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your tomorrow

## MARKET REPORT FOR HILLWOOD POLSKA SP. Z O. O.

Every day, in 33 countries around the world, Hays experts help companies to achieve their business goals. We understand the dynamics and trends of the global workforce, which enables us to deliver effective and proven HR solutions.

As experts in our field, we offer a tailored service that enables you and your organisation to thrive.

OCTOBER 2023

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## WAREHOUSE SECTOR

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Despite the more difficult economic situation, which has been particularly evident in recent months, the warehouse market in Poland is growing dynamically. This can be seen in the figures for the year 2022. The volume of space increased by 18 per cent year-on-year and amounted to 27 million sq m. There was 4.1 million sq m of space under construction, which is slightly more than at the same time a year ago. Although the full-year figures will not yet exceed 30 million sq m of warehouse space in Poland, it can be estimated at 29 million sq m.

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## LOGISTICS SECTOR

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2022 was a time of increased recruitment activity in the areas of logistics, purchasing and category management. This was the result of both the continued growth of online commerce and an even stronger drive by organisations to optimise their supply chains, led by security considerations and a number of variable factors. For specialists, this meant many attractive job offers, allowing for real increases in salary levels.

Purchasing departments are increasingly focusing on negotiations, supplier diversification and lead time in an environment of rising prices and transport costs. The transformation in the area of purchasing, linked to the creation of new strategies for products and services, the analysis of market changes or the identification of new opportunities and risks, means that we expect to see an increase in the number of positions in the strategic area, such as managers of individual purchasing categories or purchasing managers, who are responsible for the entire purchasing process in organisations.

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## MANUFACTURING AND ENGINEERING

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Today's economic and business realities and the dynamically changing reality are forcing many companies in the manufacturing sector to become more flexible - both in terms of the production processes implemented and the forms of employment used. Although the energy crisis and disrupted supply chains may constrain the growth plans of some companies, it is to be expected that manufacturing companies will nevertheless continue to suffer from labour shortages in 2023.

At the same time, a very positive signal for the market is the continuing high rating of Poland's investment attractiveness. Foreign investors looking to locate industrial projects invariably appreciate the transport infrastructure, experienced engineers and managers who speak foreign languages, as well as the proximity of sales markets. In the context of foreign direct investment, it is worth emphasising that last year we saw a significant increase in investment interest by companies with Chinese and Korean capital. Given the geopolitical situation and economic tensions between the US and China, a new wave of so-called near- and friend shoring investments should be expected in the coming years.

## GRADUATES IN LOWER SILESIA VOIVODESHIP

Graduates in Lower Silesian Voivodeship		
Natural Sciences, Mathematics and Statistics	<b>TOTAL</b>	<b>5 880</b>
	Biological and related sciences	2 136
	Environment	300
	Physical sciences	2 481
	Mathematics and statistics	963
Engineering, manufacturing and construction	<b>TOTAL</b>	<b>16 096</b>
	Architecture and building	3 786
	Engineering and engineering trades	9 750
	Manufacturing and processing	2 560
Information and communication technologies	<b>TOTAL</b>	<b>6 540</b>
	Inter-disciplinary programmes and qualifications involving Information and Communication Technologies	798
	Information and communication technologies (ICTs)	5 742

*\*Data are for several academic cities*

**TOP 10 ENGINEERING, LOGISTICS AND MANUFACTURING COMPANIES – DOBRZYKOWICE AND NEIGHBOURING CITIES**

Company Name	County	Employees (Total)
FABRYKA MEBLI BODZIO BOGDAN SZEWCZYK SPÓLKA JAWNA	Olesnicki	2107
3M WROCLAW SP Z O O	Wroclaw	1807
UTC AEROSPACE SYSTEMS WROCLAW SP Z O O	Wroclaw	1120
GKN DRIVELINE POLSKA SP Z O O	Olesnicki	1076
WAGO ELWAG SP Z O O	Wroclaw	1018
BETARD SP Z O O	Wroclawski	909
ELICA GROUP POLSKA SP Z O O	Olawski	798
CEDO SP Z O O	Wroclawski	760
TECHNISAT DIGITAL SP Z O O	Trzebnicki	713
JELCZ SP Z O O	Olawski	671

## DOBZYKOWICE - CZERNICA COMMUNE – LABOUR MARKET

COUNTY	RESULTS
The number of residents	23 010
The number of people of working age	13 898
Number of unemployed	208

