

POLISH INFORMATION AND FOREIGN INVESTMENT AGENCY

Investment climate in Poland

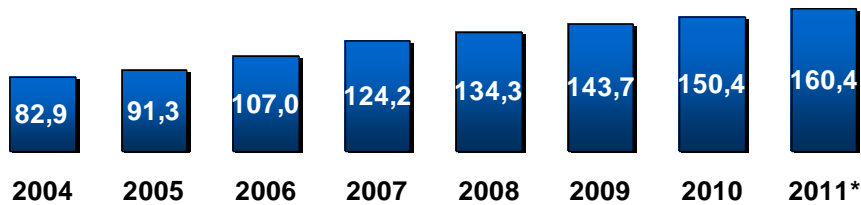
Adam Małecki
Deputy Director
Foreign Investment Department

Warsaw, October 29, 2012

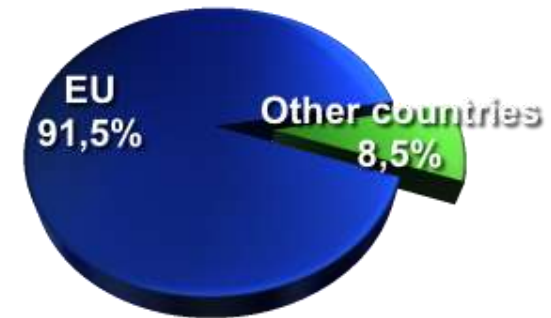


FDI stock in Poland

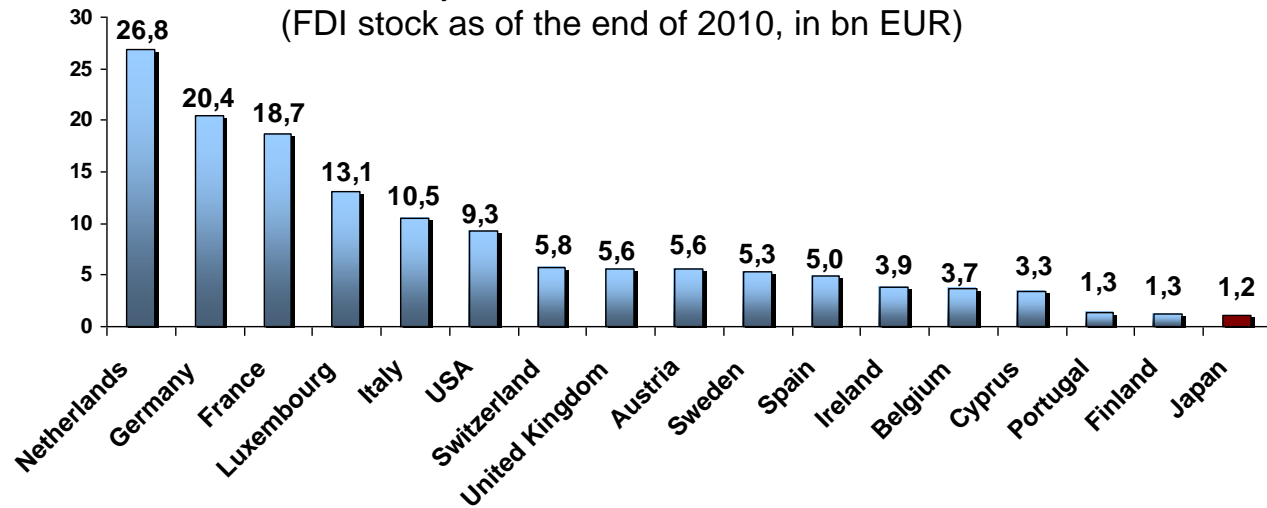
Cumulative value of FDI (in EUR bn)



