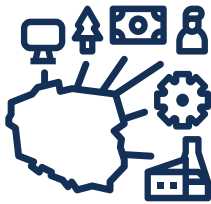




AMERICAN CHAMBER OF COMMERCE IN POLAND
PRESENTS:

U.S. COMPANIES IN POLAND

U.S. INVESTMENTS IN THE POLISH ECONOMY IMPORTANT CONTRIBUTION TO THE ECONOMY



4.3%

EQUIVALENT
OF POLISH
GDP



GREENFIELD PROJECTS IN 2020

46% of capital expenditures and 38% of new jobs in all greenfield projects in Poland were created by US-owned companies



1462

NUMBER OF COMPANIES
at the end of 2020 were owned
by 870 US-based entities
(ultimate owners)

REVENUE
\$63.9 BILLION



71% GROWTH SINCE 2010



INVESTMENTS
\$26.8 BILLION

86% GROWTH SINCE 2010

EMPLOYMENT
292 THOUSANDS



151% GROWTH SINCE 2010



ASSETS
\$57.7 BILLION

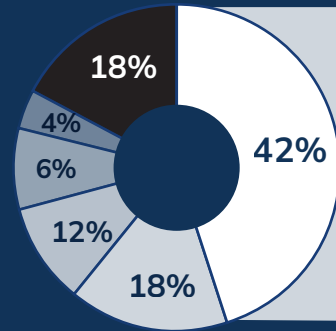
77% GROWTH SINCE 2010

SECTORAL STRUCTURE OF AMERICAN BUSINESS IN POLAND

ASSETS | \$57.7 BILLION



- Manufacturing
- Professional, scientific and technical activities
- Wholesale and retail trade; repair of motor vehicles and motorcycles
- Information and communication
- Real estate activities
- Other



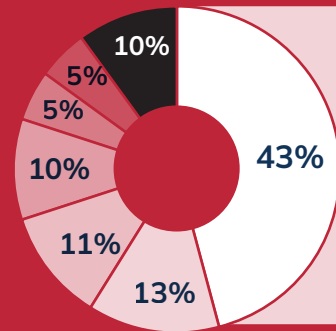
MAJOR CATEGORIES IN MANUFACTURING

| | |
|---|-----|
| Manufacture of air and spacecraft and related machinery | 6% |
| Manufacture of light metal packaging | 13% |
| Manufacture of other parts and accessories for motor vehicles | 15% |

EMPLOYMENT | 292 THOUSANDS



- Manufacturing
- Information and communication
- Professional, scientific and technical activities
- Wholesale and retail trade; repair of motor vehicles and motorcycles
- Transportation and storage
- Administrative and support service activities
- Other



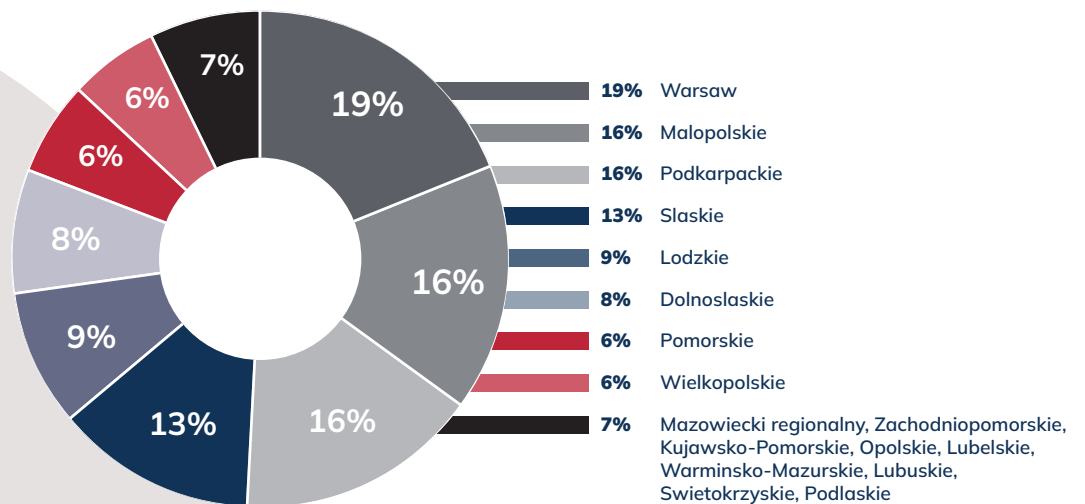
MAJOR CATEGORIES IN MANUFACTURING

| | |
|---|-----|
| Manufacture of engines and turbines | 5% |
| Manufacture of air and spacecraft and related machinery | 8% |
| Manufacture of other parts and accessories for motor vehicles | 20% |

REGIONAL ALLOCATION OF ASSETS – industrial manufacturing

Assets in industrial production, i.e. factories, have their locations throughout the country. Only one fifth of the assets are located in Warsaw.

