



Polish Investment  
& Trade Agency  
PIT Group

# THE CONSTRUCTION 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

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



# FACTS ABOUT THE POLISH CONSTRUCTION SECTOR

The construction sector is a crucial component of Poland's GDP, the size of the construction market is about 10% of GDP in 2022. Taking into account related industries such as mining, machinery, and construction financing instruments, its share in GDP is about 13 - 14%.

## The Polish construction sector in numbers:

**1,2 – 1,3 mln**

employees in the sector in 2022, which accounts for 6–8% of all working people in the economy

**6,7%**

growth in construction output in 2022

**CAGR of 3.0% (2023–2027)**

according to the forecast, construction output in Poland is expected to increase to €47,145.0 mln by 2027



About 22% of Poland's total construction output is invested in new infrastructure projects.



Poland is a leader in joinery production.

According to estimates, exports in this industry have increased more than 12 times since 2004.

In 2022, Polish companies accounted for as much as 31% of the export value of all EU countries.

Sources:

<https://www.riskman.pl/branza-budowlana-analiza/>

<https://thinking.com/articles/low-growth-expected-in-polish-construction-sector/#all>

Statistics Poland

Poland Construction Industry Report 2023, Research and Markets

PKO BP, Centre for sectoral analysis

# WHAT MAKES US DIFFERENT

## Poland has the sixth largest construction sector in Europe.

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.

## 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.

## Soundproofing

Poland is the world's largest exporter of doors and PVC windows. These products are Poland's export hit, shipped to more than 100 countries around the world.

This is a dynamically growing category due to the thermal and acoustic insulation that such windows and doors provide.

In 2022, exports of windows and doors from Poland increased by 32% to €3.96bn (compared to €2.98bn in 2021).

Sources:  
Center for Industry Analysis, <https://cab-badania.pl/en/>  
PAIH's own data.

# 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 10,000m<sup>2</sup> 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 Construction 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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