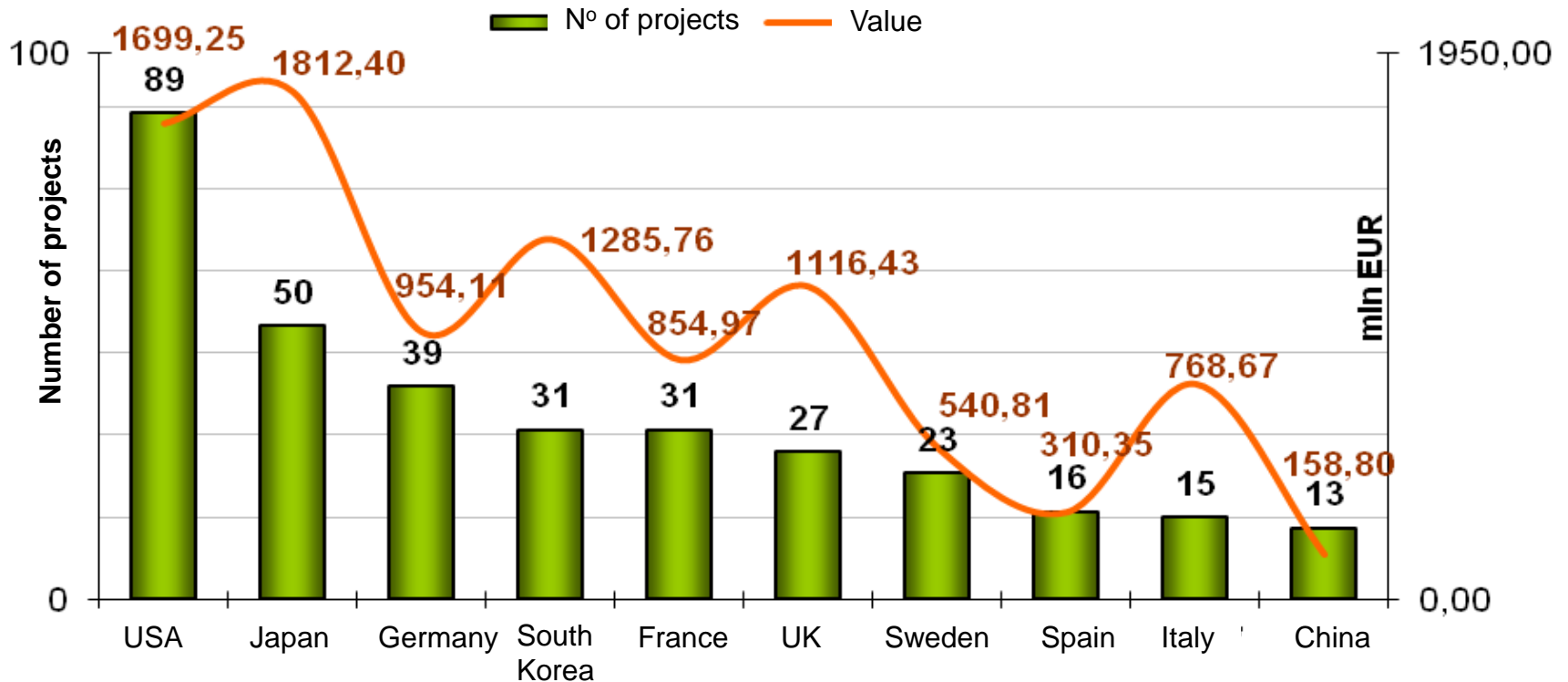
Geographical sources of FDI



Major FDI investors in Poland
(FDI stock as of the end of 2010, in bn EUR)