## LOWER SILESIA VOIVODESHIP - LABOUR MARKET

COUNTY	SCOPE	RESULTS
c. Wrocław	Population	674 079
	Working age population	413 885
	Number of unemployed people	6 622

COUNTY	SCOPE	RESULTS
Wrocławski	Population	182 778
	Working age population	110 215
	Number of unemployed people	1 653

COUNTY	SCOPE	RESULTS
Wołowski	Population	45 728
	Working age population	27 391
	Number of unemployed people	3 177

COUNTY	SCOPE	RESULTS
Trzebnicki	Population	82 287
	Working age population	49 454
	Number of unemployed people	2 473

COUNTY	SCOPE	RESULTS
Milicki	Population	36 648
	Working age population	21 329
	Number of unemployed people	1 173

COUNTY	SCOPE	RESULTS
Średzki	Population	56 065
	Working age population	34 256
	Number of unemployed people	1 816

COUNTY	SCOPE	RESULTS
Oleśnicki	Population	106 999
	Working age population	63 985
	Number of unemployed people	3 583

COUNTY	SCOPE	RESULTS
Oławski	Population	76 671
	Working age population	45 006
	Number of unemployed people	1 665

COUNTY	SCOPE	RESULTS
Strzeliński	Population	42 925
	Working age population	25 712
	Number of unemployed people	2 700

COUNTY	SCOPE	RESULTS
Świdnicki	Population	154 749
	Working age population	90 838
	Number of unemployed people	5 087

COUNTY	SCOPE	RESULTS
Dzierżoniowski	Population	95 863
	Working age population	55 792
	Number of unemployed people	3 069

COUNTY	SCOPE	RESULTS
Ząbkowicki	Population	61 087
	Working age population	36 591
	Number of unemployed people	3 623

**1 615 879**

TOTAL POPULATION OF THE AREA

**974 454**

TOTAL NUMBER OF RESIDENTS OF WORKING AGE

**36 641**

TOTAL NUMBER OF UNEMPLOYED RESIDENTS





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## Recruitment opportunities for white and blue collars employees in Dobrzykowice and the surrounding area

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### Employment of up to 50 white collars employees

**Time:** 2 months (employees without notice)

5 -6 months (employees with notice)

**Number:** 25 applicants / month

### Employment of up to 1,000 blue collars employees

**Time:** 10-12 months

**Number:** 80-100 applicants / per month

*\*Recruitment opportunities for white and blue collars positions are simulated in the presence of Candidates in the mapped location together with counties up to **80km** from the Dobrzykowice. The amount of employed people in the production, engineering, logistic sectors indicates the potential recruitment availability in the amount of: **54 970**.*

*\*\* In the case of employment with a higher volume - the possibility of posting temporary workers at the time specified by the Client.*

*\*\*\* In the case of recruitment for blue and white collars positions, the recommended area for conducting recruitment processes due to the talent pool are the **Lower Silesian Voivodeship**.*

## SALARIES - FUTURE

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At the end of 2022, the situation on the labour market continued to improve - in annual terms, the number of working people increased significantly, and the number of the unemployed and economically inactive decreased. NBP surveys indicate that enterprises' plans regarding future employment have changed, but still remain at a high level compared to historical data. It is therefore expected that the favourable situation on the labour market will continue in the coming months.

### NBP FORECAST

NBP forecast	
2019	7,3%
2020	7%
2021	8,1%
2022	10,8%
2023	9,4%
2024	6,1

*Salary growth, Hays analysis based on NBP forecasts*

## SALARIES – LOWER SILESIA VOIVODESHIP

Position	Monthly gross salary					
	Minimum		Optimum		Maximum	
	PLN	EUR	PLN	EUR	PLN	EUR
Low-skilled Production Worker	3 600	765	4 100	870	5 100	1 080
Medium-skilled Production Worker	4 200	894	4 600	975	5 700	1 210
High-skilled Production Worker	4 950	1 053	5 600	1 190	6 700	1 425
Logistics Manager	14 000	2 980	15 000	3 180	21 000	4 450
Logistics Specialist (3-5 years of exp.)	7 500	1 590	8 500	1 800	10 000	2 120
Warehouse Manager (Manufacturing)	8 500	1810	10 500	2 230	13 000	2 755
Engineering Manager	14 000	2 980	16 000	3 390	18 000	3 815
Production / Process Engineer (3-5 years of exp.)	7 000	1 485	8 000	1 695	10 000	2 120
Project Manager	12 000	2 545	14 000	2 980	15 500	3 285
Project Engineer (3-5 years of exp.)	9 000	1 908	10 000	2 120	11 500	2 450
Lean Manager	13 000	2 755	16 000	3 390	17 000	3 610
Lean Manufacturing Engineer (3-5 years of exp.)	7 000	1 485	8 000	1 695	11 000	2 330
Maintenance Manager	12 000	2 545	13 000	2 755	15 000	3 180
Maintenance Engineer (3-5 years of exp.)	7 000	1 485	9 000	1 908	10 000	2 120
Tooling Engineer (3-5 years of exp.)	7 000	1 485	10 000	1 485	11 000	2 330

\*Data in terms of minimum, optimum and maximum are from the last 6 months (Lower Silesian Voivodeship).

