

POLISH
CONSTRUCTION
PROMOTION PROGRAM





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ABOUT THE POLISH
CONSTRUCTION
PROMOTION PROGRAM

The activities carried out under the program are aimed at promoting the industry abroad and primarily include the organization of information and promotion stands at selected industry fairs and conferences. As part of the program, stands will be organized in Russia, the UAE, Ukraine, Germany and France.

The organization of national stands at some of the largest international fair events in the industry will contribute to increasing the recognition of Polish products around the world. At the stands, a zone for the organization of B2B meetings will be set apart, which will increase the possibility of establishing new contacts with potential contractors.

Micro, small- and medium-sized entrepreneurs may receive partial funding for costs related to participation in the program under sub-measure 3.3.3 “Support for SMEs in promoting product brands – Go to Brand” - the Smart Growth Operational Programme. Support for entrepreneurs is provided by the Polish Agency for Enterprise Development.

The program is implemented under sub-measure 3.3.2 “Promotion of the economy based on Polish product brands – Polish Economy Brand” - the Smart Growth Operational Programme.

The Construction and Finishing of Buildings promotion program was prepared by the Ministry of Economic Development, Labour and Technology of the Republic of Poland.

The Polish construction sector in numbers

The value of production of the construction sector in Poland

2018 → 45.7 bn EUR

2019 → 49.7 bn EUR



Construction industry growth in 2019

332 m EUR

net result generated by Polish construction companies in the first half of 2019, an almost twofold increase compared to 2018 - from EUR 177 m to approx. EUR 332 m

over 7 bn EUR

revenue of the 15 largest construction entities on the Polish market in 2019

- ◆ Until mid-2019, high levels of capacity utilization, initiated a year earlier, continued - 86.8% in July 2019. Construction companies responded by increasing the level of gross investment.
- ◆ The products and services of the construction sector have a significant impact on other sectors of the economy, especially by providing infrastructure, e.g. in the form of production halls or warehouses, supporting the economic development of the entire country.

Polish construction
and assembly
production

Large increase in construction and assembly production in Poland

January - September 2019

16.17 bn EUR

value of construction
and assembly production
in Poland in the first
three quarters of 2019

9%

increase in construction
and assembly production
in Poland in the first
three quarters of 2019
compared to the same
period in 2018

2019

4.4 bn EUR

y/y increase, mainly due
to the demand
for construction services
in the infrastructure
sector

15.5%

increase in construction and assembly
production measured in constant
prices in September 2020 compared
to August 2020

The following factors contributed
to the achievement of a large increase
in construction and assembly production:

- ◆ increasing the number of large
infrastructure projects, mainly in road
and railway construction
- ◆ good situation on the commercial projects
market, including the housing market



The Polish construction industry in comparison with Europe

Poland at the head of Central Europe

- ◆ Poland ranks first in the ranking of 5 Central European countries in terms of the number of dwellings completed in 2019. Slovakia is in second place, followed by Romania and the Czech Republic with similar results, while Hungary ends the list.
- ◆ In terms of the value of construction markets in Central Europe (expressed in EUR billion) and construction production per capita (in EUR per capita), our country was ranked 1st and 2nd in 2019:

Country	Value of construction market in 2019 (EUR billion)	Construction and assembly production per capita in 2019 (EUR)
Poland	56.1	1 461
Romania	23.4	1 211
Czech	19.9	1 869
Hungary	9.7	989
Slovakia	5.5	1 002

Poland ranks second, next to Hungary, in terms of cement consumption with a value of over 500 kg per capita per year (both in 2019 and 2018) .

The potential of the construction industry in Poland – employment data

A gradual increase in employment was observed in 2019-2020 in the Polish construction industry:

◆ In 2019, the average employment in the construction sector increased by 3.9%, reaching 425,700 people.

◆ The interest of employers in the construction sector, which translates into an increase in the employment of qualified employees, results from the growing number of investments.



◆ In a survey of the Polish construction sector conducted in 2019, 39% of companies replied that they are planning to hire new employees.

◆ The upward trend continued in the first half of 2020. The average employment was then 428,000 people - 0.5% more compared to the end of 2019.

The Polish construction sector in the time of the pandemic

- ◆ Construction is one of the few sectors that shows a relatively high resistance to the difficulties in the functioning of the economy in connection with the COVID-19 pandemic.
- ◆ In mid-2020, the financial condition of the Polish construction sector was deemed relatively stable due to the sufficient cash reserves of most large construction companies.