Other important locations of production are following voivodeships: Malopolskie, Podkarpackie i Slaskie.



TOP10

by INVESTMENTS



- GIORGI GLOBAL HOLDINGS, INC.** CANPACK FOOD AND INDUSTRIAL PACKAGING SP. Z O.O., CANPACK METAL CLOSURES SP. Z O.O., CANPACK RECYCLING SP. Z O.O., CANPACK S.A., CP GLASS S.A.
- DISCOVERY, INC.** SUNWEB SP. Z O.O., TVN SP. Z O.O.
- INTERNATIONAL PAPER CO** INTERNATIONAL PAPER (POLAND) HOLDING SP. Z O.O., INTERNATIONAL PAPER CELLULOSE FIBERS (POLAND) SP. Z O.O., INTERNATIONAL PAPER POLSKA SP. Z O.O., PRZEDSIĘBIORSTWO PRODUKCYJNO-HANDLOWE TOR-PAL SP. Z O.O.
- BORGWARNER, INC.** BORGWARNER MOBILITY POLAND SP. Z O.O., BORGWARNER POLAND SP. Z O.O., BORGWARNER RZESZÓW SP. Z O.O.
- MONDELEZ INTERNATIONAL, INC.** KRAFT FOODS POLAND SP. Z O.O., IP SP. K., KRAFT FOODS POLAND SP. Z O.O. S.K.A., KRAFT FOODS POLSKA CONFECTIONERY PRODUCTION SP. Z O.O., KRAFT FOODS POLSKA S.A., LU POLSKA SP. Z O.O., MONDELEZ INTERNATIONAL RD&Q SP. Z O.O., MONDELEZ POLSKA BRANDS SP. Z O.O., MONDELEZ POLSKA PRODUCTION SP. Z O.O., MONDELEZ POLSKA SP. Z O.O., STIMOROL SP. Z O.O.
- RAYTHEON TECHNOLOGIES CORPORATION** GOODRICH AEROSPACE POLAND SP. Z O.O., HAMILTON SUNDSTRAND POLAND SP. Z O.O., PRATT&WHITNEY RZESZÓW S.A., PRATT&WHITNEY TUBES SP. Z O.O., PRATT AND WHITNEY KALISZ SP. Z O.O.
- CARGILL, INC.** CARGILL HOLDING POLSKA SP. Z O.O., CARGILL POLAND SP. Z O.O., CARGILL PROTEIN SP. Z O.O. W LIKWIDACJI, KONSPOŁ HOLDING SP. Z O.O., PROVIMI POLSKA TWORÓG SP. Z O.O., SMET CHOCOLATES POLAND SP. Z O.O.
- PROCTER & GAMBLE CO** GILLETTE POLAND INTERNATIONAL SP. Z O.O., PROCTER & GAMBLE HEALTH POLAND SP. Z O.O., PROCTER AND GAMBLE DS POLSKA SP. Z O.O., PROCTER AND GAMBLE OPERATIONS POLSKA SP. Z O.O., PROCTER AND GAMBLE POLSKA SP. Z O.O.
- TENNECO, INC.** FEDERAL-MOGUL BIMET S.A., FEDERAL-MOGUL GORZYCE SP. Z O.O., FEDERAL-MOGUL MOTORPARTS POLAND SP. Z O.O., TENNECO AUTOMOTIVE EASTERN EUROPE SP. Z O.O., TENNECO AUTOMOTIVE POLSKA SP. Z O.O., TENNECO SILESIA SP. Z O.O., TENNECO SILESIA SP. Z O.O.
- LIBERTY GLOBAL, INC.** UPC POLSKA SP. Z O.O.

