



# Poland as assessed by foreign investors

Forecasts and market attractiveness factors



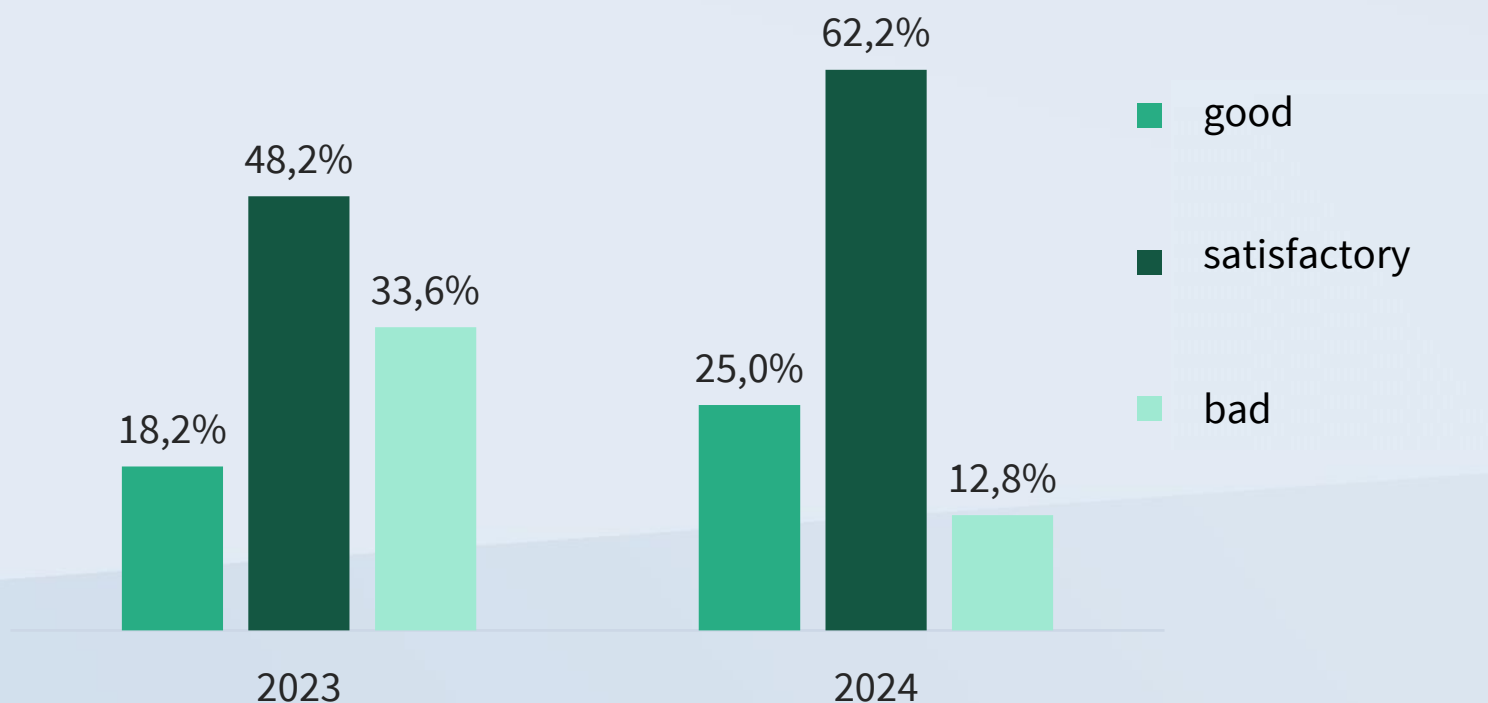


# Forecasts

Economy and companies



# CONDITION OF THE POLISH ECONOMY

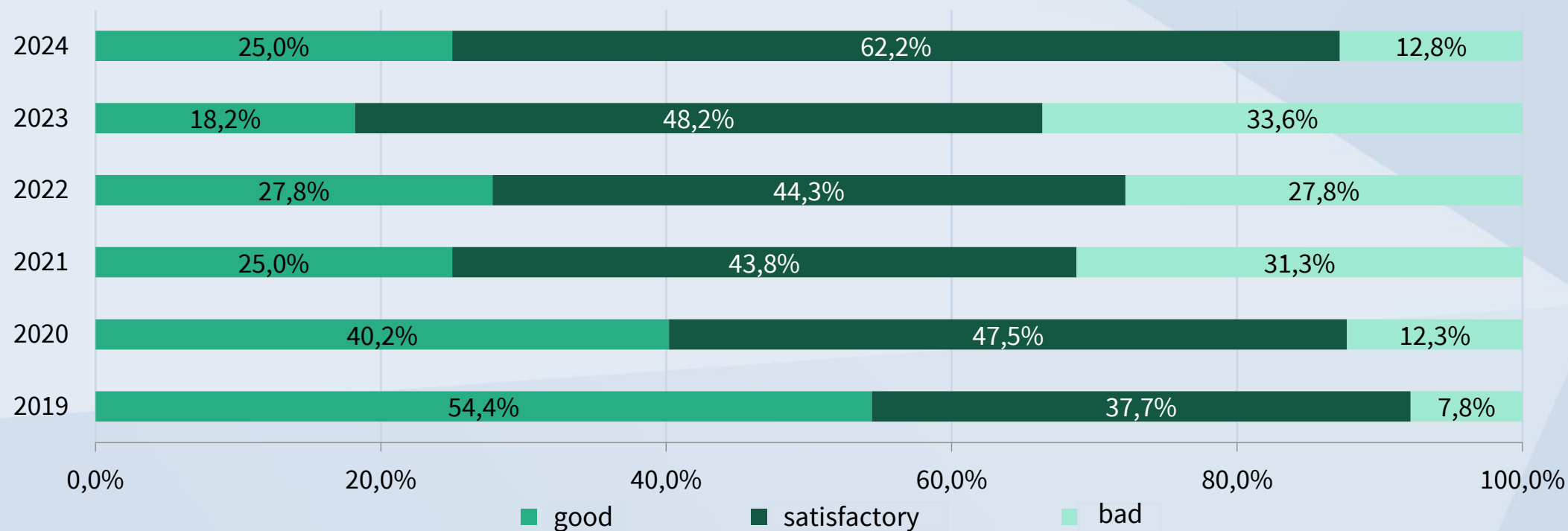


Increase in responses describing the economic situation as satisfactory and good: 2024: **87,2 %**

Compared to 2023, decrease in responses describing the economic situation as bad : 2024 - **12,8 %**

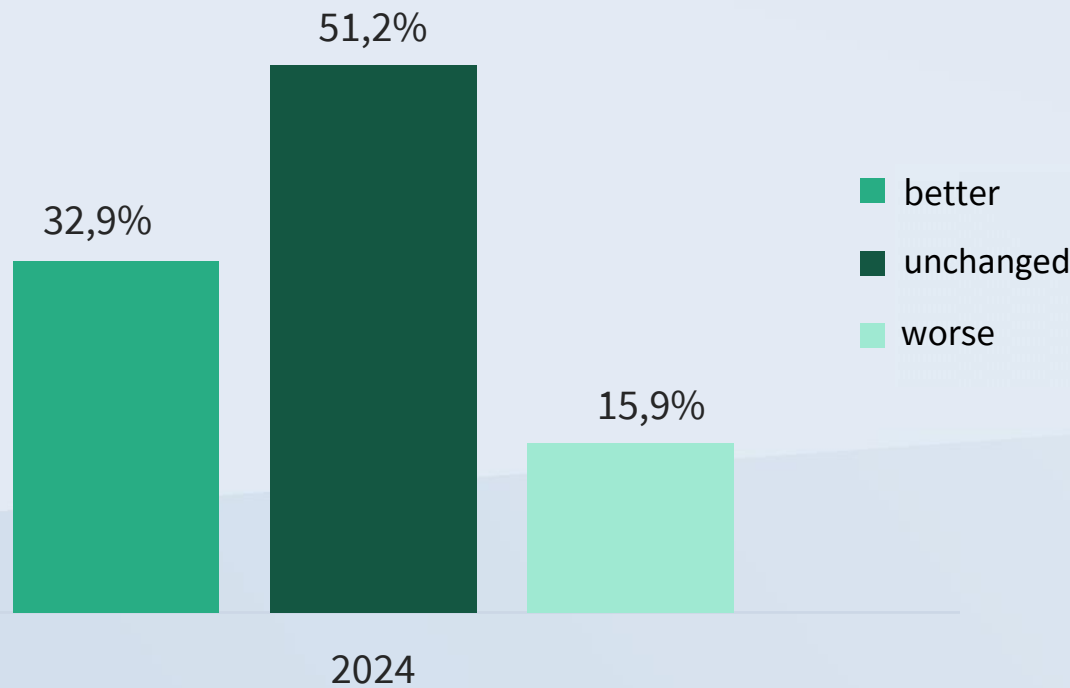
# CONDITION OF THE POLISH ECONOMY

The condition of the economy in Poland in 2024 was assessed better than in several previous years.



