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Clothing Trade in Poland in the Years 2009-2013 and Prospects for its Growth

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Abstract

The textile and clothing sector in Poland suffered severe losses in the transition period. The clothing industry was the first where sales rates started to increase, which made garment production and trade an interesting area for research. This article was designed to assess the size of the clothing market in Poland, to estimate the difference (surplus or deficit) between clothing exports and imports, and to analyse the sales revenues of major clothing companies in Poland (Polish- and foreign-owned). To achieve these three goals, the authors selected appropriate secondary statistics and used them in their own calculations to extract necessary numbers, which were presented in tables and provided with comments. They showed the present situation of the clothing industry in Poland in terms of its sales at home and exports, enabling the comparison of domestic sales of Polish and foreign-owned companies, and providing inputs for predicting the likely future of clothing trade in the country. The forecast pointed to the clothing industry's substantial potential for growth, to the competitive advantage of garments made by large Polish producers in the domestic market over clothing products delivered by foreign-owned firms, and to a probability that clothing exports would exceed clothing imports soon.

Key words: clothing trade, clothing market, market shares.

Introduction

Economic internationalisation (globalisation) in the last decade of the 20th c. influenced all types of economic activity including trade [1]. The conditions of trade in Poland were also radically changed by the country's integration with the European market [2], particularly by the elimination of customs barriers [3]. When the limits of market freedom were extended, the relatively high production costs and rather unappealing clothing designs brought about the collapse of domestic manufacturers of clothing in the 1990s. Interestingly, however, new clothing companies capable of confronting the challenges of a free market were established at the same time. These processes caused that in early 2014 Poland had a total of 2,283 clothing companies (employing more than 9 workers), including those that, despite being formed under the previous economic regime, successfully completed restructuring processes [11].

To establish how efficiently they traded in clothing products and to forecast the future of this trade in the coming years, an investigation was carried out. It showed the size of the clothing market, the deficit/surplus between clothing imports and exports, and the market positions of the largest Polish-owned and foreign-owned clothing companies in Poland.

The investigation was based on the Central Statistical Office's *Statistical Yearbook of Industry 2014* (Rocznik Statystyczny Przemysłu 2014) of February 2015, which presented business statistics for 2013 and earlier years arranged in time. The analytical method used is known as a systematic method. Düssel [3] argues that forecasts obtained with this method should not be considered a single and certain source of information, because what they say is probable rather than definite.

Volume of production and the size of the clothing market in Poland

The authors of the article have traced the expansion of the clothing market in Poland for many years. Their findings and observations can be found in their earlier publications [5]. In order to accomplish the goals of this follow-up study, the authors selected statistical data from the *Statistical Yearbook of Industry 2014*, analysed them, and subsequently made their own calculations to obtain the necessary statistics. The outcomes of their

calculations have been arranged into tables and been provided with comments and clarifications to bring out their meaning. The analysis extends over a period of five years (2009 - 2013), which is apparently long enough to serve as a reliable basis for inference.

As required by the EU, the total amount of production in the country must be calculated including the results of the grey and underground economy (**Table 1**).

There are two lines of business that clothing companies in Poland engage in: the production of their own brands of clothing and the delivery of CMT (cut, make trim) services under outsourcing arrangements. The total output of clothing in the country must therefore be calculated by adding up the results of both these activities [7]. The numbers thus obtained are not very reliable, though. In the global economy, B2B services are frequently arranged between partners located in different countries, which poses some problems with arriving at the real size of the country's clothing market. Notwithstanding these technical difficulties, it was established that in 2009, i.e. in the year when markets were struggling with the worldwide economic crisis, the Polish clothing industry delivered goods of a total value exceeding PLN 8.0 bn. Twelve months later, in 2010, sales surpassed PLN 9.2 bn (so the growth rate was 114.4%). As the trend continued into the next two years, in 2012 clothing sales reached PLN 9.5 bn and kept rising in the next twelve months to PLN 9.7 bn in

Table 1. Production of clothing and the clothing market in Poland [million PLN]; **Source:** calculated by the authors based on data in [11], pp. 80, 360, 364, 366, 368. *CMT – cut-make-trim services; **PKWiU – Polish Classification of Goods and Services; ***PKD – Polish Classification of Activities.

