

# Opportunities to grow the Polish-Australian Trade & Investment Relationship

Anthony Weymouth

Senior Trade Commissioner, Central Europe

20<sup>th</sup> March 2019



Australian Government  
Austrade



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## @Australia



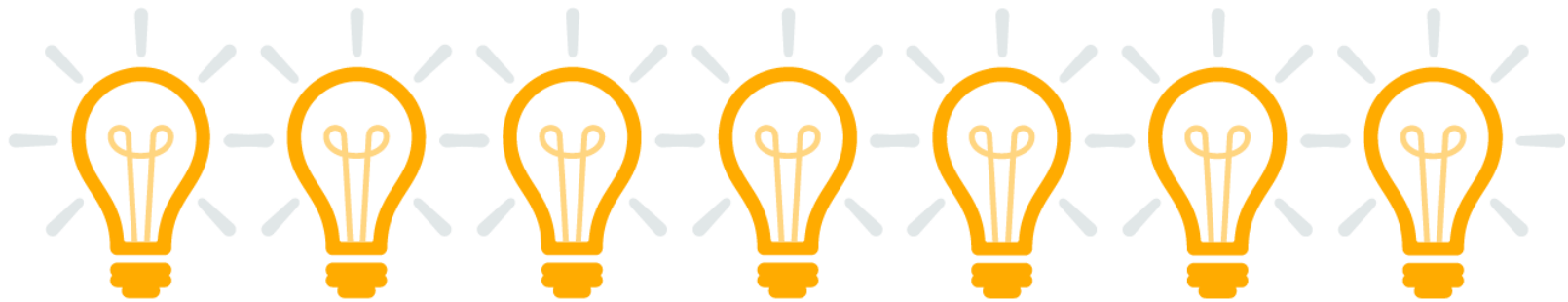
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# LONG TRACK RECORD IN WORLD-CLASS INNOVATION

Over

**1,000,000,000** people

around the world rely on Australian discoveries and innovations every day



Google  
maps

IVF

Ultrasound

WiFi

Bionic  
Ear

Cervical  
Cancer  
Vaccine

Black  
Box

# INVENTIVE AUSTRALIA

- **Bionic Ear**

- › The cochlear implant, designed to help the hearing impaired and profoundly deaf, was invented by Professor Graeme Clark of the University of Melbourne



- **Wi-Fi**

- › In 2000, using the mathematical formulas known as Fourier transforms, John O'Sullivan, Graham Daniels, John Deane, Diethelm Ostry and Terry Percival, working under the CSIRO and another organisation, Radiata, developed the first wireless transfer of data in a local area network







