

FREE PREVIEW

MARKET ANALYSIS

OF AUTOMATION FIRMS

IN POLAND

2021

Executive Summary

This report contains an overview of the robot and automation suppliers in Poland. It includes **445 firms** related to automation and robotics including manufacturers, integrators, distributors, and advisors.

For every company, we provide detailed information about who they are, what they do and who they work with.

What you will find in this report:

- A summary of the suppliers in Poland:**
 -  What type of suppliers can you find?
 -  How large are the companies?
 -  In what regions are they located?
 -  What customer industries do they focus on?
 -  What robot brands are used by most suppliers?
 -  What solution types are offered by most suppliers?
- Background information about Poland**
- 445 company profiles - grouped in regions**

The following information can be found for each company:

- Basic company data, including location and year of establishment
- Type of supplier (manufacturer, integrator, distributor and/or advisor)
- Number of employees (range)
- Use cases for their products
- List of robot brands they work with
- Names of reference customers
- Industries of their customers

Please note that the complete data is not available for all companies.

Example of company profile

Company name	Supplier type	Address	Postcode	City
ASTOR	Advisor;	Smoleński 29	31-112	Kraków
Website	Number of employees	Date established		
https://www.astor.com.pl/	1000-4999	1987		
Industries	Robot brands	Robotic applications		
Food & Beverage; Other	Kawasaki; Epson; MIR	Logistics; Material Handling; Machine Tending; Welding; Other		
Reference customers				
Farm Frites, Frost, Polmo, Bakoma, Pepsi, Can-Pack, Frito-Lay, Tymbark, Amica				

About the data

This report is based on data from www.HowToRobot.com and research conducted by Gain & Co.

It's the annual market report, edition 2021 - with data collected until 1.11.2020.

The report covers suppliers of robots and automation categorized as manufacturers, integrators, distributors, and/or advisors – see page 5 for definitions. Excluded are firms supplying only minor components, such as cables, etc. – but manufacturers of grippers or software have been included.

For a full list of possible categories used in this report, see the appendix.

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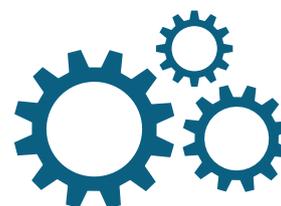
Appendix 201

Value chain of the robot industry



Distributors

Resells the products from manufacturers to integrators, typically through a local stock offering local support, service and warranty.

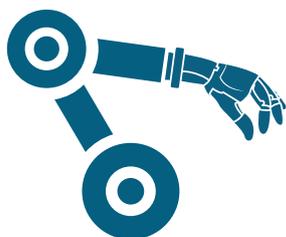
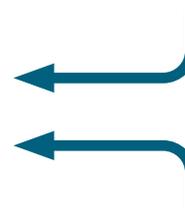


Integrators

Integrates several products into a solution sold to the end-customer. Typically has local presence and advises about own solutions and their applications.



The Customer



Manufacturers

Produces and sells products such as robot arms, grippers, etc. to distributors and integrators.



Advisors

Advises the end customer directly on buying the right solutions from integrators. Provides advice independently from other supplier interests.

Summary

We have been able to identify **445 automation firms** in Poland. On the next pages you will find some graphs showing overall trends in the whole country.

