



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



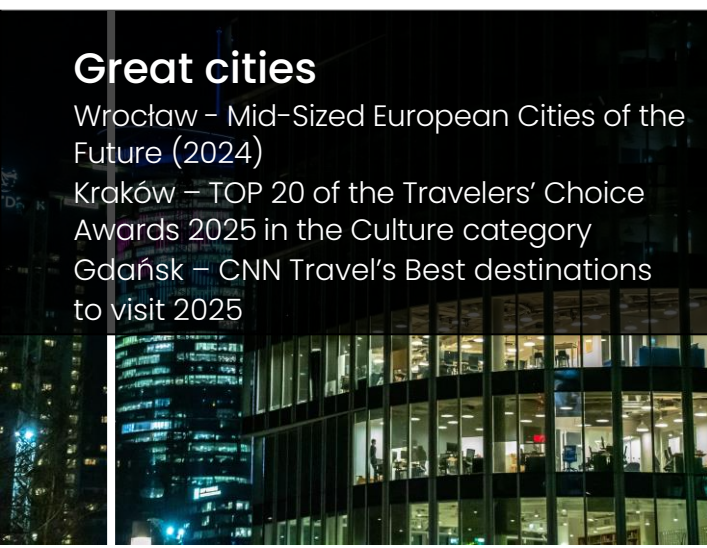
### A place where East meets West

Dynamic business hub at the heart of Europe



### Vibrant food scene

Warsaw among Top 20 Vegan-Friendly Cities in the World (HappyCow 2024)  
Poland ranked 11th in the TasteAtlas awards 24/25 of the 100 best cuisines in the World



### Great cities

Wrocław – Mid-Sized European Cities of the Future (2024)

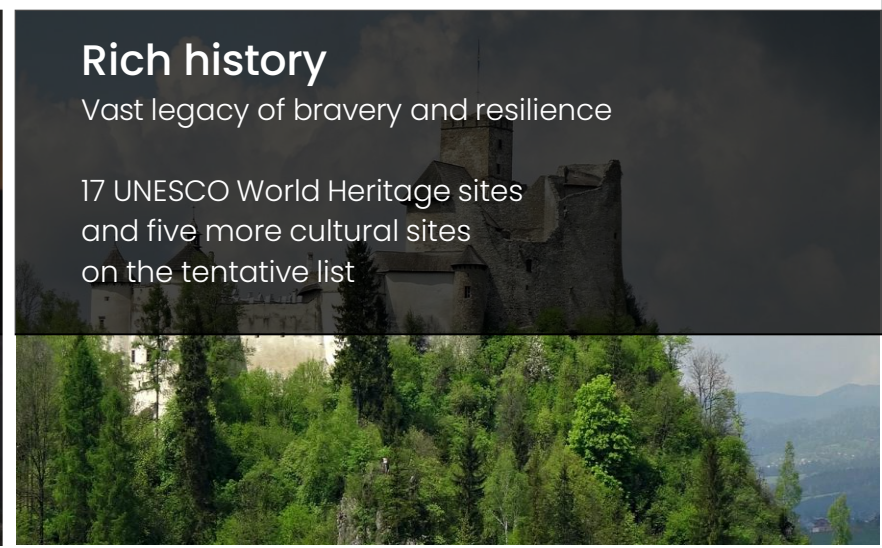
Kraków – TOP 20 of the Travelers' Choice Awards 2025 in the Culture category

Gdańsk – CNN Travel's Best destinations to visit 2025



### Attractive place for expats

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



### Rich history

Vast legacy of bravery and resilience

17 UNESCO World Heritage sites and five more cultural sites on the tentative list





WHY  
POLAND



FACTS ABOUT  
THE POLISH SECURITY  
AND DUAL USE  
GOODS  
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

Nearly 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 2023, Poland was ranked highest in the CEE region and sixth in Europe in terms of the number of inward foreign direct investments.

## Top-notch infrastructure

5th longest highway network in the EU  
Over 5,205 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 2024

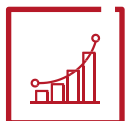
## Competitive, well-developed cities

European Cities of the Future 2024 (fDi Intelligence):  
Warsaw – 4th position overall (ahead of Paris and Munich)  
and 2nd in the business friendliness category among major cities;  
The Silesia region ranked 3rd in the “cost-effectiveness” category;  
Western Pomerania – European Entrepreneurial Region in 2022–2023,



# FACTS ABOUT THE POLISH AUTOMOTIVE & ELECTROMOBILITY SECTOR

## The automotive industry - the pillar of the Polish economy



In 2024, the Polish automotive industry employed approximately 197,000 people, representing approximately 3.1% of all people employed in the business sector in Poland (September 2024). The automotive industry in Poland strives to optimize production processes and achieve the highest possible efficiency.

## Global leader in component exports



Poland is among the top ten exporters of automotive components globally (ranking 7th in 2023). The value of exports in this industry in 2023 reached approximately €18.0 billion (a 3.9% year-on-year increase).

## Raw materials: advantages in electromobility



In terms of electromobility development, Poland has an advantage in copper ore deposits, which are a raw material used in the production of electric motors, batteries, inverters, wiring, and charging stations, among other things. Poland has rich copper ore resources, making it one of the world's largest producers. The copper deposit in Nowa Sól is considered one of the largest and highest-quality deposits in the world.

## Highly qualified and available employees



Poland is a regional leader in the number of workers with technical education. Its talent pool includes over 1.5 million students, including over 230,000 in engineering and technical fields.