No.	Specification	2009	2010	2011	2012	2013
1.	Total output, including own products and CMT* services [P]	8,046.8	9,210.9	9,591.7	9,539.1	9,712.9
2.	Clothing imports by PKWiU** [I]	10,631.0	11,548.4	13,065.3	12,361.0	13,155.6
3.	Imports of CMT services by PKD*** [I _{prod.}]	2,018.3	1,910.8	1,811.5	1,766.9	1,731.0
4.	Clothing exports by PKWiU [E]	9,728.8	10,255.1	11,574.9	11,880.7	12,986.8
5.	Exports of CMT services by PKD [E _{prod.}]	3,366.3	3,229.0	3,321.2	3,442.6	3,345.6
6.	Excess of imports over exports by PKWiU [N _{imp.}]	902.2	1,293.3	1,490.4	480.3	168.8
7.	Excess of imports over exports, [N _{imp.%}], year-to-year, %	130.6	143.4	115.2	32.2	35.1
8.	The size of the clothing market [R]	8,949.0	10,504.2	11,082.1	10,019.4	9,881.7

2013 (the year-on-year growth rate was 101.8%).

The range of clothing products available in the Polish market consists of imports from Western Europe (for high-end consumers) and from Asia (for less demanding buyers). In the 1990s, clothing imports from Asia were addressed to the mass buyer and sold well because of their low prices. Polish customers realised after a time, however, that most Asian products did not meet their quality expectations, which were formed in the years when Polskie Normy (Polish Standards) precluded the sale of garments that might change their shape, colour, etc., within 12 months of their purchase. This disappointment drove the demand for products of known brands, the wearability characteristics and quality of workmanship of which were guaranteed by established companies that could be easily located if a complaint about product quality had to be placed.

Row 2 of **Table 1** shows the clothing imports of Polish-owned and foreign-owned companies in Poland. In 2009, their volume amounted to PLN 10.6 bn, the bulk of which consisted of items made on a mass scale in Asia. In the next four years, the value of imports expanded to PLN 13.2 bn. Their volume increased because of sales growth with the strengthening purchasing power of Polish consumers and because of greater demand for luxury brands such as Gucci, Armani, etc. The data in row 3 show that while clothing imports were expanding, the imports of CMT services outsourced by Polish companies were declining; from more than PLN 2 bn in 2009 to PLN 1.7 bn 2013 (i.e. the latter amount represented 85.8% of the 2009 value). This phenomenon cannot be given a straightforward interpretation considering the intricacy

of possible business arrangements (see example below).

LPP SA is a Polish-based clothing company, the domestic activities of which include the preparation of manufacturing processes and the distribution of finished products which are made in Asia under outsourcing arrangements. LPP can import finished products to Poland or export them to its overseas customers directly from the Asian manufacturer. This alternative is possible under a sublicense agreement that LPP concluded with the Cyprus-based company Gothals. Both options are legitimate, but they allow the optimisation of tax liabilities, which distorts statistics on international trade in commodities.

Clothing companies dealing in foreign trade export their own products (made at home or by foreign providers) and high-end products they make for Western European companies under CMT arrangements. As far as imports are concerned, these consist of finished garments purchased in foreign markets and goods made by Asian providers of CMT services. The statistical data analysed by the authors show that in the 1990s the CMT services' share of clothing exports was still high, but as the clauses of the *Agreement on textiles and clothing* [9] protecting the EU market were made ineffective in 2005, the mass production of clothing was relocated to Asia. The Polish clothing industry only retained the production of high-end garments for customers that appreciated superior quality of workmanship and considered high prices to be of secondary importance. In the wake of this new situation, in 2009 clothing exports amounted to PLN 9.7 and rose continuously in the next years to almost PLN 13 bn in 2013 (increasing by 23.7% during five years). The value of exported

CMT services did not show major variations, ranging from PLN 3.3 to 3.4 bn (row 5, **Table 1**).