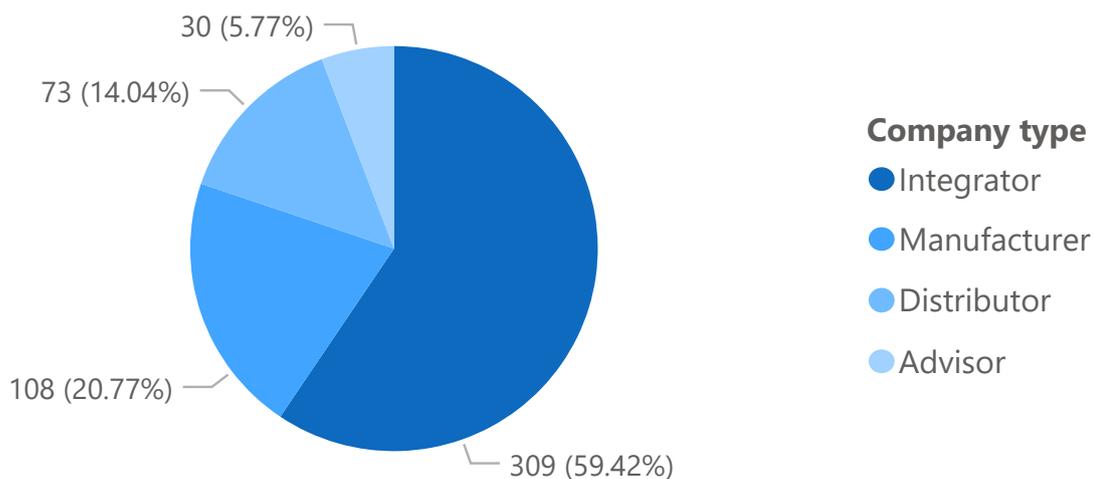
Location of automation firms



The blue areas show where the suppliers are located in Poland.

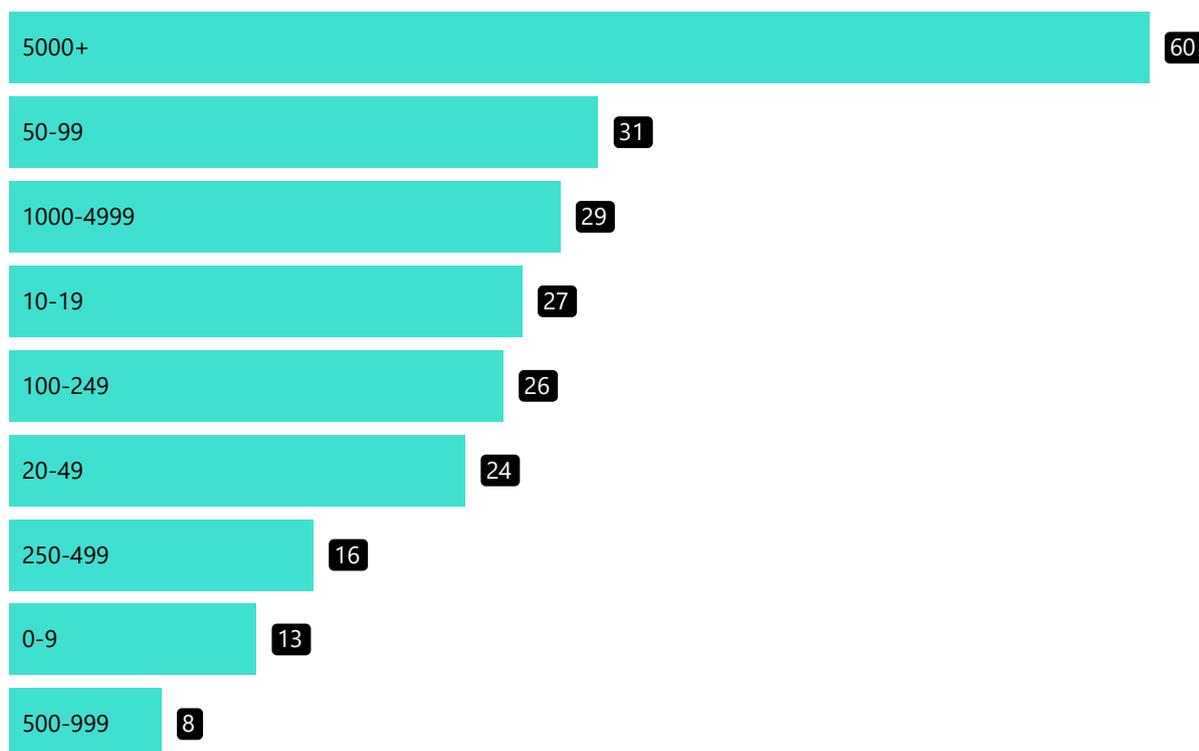
As it can be seen on the visualization above, most firms that are related to automation or robotics are located around big cities. There are also more firms in the South of Poland than in the Northern part.