TOP10

by ASSETS



- GIORGI GLOBAL HOLDINGS, INC.** CANPACK FOOD AND INDUSTRIAL PACKAGING SP. Z O.O., CANPACK METAL CLOSURES SP. Z O.O., CANPACK RECYCLING SP. Z O.O., CANPACK S.A., CP GLASS S.A.
- CVC CAPITAL PARTNERS** ZABKA POLSKA SP. Z O.O., PKP ENERGETYKA S.A.
- GOLDMAN SACHS** GRUPA ROBYG
- DISCOVERY, INC.** SUNWEB SP. Z O.O., TVN SP. Z O.O.
- BORGWARNER, INC.** BORGWARNER MOBILITY POLAND SP. Z O.O., BORGWARNER POLAND SP. Z O.O., BORGWARNER RZESZÓW SP. Z O.O.
- ADVENT INTERNATIONAL CORP** IDEMIA POLAND R&D SP. Z O.O., IDEMIA POLAND SP. Z O.O., INPOST PACZKOMATY SP. Z O.O., INPOST SP. Z O.O., INTEGER GROUP SERVICES SP. Z O.O., INTEGER.PL S.A., JENBACHER SP. Z O.O., ROEHM POLSKA SP. Z O.O., V.SHIPS/PL/ SP. Z O.O.
- MONDELEZ INTERNATIONAL, INC.** KRAFT FOODS POLAND SP. Z O.O., IP SP. K., KRAFT FOODS POLAND SP. Z O.O. S.K.A., KRAFT FOODS POLSKA CONFECTIONERY PRODUCTION SP. Z O.O., KRAFT FOODS POLSKA S.A., LU POLSKA SP. Z O.O., MONDELEZ INTERNATIONAL RD&Q SP. Z O.O., MONDELEZ POLSKA BRANDS SP. Z O.O., MONDELEZ POLSKA PRODUCTION SP. Z O.O., MONDELEZ POLSKA SP. Z O.O., STIMOROL SP. Z O.O.
- INTERNATIONAL PAPER CO** INTERNATIONAL PAPER (POLAND)HOLDING SP. Z O.O., INTERNATIONAL PAPER CELLULOSE FIBERS (POLAND) SP. Z O.O., INTERNATIONAL PAPER POLSKA SP. Z O.O., PRZEDSIĘBIORSTWO PRODUKCYJNO-HANDLOWE TOR-PAL SP. Z O.O.
- WHIRLPOOL CORP** WHIRLPOOL COMPANY POLSKA SP. Z O.O., WHIRLPOOL POLSKA APPLIANCES SP. Z O.O.
- CARGILL, INC.** CARGILL HOLDING POLSKA SP. Z O.O., CARGILL POLAND SP. Z O.O., CARGILL PROTEIN SP. Z O.O. W LIKWIDACJI, KONSPOŁ HOLDING SP. Z O.O., PROVIMI POLSKA TWORÓG SP. Z O.O., SMET CHOCOLATES POLAND SP. Z O.O.

TOP10

by EMPLOYMENT



- AMAZON.COM, INC.** AMAZON DEVELOPMENT CENTER POLAND SP. Z O.O., AMAZON WEB SERVICES POLAND SP. Z O.O.
- INTERNATIONAL BUSINESS MACHINES CORP** IBM BTO BUSINESS CONSULTING SERVICES SP. Z O.O., IBM GLOBAL FINANCING POLSKA SP. Z O.O., IBM POLSKA SP. Z O.O., RED HAT POLAND SP. Z O.O.
- MONDELEZ INTERNATIONAL, INC.** KRAFT FOODS POLAND SP. Z O.O., IP SP. K., KRAFT FOODS POLAND SP. Z O.O. S.K.A., KRAFT FOODS POLSKA CONFECTIONERY PRODUCTION SP. Z O.O., KRAFT FOODS POLSKA S.A., LU POLSKA SP. Z O.O., MONDELEZ INTERNATIONAL RD&Q SP. Z O.O., MONDELEZ POLSKA BRANDS SP. Z O.O., MONDELEZ POLSKA PRODUCTION SP. Z O.O., MONDELEZ POLSKA SP. Z O.O., STIMOROL SP. Z O.O.
- LEAR CORP** LEAR CORPORATION ENGINEERING POLAND SP. Z O.O., LEAR CORPORATION POLAND II SP. Z O.O.
- RAYTHEON TECHNOLOGIES CORPORATION** GOODRICH AEROSPACE POLAND SP. Z O.O., HAMILTON SUNDSTRAND POLAND SP. Z O.O., PRATT&WHITNEY RZESZÓW S.A., PRATT&WHITNEY TUBES SP. Z O.O., PRATT AND WHITNEY KALISZ SP. Z O.O.
- TENNECO, INC.** FEDERAL-MOGUL BIMET S.A., FEDERAL-MOGUL GORZYCE SP. Z O.O., FEDERAL-MOGUL MOTORPARTS POLAND SP. Z O.O., TENNECO AUTOMOTIVE EASTERN EUROPE SP. Z O.O., TENNECO AUTOMOTIVE POLSKA SP. Z O.O., TENNECO SILESIA SP. Z O.O., TENNECO SILESIA SP. Z O.O.
- ADVENT INTERNATIONAL CORP** IDEMIA POLAND R&D SP. Z O.O., IDEMIA POLAND SP. Z O.O., INPOST PACZKOMATY SP. Z O.O., INPOST SP. Z O.O., INTEGER GROUP SERVICES SP. Z O.O., INTEGER.PL S.A., JENBACHER SP. Z O.O., ROEHM POLSKA SP. Z O.O., V.SHIPS/PL/ SP. Z O.O.
- PEPSICO, INC.** FRITO LAY POLAND SP. Z O.O., FRITO LAY SP. Z O.O., PEPSI-COLA GENERAL BOTTLERS POLAND SP. Z O.O., PEPSICO CONSULTING POLSKA SP. Z O.O., PEPSICO GLOBAL BUSINESS SERVICES POLAND SP. Z O.O., PEPSICO LOGISTYKA SP. Z O.O., SODA-CLUB WORLDWIDE BV SP. Z O.O.
- WHIRLPOOL CORP** WHIRLPOOL COMPANY POLSKA SP. Z O.O., WHIRLPOOL POLSKA APPLIANCES SP. Z O.O.
- PHILIP MORRIS INTERNATIONAL, INC.** PHILIP MORRIS POLSKA DISTRIBUTION SP. Z O.O., PHILIP MORRIS POLSKA S.A., PHILIP MORRIS POLSKA TOBACCO SP. Z O.O., PMI SERVICE CENTER EUROPE SP. Z O.O.