Sydney, New South Wales, Australia

Warsaw

### Sydney, Australia—Warsaw, Poland

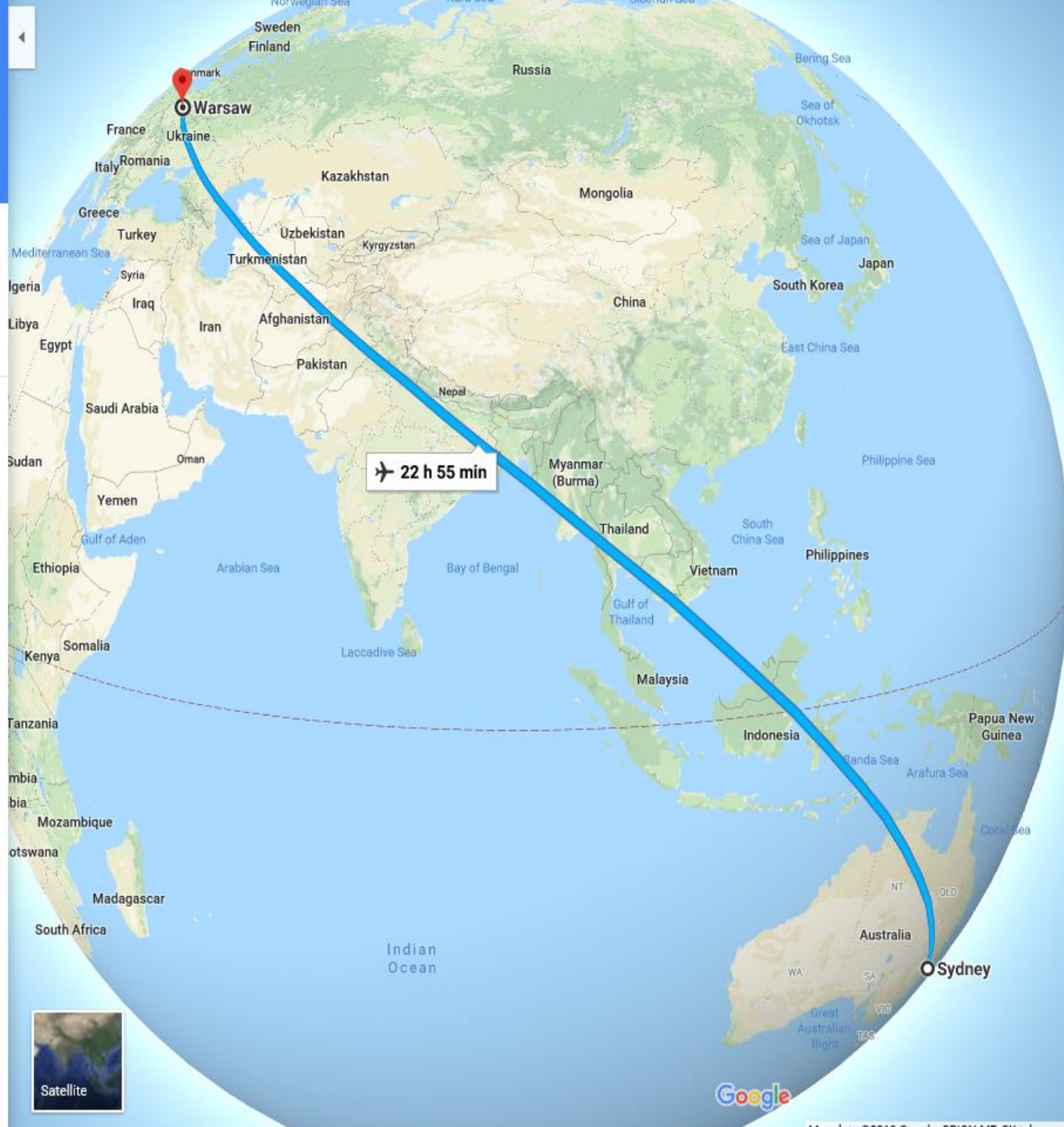
Connecting (1 or more stops)

22 h 55 min+

Qantas, Emirates, Singapore Airlines...

See results on Google Flights

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# DEMOGRAPHICS

- 24.6 million people - Approx. 25% born overseas
- English the main language, but more than 200 spoken including Italian, Greek, Chinese, Vietnamese and Tagalog
- Over 85% of the population live within 50 km of the coast
- Over 60% of the population live in 5 cities – Sydney, Melbourne, Brisbane, Perth & Adelaide
- These 5 cities consistently appear in the top ten of the EIU's list of most liveable cities in the world

# AUSTRALIA IS AN OPEN, RESILIENT ECONOMY

- 27 years of consecutive growth
  - “Free trade” economy (few subsidies)
  - Low sovereign risk
  - Stable institutions, sound regulatory frameworks
  - Australia welcomes foreign investment
-

**A GOOD  
PLACE TO DO  
BUSINESS**

**MORE THAN**  
**21,000**  
**FOREIGN COMPANIES**



**REGISTERED IN**  
**AUSTRALIA**

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# GATEWAY TO ASIA

- Strong business, cultural and political ties to Asia
- “Testing ground” for products and services



