



Polish Investment
& Trade Agency
PFR Group

THE AUTOMOTIVE & ELECTROMOBILITY 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 AUTOMOTIVE
& ELECTROMOBILITY
SECTOR



WHAT MAKES
US DIFFERENT



DID YOU KNOW
THAT



SUPPORT
INSTITUTIONS



HOW WE CAN
HELP YOU

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Department of Analysis and Market Strategies,
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FACTS ABOUT THE POLISH AUTOMOTIVE & ELECTROMOBILITY SECTOR



The automotive industry – the pillar of the Polish economy

The automotive industry accounts for 8% of GDP and for about 13.5% of the value of exports. In 2022, the value of the automotive industry's exports reached a record €39.7 billion, more than 21% more than the previous year.



Global leader in component exports

Poland is among the top 10 exporters of automotive components in the world. The value of exports in this branch in 2022 reached about €14.3 billion (y/y growth of 18.7%).



Li-ion battery production and technology cluster

We are not only the world's leader in the production of li-ion batteries but in September 2022, the European Commission decided on a €70 mln investment from the European Regional Development Fund for research on the recycling of such batteries which is to be carried out in Silesia, southern Poland.



Highly qualified and available employees

Poland is a regional leader in terms of the number and employees with a technical education. The talent pool includes nearly 1.5 mln students, more than 300,000 of whom are engineering majors.



Lower Silesia, in Kobierzyce, is home to Europe's largest lithium-ion battery factory. These components are essential for the production of electric vehicles. The production process is supported by the use of artificial intelligence.

Sources:

<https://mamstartup.pl/przemysl-motoryzacyjny-odpowiada-za-8-pkb-polski-jak-utrzymac-i-polepszy-c-ten-wynik/>

www.strefainwestorow.pl, Eurostat, www.trade.gov.pl, ec.europa.eu

<https://autoelectromoto.pl/wydarzenia/sektor-motoryzacyjny-w-polsce-i-jego-przyszlosc-raport-emis/>

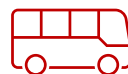
Automotivesuppliers.pl, Automotive industry in Poland 2023-05-18

WHAT MAKES US DIFFERENT

Electromobility is one of the most important elements of the Polish Government's **Strategy for Responsible Development**.



The project assumes that by 2025, there will be a million electric vehicles on Polish roads. Public transport is also going to undergo electrification. Both these projects play a key role in the innovation process of the Polish economy.



Poland is a leader in electric bus production. Between 2017 and 2021, exports from Poland accounted for 31.2% of all e-buses that were exported from the European Union.



Lithium-ion batteries account for more than 2% of all Polish exports.. Every third car battery produced in Europe comes from Poland. Investors are increasingly choosing Poland as a location for their investment. This makes us a strategic player in the field of li-ion battery production.



The Polish government plans to develop hydrogen production from electrolyzers on the scale of 500 MW of installed capacity by 2025 and 3-4 GW by 2030. Production of hydrogen from natural gas is not ruled out, but it is important that it is produced without CO₂ emissions, which will enable a carbon capture and storage (CCS) system. (Polish Hydrogen Strategy up to 2030 with an outlook to 2040. - Draft)

Sources:

Electromobility in Poland 2021 report, The Polish Investment and Trade Agency, Bergman Engineering and the Polish Chamber of Electromobility Development
Polish Automotive And Aviation Parts Industry report – polish-automotiveindustry.com

DID YOU KNOW THAT



In 2022 about 490,000 people were employed in the Polish automotive industry and related industries, which is worth about 7.6% of all people employed in industry. Such a high value puts Poland in third place in the EU in this category.



In terms of electromobility development, Poland has an advantage in copper ore deposits, which is a raw material used in the manufacturing process in electric motors, batteries, inverters, wiring and charging stations, among others. Poland has rich reserves of copper ore, which gives it the 7th position in the world in terms of producers of this raw material. The Polish company KGHM has the largest deposit of copper ore in Europe, with a total of 40 million tons of global copper reserves.



Poland ranks 3rd in Europe and 5th in the world in hydrogen production. At the end of 2021 The Council of Ministers passed a resolution to adopt the "Poland Hydrogen Strategy until 2030 with an Outlook until 2040,,. The document sets directions and goals for the development of hydrogen technology in Poland, giving us a chance to become one of the major players in the coming years in the so-called "green hydrogen" area.

Sources:

Impact of electromobility on economic development in Poland Report 2022, PSPA, PGM

www.rsmpland.pl

www.eu-sysflex.com

The automotive industry in Poland, Polish Automotive Industry Association 2023

SUPPORT INSTITUTIONS

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



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**

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 2022, Poland was ranked highest in the CEE region and eighth in Europe in terms of the number of inward foreign direct investments.

Top-notch infrastructure

5th longest highway network in the EU
Over 5,115 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 second half of 2023

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





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