TOP10

by OPERATING REVENUE



- PHILIP MORRIS INTERNATIONAL, INC.** PHILIP MORRIS POLSKA DISTRIBUTION SP. Z O.O., PHILIP MORRIS POLSKA S.A., PHILIP MORRIS POLSKA TOBACCO SP. Z O.O., PMI SERVICE CENTER EUROPE SP. Z O.O.
- CARGILL, INC.** CARGILL HOLDING POLSKA SP. Z O.O., CARGILL POLAND SP. Z O.O., CARGILL PROTEIN SP. Z O.O. W LIKWIDACJI, KONSPOŁ HOLDING SP. Z O.O., PROVIMI POLSKA TWORÓG SP. Z O.O., SMET CHOCOLATES POLAND SP. Z O.O.
- GIORGI GLOBAL HOLDINGS, INC.** CANPACK FOOD AND INDUSTRIAL PACKAGING SP. Z O.O., CANPACK METAL CLOSURES SP. Z O.O., CANPACK RECYCLING SP. Z O.O., CANPACK S.A., CP GLASS S.A.
- CVC CAPITAL PARTNERS** ZABKA POLSKA SP. Z O.O., PKP ENERGETYKA S.A.
- WHIRLPOOL CORP** WHIRLPOOL COMPANY POLSKA SP. Z O.O., WHIRLPOOL POLSKA APPLIANCES SP. Z O.O.
- ADVENT INTERNATIONAL CORP** IDEMIA POLAND R&D SP. Z O.O., IDEMIA POLAND SP. Z O.O., INPOST PACZKOMATY SP. Z O.O., INPOST SP. Z O.O., INTEGER GROUP SERVICES SP. Z O.O., INTEGER.PL S.A., JENBACHER SP. Z O.O., ROEHM POLSKA SP. Z O.O., V.SHIPS/PL/ SP. Z O.O.
- TENNECO, INC.** FEDERAL-MOGUL BIMET S.A., FEDERAL-MOGUL GORZYCE SP. Z O.O., FEDERAL-MOGUL MOTORPARTS POLAND SP. Z O.O., TENNECO AUTOMOTIVE EASTERN EUROPE SP. Z O.O., TENNECO AUTOMOTIVE POLSKA SP. Z O.O., TENNECO SILESIA SP. Z O.O., TENNECO SILESIA SP. Z O.O.
- PEPSICO, INC.** FRITO LAY POLAND SP. Z O.O., FRITO LAY SP. Z O.O., PEPSI-COLA GENERAL BOTTLERS POLAND SP. Z O.O., PEPSICO CONSULTING POLSKA SP. Z O.O., PEPSICO GLOBAL BUSINESS SERVICES POLAND SP. Z O.O., PEPSICO LOGISTYKA SP. Z O.O., SODA-CLUB WORLDWIDE BV SP. Z O.O.
- BORGWARNER, INC.** BORGWARNER MOBILITY POLAND SP. Z O.O., BORGWARNER POLAND SP. Z O.O., BORGWARNER RZESZÓW SP. Z O.O.
- INTERNATIONAL PAPER CO** INTERNATIONAL PAPER (POLAND) HOLDING SP. Z O.O., INTERNATIONAL PAPER CELLULOSE FIBERS (POLAND) SP. Z O.O., INTERNATIONAL PAPER POLSKA SP. Z O.O., PRZEDSIĘBIORSTWO PRODUKCYJNO-HANDLOWE TOR-PAL SP. Z O.O.