Row 5 in **Table 1** ends the analysis and interpretation of the *Yearbook's* data. The data in row 6 and below were calculated by the authors based on official statistics. A comparison of clothing imports and clothing exports indicates that in 2009 imports were greater by PLN 0.9 bn and that in 2011 the difference between them reached a peak value of almost PLN 1.5 bn. In the next twenty four months, the trend fell, and consequently by 2013 it shrank to only 169 mln PLN. These numbers clearly confirm that clothing exports were increasing in proportion to the exports of CMT services. This trend is reflected by the falling value of N_{imp} and of the indicator in row 7 of **Table 1** (excess of imports over exports), the value of which dropped within three years to 35.1%. Should the trend continue into the future, clothing exports might exceed clothing imports as early as 2014.

Polish customers can buy garments made by Polish-owned companies (at home and through their providers of CMT services abroad) and by foreign-owned firms. The size of the Polish clothing market in particular years of the sample period (row 8 **Table 1**) was calculated with data presented in rows 1, 2 & 4 and using the following formula:

$$R = P + I - E$$

where, R – the size of the clothing market in Poland, P – total output of clothing, I – clothing imports (million PLN), E – clothing exports (million PLN).

According to experts from the Central Statistical Office, the PKD and PKWiU statistics are not compatible, thus they cannot be summed up. In this situation, the size of the Polish clothing market had to be estimated by adding up the total output of clothing and clothing imports and by deducting clothing exports from the sum. The numbers obtained for particular years show that between 2009 and 2011 the domestic clothing market expanded from 8.9 bn PLN to 11.1 bn PLN, because of consumption growth after the worldwide economic crisis. In the next two years, by 2013, the market shrank to PLN 9.9 bn, which constituted 89.2% of its value in 2011, but even then, it was bigger by 10.4% than in the first of the years analysed. Calculations and observations allow to estimate clothing sales

in Poland at approximately PLN 10 bn. Changes in the economy, e.g. wage increases, are likely to increase this value in the next years, but less spectacularly than it was observed between 2009 and 2013. To see whether this forecast is true, more research is necessary though.

Polish-owned and foreign-owned clothing companies in Poland and their sales

Information on the sales of the largest clothing companies in Poland was derived from *Lista 2000 – polskie przedsiębiorstwa 2014* (List 2000 – Polish Companies 2014) [7], a ranking of 2000 companies arranged by their sales volumes in 2013). The authors of the ranking used two sources of data: a questionnaire survey of over 6,000 companies representing different economic sectors and the resources of the business intelligence agency Bisnode Polska. To be considered for the survey, a company had to have sales of at least 100 million PLN in 2013. Data derived from both sources were aggregated and then reviewed and commented on by Polish economists, such as M. Rocki, W. Orłowski and A. Koźmiński. The latter stated in his analysis that ‘Poland did not surrender her industry (in the transition period – E.G., A.G.) and its share of GDP is one of the highest in Europe (17.8%). Only Czech R., Hungary, Germany and Slovakia, with shares in excess of 22%, are ahead of us [...] the EU average is 15.2% [...] The industry was one of the factors that enabled relatively effective defence against the waves of crisis coming from outside the economy’ [7]. This seems to imply that not only did large companies (including the manufacturers of clothing) adopt effective growth strategies, but also that they were professionally managed.

The authors of the article analysed two *Lista* rankings published in 2014 and 2015. For the purposes of this research, clothing companies were extracted from a total set of 2000 organisations covered by the ranking and then divided them into two groups according to their ownership (Polish or foreign). **Tables 2, 3, 4 & 5** contain statistics characterising the companies selected. The last columns of the tables show ROE (return on equity), a major indicator of a company’s performance, being a quotient of net profit and equity indicating a rate of return for ownership interest. An increasing ROE signi-

Table 2. Largest Polish-owned clothing companies in Poland in 2013. *Source:* developed by the authors based on [7].