# CONDITION OF THE POLISH ECONOMY

## as compared to the previous year

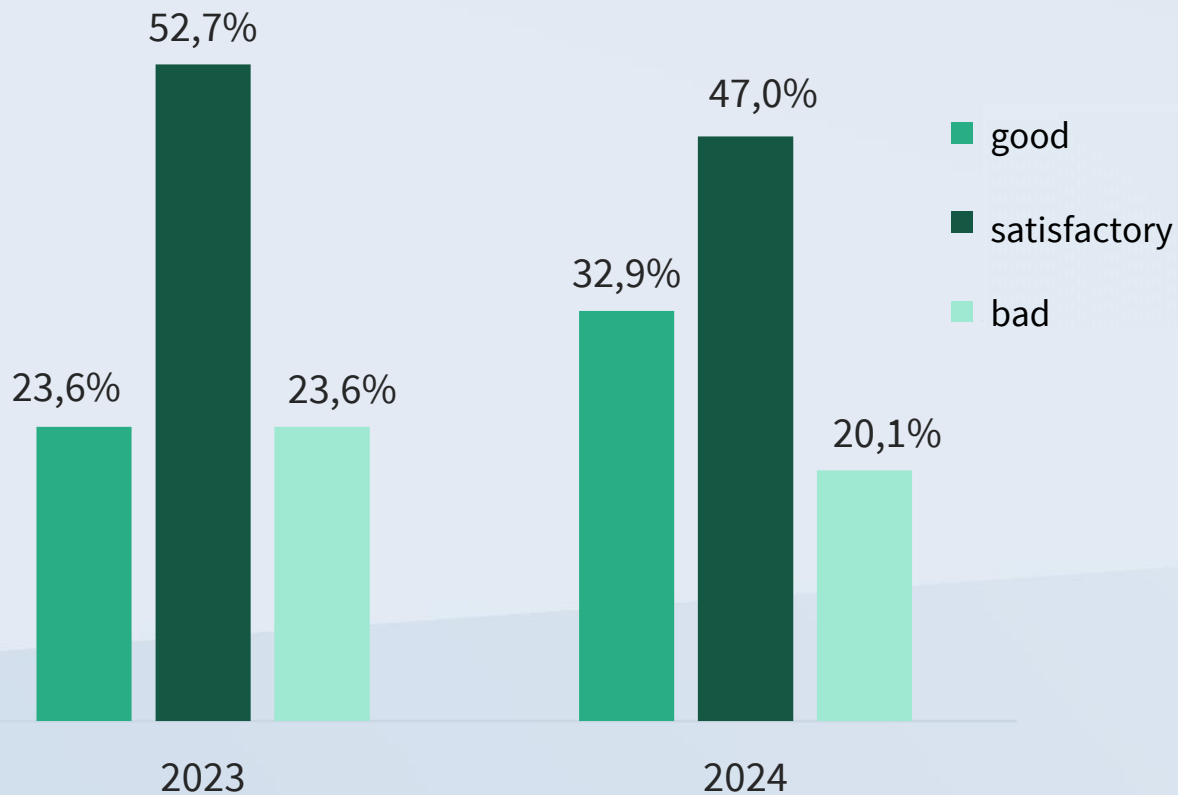


**51.2 %** - the situation is unchanged

**one in three** described the forecasts as better

**one in six** described them as worse

# ECONOMIC SITUATION OF THE SECTORS



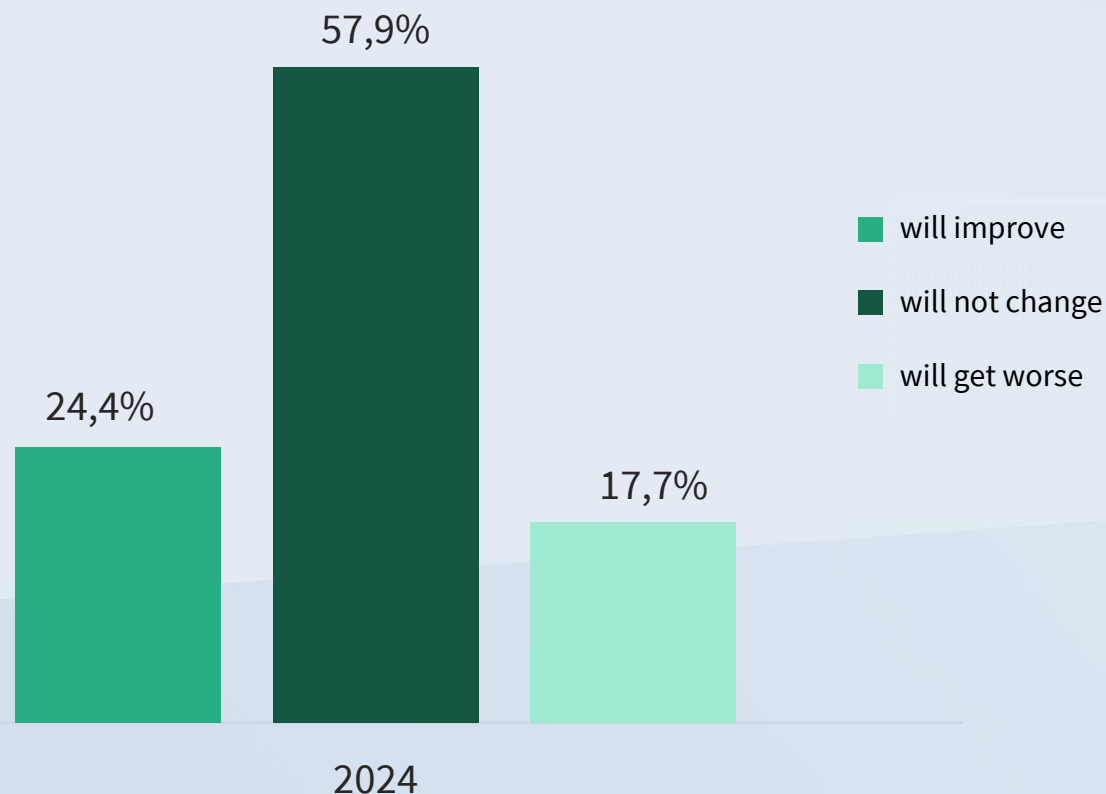
2024 - the economic situation in the sector is less frequently described as satisfactory: a decrease of **5.7** percentage points

but more frequently as good: increase of **9.3** percentage points.

A similar proportion of respondents described the economic situation in their sector as bad.

# ECONOMIC SITUATION OF THE SECTORS

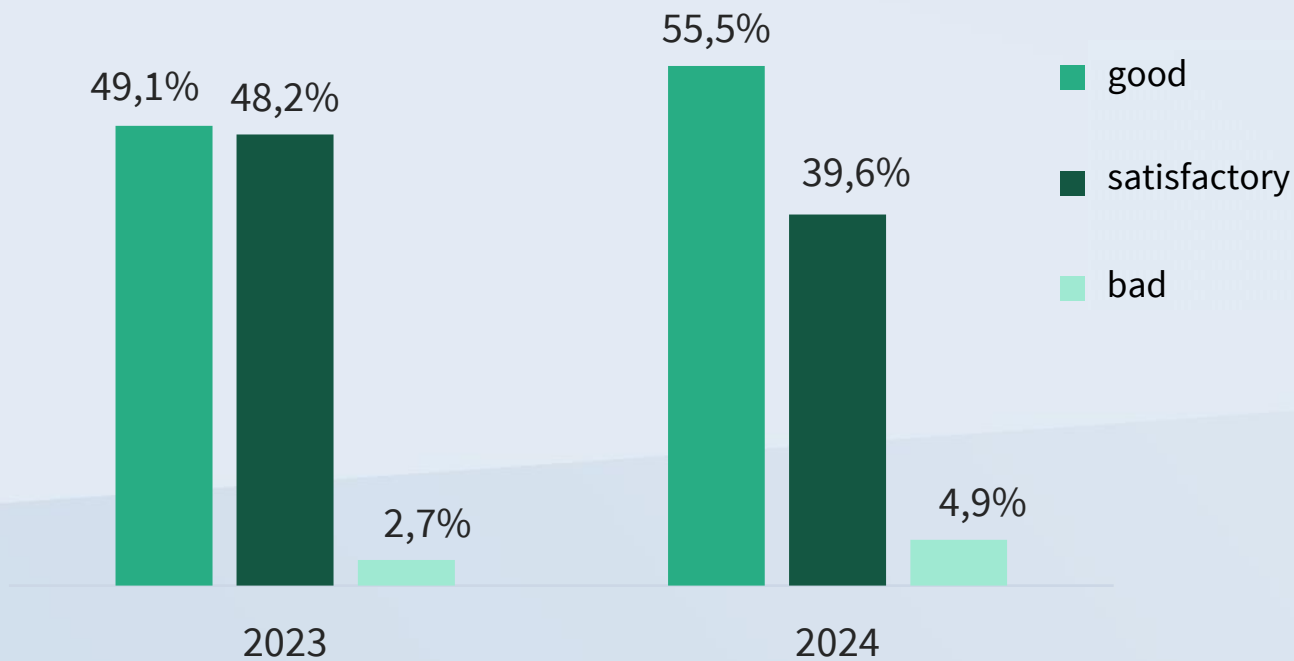
as compared with the previous year



**More than half** of those surveyed said that the situation in the sector will not change in the current year compared to the previous year.

**One in four** expect the situation in the sector to improve.

# THE COMPANY'S BUSINESS CONDITION



Almost **2/3** of respondents expect no change in their company's business situation compared to the previous year: **63.4 %** of respondents.

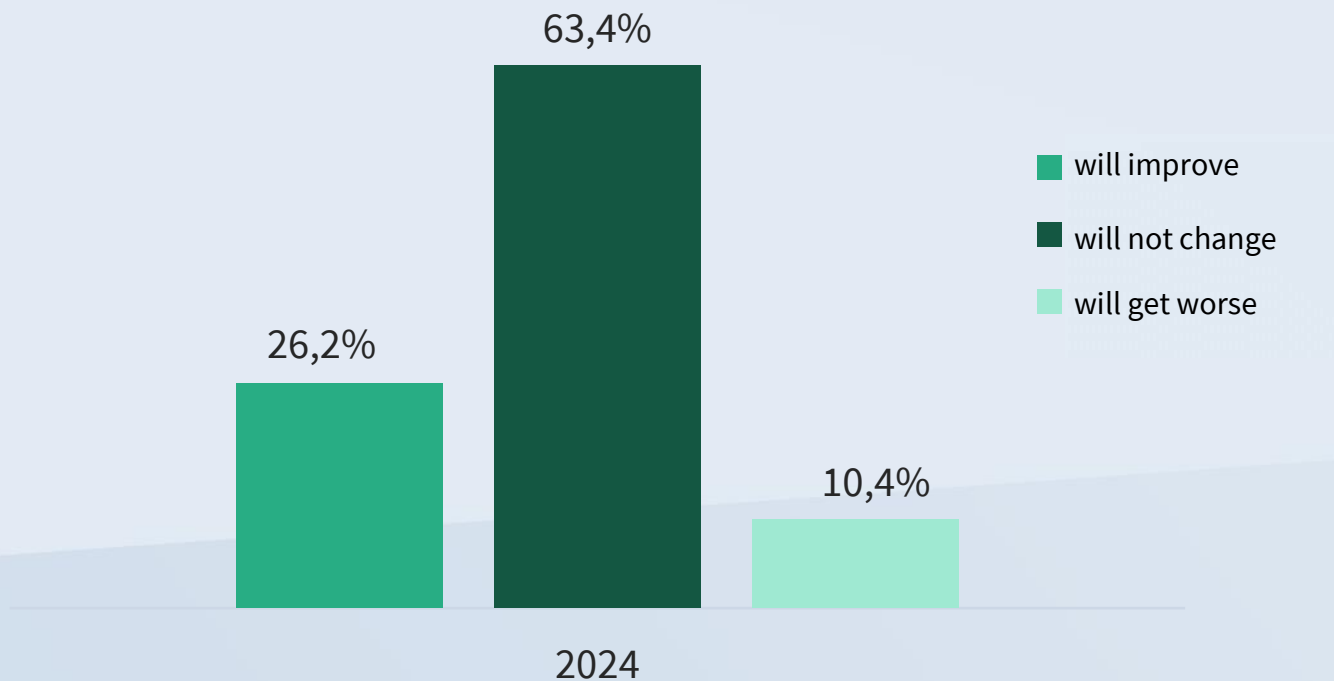
The situation will improve: **26.2%** of responses





# THE COMPANY'S BUSINESS CONDITION

as compared to the previous year

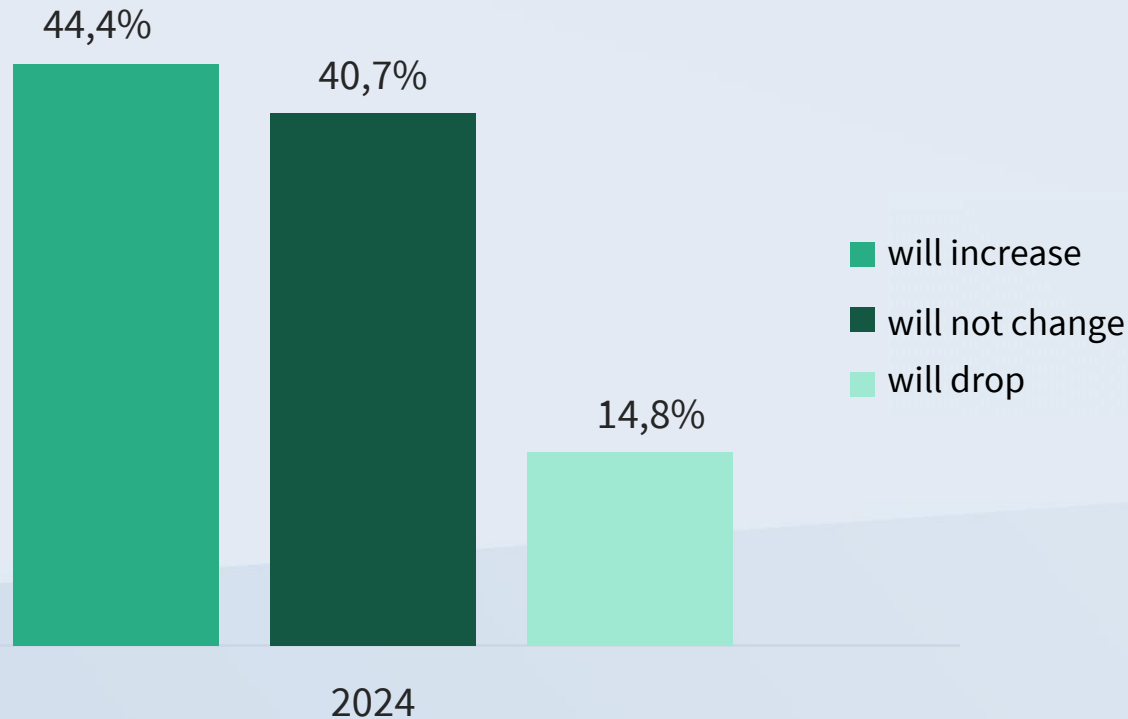


In response to the question of how their company's business situation will develop, almost **2/3** of respondents said that they did not expect any change compared to the previous year: **63.4%** of respondents.