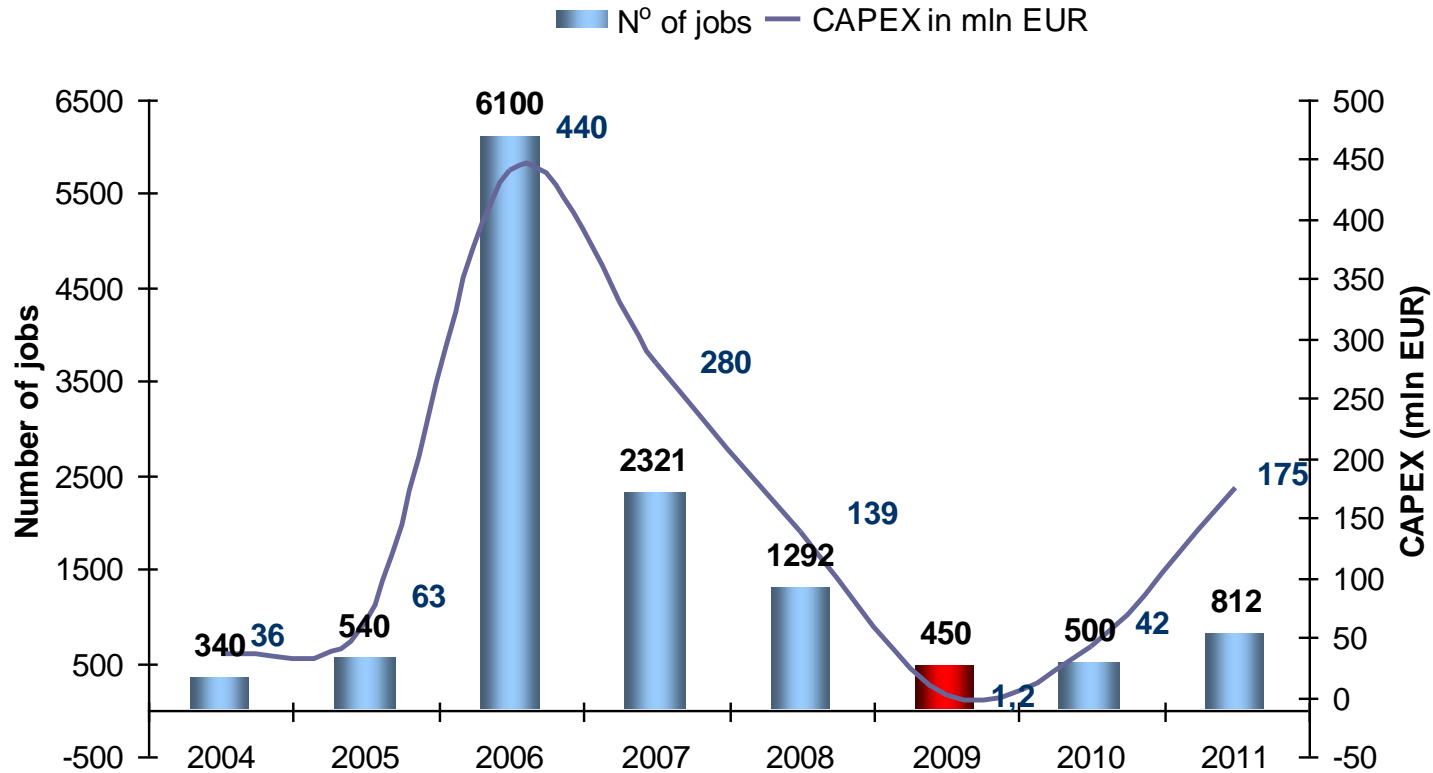


Projects completed by PAIIZ between 2002 and 2012



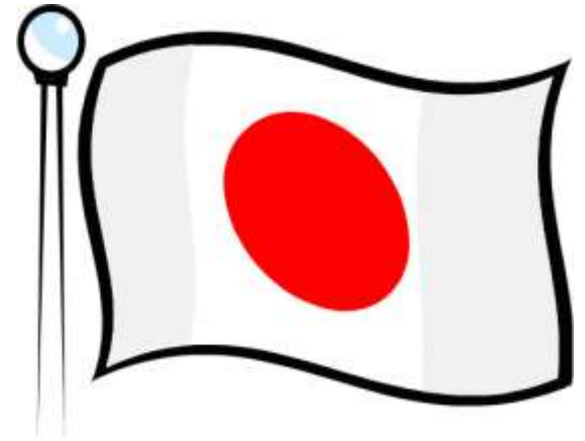
- Japanese investment projects are **highly capital intensive**
- **Automotive and electronics** are predominant sectors of interest

Japanese projects completed by PAIiZ between 2002 and 2012



Japanese projects completed by PAIiZ

- Total value of Japanese projects (**1812 mln EUR**) constitutes over **16%** of value of all the projects completed by PAIiZ between 2002 and 2012, ranking **1st** (before USA – 1699 mln EUR)
- The number of Japanese investments (**50 projects**) ranks **2nd** (after USA – 89 projects) and constitutes more than **10%** of all PAIiZ projects
- Only last year, **5** Japanese projects were completed with value amounting to **176 mln EUR** and creating **815 new jobs**



Japanese Manufacturing Hubs in Poland

AUTOMOTIVE

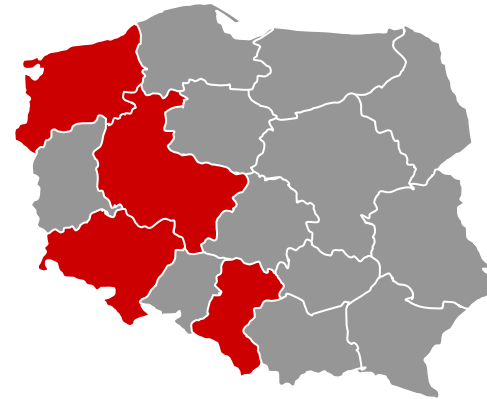
Gliwice, Tychy

Wałbrzych, Legnica, Wrocław

Poznań / Stargard Szcz.