Automation market by company type



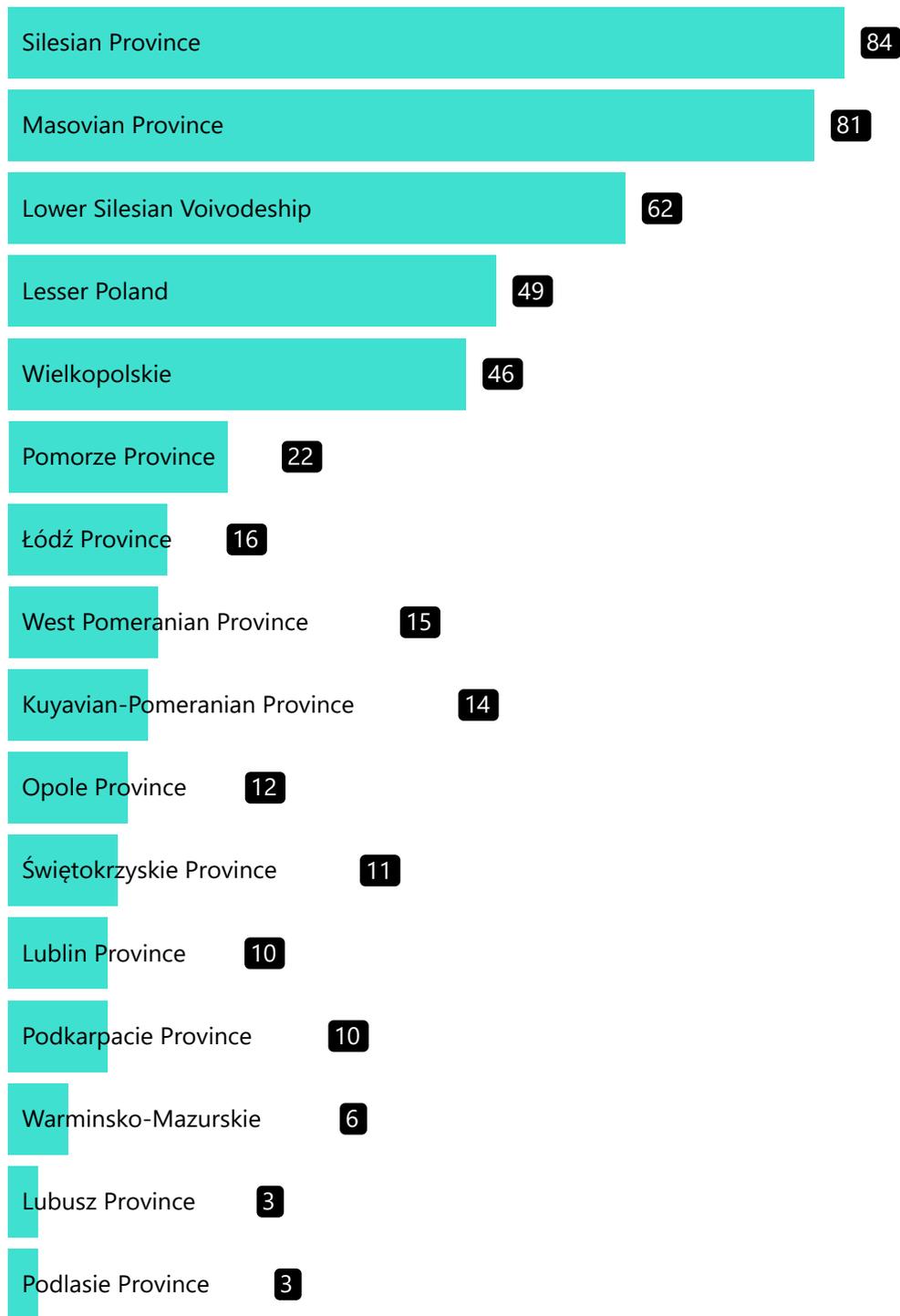
Most firms have been characterized as integrators - more than half of all firms that have been identified in Poland. It is worth noting that some of the companies might have two categories - for instance integrator & distributor.