**One in four** said that the situation would improve: **26.2%**.



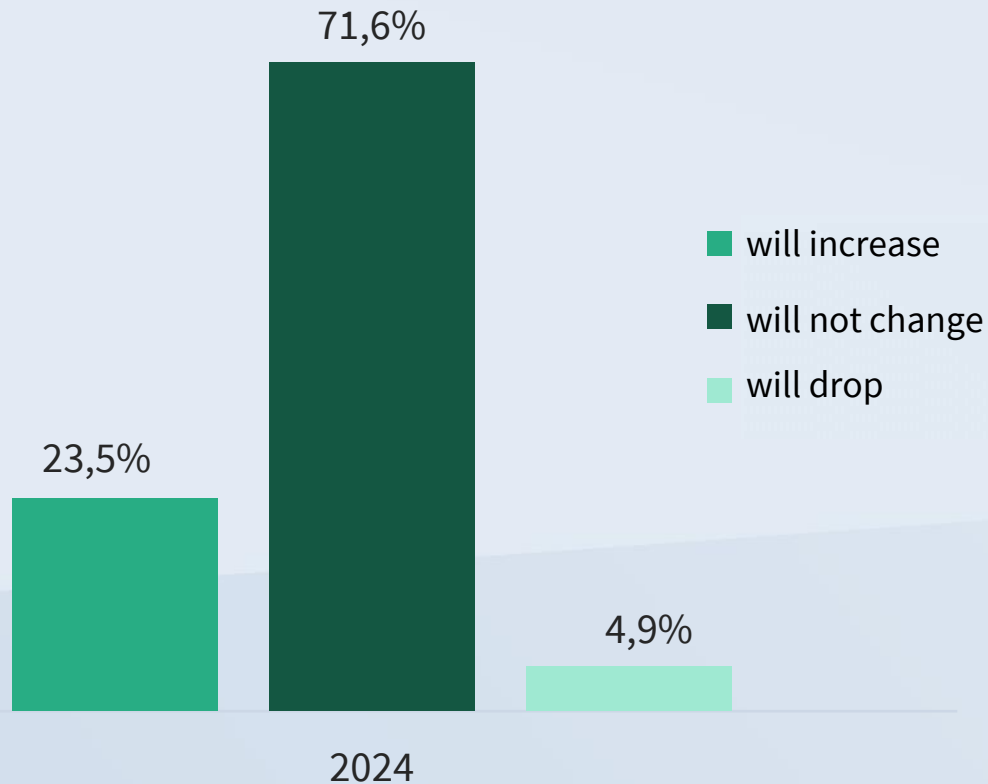
# COMPANY TURNOVER as compared to the previous year



**44.4%** of respondents expect their company's turnover to increase compared to the previous year.

**2/5** of respondents expect turnover to remain at a similar level.

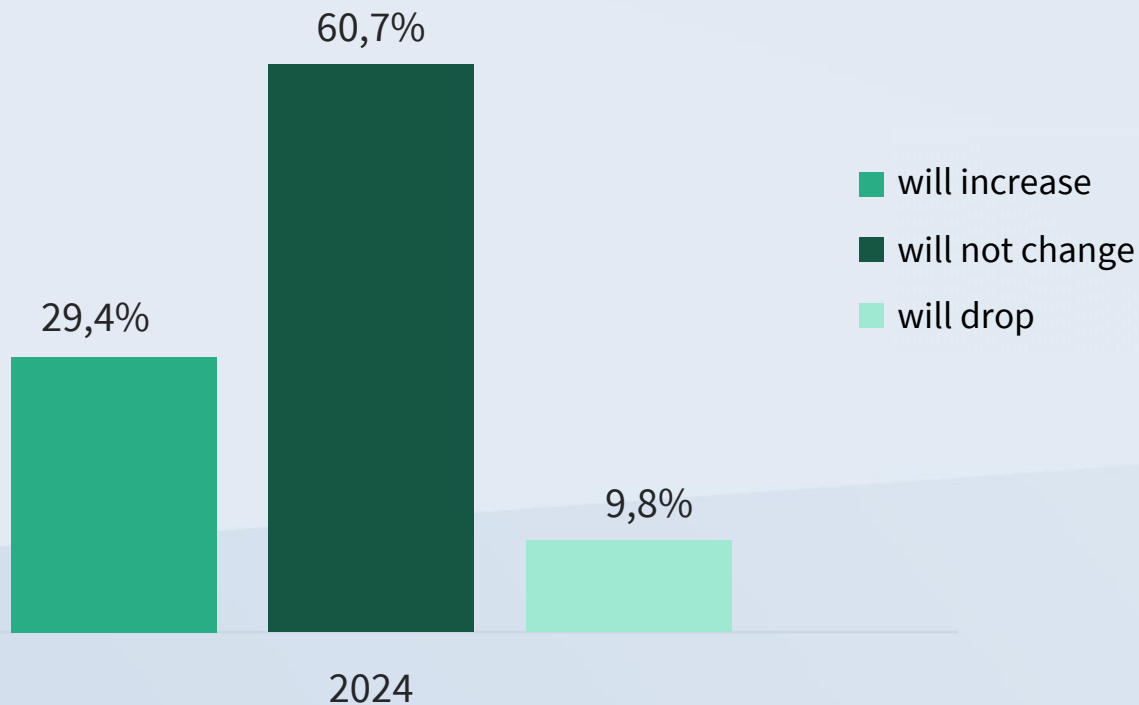
# EXPORT EARNINGS IN THE COMPANY as compared to the previous year



Most respondents stated that they expect their company's export earnings to remain at the same level as last year - **71.6%** of respondents.

**1/4** of respondents expect this earnings to increase.

# EMPLOYEE NUMBER as compared to the previous year

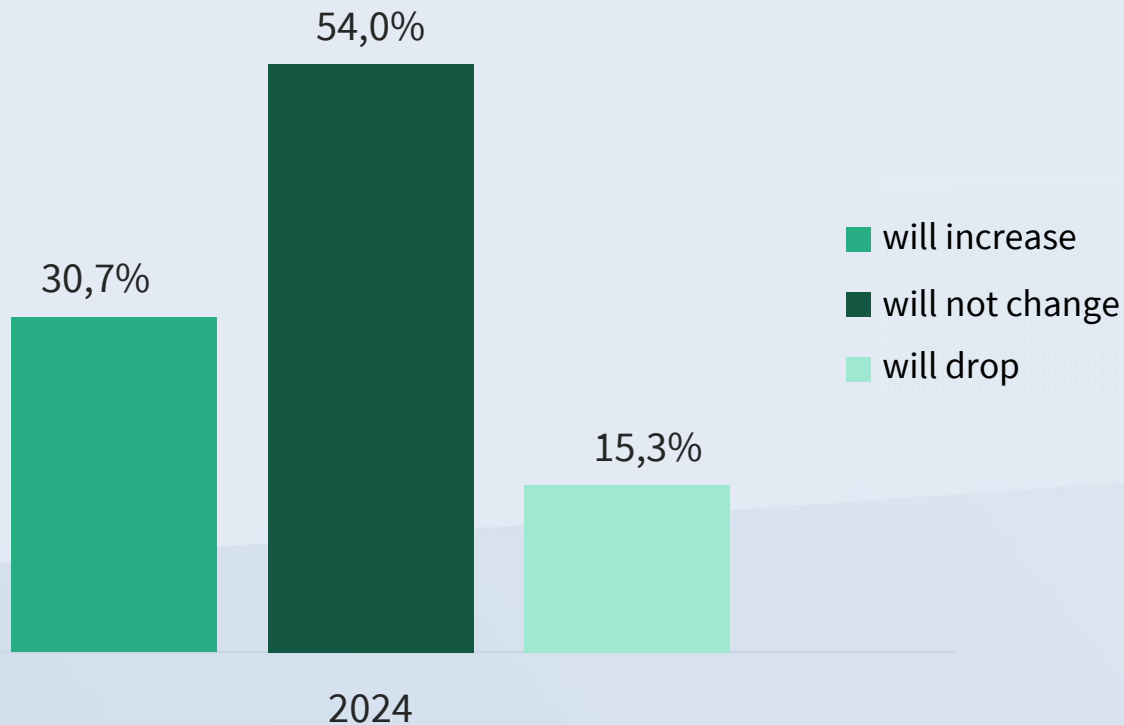


**6 out of 10** respondents said that the number of employees would not change compared to the previous year.

In contrast, **29.4%** of respondents announced an increase in the number of employees.

In **1/10** companies, the number of employees is expected to drop - **9.8%**.

# CAPITAL EXPENDITURE as compared to the previous year



In **more than half** of the companies, capital expenditure is expected to remain the same, while it will increase **in 3 out of 10** companies.

Capital expenditure will drop in **15.3%** of the companies surveyed.

# INCREASE IN AVERAGE SALARY

On average, the companies surveyed expect average wages to rise by **8.1%**, with an increase of **10%** being stated most frequently.

Some companies expect no increase at all, while others expect an increase of **30%**.

8,1%

Average

10%

Dominant

0%

Minimum

30%

Maximum



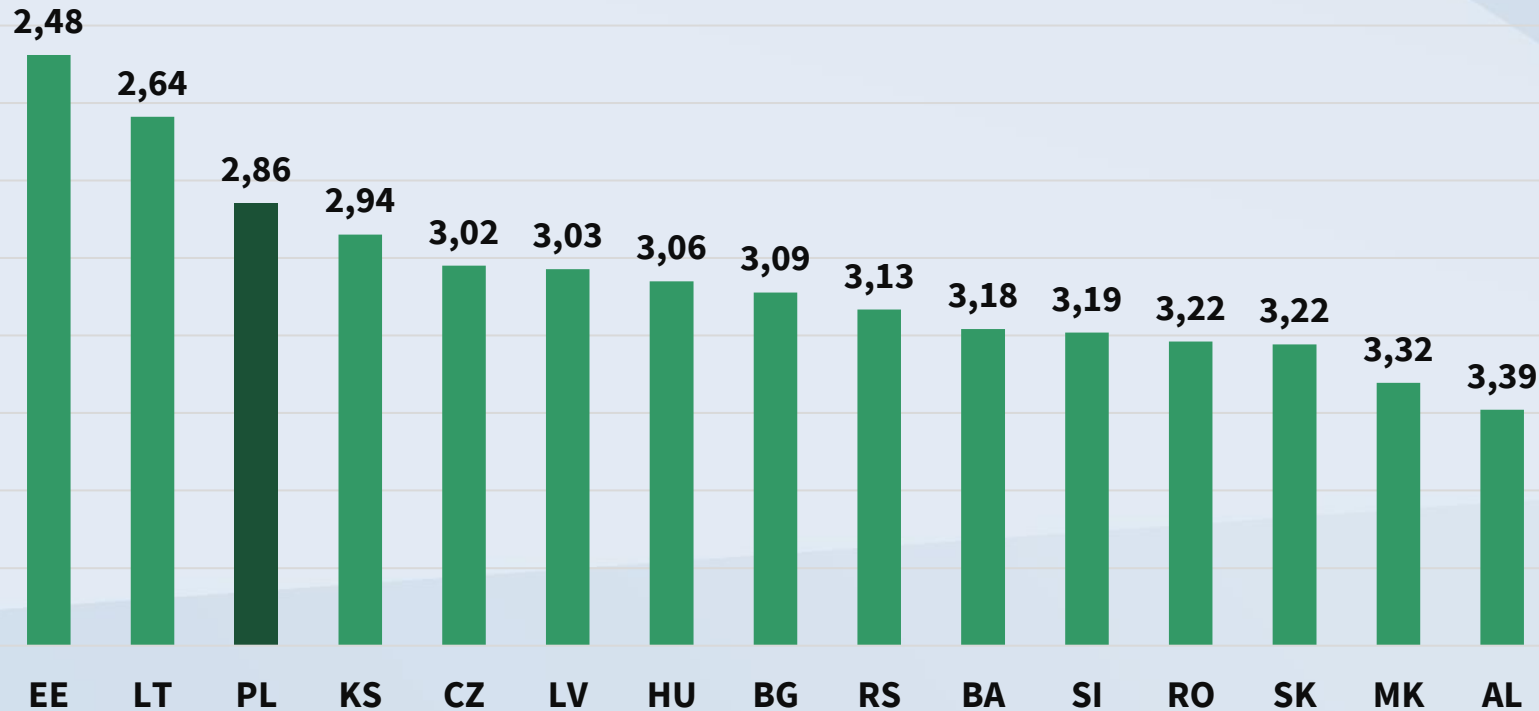


# Attractiveness of Poland

Market attractiveness factors



# Attractiveness ranking



Poland came in third place as the most attractive location.

