



Polish Investment
& Trade Agency
PFR Group

THE RAIL VEHICLES SECTOR

Poland. Business Forward



Poland is an internationally acclaimed destination for:



Pristine nature

A top 10 country to visit according to Lonely Planet



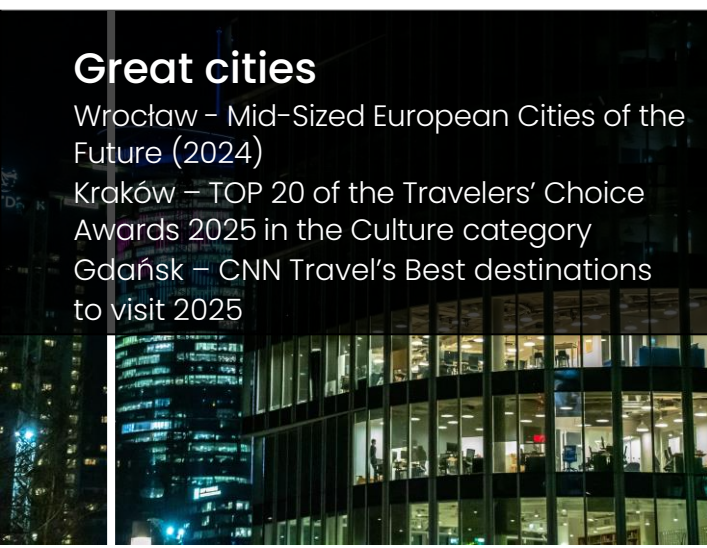
A place where East meets West

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)

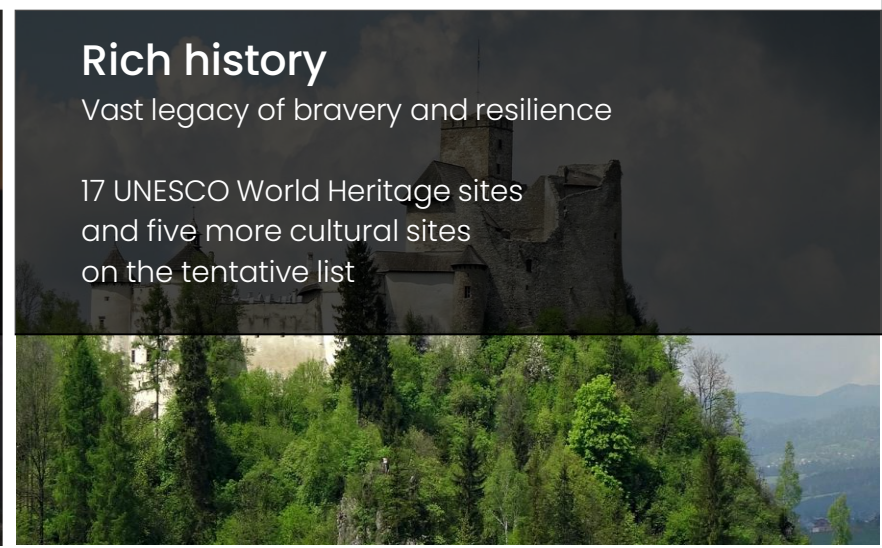
Kraków – TOP 20 of the Travelers' Choice Awards 2025 in the Culture category

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 RAIL VEHICLES
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

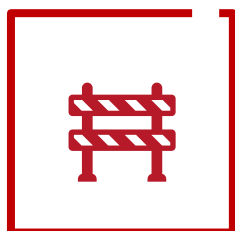
Moody's: A2 , S&P: A-, Fitch: A-, as of the second half of 2024

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 RAIL VEHICLES SECTOR



Extensive railway network

19,539 km of railway lines, of which 62.5% are electrified. (2023).



Freight railway

Number of freight wagons on the railway market (2024): 83 761



Orders for new passenger carriages:

The value of orders for new passenger cars placed in 2024 by the largest Polish railway company *PKP Intercity* amounted to 4.2 bn PLN.

Value of Polish export:

\$971.85 m. (2014)



\$1750.61 m. (2024)

CAGR (2014 – 2024):

+6.1% annually



Sources:

Railway lines statistics: Eurostat

Export – industry defined by CN code 86 excluding 8608 and 8609

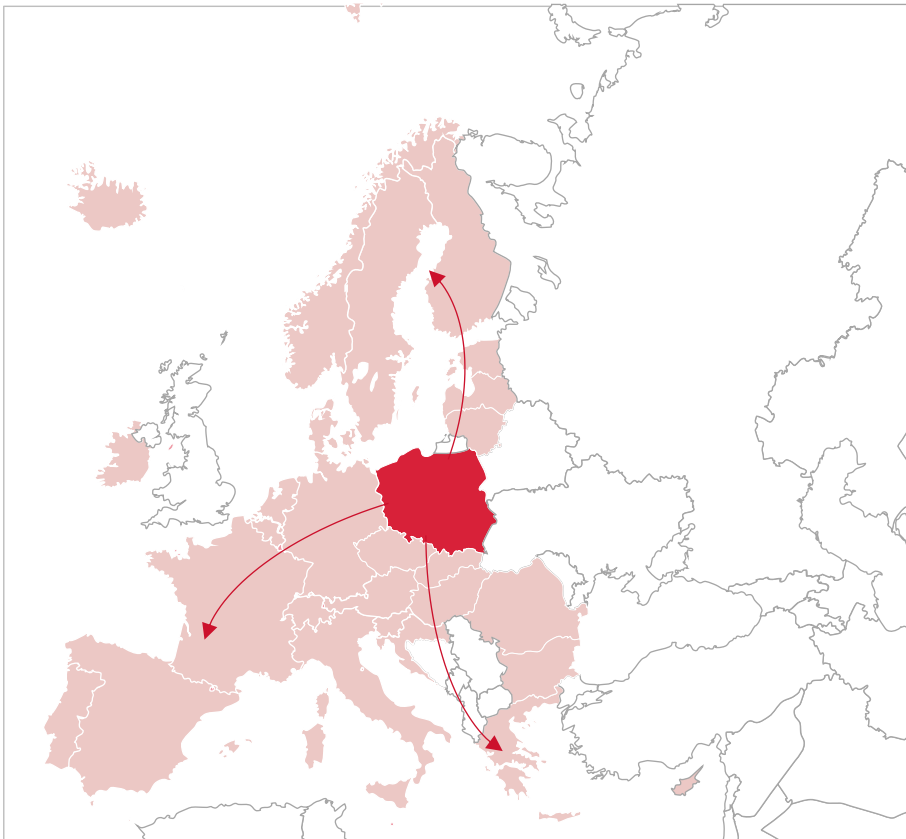
<https://www.bankier.pl/wiadomosc/PKP-Intercity-podpisalo-kontrakt-wartosci-ponad-4-2-mld-zl-na-zakup-300-nowych-wagonow-8783934.html>

Growth icon made by iconixar from www.flaticon.com.

WHAT MAKES US DIFFERENT

Central localization

Poland is in the heart of Europe
and it's a part of European Economic Area



Competitive labour market



Attractive labor market - according to Eurostat data, Poland continues to be highly competitive in terms of labor costs (average €14.5/hour in 2023). At the same time, Poland is characterized by highly qualified employees and a broad human resources base.

High development potential in a long term

The rail network development program in Poland announces connecting key Polish cities with rail connections that take less than 100 minutes. A key railway line will be the so-called "Y Line", the high-speed line connecting Warsaw with Łódź, Poznań, and Wrocław. Trains will travel at speeds of 300-320 km/h. Completion of the first section is scheduled for 2032.

Sources:

<https://www.money.pl/gospodarka/rzad-porzucza-szprychy-i-obiecuje-polske-w-100-minut-nie-przedstawiono-szczegolow-7043369936554848a.html>

<https://www.cpk.pl/pl/aktualnosci-2/projekt-cpk-nie-zwalnia-tempa-i-bedzie-gotowy-juz-w-2032-roku>

Eurostat data via https://www.destatis.de/Europa/EN/Topic/Population-Labour-Social-Issues/Labour-market/EU_LabourCostPerHourWorked.html

DID YOU KNOW THAT



Development of railways in Poland

The Central Communication Port (CPK) under construction in Poland is not only an airport but also a railway component. Following the enormous success of the expressway and highway construction program, Poland is beginning to develop an extensive railway network. High-speed rail, capable of speeds up to 300-320 km/h, is planned. The development of railways in Poland presents a significant opportunity for manufacturers of rolling stock and rail infrastructure.



Poland – place where rolling stock and trams are produced

Rail vehicle production is well-developed in Poland. Three major rolling stock manufacturers operate in the market: PESA Bydgoszcz, Newag, and H. Cegielski FPS. Furthermore, foreign manufacturers, such as Alstom, Stadler, and Siemens, also have a presence in Poland. Trams are also manufactured by companies such as PESA Bydgoszcz, Solaris, Modertrans, and Stadler.



Hydrogen trains are the future of rail transport

Hydrogen trains are the future of rail transport – Polish rolling stock manufacturer PESA Bydgoszcz is developing the hydrogen-powered vehicle segment. Its first design of this type, the SM42-6Dn shunting locomotive, is gaining a growing number of customers. The first customer was the Polish oil company PKN Orlen, seeking new, eco-friendly solutions. In mid-2024, PESA and the Swedish companies Väte Rail and Hankavik signed a letter of intent regarding the commissioning of hydrogen locomotives in Sweden (at the turn of 2027/28). Swedes praised the operating parameters, and Swedish drivers highly rated the comfortable working conditions.

Sources:

<https://www.money.pl/gospodarka/rzad-porzuca-szprychy-i-obiecuje-polske-w-100-minut-nie-przedstawiono-szczegolow-7043369936554848a.html>

<https://www.rynek-kolejowy.pl/wiadomosci/raport-taborowy-patl-kolejny-rekord-121178.html>

<https://www.rynek-kolejowy.pl/wiadomosci/wodorowe-lokomotywy-pesy-wjada-do-szwecji-120687.html>

SUPPORT INSTITUTIONS

Polish Chamber of Manufacturers of Equipment and Services for Railways

The Polish Chamber of Manufacturers of Equipment and Services for Railways (izbakolei.pl) is a non-profit institution that brings together economic entities related to the railway market.

The primary goal of the Chamber is to represent and protect the interests of its members, as well as to inspire and support the development of rail transport in Poland. The seat of the Chamber is Bydgoszcz. The activity is based on organizing thematic conferences, seminars, economic missions, trainings, workshops and exhibition activities at trade fairs, which give great opportunities to present themselves to a large number of recipients operating not only in the railway industry.

izbakolei.pl



Office of Rail Transport

The Office of Rail Transport (Urząd Transportu Kolejowego) is a Polish authority regulating rail traffic in Poland and transport services provided by rail carriers. It regularly publishes reports on the demand for railway services and the characteristics of the railway market in Poland.

utk.gov.pl



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**

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2025



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