



Polish Investment
& Trade Agency
PFR Group

Poland. Business Forward

THE MOBILITY, ELECTROMOBILITY & DRONES SECTOR

Poland. Mobility



Poland is an internationally acclaimed destination for:



Pristine nature

Top 10 country to visit according to Lonely Planet



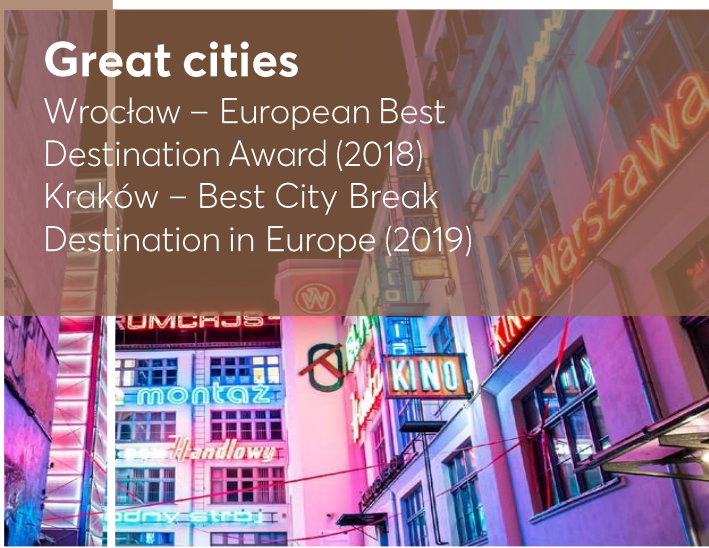
A place where east meets west

Dynamic business hub at the heart of Europe



Vibrant food scene

Warsaw among top 10 vegan-friendly cities in the world



Great cities

Wrocław – European Best Destination Award (2018)
Kraków – Best City Break Destination in Europe (2019)



Attractive place for expats

Young, increasingly international society, with very high level of English proficiency



Rich history

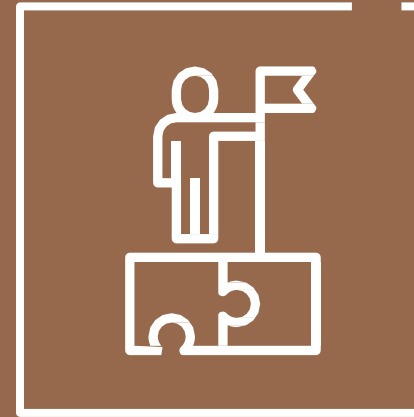
Vast legacy of bravery and resilience



**WHY
POLAND**



**WHAT THE
POLISH MOBILITY US
SECTOR STANDS
FOR?**



**WHAT MAKES
DIFFERENT?**



**DID YOU
KNOW?**



**INSTITUTIONAL
ENVIRONMENT**



**HOW WE CAN
HELP YOU**

Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

Superb market access

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)

Largest share of the EU budget

EUR 160bn for Poland in subsidies and loans until 2027

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

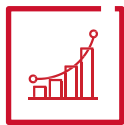


WHAT THE POLISH MOBILITY SECTOR STANDS FOR?



Record-breaking export growth

In the first quarter of 2021, a new record was set in exports of the automotive industry from Poland (EUR 8.55 b., +13.5% YoY).



Steady growth despite pandemic

In the first quarter of 2021, the production sold in the group of motor vehicles, trailers and semi-trailers amounted to EUR 10.5 b. This is 11.2% more than a year ago.



Leader in Li-ion battery manufacturing

thanks to our strategic location, strong pool of skilled employees, good business environment and investor support from the government.



A large pool of qualified employees

The Polish automotive industry employs over 210,000 people. This gives us 3rd place in Europe after Germany and France and makes us a leader among the countries of the V4 group.



Over 17-fold increase in Li-ion battery exports

Li-ion battery exports increased from just over €218 mn in 2017 to over €3.8 b. in 2020.