Ranked	Company	Sales, PLN million	Sales growth rate 2012/2013, %	Net result, PLN million	Assets, PLN million	ROE, %
74	LPP SA GK, Gdańsk	4,116.302	127.7	432,859	2,491.570	28.92
614	Redan SA GK, Łódź	468.315	106.4	3,357	203.292	6.45
725	Vistula Group SA GK, Krakow	397.677	100.5	45,061	625.932	10.99
1234	Gino Rossi SA GK, Słupsk	218.501	104.5	2,025	185.670	2.92
1290	KAN sp. z o.o., Łódź	205.248	96.9	8,007	154.664	10.17
1738	Monari Trade SA GK, Łódź	145.552	110.4	17,017	102.005	19.23
	Total	5,551.595				

Table 3. Largest Polish-owned clothing companies in Poland in 2012. *Source:* developed by the authors based on [8].

Ranked	Company	Sales, million PLN	Sales growth rate 2013/2012, %	Net result, million PLN	Assets, million PLN	ROE, %
102	LPP SA GK, Gdańsk	3,223.755	129.3	353.977	1,932.222	29.23
705	Redan SA GK, Łódź	440.124	115.7	-26.983	202.703	-56.16
789	Vistula Group SA GK, Kraków	358.513	102.0	12.276	333.230	3.68
1387	Gino Rossi SA GK, Słupsk	209.257	112.4	3.809	160.271	5.65
1921	KAN sp. z o.o., Łódź	146.280	91.7	-8.308	80.217	-41.96

Table 4. Largest foreign-owned clothing companies in Poland in 2013. *Source:* developed by the authors based on [7].

Rank	Company	Sales revenue, million PLN	Sales growth rate 2012/2013, %	Net result, million PLN	Assets, million PLN	ROE, %
250	H&M Hennes & Mauritz sp. z o.o., Warszawa	1,267.159	108.6	61,853	519,213	17.12
552	C&A sp. z o.o., Warszawa	516.609	101.1	-33,294	203,386	-22.64
659	Adidas Poland sp. z o.o., Warszawa	438.018	105.0	13,555	134,819	33.09
1220	Stradivarius Polska sp. z o.o., Warszawa	220.478	128.3	23,366	137,126	29.04
1243	Levi Strauss Poland sp. z o.o., Płock	215.186	99.4	15,989	141,887	15.58
1516	Kappahl Polska sp. z o.o., Warszawa	167.844	106.6	-53,352	55,404	n/a
	Total	2,825,294				

Table 5. Largest foreign-owned clothing companies in Poland in 2012. *Source:* developed by the authors based on [8].

Rank	Company	Sales revenue, million PLN	Sales growth rate 2013/2012, %	Net result, million PLN	Assets, million PLN	ROE, %
228	H&M Hennes & Mauritz sp. z o.o., Warszawa	1,416.623	136.8	n/a	n/a	-
518	Zara Polska sp. z o.o., Warszawa	600.365	118.6	81.727	278.546	61.68
613	C&A Sp. z o.o, Warszawa	511.071	114.7	-53.427	197.697	-106.76
1337	Levi Strauss Poland sp. z o.o., Płock	216.392	68.8	4.154	127.392	4.30
1656	Stradivarius Polska sp. z o.o., Warszawa	171.899	-	20.786	105.980	36.40

fies that the company analysed is improving its performance and that it is paying more and more in dividends.

The main engine driving the expansion of the clothing industry in Poland as well as in the world is small and medium-sized companies (SMEs) [1]. It is therefore a great success whenever some of them

join the ranks of the biggest producers, ascend in the rankings or keep their position for a longer time, because they have to compete on equal terms with banks, oil companies, mining companies and other big players in the national economy. The first column in the tables below shows how a company was ranked by its sales, and the next columns present selected

business results. To keep the presentation concise, only three companies with the highest sales in 2013 and 2012 will be discussed for each category of ownership.