Size of automation firms in Poland



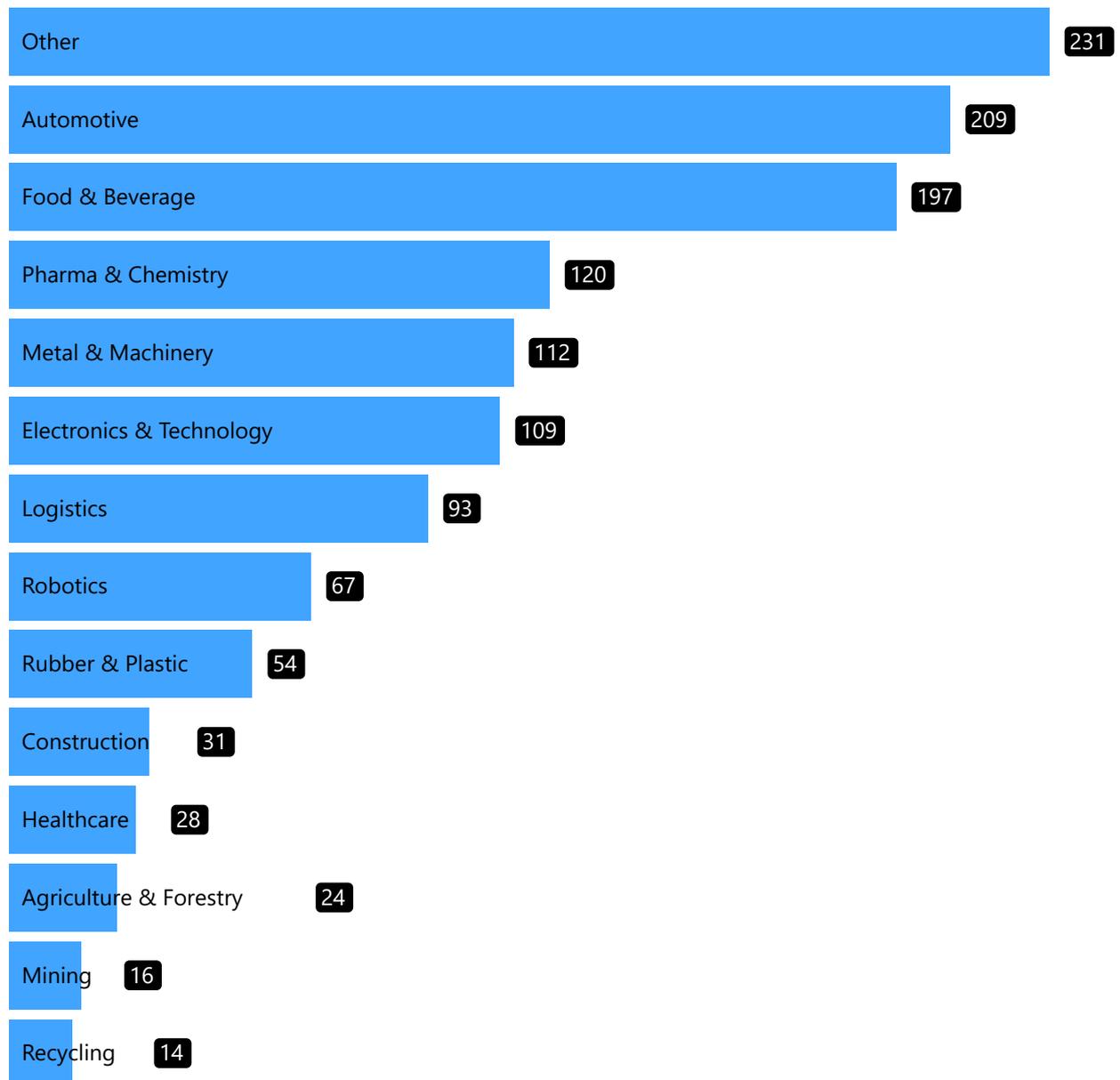
The most automation firms in Poland are characterized as enterprises bigger than 5000 employees - those are mostly the big manufacturers that have local offices in Poland and the number of employees represents all locations summed up globally. The second most common group are firms employing between 50-99 workers - those are mostly well-established integrators that have been on a market for a long time. The general tendency is that the bigger firms belong to either a manufacturer or advisor categories, while the smaller ones are integrators.

Regions with the most automation firms



The most firms related to automation & robotics are located in the regions called: Silesian (south of Poland), Masovian (around Warsaw), Lower Silesian (south-west), and Lesser Poland (also in the south). Together with Greater Poland (a little bit west from the center of Poland), they account for 70% of all automation firms in the whole country.

