



Polish Investment
& Trade Agency
PFR 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 2021, Poland was ranked highest in the CEE region and ninth in Europe in terms of the number of inward foreign direct investments.

Top-notch infrastructure

5th longest highway network in the EU
Over 4,880 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 first half of 2022

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 employed



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

6,7%

growth in construction output in 2022



Poland is a leader in joinery production.

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

Polish exports in this sector accounted for as much as 31% of all EU countries total export value 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

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 as it is technically advanced, has many talented specialists and offer innovative solutions as well as great value for money.

This facts have been recognised by a number of high-profile foreign investors that have chosen Poland as a place to build their factories where they will produce their products for the construction industry.

But Polish companies are eager to expand their businesses abroad. This is clearly shown in the form of both greenfield and M&A investments by such companies as Oknoplast, the Pietrucha group and Selena in such countries as Germany, Ukraine, Spain, the Philippines and Romania.

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

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).

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 10,000m² 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 Constuction 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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