The leading producer of clothing in Poland is a Gdańsk-based company LPP SA. Its portfolio contains Reserved, Cropp, House, Sinsay, and Mohito, brands of clothing for children, youths and adults. In early 2014, LPP SA operated a chain of 1300 outlets at home and abroad (quite recently it announced its plans to expand into the Arabian Peninsula markets). In 2013, the company's exports of PLN 835m accounted for 20.3% of its total sales. According to the data presented in tables 2 and 3, its sales revenue increased between 2012 and 2013 by PLN 892.547 mln, i.e. by almost 30%. The net result and the value of assets improved by PLN 78.882 mln and 559.348 mln, respectively. The 2013 ROE of 28.92% was only slightly smaller than in 2012. As a result, LPP ascended in the ranking of the largest companies in Poland from the 102nd position in 2012 to 74th in 2013 (in 2010 it was ranked 146th).

Another major player in the clothing market in Poland is Redan SA, a Łódź company established in 1995. Redan SA was growing fast until 2009 and then the trend suddenly collapsed. Its net result of PLN -26.983 mln in 2012 is an indication of how grave and persistent the problems were that it faced that year. Redan SA uses two channels to distribute its products. One consists of 100 Top Secret, Troll and Drywash outlets that sell garments and accessories made by the company itself. The other channel comprises 400 Textilmarket outlets, through which clothing imports from Asia are distributed. Based on this dual strategy, Redan improved its performance and in 2013 achieved a positive net result of PLN 3.357 mln. The value of assets remained almost the same, but sales revenues of PLN 468.315 mln were greater by 6.4% than in 2012 and the ROE improved spectacularly, from -56.16% to 6.45%. With higher sales revenues, Redan SA rose in the ranking of the largest companies in Poland from the 705th position in 2012 to 614th in 2013 (in 2010 it was ranked 773rd). Redan SA was also special in that its exports grew the fastest in relation to total sales between 2010 and 2013 (from 3.6% to 14.0%) [7].

Sales revenues of 397.677 mln PLN that Vistula Group SA earned in 2013 were not much lower than Redan's. The company designs, manufactures and sells collections of men's fashion (its portfolio includes Vistula and Lantier (men's suits), Wólczanka and Lambert (men's shirts), and Deni Cler Milano (a luxury brand of women's wear)). Vistula owns also the W.Kruk brand (a manufacturer of jewellery and the distribution of jewellery and Swiss hand watches). All of its 272 outlets, including 84 W.Kruk stores, are located in Poland. Between 2012 and 2013, Vistula increased its sales by only 0.5%, but the net result improved by 367.1%; the value of the assets increased by 187.8%, and the ROE rose from 3.68% to 10.99%. Owing to these successes, the company improved its position in the rankings from 789th to 725th. This undoubtedly proves that the strategy it adopted was well-designed and effective, but its long-term plans should take account of exports as well.

Foreign-owned manufacturers of clothing in Poland were investigated using the same analytical approach. Like their Polish competitors, they also sell both garments and complementary items (footwear, accessories) in their outlets, but data on these additional sales are not available, and hence it was impossible to establish their value in relation to total sales in order to arrive at the value of clothing sold. Their amounts are, in all probability, very small, consequently they can be omitted without any risk of distorting the calculation results.

Of all foreign-owned clothing companies in Poland, H&M has had the highest sales revenues for years [4]. The rate showing their growth between 2013 and 2012 is not a miscalculation. At the turn of 2013, H&M sold off H&M Logistic as a separate company, which influenced its business results and made comparisons impossible. In 2013, H&M was ranked lower than in 2012 when sales revenues of PLN 1.4 mln earned it the 250th position among the largest companies in Poland. Within the next twelve months its sales dropped to 1.3 mln, and consequently it was ranked 228th. This is more proof that the restructuring contributed to the incomparability of its results from 2012 and 2013. Hence no data on H&M are presented in the last three columns of *Table 5*.

In 2012, the second largest clothing company in Poland in terms of sales was Zara Polska Sp. z o.o. It was omitted from the 2013 ranking following its management's decision not to disclose business data. While it is not mandatory for companies to make their data public, a refusal must raise serious doubts about the quality of business standards.

