referred to in Article 8 (2), the documentation must comprise in particular:

1. the manufacturer's technical file consisting of:
(a) overall and detailed plans of the PPE accompanied, where appropriate, by calculation notes and the results of prototype tests in so far as necessary for the verification of compliance with the basic requirements;

(b) an exhaustive list of the basic safety requirements and of the harmonized standards or other technical specifications referred to in Articles 3 and 5, taken into account in the design of the model;

2. a description of the control and test facilities to be used in the manufacturer's plant to check compliance of production PPE with the harmonized standards or other technical specifications and to maintain quality level;

3. a copy of the information notice referred to in Annex II, 1.4.

ANNEX IV

EC MARK OF CONFORMITY

The EC mark of conformity consists of the symbol shown below.

(¹)(²)

The vertical dimensions of the different components of the EC mark must be perceptibly the same and not less than 5 mm.

(¹) As provided in Article 13 (1) the mark may also include the distinguishing number of the approved inspection body referred to in Article 9 (1).

(²) Year in which the mark was affixed.

ANNEX V

CONDITIONS TO BE FULFILLED BY THE BODIES OF WHICH NOTIFICATION HAS BEEN GIVEN

(Article 9 (2))

The bodies designated by the Member States must fulfil the following minimum conditions:

1. availability of personnel and of the necessary means and equipment;

2. technical competence and professional integrity of personnel;

3. independence, in carrying out the tests, preparing the reports, issuing the certificates and performing the surveillance provided for in the Directive, of staff and technical personnel in relation to all circles, groups or persons directly or indirectly concerned with PPE;

4. maintenance of professional secrecy by personnel;
5. subscription of a civil liability insurance unless that liability is covered by the State under national law.

Fulfilment of the conditions under 1 and 2 shall be verified at intervals by the competent authorities of the Member States.

ANNEX VI

MODEL EC DECLARATION OF CONFORMITY

The manufacturer or his authorized representative established in the Community (¹):

……………….. declares that the new PPE described hereafter (¹)

……………….. is in conformity with the provisions of Council Directive 89/686/EEC and, where such is the case, with the national standard transposing harmonized standard N°……………….. (for the PPE referred to in Article 8 (3))

……………….. is identical to the PPE which is the subject of EC certificate of conformity N°……………….. issued by (³) (%) .

……………….. is subject to the procedure set out in Article 11 point A or point B (%) of Directive 89/686/EEC under the supervision of the notified body (³) .

……………….. Done at ..........................................., on .
. Signature (*)

(*) Business name and full address; authorized representatives must also give the business name and address of the manufacturer.

(²) Description of the PPE (make, type, serial number, etc.).

(³) Name and address of the approved body.

(%) Delete whichever is inapplicable.

(*) Name and position of the person empowered to sign on behalf of the manufacturer or his authorized representative.
## Annex 2: Companies Directories

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