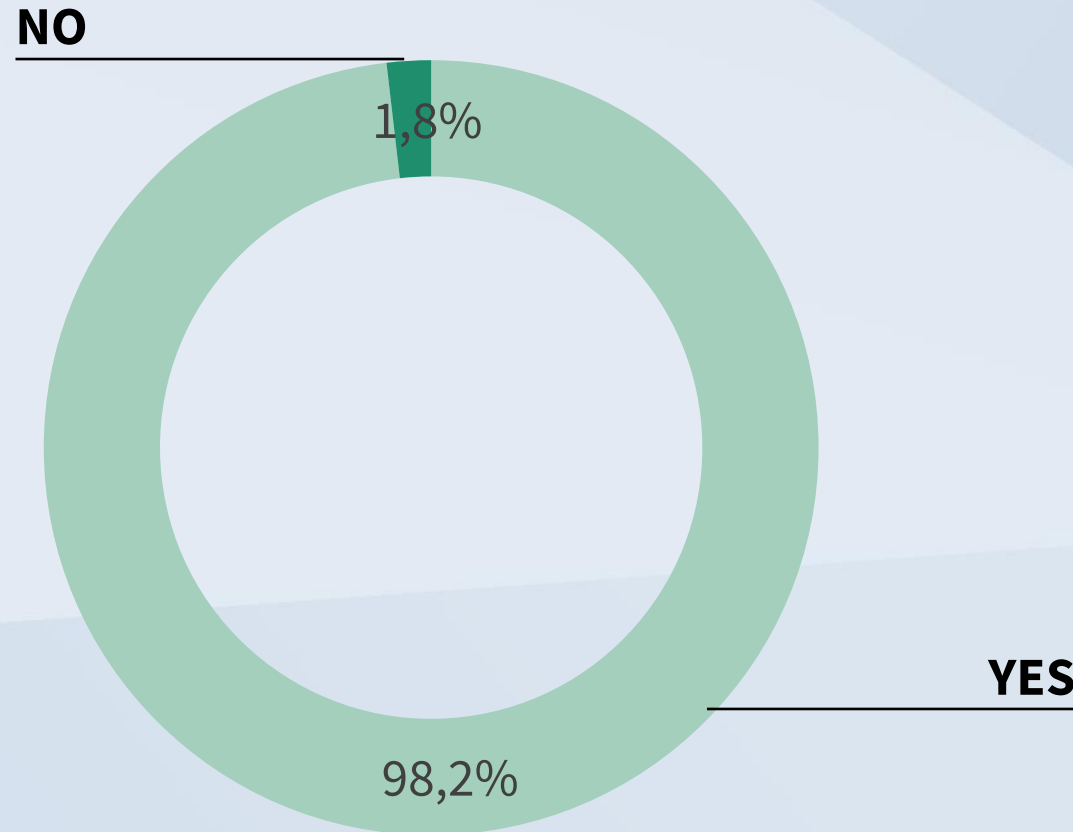
The most attractive country was Estonia. Albania received the worst rating.

Rating scale:  
1 – very satisfied  
2 – satisfied  
3 – moderately  
4 – dissatisfied  
5 – very dissatisfied

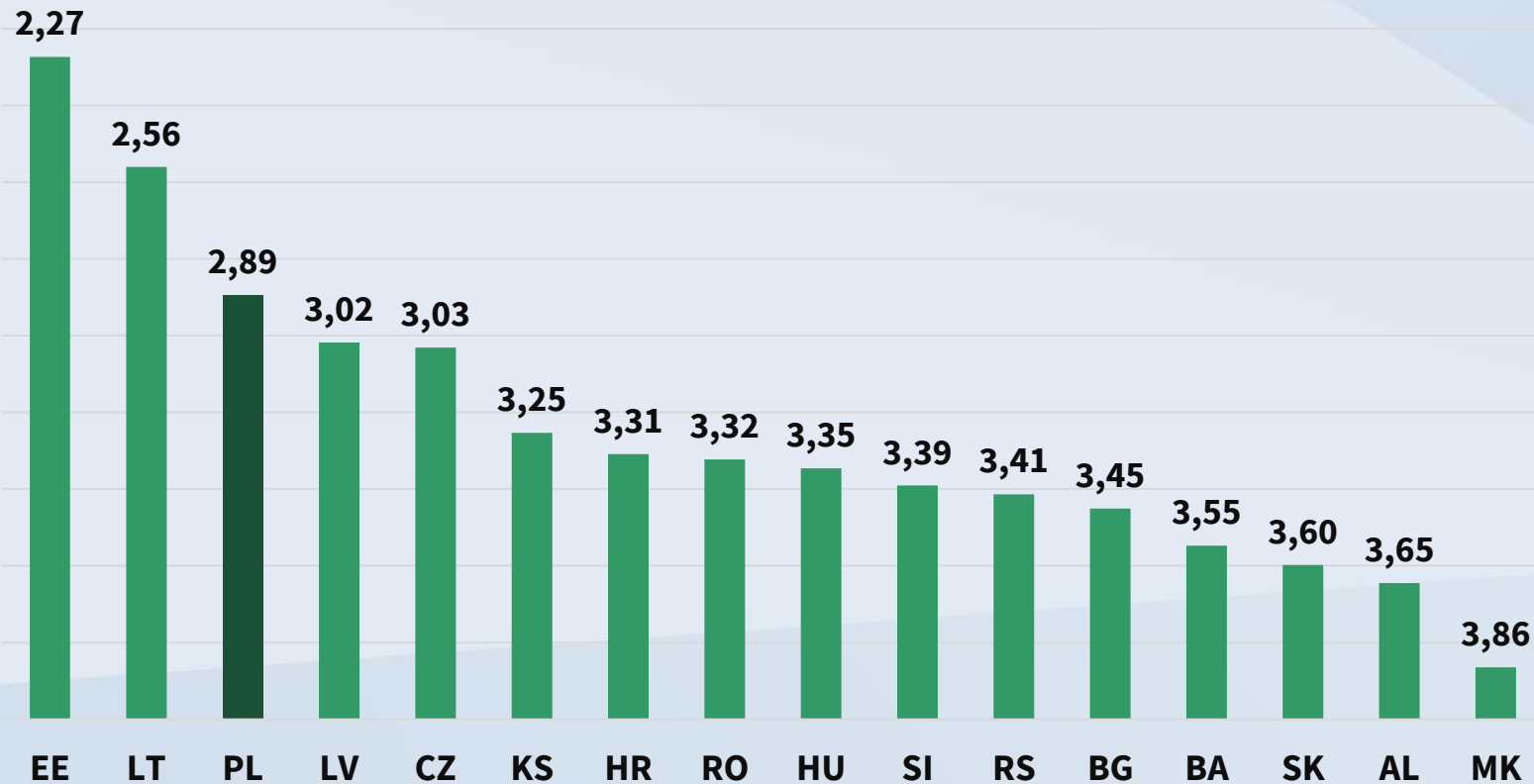




# Would you choose Poland as a location for your investment again?



# Economic policy and administration

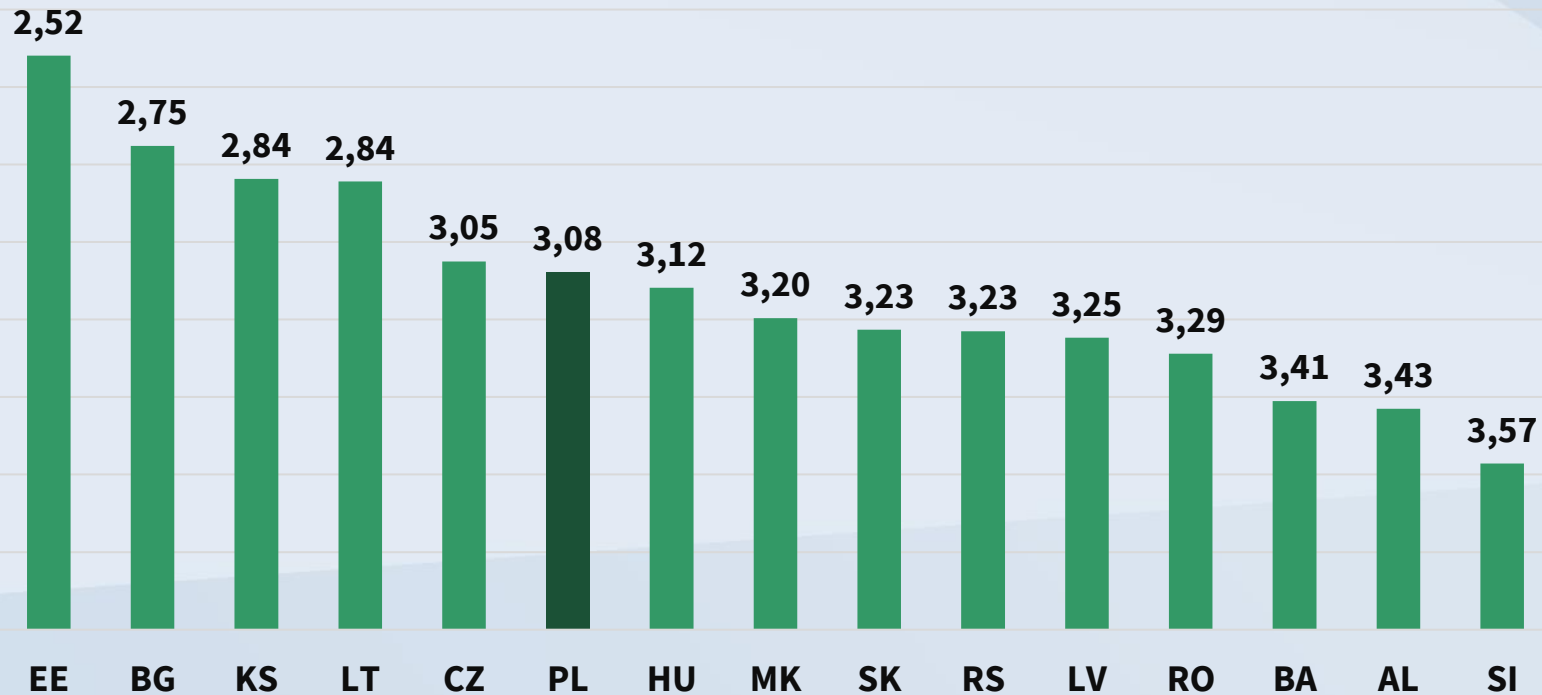


In relation to economic policy and administration, Estonia received the best average score and Macedonia the worst.

Rating scale:  
1 – very satisfied  
2 – satisfied  
3 – moderately  
4 – dissatisfied  
5 – very dissatisfied



# Taxes, subsidies

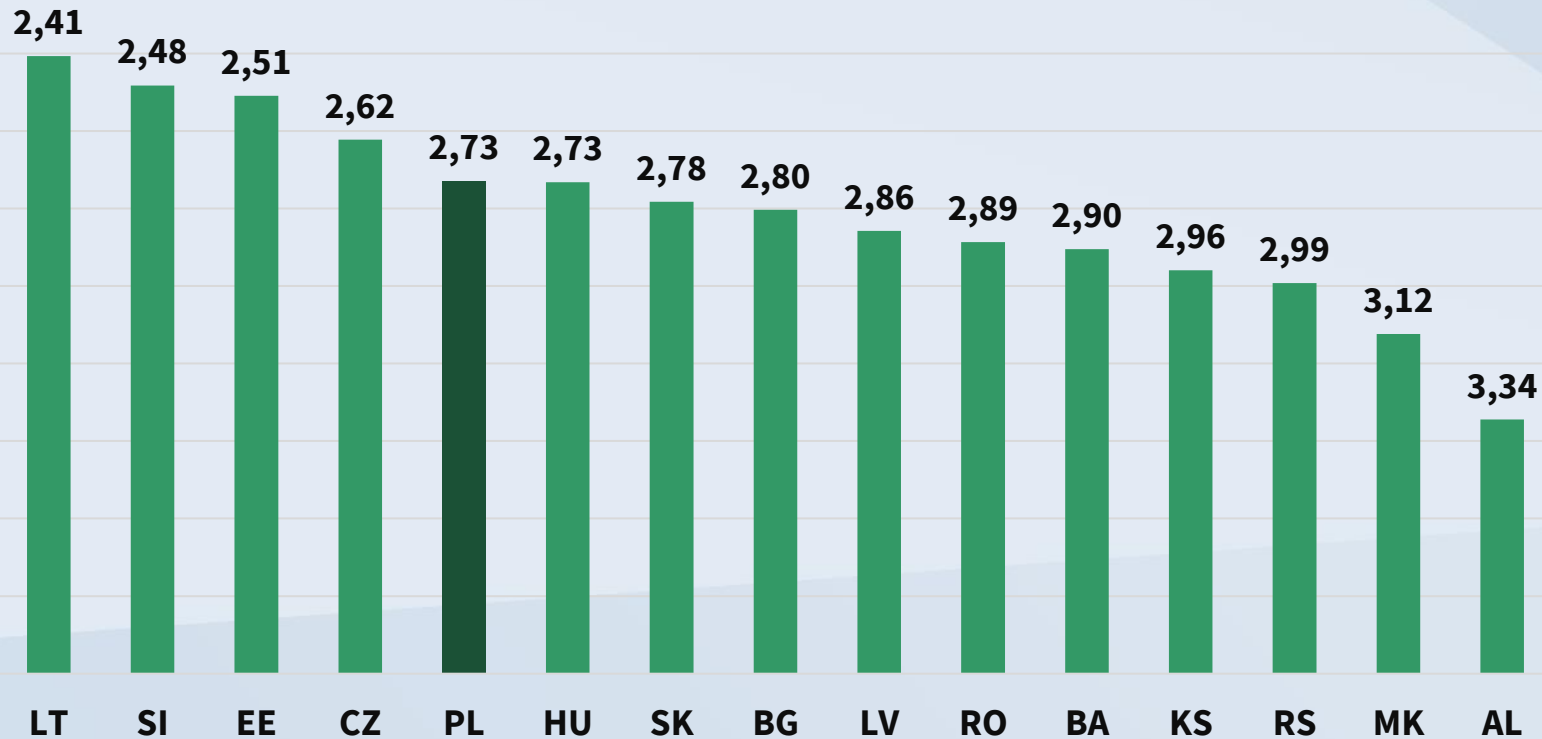


Regarding taxes and subsidies, Estonia had the best average score and Slovenia the worst.

