

THE CONSTRUCTION AND FITOUT SECTOR

Poland. Business Forward



Poland is an internationally acclaimed destination for:

Pristine nature
A top 10 country to visit according to Lonely Planet

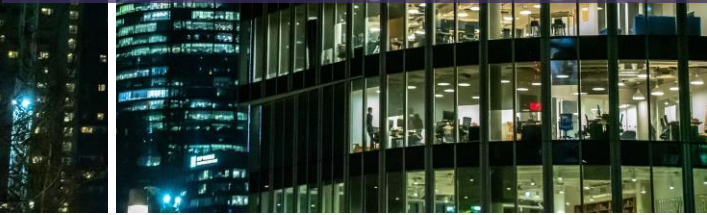
A place where East meets West
Dynamic business hub at the heart of Europe

Vibrant food scene
Warsaw among Top 10 Vegan-Friendly Cities in the World

Great cities
Wrocław – most business friendly medium – sized European city (2022)
Kraków – a TOP 25 Travellers’ Choice 2022
Łódź – in the „Best of the World 2022” List by National Geographic

Attractive place for expats
Young, increasingly international society, with a very high level of English proficiency

Rich history
Vast legacy of bravery and resilience





WHY
POLAND



FACTS ABOUT
THE POLISH
CONSTRUCTION
SECTOR



WHAT MAKES
US DIFFERENT



DID YOU KNOW
THAT



SUPPORT
INSTITUTIONS



HOW WE CAN
HELP YOU

Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

Superb market share

40% of the region's total GDP and a gateway to the wider EU market

Large, high-quality talent pool

300k+ of well-educated graduates annually

Resilient economy

Max score for Macroeconomic Stability in the Global Competitiveness

Almost 30 years of continuous growth

Almost 10 years of stable growth in foreign trade turnover

Transparent

Regional leader in the Transparency International Corruption Index

FDI magnet

2nd in the EU, 5th in the world in terms of value of new greenfield projects (2020)

One third of all FDI stock in the region

Top-notch infrastructure

1st in CEE in Airport Connectivity & Quality of Road Infrastructure (Global Competitiveness Report)

Ratings remain high despite the turbulent Times

Moody's: A2, S&P: A-, Fitch: A-, as of the first half of 2022

Competitive, well-developed cities

European Cities of the Future (fDi Intelligence)

Warsaw: 7th position (ahead of Berlin and Stockholm)

Kraków: 2nd in EU in Business Friendliness among Large Cities



FACTS ABOUT THE POLISH CONSTRUCTION SECTOR

The construction sector is a crucial component of Poland's GDP, contributing over 151,856 mln PLN in 2021, which amounted to approximately 5.8% of Poland's total GDP.

The Polish construction and fitout sector in numbers:

1,034,600

employees in the sector in 2021

144,971+ mln PLN

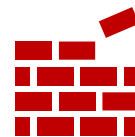
was the overall revenue of Polish construction and building materials sector in 2021

32.3+ bn PLN

was the revenue of Polish building materials subsector in 2019, which comprised of 48,957 companies



The export of Polish doors and windows to **over 100 countries** was worth **over €2,975 bn in 2021**, making Poland the largest exporter of these products in the EU



Poland exported ceramic building materials worth a total of **€443 mln in 2021**

Sources:

Statistics Poland – Concise Statistical Yearbook of Poland, 2022.

Ministry of Development, Polish Industrial Policy; data covers clay materials, concrete, lime & plaster as well as products made out of such materials.

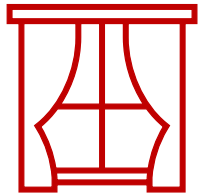
PKO BP, Centre for sectoral analysis. CAB Research Agency.

WHAT MAKES US DIFFERENT

Soundproofing

Poland is the world's largest exporter of doors and PVC windows. This is a dynamically growing category due to the thermal and acoustic insulation that such windows and doors provide. The exports of Polish windows and doors increased to 28 out of its 30 main destinations, making up for 29% of all European exports of these products in 2021.