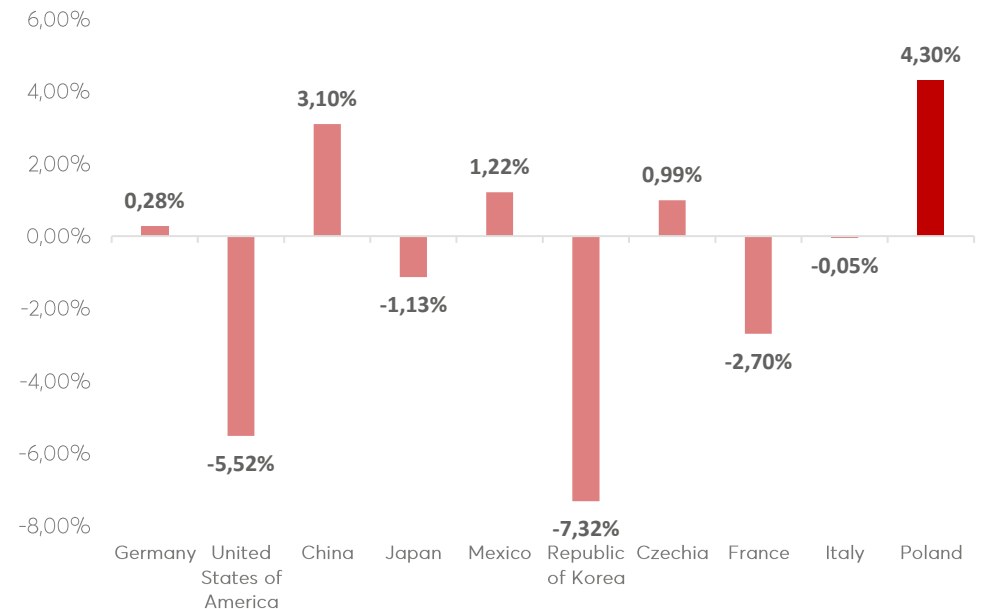


Professionalisation of the drone industry

with high quality courses being offered by 90 training centers located across 44 Polish cities.

CAGR of top 10 largest car parts exporters between 2015-2020

(countries ordered according to the absolute export value for 2020 in this category)



In the years 2015-2020, the Polish sector of automotive parts was the one that grew the fastest in the world

Sources:

Own calculations based on UN COMTRADE and ITC statistics

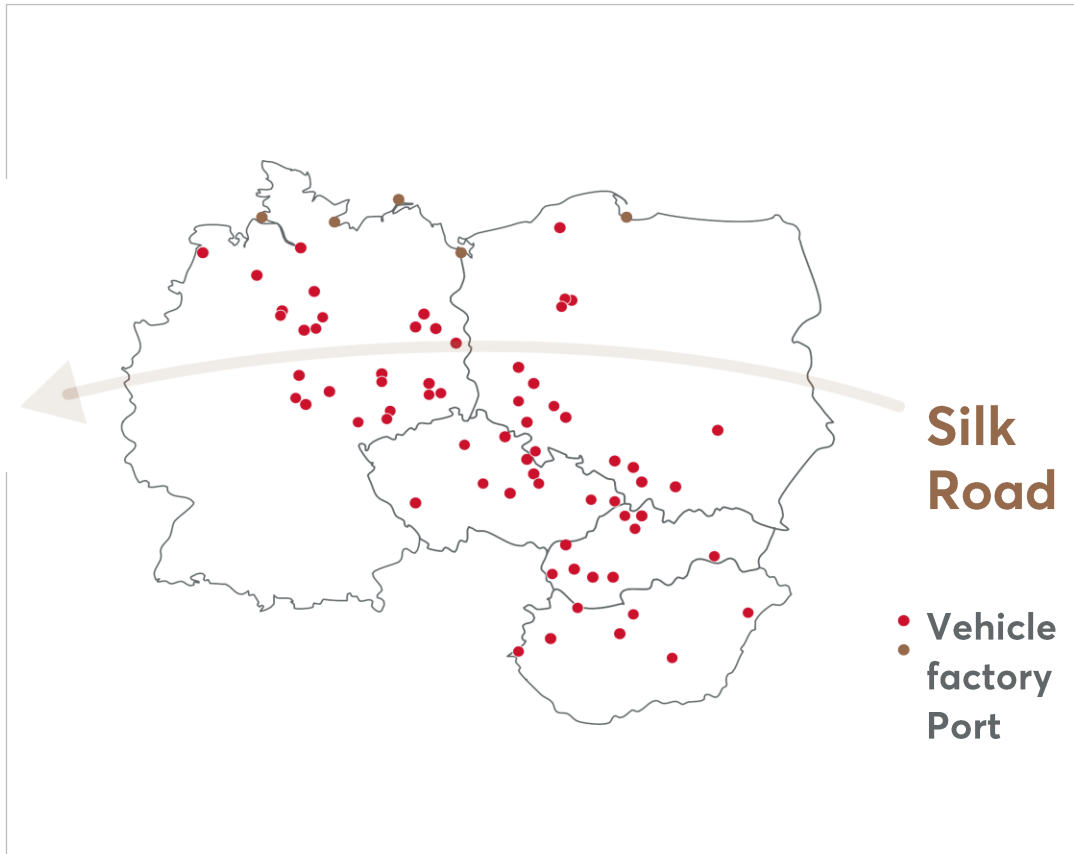
European Automobile Manufacturers Association