C&A is a subsidiary of the Swiss holding COFRA. Its sales increased between 2012 and 2013 by approx. PLN 5 mln, but the growth rate of 101.1% was rather unimpressive. Nevertheless the increase in sales proved sufficient for the company to improve its net loss from PLN -55 mln in 2012 to PLN -33 mln in 2013. The value of its assets basically did not change, but the ROE also rose from -106.76% in 2012 to -22.64% in 2013. With better financial results, C&A ascended in the ranking by 61 positions, from 613th in 2012 to 552nd in 2013. If its expansion plans work, its net sales in 2014 may be represented by a positive number.

Other foreign-owned clothing companies in Poland (Levi Strauss and Kappahl) had sufficient sales in 2013 to be ranked among the 2000 largest firms in the country. However, the downward trend in their financial results supports the earlier conclusion that consumers in Poland prefer products made by Polish manufacturers. Even though all manufacturers operate in the same business environment, their sales are clearly different (see *Tables 2, 3, 4, 5*), which shows how much depends on the skills of the managers and their understanding of the realities of their organisations. To develop this understanding, managers must have the ability to view other members of the organisation, its values, strategies and structure from many perspectives to form and synthesise judgements [13]. Garments made by Polish manufacturers are competitive because of the high quality of fabrics and workmanship and wearability. Polish consumers still prefer clothes that can be worn for several years, unlike consumers in highly developed countries who usually replace their wardrobe with the coming of new seasons and trends.

■ Conclusion

The authors of the article analysed statistics on the clothing trade in Poland and then made their own computations. The outcomes of these computations and the

financial results of the largest clothing companies in Poland in 2013 were reviewed together to build an outlook for this trade. The research resulted in the following conclusions:

1. In 2009, the domestic market for clothing was estimated at PLN 8.9 bn. Consumption growth in the next two years after the worldwide economic crisis enlarged sales to PLN 11.1 bn. This sharp increase (23.8% from 2009 to 2011) was followed by two years of declining sales, as a result of which their value in 2013 decreased to 9.9 bn PLN, which accounted for only 89.2% of the 2011 value, but it was nonetheless greater by 10.4% compared with 2009. This trend suggests that the Polish clothing trade will grow in the coming years, which will be driven by increasing domestic demand (stimulated by the rising incomes of the population and people replacing their wardrobe more often) and by greater exports of domestic goods (see the data in row 5, **Table 1**).
2. Between 2009 and 2013, exports of finished clothing increased by 133.5%, with the volume of exported CMT services remaining at a constant level of 3.3 bn PLN, and clothing imports consistently exceeding clothing exports. In the first year of the period analysed, the difference between them was 0.9 bn PLN. Within the next twenty four months (by 2011) it rose to a record high value of almost 1.5 bn PLN and then declined dramatically to merely 169 mln PLN in 2013. An illustration of this trend is the $N_{imp.}$ value falling for three years in a row to 35.1% in 2013, suggesting that clothing exports may slightly surpass imports as early as 2014.
3. It is generally known that in both Poland and the world the clothing industry mostly consists of SMEs. In Poland, however, 12 clothing companies selling products in the domestic market were ranked among the 2000 largest organisations in the country by sales in 2013, which shows that every industry has a capacity for growth and that whether, and to what degree, it will be exploited depends on the company's strategy and the skills of its managers.
4. The largest clothing companies in Poland are represented by six Polish-owned and six foreign-owned organisations with total sales of 5.552 mln PLN and 2.825 mln PLN, respectively. These two numbers show that

clothing made by large Polish manufacturers has a competitive advantage over products delivered by their major foreign-owned competitors and that the former have a better sense of what domestic customers may want to wear.

Based on these conclusions it can be generally predicted that not only will the market position of the products made by Polish-owned clothing manufacturers or delivered by them under CMT arrangements not be threatened in the coming years, but also that their sales at home and abroad are likely to increase.



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