\*\*Data comes from the counties: c.Wrocław, Wrocławski, Wołowski, Trzebnicki, Milicki, Średzki, Oleśnicki, Oławski, Strzeliński, Świdnicki, Dzierżoniowski, Ząbkowicki.

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## TRENDS IN THE LABOUR MARKET

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While the first half of 2023 was record-breaking for the labour market in many aspects, the last quarter brought some cooling. High inflation and uncertainty related to the geopolitical situation and global economic trends, limited the development plans of some enterprises, and thus their readiness to increase employment. A slowdown in the labour market does not mean the end of recruitment. In 2023, employers expect both recruitment activity and challenges. In the face of strong salary pressure and a perceived skills gap, attracting and retaining specialists will not be an easy task.

In 2023, a calming of moods in the entire labour market should be expected. On the other hand, possible decreases in the values determining the condition of the market will also result from a high comparative base, i.e. record-breaking recruitment activity of companies at the turn of 2021 and 2022.

Although entities operating in the market sectors most affected by the unfavourable economic and geopolitical situation will be much more cautious in their decisions to launch recruitment, the demand for highly qualified specialists will remain high. Therefore, the year 2023 will not bring a collapse on the labor market of specialists and managers, but rather a certain equalization of the powers of employers and employees. The candidate market will still be a reality in some specialization areas, while the competition for talent will not be as fierce as in recent months.

In 2023, organizations will hire experts to help them mitigate the consequences of economic downturns, interrupted supply chains and falling consumption. Experts in the field of technology, finance and accounting, talented salespeople and specialist in production, engineering and logistics will continue to enjoy great interest. The demand for employees will continue to be generated by foreign investors locating shared services centres, technology hubs and production plants in Poland.

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## INCREASING SALARY PRESSURE

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Despite the increases in 2022, which were obtained by 62 percent of specialists and managers, the overall satisfaction with the remuneration received decreases. In this year's edition of the survey, only 40 percent of respondents declared satisfaction with their earnings, and 12 percent could not give a definite answer to this question. This is due to the fact that increases of 5-15 percent do not compensate workers for the purchasing power lost as a result of high inflation. Meanwhile, as much as 51 percent employers in the past year granted increases of no more than 10 percent.

In 2023, as many as 81% of employers plan to increase salaries. Increase up to 10% are expected the most, every second company is planning to reach the level. 28% of companies will offer 10-19.9% and increases of 20% or more - 3% of companies. Only 3% of employers expect wage cuts.

However, employers are aware that in the reality of double-digit inflation, further changes to the pay scale will be necessary to attract and retain employees. However, due to budget constraints, increases in 2023 will not be as high as in the past 12 months. Some companies will probably raise rates only for key employees or extremely difficult to recruit candidates.

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## STABILITY OF EMPLOYMENT

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Only 52 percent of professionals declare satisfaction with their current job. Therefore, it is not surprising that many specialists and managers are open to changing their place of employment, if the new employer, apart from an attractive salary, offers them a sense of stability.

In the current macroeconomic environment, changing jobs entails greater risk for candidates. They will decide to participate in recruitments and accept the offer with more caution, carefully analysing whether the new company will offer them stable employment. This attitude makes it even more difficult for employers to recruit. This is confirmed by the results of the study - in 2023 as much as 72 percent of companies expect difficulties in recruiting employees.

In 2023, 20% of specialists and managers plan to start a job in another company. Whereas another 18 percent expects that in the coming months they will change their current career path, which may also be tantamount to a change of employer.

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## RECRUITMENT PLANS

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**20% Employees plan to change a job in 2023**

**18% Employees plan to change their specialization/career path in 2023**

*\* Research conducted by Hays Poland in December 2022.*

Almost every third company participating in the survey, indicated talent shortage as an obstacle to achieving its strategic goals. It should therefore be expected that the competence gap will continue to plague employers looking for highly qualified experts with valuable skills. In 2023, we will observe the continuation of the competence market, although in key specializations, employees will still enjoy a stronger position in negotiations.