Rating scale:  
1 – very satisfied  
2 – satisfied  
3 – moderately  
4 – dissatisfied  
5 – very dissatisfied



# Business environment

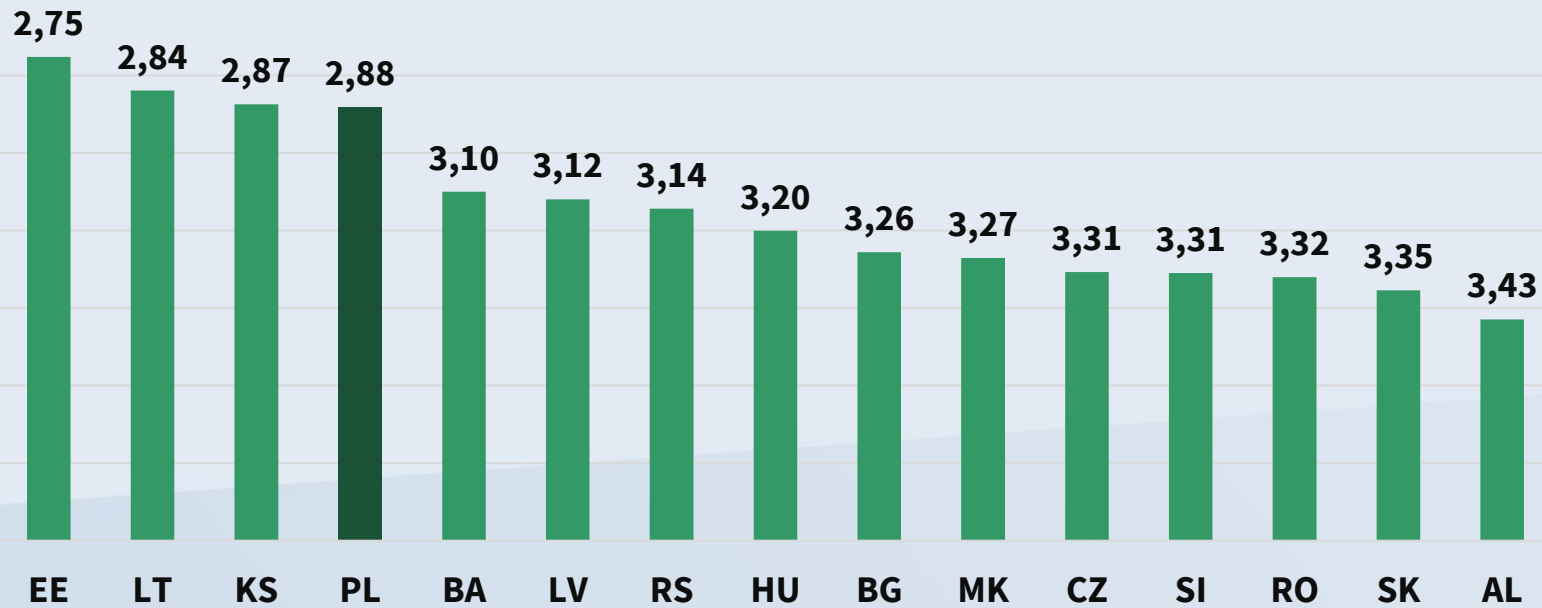


Regarding the business environment, the best average score was given to Lithuania and the worst to Albania.

Rating scale:  
1 – very satisfied  
2 – satisfied  
3 – moderately  
4 – dissatisfied  
5 – very dissatisfied



# Labour market

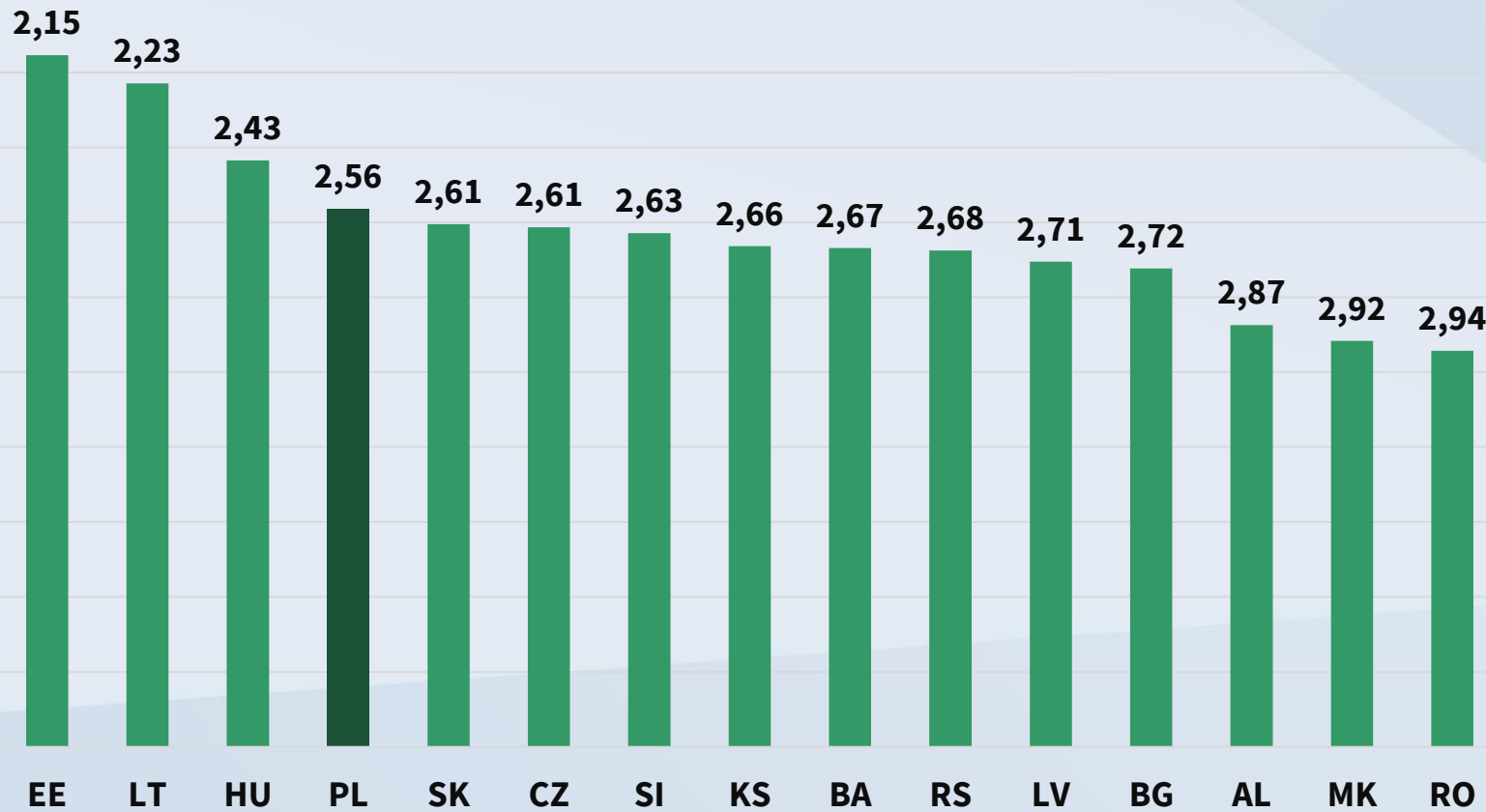


Regarding the labour market, Estonia had the best average score and Albania the worst.

Rating scale:  
1 – very satisfied  
2 – satisfied  
3 – moderately  
4 – dissatisfied  
5 – very dissatisfied



# Infrastructure



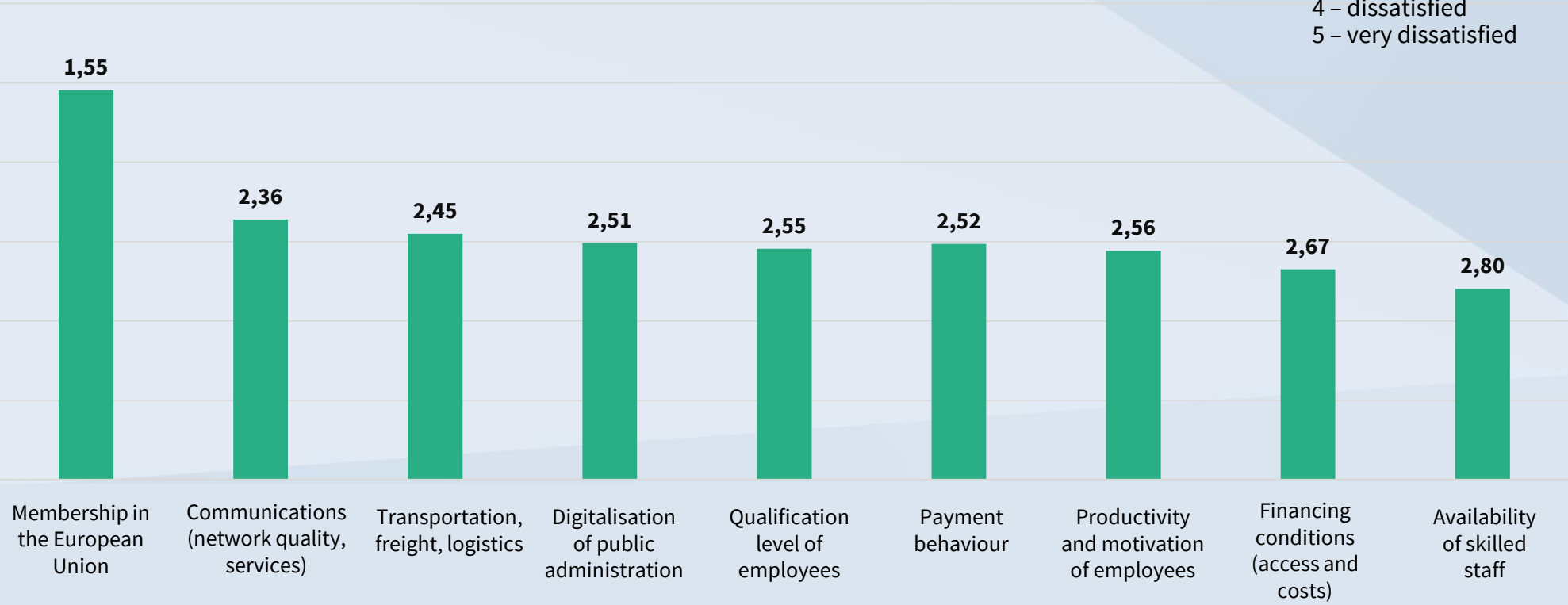
Regarding infrastructure, Estonia had the best average score and Romania the worst.