Additional aspects of the functioning of the Polish construction industry during the pandemic:

- ◆ stable staffing situation within contracting companies
- ◆ relatively good liquidity situation in the road and rail infrastructure segment
- ◆ expected consistency of outlays on public investments in the road, rail, energy, and hydro technical sectors



Program for national road construction in 2020

The implementation status of the National Road Construction Program at the end of August 2020 (bn EUR)

Value of projects in progress → **13.6**

Value of finished projects → **8.7**

National Railway Program in 2020

Previous and forecast investment outlays for the National Railway Program as of July 2020 (bn EUR)

2018 → **1.7**

2019 → **2.1**

2020 → **3.14**

2021 → **3.16**

+ KPK 2.0 (railway line development program for 2021-2027)



Industry assessment from the perspective of Polish construction entrepreneurs

The potential and prospects of the Polish construction industry are illustrated by both the recorded figures and the voices of the market participants themselves. Entities operating in the construction sector in Poland, even in the face of challenges or periodic operational difficulties, recorded an increase in revenues and conduct a record number of investments.

- ◆ From 2018 onward, construction companies increased investment outlays in order to expand their execution potential. As a result, in 2019, most of the surveyed entrepreneurs from the construction sector (61%) assessed their machinery as sufficient to satisfy the current order portfolio.
- ◆ According to surveyed companies from the industry, the residential segment was the most promising of the construction market (39% of responses), followed by the railway segment (35%).

These answers were given in a survey conducted from July to September 2019. Construction companies in the Polish Association of Construction Employers, the Polish Chamber of Commerce of Road Construction Industry, the Polish Electric Power Industry Association and the Polish Cluster of Construction Exporters took part.



Construction services in the road and rail segment

The demand in the road and rail construction segment is created mainly by government administration and local government units. There was a dynamic increase in demand for construction services after 2016.

In the near future, it is expected that the demand for tasks in the field of railways and roads commissioned by entities other than the local government will be sustained. The main public investors in Poland are GDDKiA and PKP PLK:

- ◆ the General Directorate for National Roads and Motorways – 43% of GDDKiA's long-term plans are still in the preparation or tender stage
- ◆ PKP Polish Railway Lines S.A. – 25% of PKP's long-term plans are still at the preparation or tender stage

16.8 bn EUR

the total value of investments in the construction industry in the railway segment planned under the National Railway Program

31.4 bn EUR

planned expenses in the construction industry in the road segment under the National Road Construction Program for 2014-2023 (with a 2025 perspective)



Exports of the Polish construction industry

Data on exports in the Polish construction industry based on a survey conducted from July to September 2019



27% Number of construction companies that export products or services

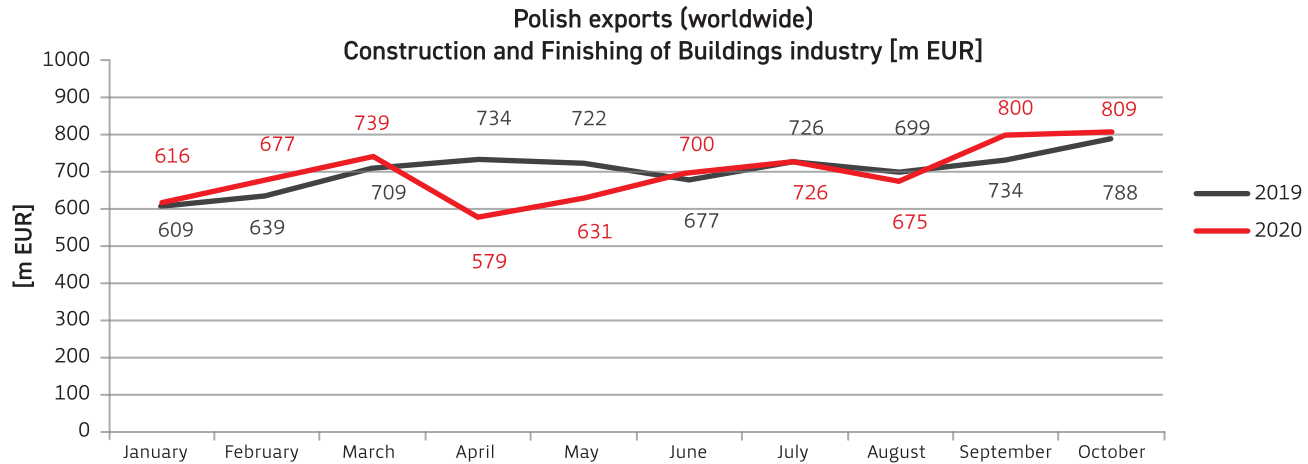
37% The percentage of large companies in the construction industry that conduct export activities

42% Number of entrepreneurs from the residential and cubature sector that show a presence on international markets

18% Average estimated share of export sales in total sales in 2018 among all exporting companies included in the survey

20% Number of entrepreneurs from the construction sector who are thinking about foreign expansion

Facts about exports of the Polish construction sector



The largest construction companies conduct export activities mainly in Eastern Europe, Scandinavia and Germany.