In 2023, as many as 87% of companies plan to recruit and 72 percent of them expect difficulties in finding employees. Interestingly, business development is most often indicated as the main reason for recruitment (53%). The need to find replacements for departing employees ranked second.

Companies on a large scale will recruit experts in the field of IT and new technologies, sales, production and engineering, finance and accounting, and logistics. Organizations will also continue the trend of strengthening their managerial structures, looking for effective leaders with highly developed soft skills. The results of the study prove how crucial managerial skills are for companies currently. Managerial competencies were identified as both the most needed and the most difficult to acquire (54% and 34% respectively).

### How did the employment level change in the company in 2022?

increased	51%
remained on the same level	21%
decreased	19%
hard to say	9%

*\* Research conducted by Hays Poland in December 2022*

Do the company plan to hire new employees in the perspective of 2023?

87% YES

13% NO

What will be the reason of new recruitments?\*

Replacement for the leavers	37%
Business development	53%
Structural changes	9%
other	1%

*Companies' perspective*

*\*Only companies expecting planning to recruit*

## RECRUITMENT CHALLENGES

Company representatives predict that competition for employees will remain high. Still, almost three in four employers expect recruitment challenges in 2023. This is only 2 percentage points lower compared to last year.

Due to changes in the economic situation, companies face new challenges. Employers most often identify the growing costs of running a business as the biggest barrier to achieving strategic goals (36%), which of course may also be affected by the increase in labour costs. It was followed by talent shortage (27%) and budget constraints (16%). Every tenth respondent indicated wage pressure as the biggest barrier.

In 2023, sourcing employees will be a challenge for 72 per cent of employers. While the overall recruitment activity of companies may be lower, recruitment challenges will remain. Why? Firstly, the problem of the competence gap on the Polish market remains valid. The Polish economy is undergoing a digital transformation, which increases the demand for highly qualified employees, and these are simply missing on the market. Secondly, it is more difficult for employers to convince passive candidates to change jobs. Some specialists make decisions about changing their place of employment more carefully, often withdrawing from recruitment at its last stage. Thirdly, the search for savings in companies will limit their ability to compete for the best employees in conditions of strong wage pressure.

Employers, when asked about the specializations that their recruitment will concern, most often indicate IT (37% of companies), sales (31%), production (25 %), finance and accounting, and engineering (22% each).

### Factors constituting the biggest barriers to achieving the company's strategic goals

Rising business costs	36%
Talent shortage	27%
Budget constraints	16%
High salary pressure	11%
Keeping up with digital transformation	3%

### Next to financial conditions, which factors help a company to gain employees the most?

Employment stability	48%
Interesting projects/challenges	45%
Career development plan	40%
Working model (remote, hybrid)	35%
Benefits	33%
Location	27%
Company brand	27%
Work-life balance	22%

Working environment	19%
other*	2%

\*Percentages do not sum up to 100 because more than one answer was possible

\*Among others, employers most often mentioned CSR activities, an attractive bonus system, organizational culture, the company's industry, the opportunity to work in a start-up environment

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## SPECIALIST'S CAREER PLANS

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Only 52 percent professionals find their current job satisfying. The above result and the widespread dissatisfaction with earnings mean that in 2023, 20 percent of professionals plan to change jobs, and another 18 percent - current career path.

Professionals very diversely assess the impact of the current economic situation on their professional prospects in the next 2-5 years. However, there are more respondents with a negative opinion on this subject than those with a positive opinion (37% vs. 25%). The results of the survey show that there is a strong uncertainty about the future among specialists.

The vast majority of professionals expect a change in their professional life in 2023 - the position held in the current company (20%), place of employment (20%) or career path (18%). Another 4 percent planning to start their own business or business.

The most frequently indicated motivator for changing jobs is the level of remuneration (57%). In second place, similarly to last year, was the lack of development opportunities (45%), while the third was the lack of a defined career path (22%). Every fifth respondent planning to change their job indicated the lack of balance between personal and professional life as the reason. As much as 18 percent professionals are motivated by their dissatisfaction with their direct superiors to work for another company.

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## SATISFACTION WITH REMUNERATION

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Despite the fact that last year, 62% of specialists received a raise, most of them are not satisfied with their salary.

In 2022, 62% of employees received a salary increase, usually the level was less than 10%. It is worth emphasizing that only 15% of respondents received a raise of 20% or more, which would be able to compensate employees for the loss of their purchasing power. It is therefore not surprising that only 40% of employees declare satisfaction with their earnings.