Rating scale:  
1 – very satisfied  
2 – satisfied  
3 – moderately  
4 – dissatisfied  
5 – very dissatisfied



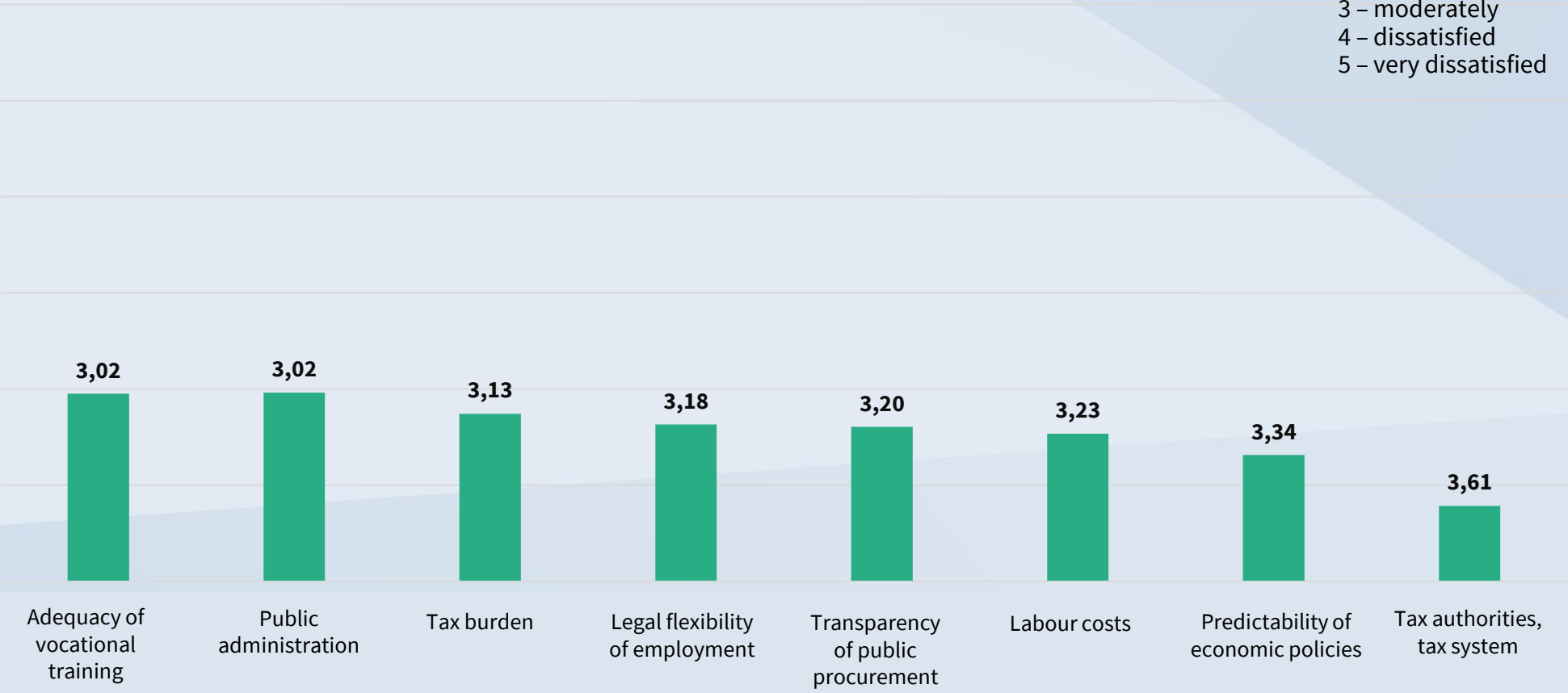
# Factors most positively impacting on the attractiveness of doing business

Rating scale:  
1 – very satisfied  
2 – satisfied  
3 – moderately  
4 – dissatisfied  
5 – very dissatisfied



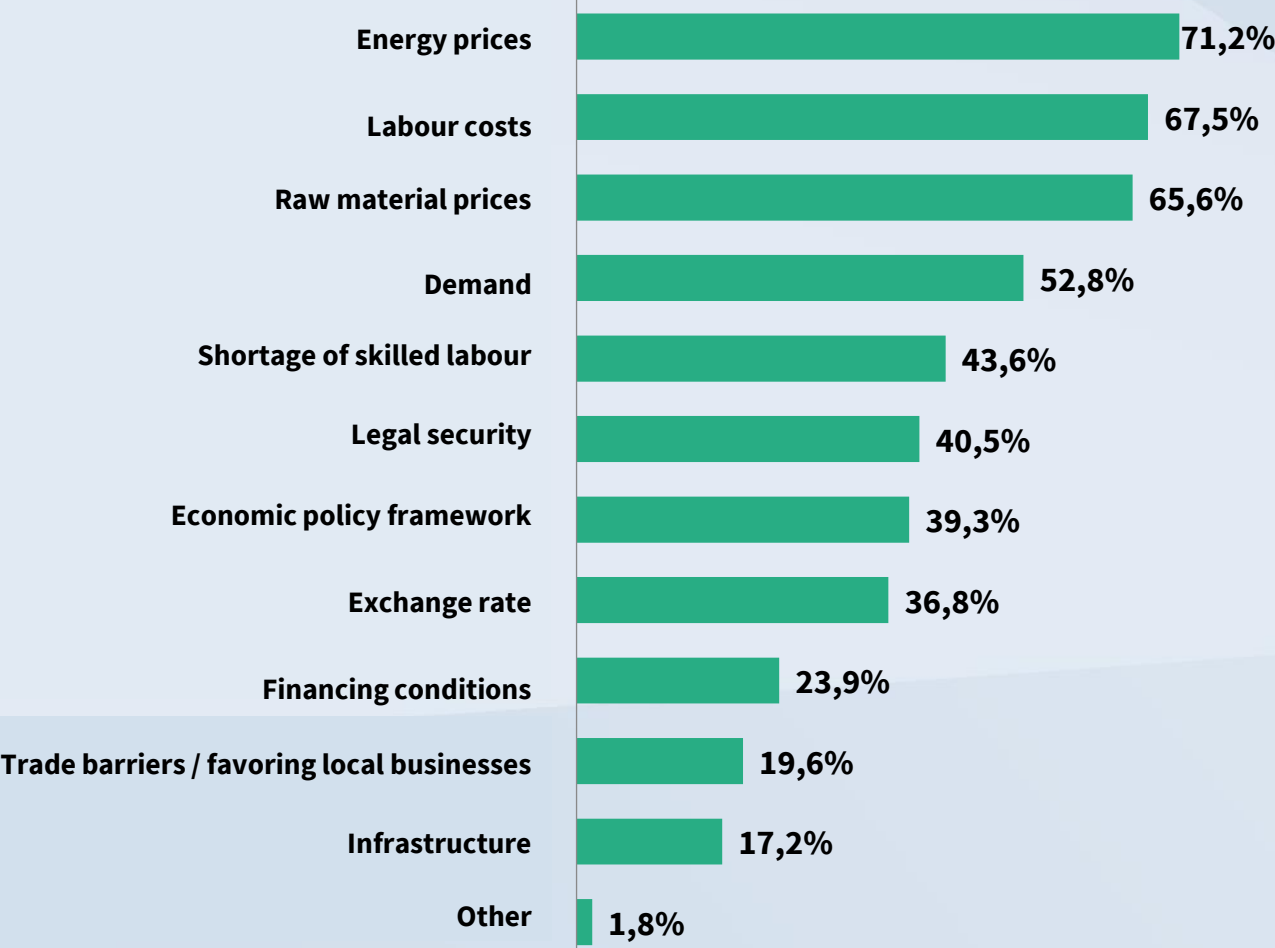
# Factors least positively impacting on the attractiveness of doing business

Rating scale:  
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3 – moderately  
4 – dissatisfied  
5 – very dissatisfied





# The biggest threats to the company's economic development over the next 12 months?



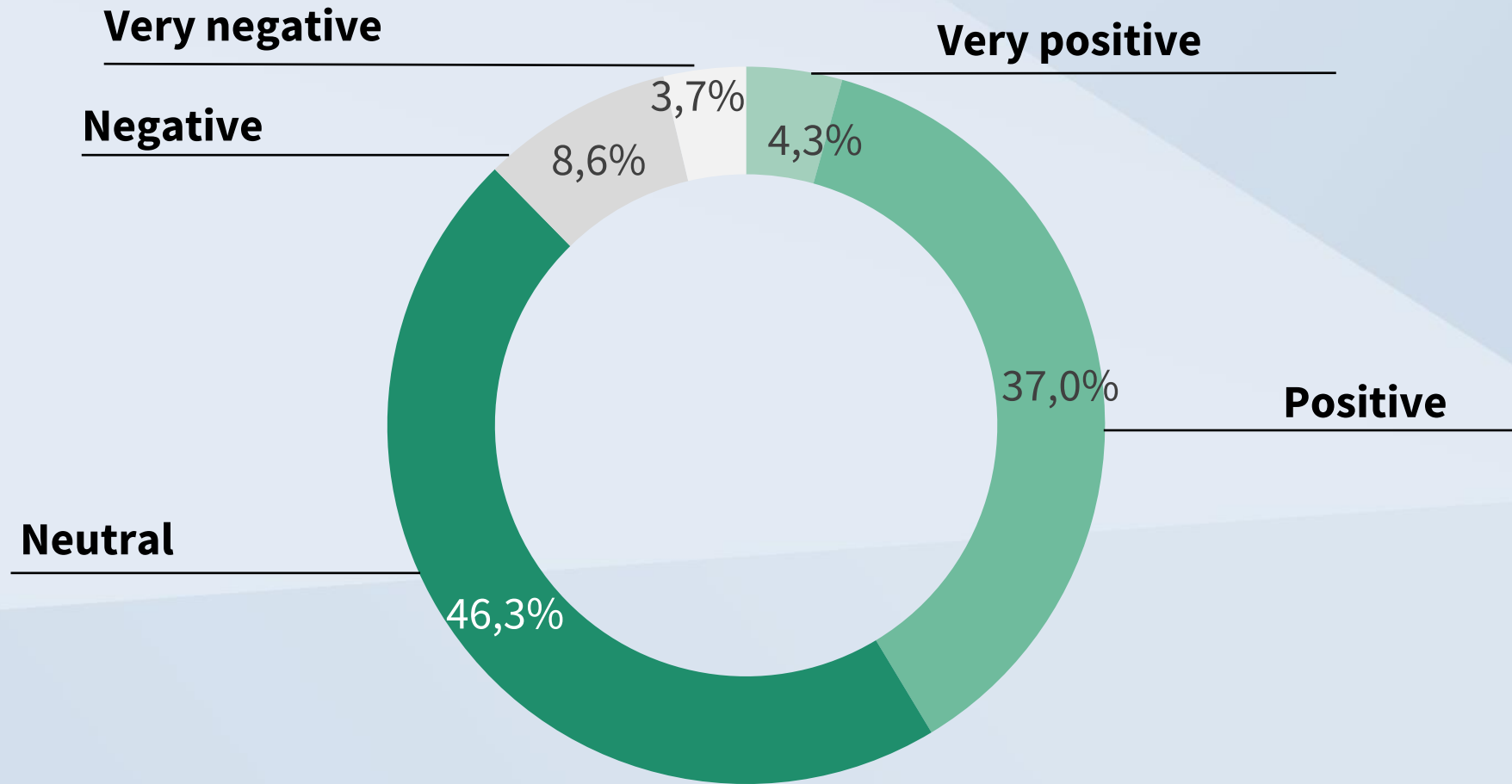
**71.2%** of respondents said that energy prices will pose the greatest threat to their company in the coming year.

Almost **2/3** of respondents cited labour costs (**67.5%**) and commodity prices (**65.6%**), while more than half mentioned demand (**52.3%**).

