



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 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

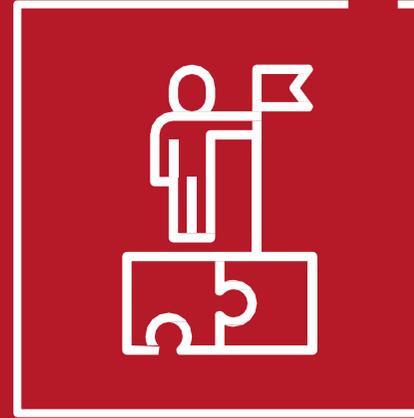




WHY
POLAND



FACTS ABOUT
THE 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

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

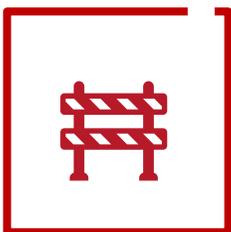
Moody's: A2 , S&P: A-, Fitch: A-, as of the first half of 2022

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

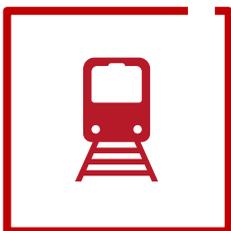


FACTS ABOUT THE POLISH RAIL VEHICLES SECTOR



An extensive railway network

19,326 km of railway lines, of which 62.9% are electrified (2021). Next 4,500 km planned before 2050.



Railway production

1,685 railway wagons manufactured in Poland in 2022.



Number of companies:

Over 10 companies manufacturing railway stock and 4 tramways producers.

Value of Polish export:

\$687.61 m. (2012)



\$1,554.17 m. (2022)

CAGR (2012 - 2022):

+8.5% annually



Sources:

Office of Rail Transport data

Statista, „Production of rail wagons in Poland from 2018 to 2022”

Statistics Poland, Foreign Trade Database

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

Graff M, „Rolling Stock Manufacturers and New Rail Vehicles in Poland”, Problemy kolejnictwa – Railway Report, No 192 (2021)

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

WHAT MAKES US DIFFERENT

Central localization

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



Sources:
Statistics Poland
CPK website
Eurostat data, „Hourly labour costs, 2022”.

Competitive labour market



According to Eurostat data, Poland still has an advantage in terms of labour costs (on average EUR 12.5/h in 2022). At the same time, Poland is known for its highly qualified employees and accessibility of such.

High development potential in a long term

The planned extensive development program for Poland's railway network plans the connection of almost all its cities with a travel time of less than 3 hours. The planned construction of completely new railway lines means there will be a large potential demand for rolling stock up to 2050 and possibly longer.

DID YOU KNOW THAT



Development of railways in Poland

Poland's Central Communication Port (CPK airport) under construction will not only be an airport, but major transport hub with railway connections. After the major success of the expressway and motorway construction program, Poland is starting to develop its railway network. 2,000 km of new railway lines are planned to build by 2034 and 4,500 km by 2050 - including high-speed rail. The development of railways in Poland is a great opportunity for manufacturers of rolling stock.



Poland – a place where rolling stock and trams are produced

In Poland, the production of rail vehicles is well developed. There are three main manufacturers of rolling stock: PESA Bydgoszcz, Newag and H. Cegielski FPS. What's more, the following foreign investors have invested in Poland: Alstom, Stadler, Siemens). The following manufacturers are also produce trams in Poland: PESA Bydgoszcz, Solaris, Modetrans and H. Cegielski FPS.



Hydrogen trains are the future of rail transport

PKN Orlen has signed an agreement on strategic cooperation with the Polish rolling stock manufacturer PESA Bydgoszcz. Orlen will provide hydrogen fuel and refueling infrastructure for hydrogen-powered vehicles produced by PESA, the first of which is to be put into service next year. Hydrogen trains will complement trains on non-electrified routes.

The first PESA hydrogen locomotive was certificated for operation in June 2023.

Sources:
biznes.pap.pl
CPK website
Graff M, "Rolling Stock Manufacturers and New Rail Vehicles in Poland", Problemy kolejnictwa - Railway Report, No 192 (2021)

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.



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.



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

The Polish Investment & Trade Agency

Krucza St. 50
00-025 Warsaw

NIP: 526-030-01-67
KRS: 0000109815

Contact FORM:



Service PAIH24: +48 22 334 99 55
Contact PAIH24: paih24@paih.gov.pl

Social media:



Polish Investment
& Trade Agency
PFR Group

Department of Analysis and Market Strategies,
June, 2023



Polish Investment
& Trade Agency
PFR Group

THE RAIL VEHICLES SECTOR

Poland. Business Forward