The wage pressure is very high, and 34% of specialists expect that in 2023 they will receive salary increase – in their current or new company. However, the respondents' answers show uncertainty, because as many as 50% of them do not know if and how their earnings will change. Employees - although often dissatisfied with their remuneration - are aware that the increase in prices also affects companies, and therefore employers may not be willing to respond to wage pressure. At the same time, only 2% of professionals and managers expect their earnings to be reduced in 2023.



## Did your salary change in 2022?

Increased 20% or more	15%
Increased 10%-19,9%	16%
Increased less than 10%	31%
Remained on the same level	33%
Decreased	5%

## Will your salary change in 2023?

Will increase 20% or more	5%
Will increase 10%-19,9%	12%
Will increase up to 10%	17%
Will remain on the same level	14%
Will be decreased	2%
Hard to say	50%

Budget constraints often prevent companies from meeting the high financial expectations of professionals. As a consequence, employers are increasingly focusing on the benefits package, which they perceive as a key tool for retaining employees in the organization.

Non-wage benefits in the workplace are received by 65% of employees, which is a result of 4 points percent lower than last year. The composition of the benefit package also changes. The percentage of companies in which the so-called a cafeteria of benefits (34% compared to 29% last year), enabling employees to choose the most attractive benefits for them.

The proportion of companies offering basic and extended private medical care packages is also changing. Although the basic version is still more common, it is increasingly replaced by the extended option, which is already included in its package by 42 percent employers. The percentage of employers offering a benefit in the form of psychological support also increased - by 2 points.

Benefits that are most attractive from the perspective of employees can be divided into two groups. Most often they are related to flexibility and free time, or they relieve the household budget. The first group includes flexibility of time and place of work (30%), additional vacation days (26%) and additional days off (19%). The second one can be classified as an extended medical care package (26%), a company car (23%) or a supplement to bills for remote work (12%).

## Benefits most important for employees\*

Gift certificates	35%
Additional vacation days	18%
Additional days off	16%
Additional education co-financing	32%
Child care co-financing	3%
Lunch cards	22%
Co-financing the home office equipment	10%

Co-financing the costs of home office	<b>5%</b>
Events, integration trips	<b>52%</b>
Cafeteria program	<b>34%</b>
Sport activities card	<b>64%</b>
Work computer for private use	<b>34%</b>
Basic healthcare	<b>56%</b>
Employee loans	<b>16%</b>
Flexible work hours	<b>39%</b>
Retirement plan	<b>18%</b>
Extended parental leave	<b>3%</b>
Extended healthcare	<b>42%</b>
Company car	<b>34%</b>
Work phone for private use	<b>39%</b>
Life insurance	<b>55%</b>
Psychological support	<b>20%</b>
Discount for company products	<b>15%</b>
other	<b>3%</b>

*\* Percentages do not add up to 100% because respondents were asked to identify the three most important additional benefits.*

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**EMPLOYMENT CONTRACT - EMPLOYER'S COST**

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	<b>GROSS ANNUAL salary up to 142 950 PLN</b>	<b>GROSS ANNUAL SALARY OVER 142 950 PLN</b>
<b>STATUTORY EMPLOYER'S COSTS</b>	<b>19,21% - 22,41% of annual salary</b>	<b>19,21% - 22,41% of 142 950 PLN + 2,95% – 6,15% of annual salary over 142 950 PLN</b>

## HAYS METHODOLOGY – TAILOR MADE REPORT

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**We create tailor-made salary reports and market overviews, which enable our Clients to take informed, right decisions.**

Among our clients are investors with successful market entry, consulting companies and government agencies.

Our expert knowledge covers both the availability of employees with certain skills (including foreign language proficiency), their salary expectations and general market insights and information regarding each industry and specialism.

Except for handling specific inquiries of each Client, we also constantly monitor all the activity on the labour market by collecting up-to-date statistical data and running surveys among employees, candidates and students. We share our expert knowledge through press articles and reports prepared in cooperation with our partners.

### **Data sources**

We used the following data sources:

1. Recruitment procedures carried out by Hays Poland (carried out from May 2023 to October 2023).
2. Hays market surveys (carried out in the last 6 months) for in logistics, engineering, manufacturing sector in Lower Silesian Voivodeship.
3. Salaries offered to candidates by our Clients.
4. Financial expectations of candidates participating in recruitment processes.
5. Expert market knowledge acquired by Hays consultants.

## CONTACT DATA

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