# EXTENSIVE SET OF FREE TRADE AGREEMENTS

NEW ZEALAND 1983	HONG KONG 1993	SINGAPORE 2003	THAILAND 2005	USA 2005	CHILE 2009	ASEAN 2010	MALAYSIA 2013	KOREA 2014	JAPAN 2015	CHINA 2015
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and

INDONESIA	INDIA	TPP - 11	UK	EUROPEAN UNION
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(not in force, in progress or under active scoping)

## EU & Australia

- Two-way trade valued at approximately A\$105 billion in 17/18

## Poland & Australia

- Two-way trade valued at approximately A\$1.7 billion in 17/18



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NEWS  
ARCHIVE

A A A   

Tuesday, 21 August 2018

## President opens Polish trade agency's office in Sydney



Official opening of the Polish Trade and Investment Office in Sydney (1 / 5)



ABOUT  
POLAND



## Foreign Trade Of

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## Foreign Trade Office Sydney

**Are you an investor eyeing Poland? PAIH's Foreign Trade Offices will seek investment opportunities for you in Poland and match you with trustworthy partners.**

Or perhaps you are a Poland-based company that exports internationally? PAIH's Foreign Trade Offices will support your business, not only in selling your goods and services abroad, but also in the implementation of investment projects overseas. Our experts can provide you with sector and market analyses, select potential contractors and arrange B2B meetings. They will also organize your company's participation in the most important trade fairs and missions in countries around the world.

Trust in us to help you with your business. Contact us today!

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Polish and Australian Technology and  
Innovations in the Resource and  
Energy Sectors





# Avalon 2019

- Australian International Airshow and Aerospace & Defence Exposition, Geelong, 25 Feb to 3 Mar 2019.
- Polish Trade and Investment Agency organised Polish pavilion to promote the aviation industry.
- 11 Polish companies at Avalon – Austrade arranged business matching with key companies.



# Avalon 2019

- Poland's WB Electronics and Australian defence company Cablex Pty Ltd signed an agreement on Warmate. (Witnessed by the Defence Industry Minister Steven Ciobo MP and the Ambassador of Poland to Australia Michał Kołodziejcki).



# Avalon 2019

- MOU signed between the Polish Aviation Valley (industry cluster) and the Australian Defence Alliance-Victoria. Witnessed by Martin Pakula, Minister for Jobs, Innovation and Trade, Victoria.



# Upcoming events in Australia

- Sydney Home Show – 5 to 7 Apr 2019

<https://www.sydneyhomeshow.com.au/>

- AUSTMINE – 21 to 23 May 2019

<https://austmineconference.com.au/>

- Sydney Boat Show – 1 to 5 Aug 2019

<https://www.sydneyboatshow.com.au/>

- CEBIT Australia – 29 to 31 Oct 2019

<https://www.cebit.com.au/>

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**OPPORTUNITIES**

# MAJOR INFRASTRUCTURE

- Strong demand for infrastructure investment
  - fast population growth
  - high levels of urbanisation
  - increase in freight volumes
- Australian Government to spend \$50 billion on infrastructure in addition to state and territory budgets
- The Government's Asset Recycling Initiative will unlock a further \$23 billion in greenfield infrastructure
- Infrastructure Australia's 15 year plan for future infrastructure projects
- A coordinated pipeline of infrastructure projects on the National Infrastructure Construction Schedule
- Long track record of privatising public assets and one of the world's most sophisticated PPP markets





Australian Government

**Infrastructure  
Australia**

# Infrastructure Priority List

Australian Infrastructure Plan  
Project and Initiative  
Summaries  
February 2017



Download from <http://infrastructureaustralia.gov.au>

## High Priority Projects

High Priority Projects are potential infrastructure solutions for which a full business case has been completed and been positively assessed by the Infrastructure Australia Board. A High Priority Project addresses a major problem or opportunity of national significance.