Germany is the recipient of nearly half of the exported production of the Polish construction sector.



Despite a temporary decline due to the COVID-19 pandemic in 2020, the exports in the Polish construction sector remained at a similar or higher level compared to 2019.

72.1 m EUR

average revenue from abroad for the largest companies in 2019 in nominal terms

Value of construction and assembly production carried out abroad (bn EUR) concerns the production carried out with their own resources by construction and non-construction enterprises with more than 9 people

2018 → 1.4

2019 → 1.5

Records in Polish housing construction

Number of completed dwellings in Poland

2018	→	185,063
January - September 2019	→	145,554 increase of 12.2% y/y
September 2019	→	over 17,000 increase of 27.4% y/y

*The number
of buildings constructed
on the Polish housing
market increases
every year*

222 thousand

number of dwellings completed
in January - December 2020,
which means a 7% increase
compared to 2019

19.6 m m2

usable floor space of dwellings
completed in 2020 - 6.9% more
than in 2019

223.8 thousand

number of dwellings whose
construction started in 2020

827.4 thousand

number of dwellings under construction
at the end of December 2020

Polish market of paints, adhesives and sealants

The paint industry in Poland is divided into several main market segments, i.e.:

- ◆ decorative paints – comprise over 40% of the industry
- ◆ industrial paints - account for nearly 20% of the paints market
- ◆ car paints – about 17% of the paints market
- ◆ printing inks - account for approximately 15% of the industry

Polish market of paints, adhesives and construction sealants

Sales value

886.5 m EUR

Dry products in tones

1 m tones

Liquid products in liters

300 m liters

There are several segments on the Polish market of adhesives and sealants, including:

- ◆ construction, civil and water engineering, which cover almost 30% of the industry
- ◆ assembly operations with a large share of the foam and silicones segment, accounting for approximately 18% of the market

Value structure of the market for construction paints, adhesives and sealants in Poland

Paints → 60%

Adhesives → 30%

Sealants → 10%

Poland is more and more often chosen as an attractive production base for Europe due to its advantages, which include:

- ◆ economic development
- ◆ the location of the country
- ◆ access to qualified staff

Positive situation of the paint industry in Poland

The results of the Polish paint industry in the time of the pandemic

Record growth in the decorative paints sector

- ◆ Positive results were recorded in the Polish decorative paint industry in the first half of 2020.
- ◆ Record-breaking growth for over 5 years shows that the Polish paint industry managed the COVID-19 pandemic well.
- ◆ More traffic in the online sales channel during the pandemic period.

Increased sales of products for the care and protection of wood

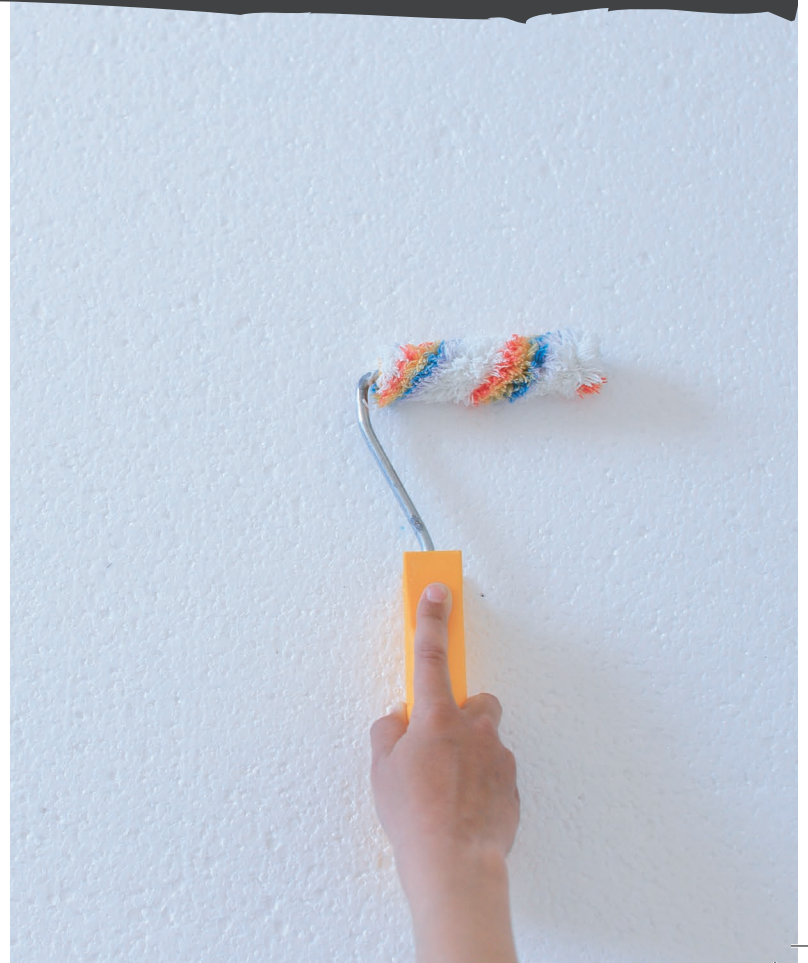
In the category of wood care and protection products a 19% increase was recorded in the first half of 2020.