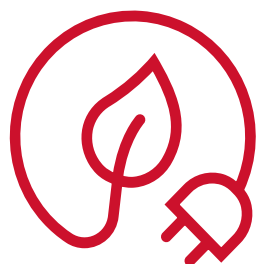
*Poland is one of the world leaders in the production of lithium-ion batteries (as of 2024), ranking first in Europe and second globally. Poland accounts for 6% of global production.*

### Sources:

GUS, „Szkolnictwo wyższe w roku akademickim 2023–2024 – studenci i absolwenci” | <https://forsal.pl/biznes/motoryzacja/artykuly/9536618%2Cpolska-motoryzacja-na-zakrecie.html>  
<https://www.money.pl/gospodarka/polska-branza-w-kryzysie-to-dopiero-poczatek-zwolnien-7094028922493920a.html>  
<https://notesfrompoland.com/2024/10/03/polands-booming-battery-industry-threatened-by-proposed-eu-emission-rules>  
<https://www.pap.pl/mediaroom/1600636%2Crekordowe-polroczne-kghm-takich-wynikow-nie-bylo-od-lat.html>  
[https://www.allianz-trade.com/pl\\_PL/wiadomosci-informacje/dzial-prasowy/wiadomosci/2024-10-23-globalna-sprzedaz-samochodow-hamuje-i-negatywnie-wplywa-na-branze-motoryzacyjna-w-polsce.html](https://www.allianz-trade.com/pl_PL/wiadomosci-informacje/dzial-prasowy/wiadomosci/2024-10-23-globalna-sprzedaz-samochodow-hamuje-i-negatywnie-wplywa-na-branze-motoryzacyjna-w-polsce.html)

# WHAT MAKES US DIFFERENT

The automotive industry is one of the most important sectors in Poland, accounting for approximately 8% of GDP.



## 2025

### Record growth in Polish e-mobility

As of the end of June 2025, a total of 98,813 passenger and commercial all-electric vehicles (BEVs) were registered in Poland. In the first half of this year, their number increased by 18,553, which is 51% more than in the same period in 2024, according to the Electromobility Counter launched by the Polish Automotive Association (PZPM) and the Polish Automotive Association (PSNM).

Sources:

[https://elektromobilni.pl/biuro\\_prasowe/elektromobilnosc-gra-o-wysoka-stawke](https://elektromobilni.pl/biuro_prasowe/elektromobilnosc-gra-o-wysoka-stawke)

<https://www.pzpm.org.pl/pl/Elektromobilnosc/Licznik-Elektromobilnosci/Czerwiec-2025>

Polski Związek Przemysłu Motoryzacyjnego, "Produkcja pojazdów samochodowych i silników do pojazdów mechanicznych w Polsce" KPMG, "Branża motoryzacyjna. Podsumowanie danych za 2024"



Poland is a major producer of trucks. In 2023, production of this type of vehicle reached 308,500 units.



Passenger car production was even higher, reaching 574,600 units in 2023.



The automotive sector's revenues in 2023 amounted to EUR 51.8 billion in the production area and EUR 59.8 billion in the trade and repair area.



The key export destinations for vehicles, trailers and semi-trailers from Poland in 2023 were Germany (EUR 3.53 billion), France (EUR 1.55 billion), Italy (EUR 0.84 billion), Great Britain (EUR 0.83 billion) and Ukraine (EUR 0.67 billion).

# DID YOU KNOW THAT



The first months of 2025 saw a further increase in new car registrations, particularly among individual customers and in the alternative fuel segment. From January to March, 142,000 new passenger cars were registered in Poland, a 2.5% increase compared to the previous year. The number of individual buyers increased by a staggering 11%, and registrations of alternative fuel vehicles increased by nearly 15%.



The growth of the electromobility market is evident in Poland. According to a report by the Polish Alternative Fuels Association (PSPA), by 2025, electric cars could account for 14.5% of new vehicle sales in Poland, translating to approximately 100,000 vehicles annually. The growing popularity of leasing and long-term rentals is making it easier for consumers to transition to electromobility.



The ORLEN Group received over PLN 1.7 billion in non-repayable support from the National Recovery Plan for the development of two key programs: Green H2 and Hydrogen Eagle. The funds will enable the development of hydrogen production technologies, both renewable from electrolysis powered by renewable energy sources (RES) and low-emission from municipal waste. This innovative approach combines environmental protection with industrial efficiency. It is a major step towards a modern, low-emission energy sector.

Sources:

<https://polskamorska.pl/2025/06/30/rusza-produkcja-wodoru-z-oze-i-odpadow-komunalnych-orklen-otrzymal-bezzwrotne-dofinansowanie>

[https://electricmobility.store/elektromobilnosc-w-2025-roku-prognozy-rozwoju-w-polsce-i-europie/?srsltid=AfmBOop00DU7QIMCsk0y3l0f\\_SqcyqVHH-xODcC4y9scdgQyPnZvmbGs](https://electricmobility.store/elektromobilnosc-w-2025-roku-prognozy-rozwoju-w-polsce-i-europie/?srsltid=AfmBOop00DU7QIMCsk0y3l0f_SqcyqVHH-xODcC4y9scdgQyPnZvmbGs)

<https://kpmg.com/pl/pl/home/insights/2025/05/raport-kwartalny-pzpm-i-kpmg-w-polsce-branza-motoryzacyjna-podsumowanie-danych-za-q1-2025.html>

# 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**

# Contact us

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Strategy and Analysis Division  
Promotion Department  
2025



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