AutomotiveSuppliers analysis

Statistics Poland, 2020

Civil Aviation Office, 2019

WHAT MAKES US DIFFERENT?



Strategic location

Poland's unique geographic position allows for a quick and steady supply of automotive parts to major assembly plants and ports within the same day

Entrepôt to Europe

Poland lies on the crossroads of key logistical routes, including the important New Silk Road project



Largest factory of electric batteries in Europe



Competitive source of suppliers across the whole value chain, record value of FDI projects in the automotive industry in recent years



Electromobility is one of the most important elements of the Polish Government's Strategy for Responsible Development, which estimates that by 2025, there will be a million electric vehicles travelling on Polish roads



As the first country in Europe, Poland has an operational infrastructure supporting unmanned aerial vehicle traffic management - the PANSAs UTM system

DID YOU KNOW?



Poland is a member of the European Battery Alliance, which works to build a strong European industry in all areas of the battery value chain (raw materials, materials, cells, batteries, recycling).



In the last decade, the Polish automotive sector has recorded a 100% growth in sold industrial production. The automotive industry is one of the most important industries in Poland, accounting for 15.3% of exports.



Currently, Poland is the largest exporter of car batteries in the EU. In 2020, batteries were the most important item not only in exports to Germany, but also in exports to France, Belgium, Austria or Sweden. Exports of hybrid passenger cars and electric buses are also showing strong increases.



According to the draft of Polish Hydrogen Strategy, a minimum of five Hydrogen Valleys will be established in Poland by 2030. Each of them will become a center for research, development, improvement and education in the implementation of this technology in the economy.

INSTITUTIONAL ENVIRONMENT



Polish Automotive Industry Association Poland's largest employers' organisation in the automotive industry



Polish Automotive Group Key national cluster gathering Polish private suppliers of spare parts and components for the automotive industry



Association of Automotive Parts Distributors and Producers Associates 164 biggest players of the sector; belongs to CLEPA and FIGIEFA



Polish Alternative Fuels Association The largest industry organization creating the e-mobility and hydrogen technology market in Poland and in the CEE region



Polish Chamber of Automotive Industry Since 1994, the company has been gathering representatives of the broadly understood lobby of the automotive sector



Aviation Valley One of the best places in Central Europe for the development and fulfillment of aerospace projects



Polish Air Navigation Services Agency It is running as a state agency which deals with air traffic management

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 the needs of entrepreneurs will ensure that your cooperation will be as fast and smooth as possible



Information packages
(macroeconomic, HR, legal, sectoral data)



Analysis of export potential



Preparing information packages



Verifying business partners



Organising business missions



Preparing lists of possible business partners



Organising B2B meetings



Supporting in contacts with government agencies

Contact us

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