2019 is a year of increases in the decorative paint industry

The Polish decorative paint industry achieved good results for another year in a row.

494.2 m EUR

sales of decorative paints in 2019
- an increase of 4.3% y/y



Selected sectors of the construction market in Poland

1.07 bn EUR

total sold production in construction in 2019

Manufactured production of industrial products in 2019:

- ◆ cement -18,946,000 tones
- ◆ total brick -667,651,000 pieces
- ◆ wooden windows - 3,263,000 pieces
- ◆ wooden doors - 10,428,000 pieces
- ◆ plastic products for construction -990,198 tones
- ◆ plastic windows for construction - 8,645,000 pieces
- ◆ plastic doors for construction - 386,000 pieces



The production of plastic windows had the largest share in 2019 in the group of plastic products for construction - both in terms of the amount of manufactured production and the value of sold production:

- ◆ it accounted for 46.6% of the total production of all reported products for the construction industry
- ◆ the share of the value of sold production of plastic windows was 52.7%

6.2 bn EUR

sold production of wooden and cork products, excluding furniture, straw products and plaiting materials in 2019

In the group of wooden products for the construction industry, the production of chipboards has been steadily increasing. The production generated in 2019 increased by:

- ◆ 7.9% compared to 2018
- ◆ 26.2% compared to 2015

The Polish concrete products sector

- ◆ The concrete products sector, which has been increasing its share in the construction industry, includes production activities in reinforced concrete, and prestressed, spun and vibro-pressed concrete elements.
- ◆ By 2022, the value of the concrete products market in Poland is to reach EUR 2.2 billion.

Main segments of the concrete products market:

- ◆ paving stone segment with paving slabs, curbs and edging(in terms of quantity)
- ◆ heavy prefabrication segment (in terms of value)
- ◆ aerated concrete products segment (in terms of value).

These three specializations account for over 75% of the market value.

The rest of the market consists of such product groups as:

- ◆ concrete blocks
- ◆ pipes
- ◆ wells
- ◆ culverts and other elements of the sewage system elements
- ◆ roofing and facade materials
- ◆ fences
- ◆ street furniture
- ◆ decorative concrete



Polish construction - the industry of opportunities

The Polish construction sector has a solidly developed foundation, which translates into benefits for business partners.

The broad framework of the Polish industry is created by the quality and the participation of competent specialists, which include:

- ◆ representatives of construction companies operating in individual market segments,
- ◆ manufacturers of paints, varnishes and adhesives, wooden products or wallpapers,
- ◆ manufacturers of rubber and plastic products,
- ◆ manufacturers of electrical equipment and machinery for construction.

The strong results achieved by construction companies, as well as the specializations and potential of the construction industry in Poland, encourage cooperation, both on the domestic and foreign markets.



Choose a trusted construction brand from Poland. Build a solid business in cooperation with Polish entrepreneurs.



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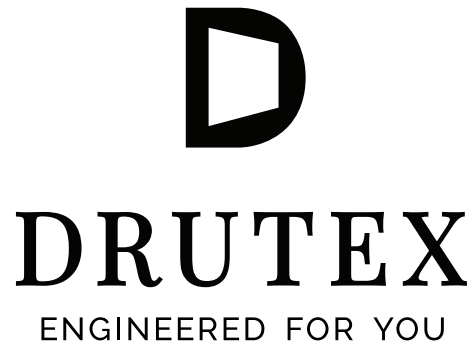
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