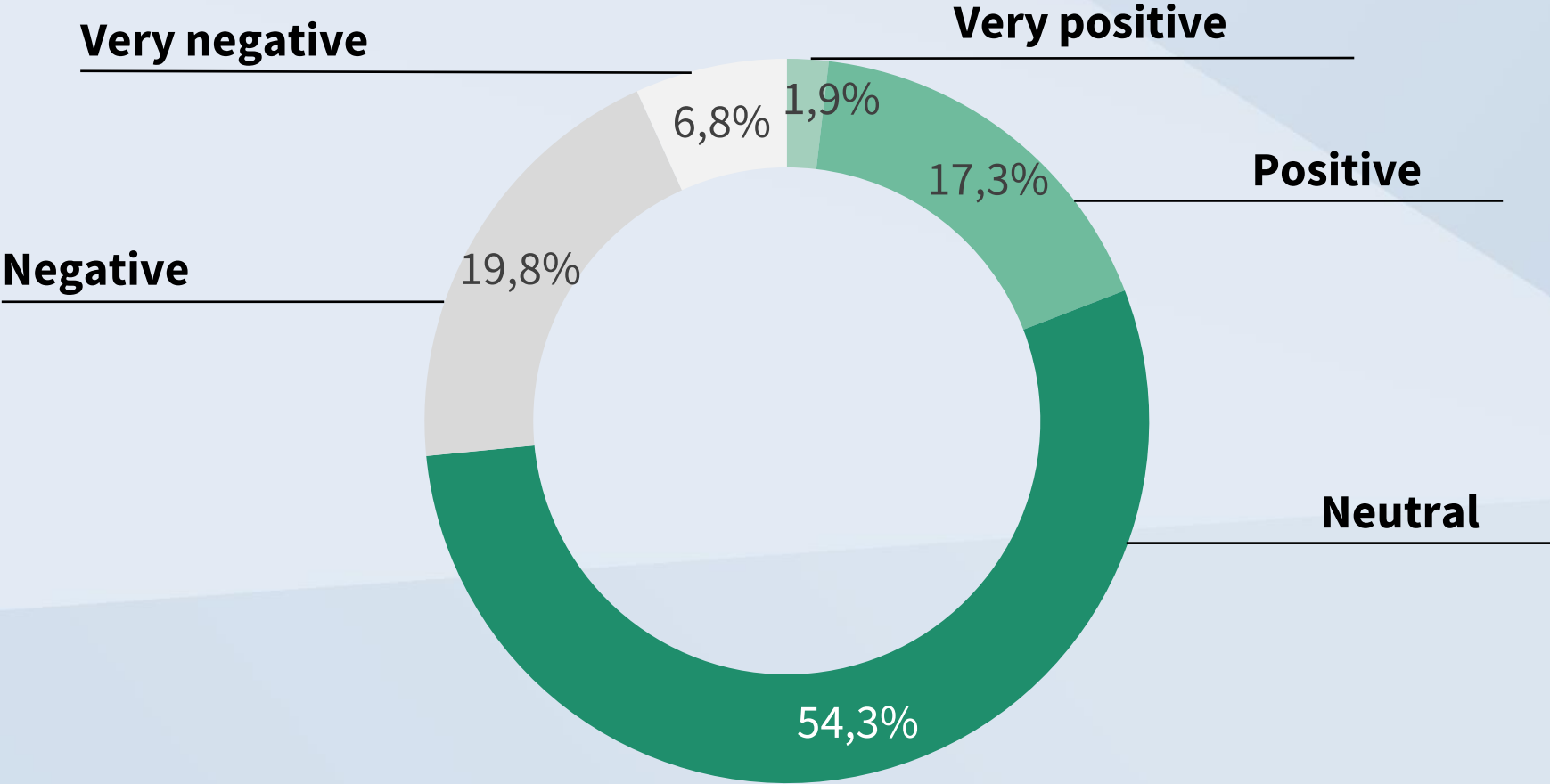
Infrastructure was mentioned least frequently (**17.2%**).



# How do you rate the measures taken by the government regarding the framework conditions for investors?



# How do you rate the government's measures to support companies in connection with the energy transition?

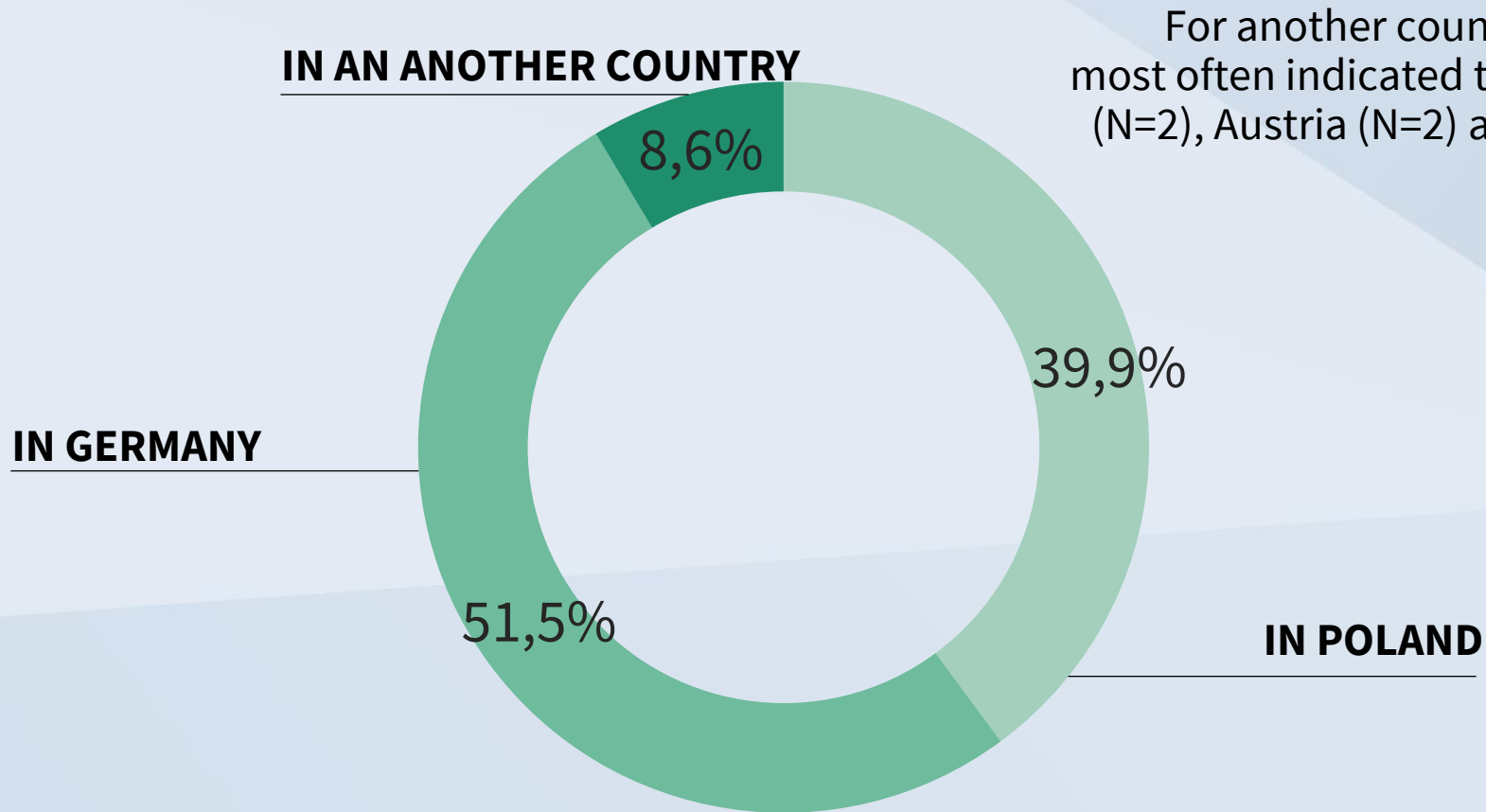




# Characteristics of enterprises

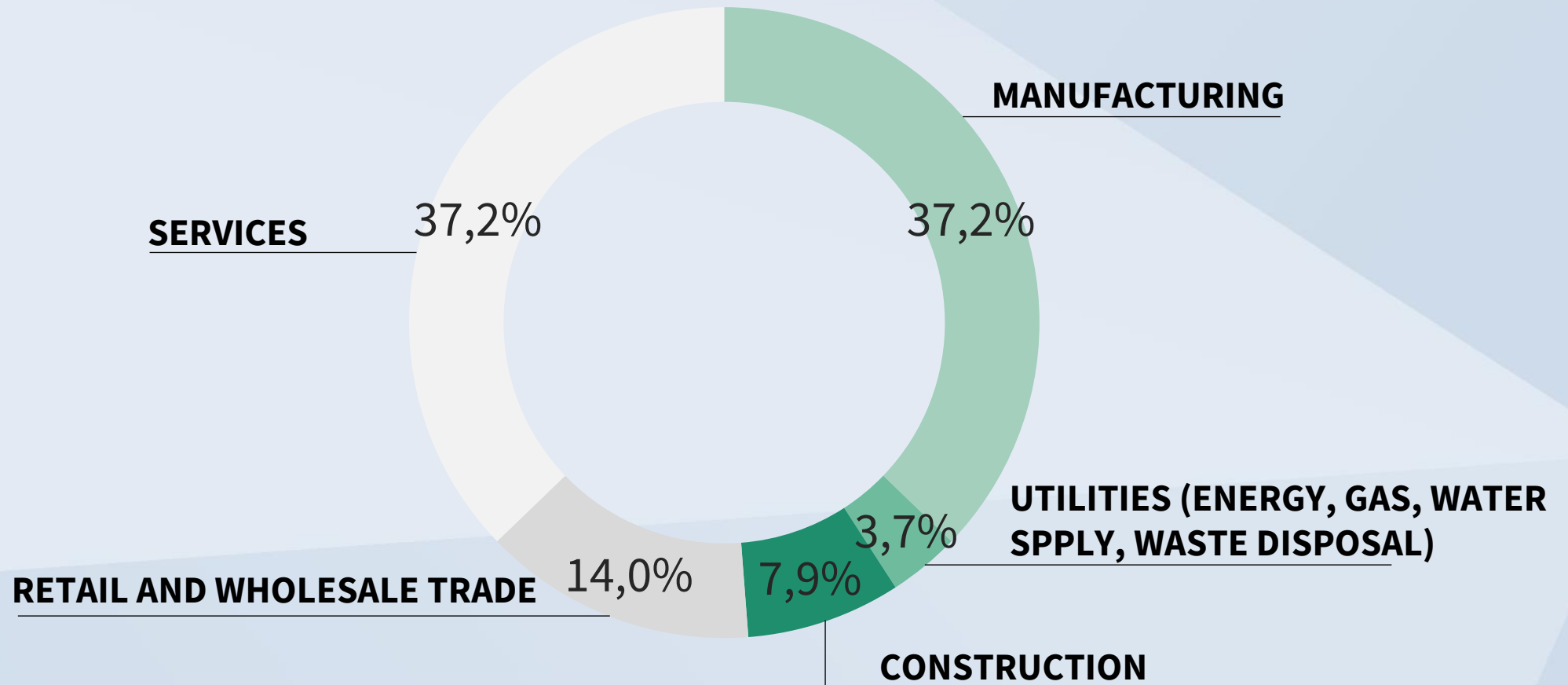


# In which country is the headquarter of the majority owner of your company / group located?

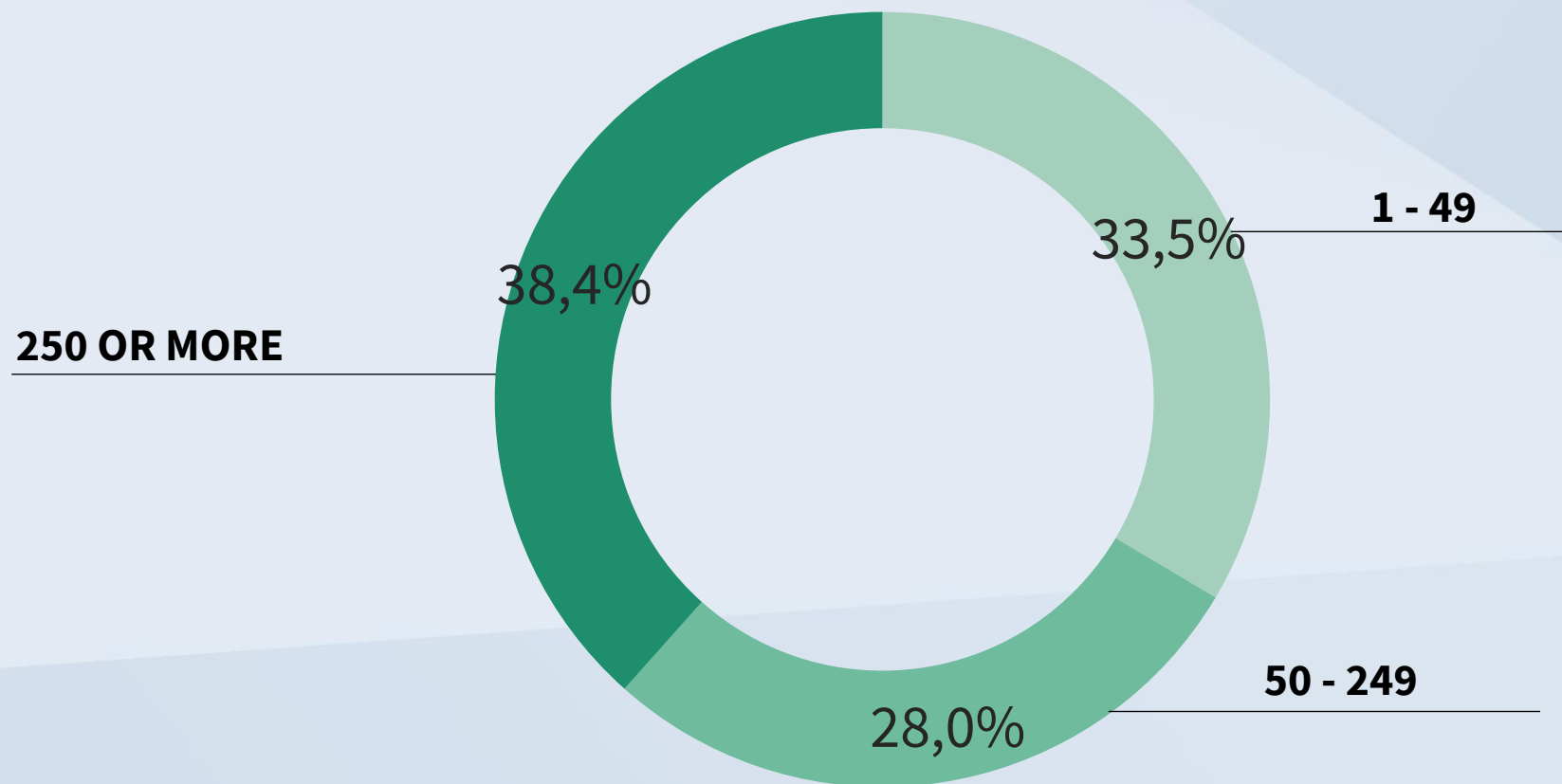


For another country, respondents most often indicated the United States (N=2), Austria (N=2) and France (N=2).