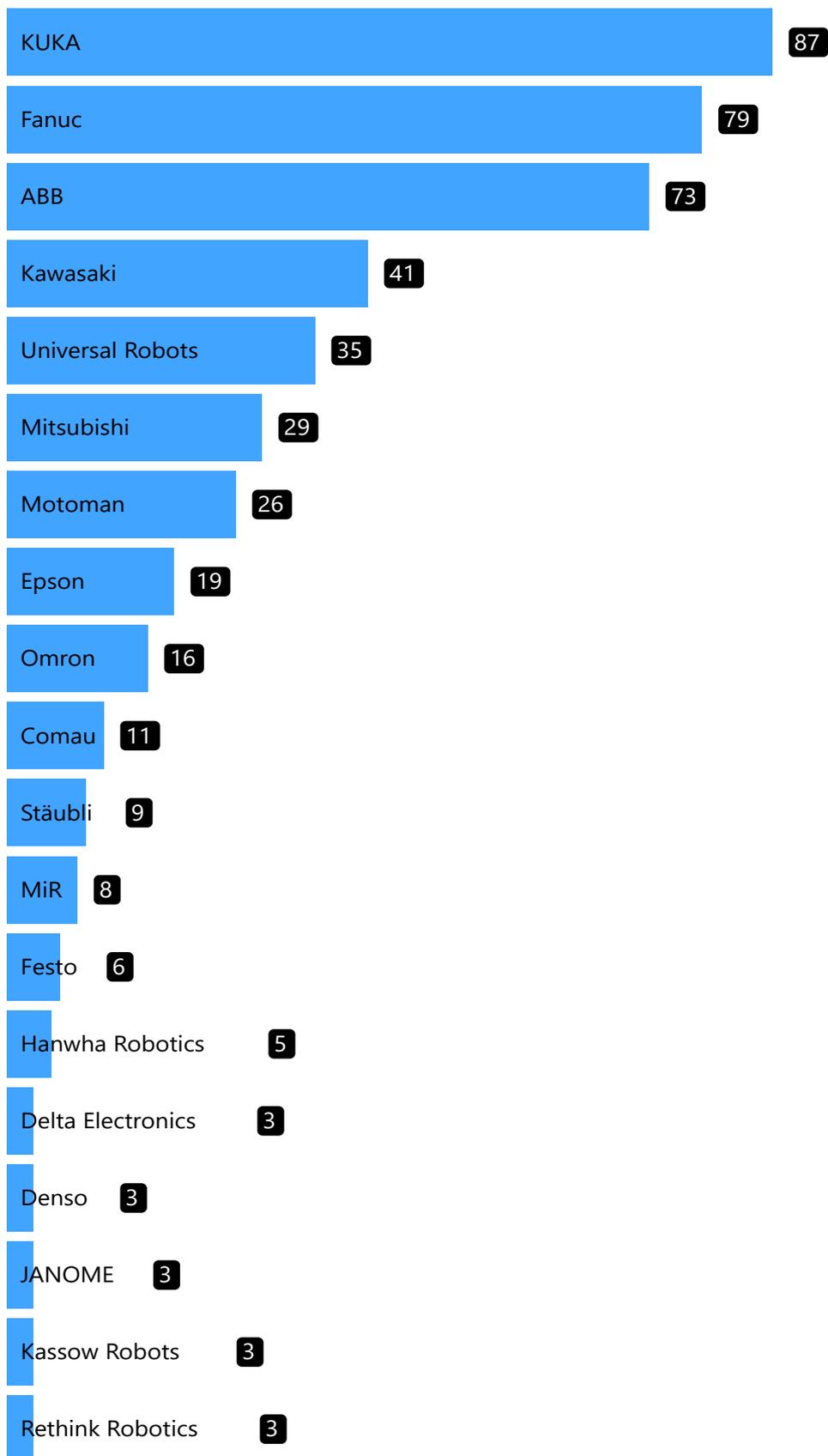
Target Industries



The next categorization is based on industries the automation firms list as their target customers. It is not surprising that the most popular industry is automotive, since it is also the most automated one. There are also quite a lot of manufacturers of cars and their components located in Poland or neighboring countries, which makes it easier to provide service and deliver solutions. The second most popular industry is food & beverage – food production actually has the biggest value of sold production in Poland and a lot of manufacturers from this sector have their production sites in Poland.

The category “other” includes all sectors of customers not elsewhere classified. Thus, all educational institutions, public sector, manufacturers of furniture, wooden products, clothes, textiles, tobacco products etc.