The world's exports of PVC windows and doors in 2021, in %



- | | | |
|----|---------------|--------------------|
| 1. | Poland | Approx. 36% |
| 2. | Germany | Approx. 8% |
| 3. | China | Approx. 8% |

Sources:
Intracen Trade Map: data for CN code 3925 20.
PAIH's own data.

Eco-innovation

Polish construction industry boasts a number of the world's finest, eco-friendly solutions. They range from composite building materials made of PET bottles and prefabricates to energy-efficient 'passive' houses and smart home solutions.

How others see Poland

The Polish construction industry is highly regarded for its technical proficiency, talented specialists, great value for money and innovative solutions. This has been recognised by a number of high-profile foreign investors that have chosen to build their factories in Poland.

But Polish businesses are also eager to expand abroad, as is clearly shown in the form of both greenfield and M&A investments by such companies as Oknoplat, the Pietrucha group and Selena in such countries as Germany, Ukraine, Spain, the Philippines and Romania.

DID YOU KNOW THAT

Palaces and residences



The advanced energy-saving technology developed by the Polish company Izodom has been used in 3,000 residences built in the United Arab Emirates, as well as a 10,000m² Royal palace in Morocco.

Leaders in modular building



Walking down Sixth Avenue in New York you will soon find the world's tallest modular hotel, the Marriott. This 26-floor-high hotel had its modules manufactured by a Polish company DMDmodular and some experts have already acclaimed it a major architectural achievement. Another Polish manufacturer Polkon has recently been contracted to manufacture a prefabricated student hall of residence for Kampala University in Uganda. Their well-appreciated modules can be found in low-rise and high-rise buildings in Europe, Canada, the Caribbean and on both the East and West coasts of the US.

Constructing the world



Polish construction companies have been involved in a wide range of infrastructural projects all over the world, ranging from metro systems in Almaty and Saint Petersburg, Charkov's tram tracks to a rail bridge in Stockholm and a wastewater treatment plant in Riga, to name just a few.

Sources:
PAIH's own data
Polcom Group webpage: <https://polcomgroup.com/portfolio/>

SUPPORT INSTITUTIONS

The Polish Construction Cluster

The Polish Construction Cluster project is complementary to what is dealt within the confines of the Business Environment Institutions Cluster – a project coordinated by the Polish Consulting Association – and is also a continuation of promotion of the clustering concept and development of ties between business and science.

- Comprises of 400+ companies from the construction industry, it's the largest construction cluster in Poland
- It fosters cooperation between industry, various organisations, universities and R&D Centres
- Facilitates cooperation within the industry

The Polish Association of Construction Industry Employers (PZPB)

This country-wide organisation associates over 80 of the largest construction contractors, construction materials manufacturers, specialist design and geodetic companies, developers and other specialists related to the construction industry.

The Polish Association of Constuction Industry Employers, among other things:

- Represents its associates and their interests in talks with various State authorities
- Provides opinions on legal provisions in the construction industry and grants „Developer Certificate“
- Organises national and international conferences and conduct specialised training



Polish Construction Cluster
Key National Cluster



PZPB

The Polish Investment and Trade Agency

The Polish Investment and Trade Agency's (PAIH) mission as a Government Agency is:

- To enable small- and medium-sized companies to reach their full potential in exporting their products and services around the world
- To support potential investors in Poland by providing comprehensive and up-to-date information services regarding legal and tax aspects, location and human capital, as well as on the available financial incentives
- To promote 'Poland as a Brand'

How we can help

PAIH's experienced team of experts with a hands-on approach and excellent understanding of the needs of entrepreneurs will ensure that your projects will move as fast and smooth as possible.



Information packs
macroeconomic, HR,
legal, sectoral data



**Analysis
of export
potential**



**Preparing
information
packs**



**Verifying
business
partners**



**Organising
business
missions**



**Preparing lists
of possible
business partners**



**Organising
B2B meetings**



**Support in contacts
with Government
Agencies**

Contact us

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Polish Investment
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PFR Group

Strategy and Business Promotion Department,
September, 2022



Polish Investment
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