



Polish Investment
& Trade Agency
PFR Group

THE SPECIALIZED SHIPS, YACHTS AND BOATS SECTOR



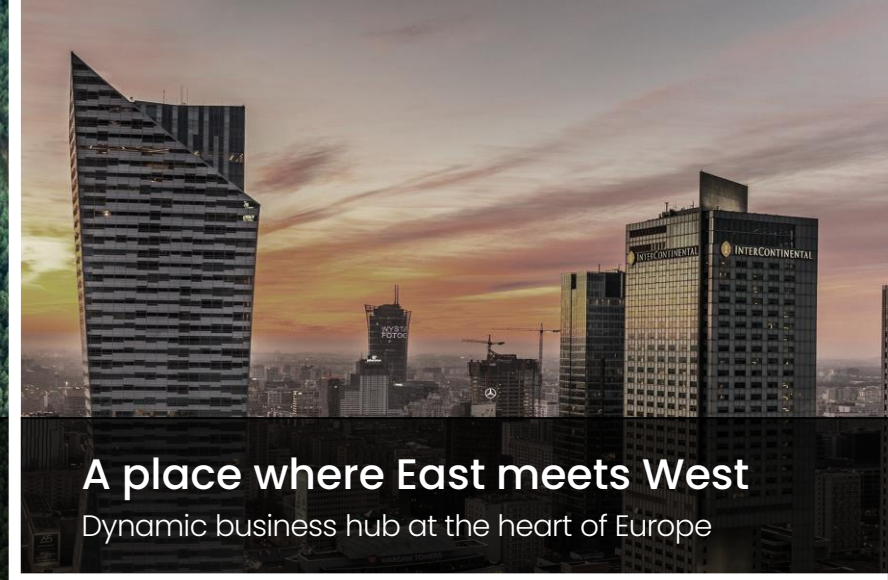
Poland. Business Forward



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



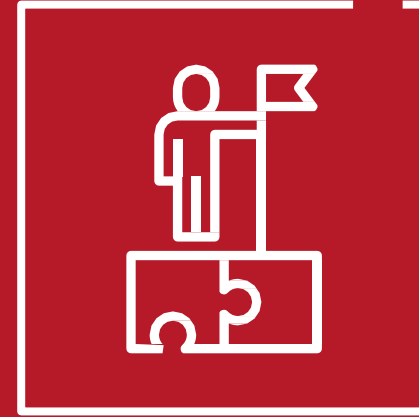
Rich history
Vast legacy of bravery and resilience



WHY
POLAND



FACTS ABOUT THE
POLISH SPECIALIZED
SHIPS, YACHTS &
BOATS 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

Poland is the sixth largest economy in the European Union in terms of GDP

Large, high-quality talent pool

300k+ of well-educated graduates annually

Resilient economy

Poland is considered to be one of the most economically stable and fastest developing countries in the world.

Transparent

Regional leader (2nd in CEE) in the Transparency International Corruption Perceptions Index

FDI magnet

In 2021, Poland was ranked highest in the CEE region and ninth in Europe in terms of the number of inward foreign direct investments.

Top-notch infrastructure

5th longest highway network in the EU
Over 4,880 km total length of motorways and expressways

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 2023 (fDi Intelligence):
Warsaw – 6th position overall (ahead of Berlin and Stockholm)
and 2nd in the business friendliness category among major cities;
The Silesia Region – European Entrepreneurial Region in 2021-2022,
among the top ten European regions in terms of attracting FDI and cost-effectiveness



FACTS ABOUT THE POLISH SPECIALIZED SHIPS, YACHTS & BOATS SECTOR

Polish yachts and recreational boating industry in numbers:

1,000+

boating-related companies

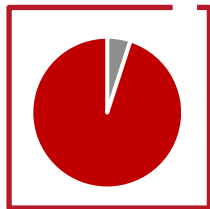
~45,000

employees



~25,000

boats produced in 2022



~45%

of yachts produced in Poland are exported

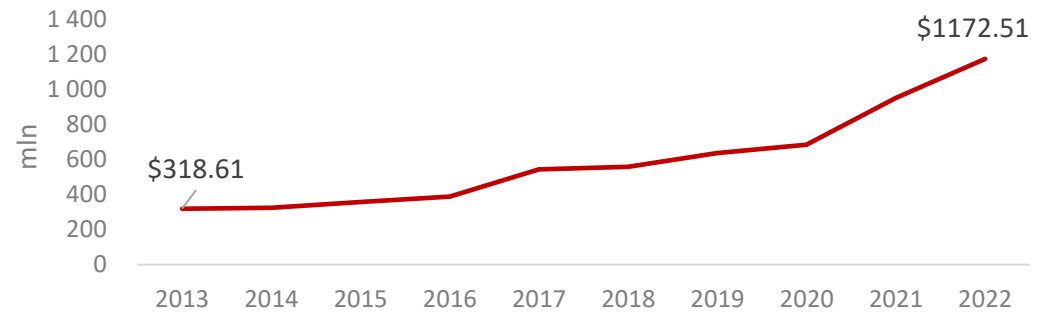
by sold production

Sources:

gospodarkamorska.pl, 14.03.2023

Statistics Poland, data for the CN heading of 8903 | Eurostat – PRODCOM database, data for PRODCOM heading of 30.12.19.30

Over the last decade the export of Polish yachts and recreational boats has **steadily been growing**



Main export destinations in 2022

	The US	18.80%
	Germany	14.06%
	France	8.27%
	The Netherlands	6.97%
	Norway	6.90%

WHAT MAKES US DIFFERENT

Rapidly developing sector

In years 2013-2022, the average growth (compound annual growth rate, CAGR) was about 6,5%-9,9%. With over 1000 companies and ca. 45,000 employees today, as well as almost 25,000 boats produced in 2022, this sector has come through rapid development since 2013.

Poland is also the 2nd after the US exporter of yachts worldwide

Ranked **first** in the EU in terms of the value of yacht exports in 2022

1. **Poland** **\$640.7 mln**
2. Italy \$122,8 mln
3. Finland \$64,0 mln
4. Lithuania \$48,8 mln
5. France \$46,7 mln

Top-class efficient manufacturing

Efficiency	2015	2016	2017	2018	2019
Poland [€/cGT]	4,111	4,573	3,489	4,043	4,480
Europe [€/cGT]	4,226	4,863	4,070	4,272	4,226
China [€/cGT]	1,623	1,623	1,635	1,589	1,529
Korea [€/cGT]	2,393	2,178	2,344	2,518	1,899
Japan [€/cGT]	1,459	1,785	1,720	1,482	1,544

How others see Polish yachts?

Polish yachts and boats are appreciated worldwide. They are widely recognised for their superior quality, excellent workmanship and the great attention to detail.

Polish yacht manufacturers and designers have received the most prestigious awards and distinctions at various international competitions.

These qualities have attracted buyers of luxury goods both from European and non-European countries alike, resulting in a steady growth in the export of Polish yachts and boats over the years.

Sources:

According to UN Comtrade data (Cn 890399)

Pomerania Development Agency Co., "Focus on Pomerania. Maritime Report 2023" - with data extrapolation to 2022

Data of Ministry of Economic Development and Technology; cGT stands for compensated gross tonnage

DID YOU KNOW THAT



Ideal for sailing and boating

Poland's 440 km of coastline, over 7,000 lakes and 631 marinas make it an ideal country for boating enthusiasts.



Chosen by the best

You may be surprised to learn that among the fans of Polish yachts you will find the international tennis superstar Rafael Nadal (who is the proud owner of a luxury 80 Sunreef Power yacht) and the former F1® World Champion Nico Rosberg (an ambassador for Sunreef Yachts Eco line of catamarans). Both yachts were manufactured in Gdańsk.



Innovation matched by style

Galeon, the Polish yacht manufacturer, is appreciated for their innovative solutions such as the rotating cockpit sofa and 'Beach Mode' drop-down sides, while Conrad Shipyard's 133' Viatoris won an award at the World Superyacht Awards in London. The Polish yacht builders were also involved in such projects as the polar vessel „National Geographic Resolution” or Cable Layer „Nexans Aurora”.

Sources:
Higginson, John, Yacht.Style, „Made in Poland for the World”, 2021

SUPPORT INSTITUTIONS

The Polish Chamber of Marine Industry and Water Sports – POLBOAT

Established in 2006 by a wide range of businesses and people associated with maritime production, POLBOAT acts in the interest of the whole industry and assists State and local administration. It represents businesses that together are responsible for almost 70% of the output in the yacht and boating industry.

POLBOAT's activities include:

- cooperation with the State, regional and local organisations
- organisation of promotional events and seminars
- participation in international associations on behalf of the Polish yacht and boating industry
- publication of an annual catalogue of products and services sold by the Chamber's members



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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Department of Analysis and Market Strategies,
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