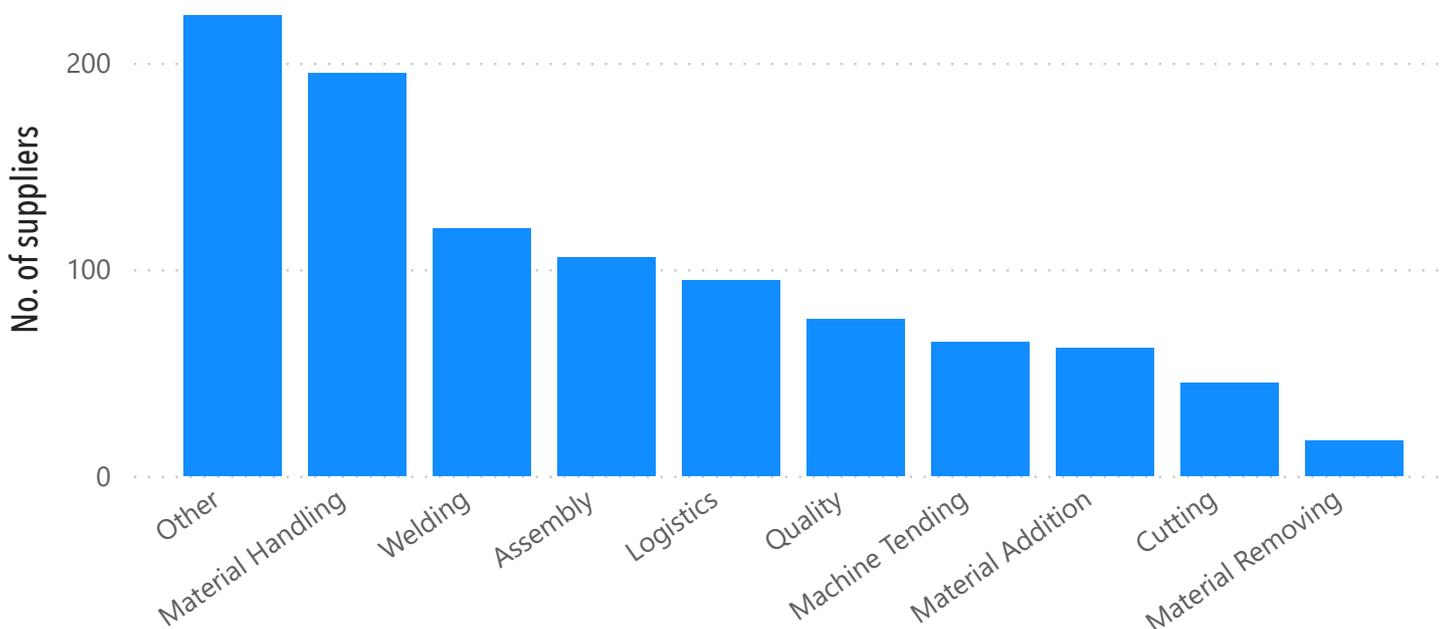
The robot brands used by most suppliers



The numbers show how many suppliers use the corresponding robot brands. The robots used by most suppliers still fall under the industrial robots category and are produced by well-established brands such as KUKA, Fanuc, and ABB. Although, Universal Robots with their range of collaborative robots started to gain some market share through their network of integrators and distributors.

There is quite a lot of firms specialized in one or two robotic brands that prefer working with particular technologies but more and more integrators start to broaden their offers, and becoming more flexible if it comes to preferred robot manufacturers. Bigger integrators have even 4 or 5 different robot brands that customers can choose from while they ask for a solution.

The robot solution types offered by most suppliers



After looking at robot brands, it is worth taking a closer look at the applications that are implemented by various automation firms. The ones that most suppliers specialize in is material handling, followed by welding. The numbers show how many suppliers offer solutions for this kind of task.

The categories that have been mentioned on websites of integrators do not correspond to classification on HowToRobot.com, therefore they have been classified as "other". The most common applications on the Polish market, offered by integrators, are palletizing/de-palletizing and packing. There is also quite a lot of "pick & place" operations that have been automated. Other less popular applications that have been classified as "other" are: gluing, painting, clean-ing, and labelling.

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