Other Manufacturers



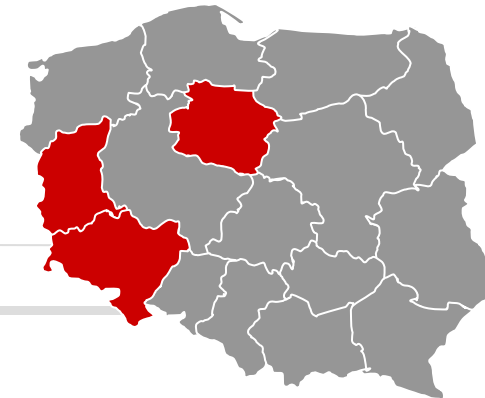
ELECTRONICS

Toruń

Wrocław



Other Manufacturers



Other sectors

Kutno

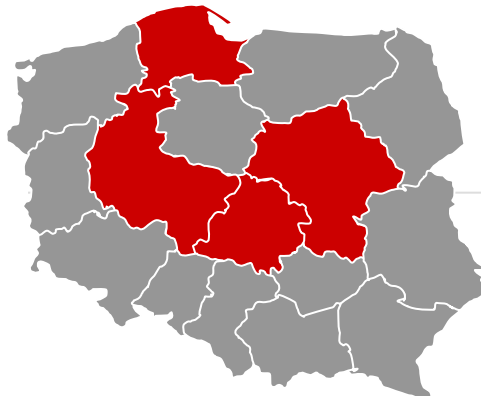
Grodzisk Maz.