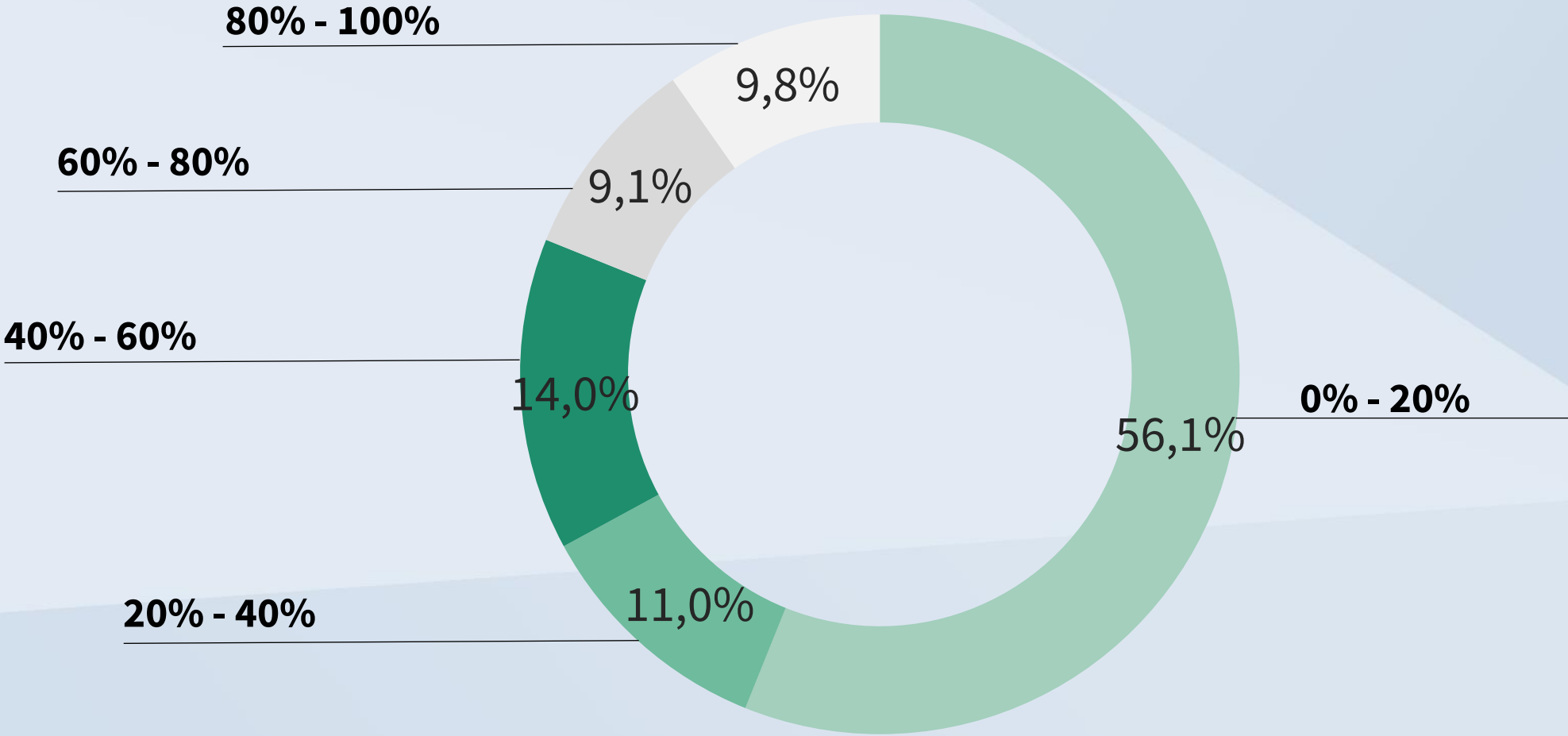
# Main area of operations



# Number of employees

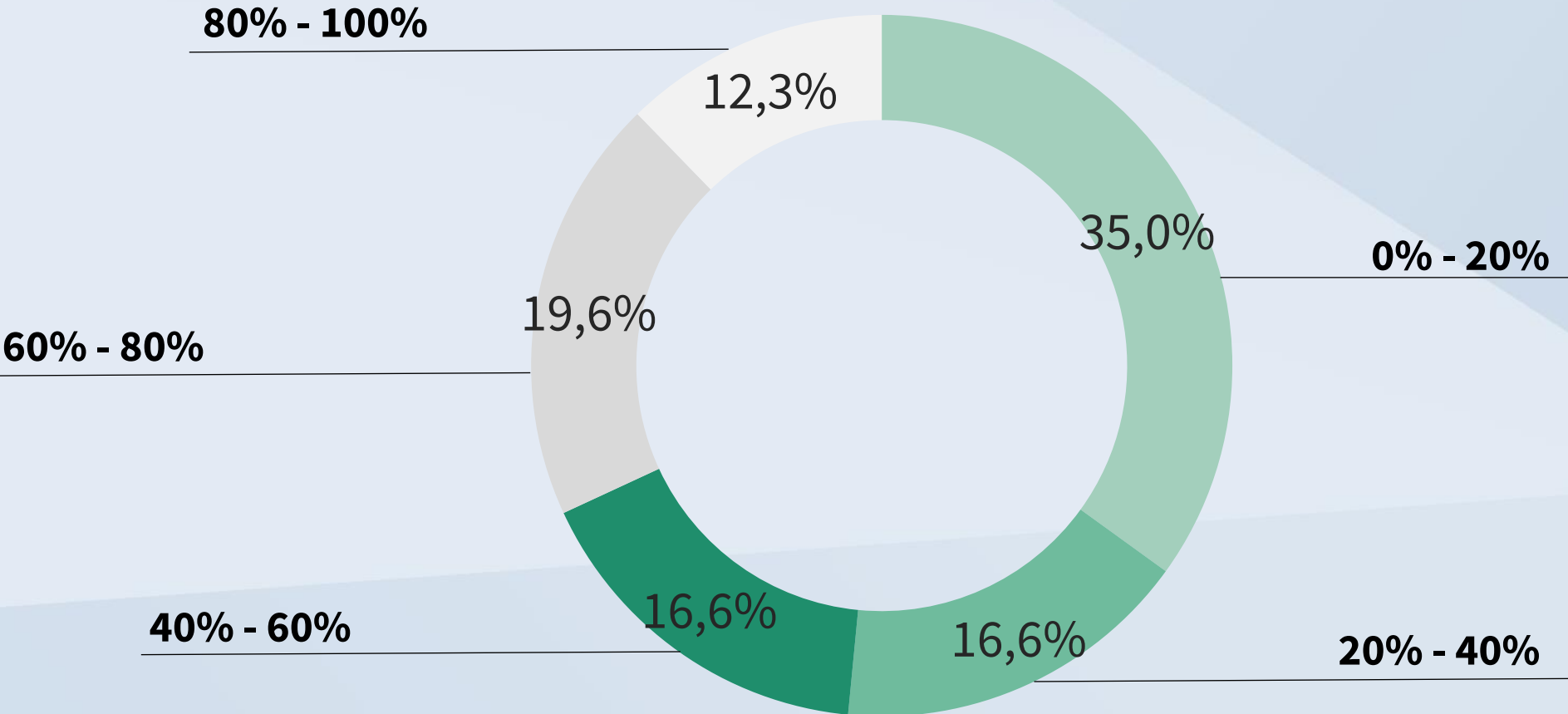


# Share of export sales in total revenues

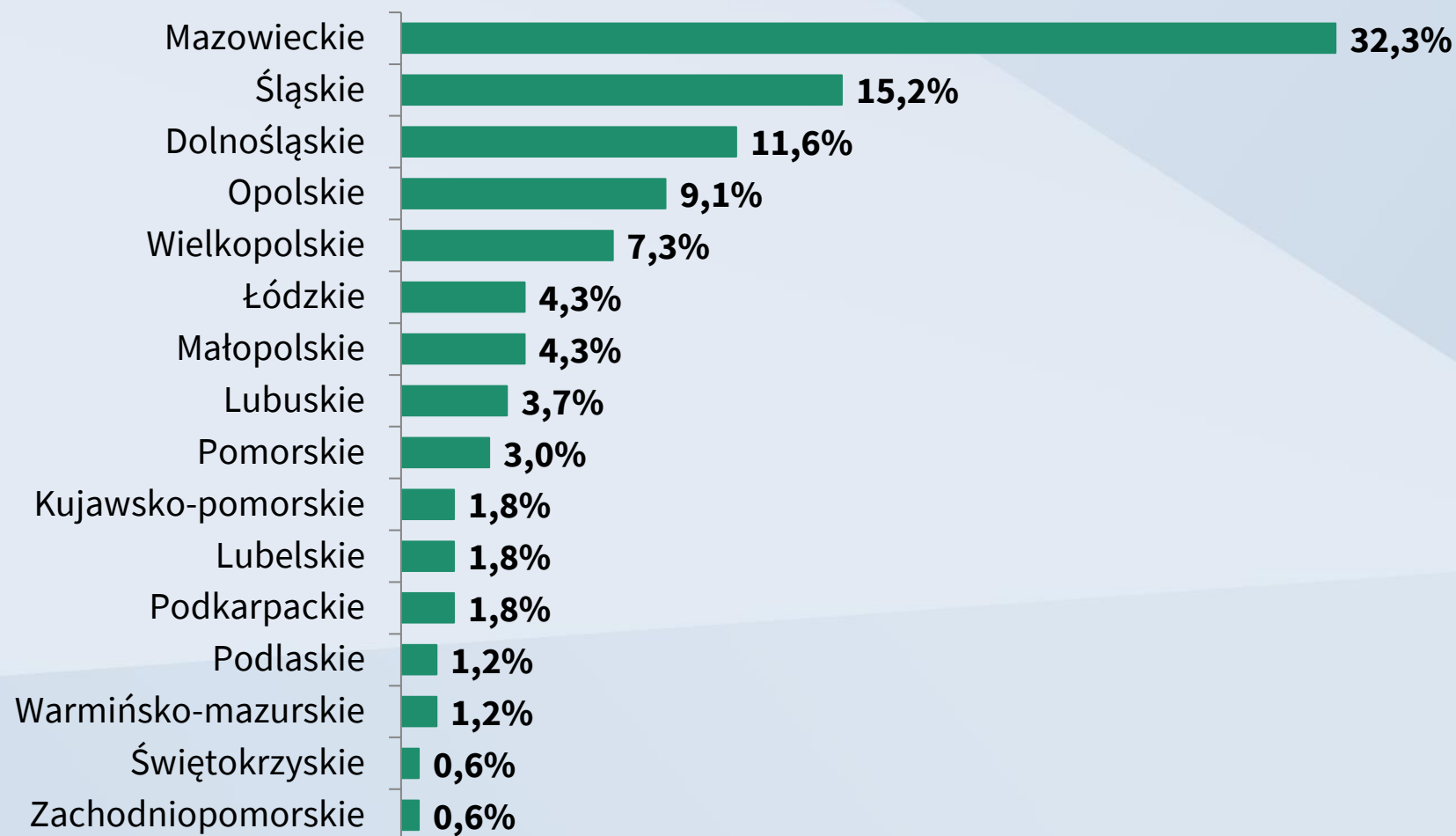




# Share of your company's purchases (products and services) from Polish suppliers



# Location of the company



# Thank you for your attention!



CAMERA DI COMMERCIO  
E INDUSTRIA ITALIANA IN POLONIA  
CAMERE DI COMMERCIO ITALIANE ALL'ESTERO



POLSKO-HISZPAŃSKA IZBA GOSPODARCZA  
CÁMARA DE COMERCIO POLACO-ESPAÑOLA



CCI FRANCE POLOGNE  
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