POLAND-US TOTAL TRADE IN MERCHANDISE GOODS (2020): \$15 222 MILLION



EXPORT OF GOODS
\$7 318 MILLION

No. 8 on the list of importing markets from Poland (up from no. 17 in 2010).

Export to the US raised higher than to other exporting markets – annual growth rate of export in 2010-2020: 10%.

36% of export is Machinery, mechanical appliances, nuclear reactors, boilers; and parts thereof:

- US is no. 2 importing market after Germany
- rose 5 times in value since 2010
- mainly: Parts of turbojets or turbopropellers, n.e.s., Mobile lifting frames on tyres and straddle carriers (Poland is no. 1 supplier in the US), Parts of aeroplanes or helicopters.



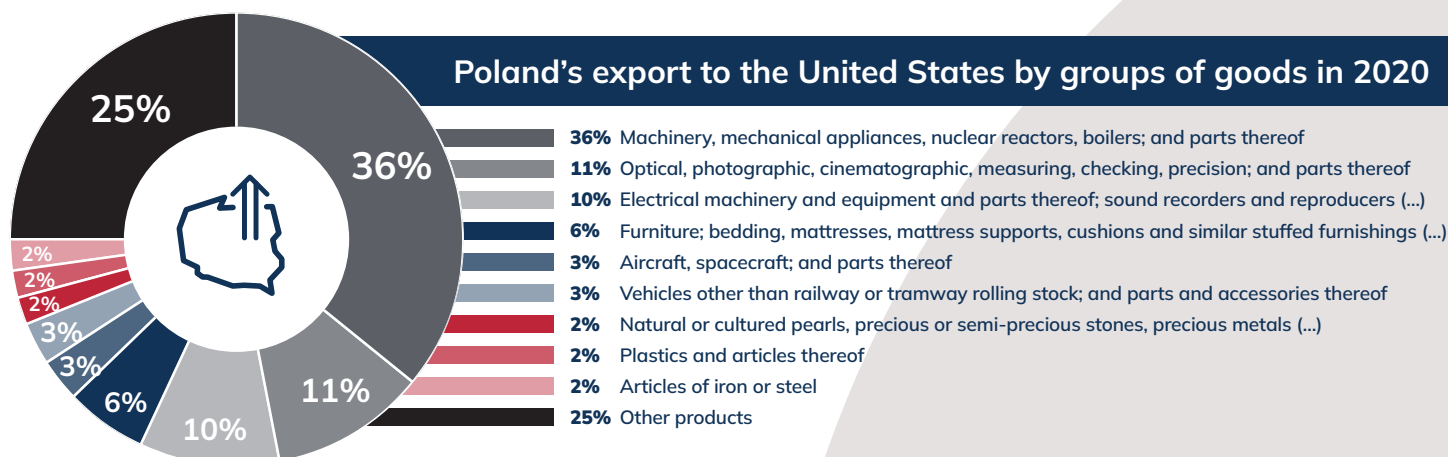
IMPORT OF GOODS
\$7 904 MILLION

No. 8 on the list of supplying markets to Poland (no. 9 in 2010).

Annual growth rate of import in 2010-2020: 6%.

24% of import is Machinery, mechanical appliances, nuclear reactors, boilers; and parts thereof.

TRADE DEFICIT: \$-586 MILLION



Poland's import from the United States by groups of goods in 2020



POLAND-US TOTAL TRADE IN SERVICES (2020): \$7 049 MILLION



EXPORT OF SERVICES
\$4 871 MILLION

No. 5 on the list of importing markets from Poland (no. 6 in 2010).

Annual growth rate of export in 2010-2020: 12.5%, year-by-year change since 2016: 20%.

Knowledge-intensive business services (ICT, Technical, R&D, Engineering): USD 3.3 billion, which accounts 68% of Polish export of services to the US.



IMPORT OF SERVICES
\$2 178 MILLION

No. 5 on the list of supplying markets (no. 4 in 2010).

Annual growth rate of import in 2010-2020: 4%.

The highest annual growth rate since 2010:

Personal travel (32%).

TRADE SURPLUS: \$2 693 MILLION

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