Gniezno

Gdańsk

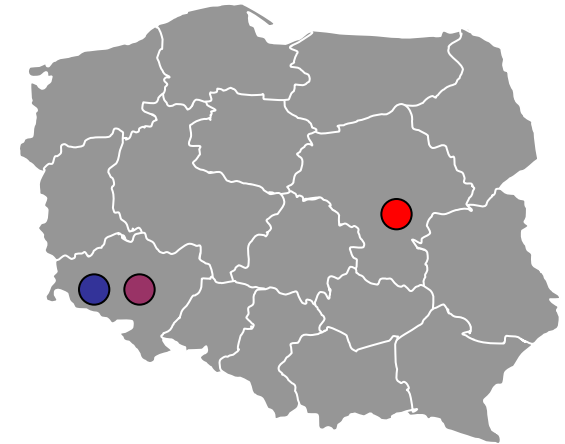


Other Manufacturers



Case study – Toyota Boshoku in Poland

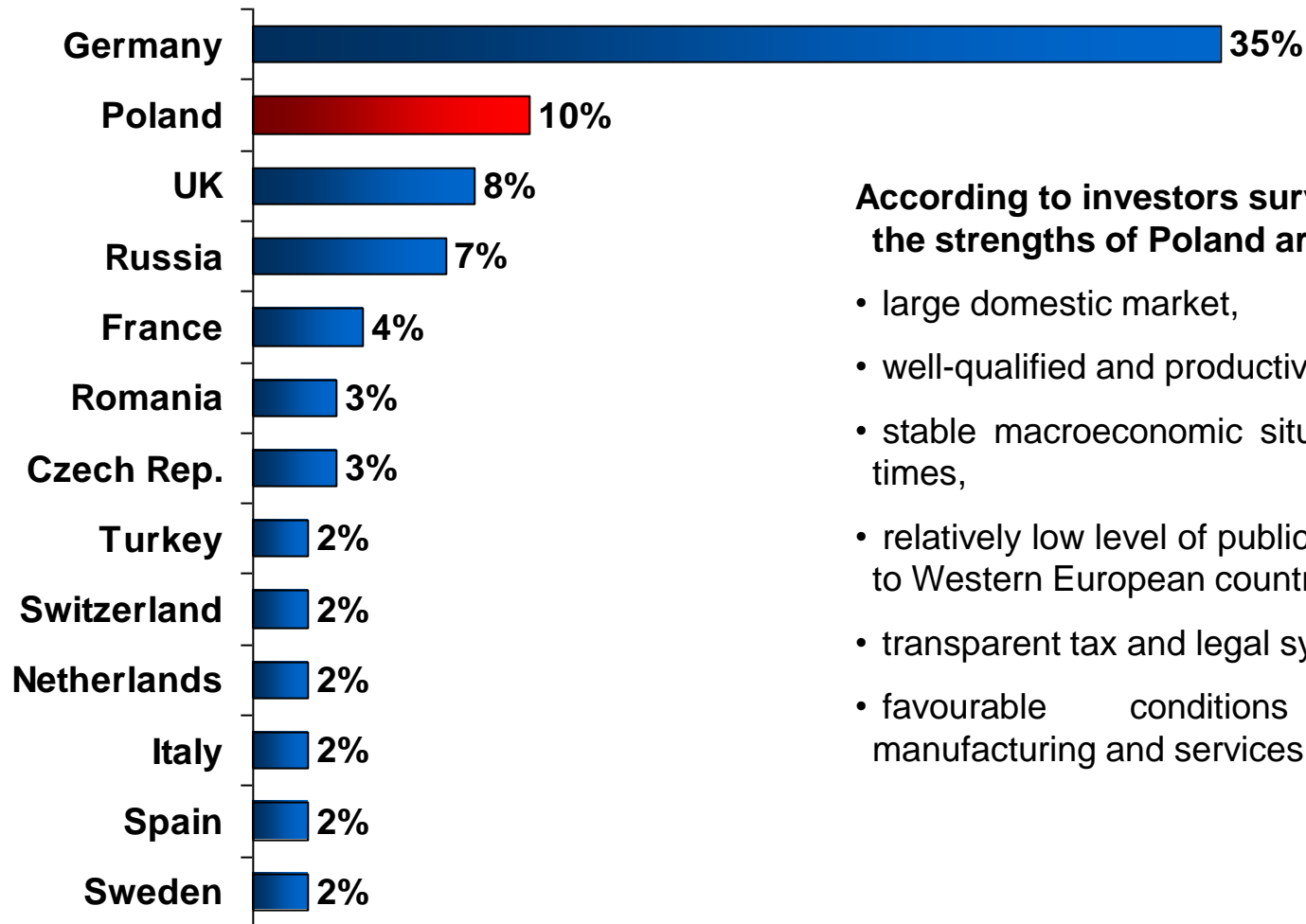
- Founded in 1918 Toyota Boshoku Corp. established a multiple footprint in Poland
- 2003 - TBMECA in Legnica as a joint venture between Toyota Boshoku, Denso and Mecaplast is incorporated – 100 employees hired
- 2009 - TBAI near Boleslawiec is created (CAPEX: 26 M EUR, 390 employees)
- 2011 - Polytec Tomaszów Mazowiecki plant was acquired – new investments followed (CAPEX: 14 M EUR, 250 to be added)
- In 2012 Toyota Boshoku employs more than 1000 employees in three production plants



- BOSHOKU AUTOMOTIVE POLAND
(Manufacture of headliners and interior components)
- TBAI POLAND (Manufacture of metal components for seats and seat covers)
- TBMECA POLAND (Manufacture of filters and powertrain components)

E&Y 2012 European Attractiveness Survey

What are the most attractive countries for FDI in the next 3 years?



According to investors surveyed by E&Y the strengths of Poland are:

- large domestic market,
- well-qualified and productive workforce,
- stable macroeconomic situation in difficult times,
- relatively low level of public debt comparing to Western European countries,
- transparent tax and legal systems,
- favourable conditions both for manufacturing and services investments

International recognition

6th place as the most attractive FDI destination

World Investment Report



2nd location in Eastern Europe and Russia offering the greatest revenue opportunities over next three years

Emerging market growth strategies, practices and outlook



3rd place worldwide as the best quality location for manufacturing projects


FDI Benchmark



Thank you for your attention

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A decorative graphic consisting of a large, light gray, curved shape that tapers to a point on the right side, and a smaller, red, triangular shape pointing upwards from the bottom right corner.