Proposed project	Location	Problem description	Proponent's proposed delivery timescale	Problem category
Sydney Metro: City and Southwest	NSW	Sydney rail network capacity	Medium term	Urban Congestion
M4 motorway upgrade (Parramatta to Lapstone)	NSW	Connectivity in outer western Sydney	Near term	Urban Congestion
WestConnex	NSW	Sydney inner west road congestion	Near term	Urban Congestion
Melbourne Metro Rail	Vic	Melbourne rail network capacity	Medium term	Urban Congestion
M80 Ring Road upgrade	Vic	Melbourne M80 Western Ring Road congestion	Near term	Urban Congestion
Ipswich Motorway Rocklea–Darra Stage 1c	Qld	Southern Brisbane-Ipswich road network capacity	Near term	Urban Congestion
Western Sydney Airport	NSW	Sydney aviation capacity	Medium term	National Connectivity
Perth Freight Link	WA	Perth freight network capacity	Near term	National Connectivity

## Priority Projects

Priority Projects are potential infrastructure solutions for which a full business case has been completed and been positively assessed by the Infrastructure Australia Board. A Priority Project addresses a nationally-significant problem or opportunity.

Proposed project	Location	Problem description	Proponent's proposed delivery timescale	Problem category
Armadale Road upgrade	WA	Perth urban road network capacity	Near term	Urban Congestion



## Western Sydney Airport

Listen to this page

A A A



Set to open in 2026, Western Sydney Airport is a transformational infrastructure project that will generate economic activity, provide employment opportunities closer to home for people in the Western Sydney region, and meet Sydney's growing aviation needs.

The Australian Government established a Government-owned company, WSA Co, and is investing up to **\$5.3 billion** in equity to deliver the airport. [WSA Co](#) will be responsible for construction of the airport.

Thousands of jobs and opportunities for local businesses will be created. The airport is expected to support almost 28,000 direct and indirect jobs by 2031, five years after the airport opens.

Thorough environmental assessment has informed measures that will mitigate and manage the effects of the airport's construction and operation on surrounding communities.



Discover what a Western Sydney Airport could look like by watching a video and exploring the new [Western Sydney Airport Portal](#).

Find out more about the planning for the Western Sydney Airport and what the next steps are in [An airport for Western Sydney](#):



# DEFENCE

Australia will spend approximately A\$200 billion over the next ten years under the Integrated Investment Program on new military hardware. <http://www.defence.gov.au/SPI/Industry/CapabilityPlan/>

In December 2016, Australia and France signed an agreement for the development and construction of 12 submarines under the Royal Australian Navy's [SEA 1000 Future Submarine Program](#). The total cost is estimated at A\$50 billion (US\$38.13 billion).

24 November 2017 - Lürssen was named as the prime contractor for 12 new Offshore Patrol Vessels (OPV).

29<sup>th</sup> June 2019 - Announcement Australia will acquire nine high-end anti-submarine warfare frigates under a deal with BAE Systems worth AU\$35 billion (U.S. \$26 billion).





Australian Government  
Department of Defence

# SEA1000

AUSTRALIA'S  
FUTURE  
SUBMARINES



THE PROGRAM



CURRENT ACTIVITIES



BUSINESS OPPORTUNITIES



SUBMARINE ESSENTIALS



COLLINS PROGRAM



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EMPLOYMENT  
OPPORTUNITIES

<http://sea1000.gov.au/>

# RESOURCES AND ENERGY



## **Abundant mineral and primary energy resources**

- World's largest economic demonstrated resources of mineral sands (rutile and zircon), brown coal, uranium, nickel, zinc and lead
- Top six producer worldwide for bauxite, black coal, copper, gold, iron ore and industrial diamond
- Significant solar and wind resources

## **Unconventional gas (exploration and production)**

- Proven plus probable reserves of coal seam gas estimated at more than 130 years of production life

## **Oil and gas supply chains**

- Projected to be world's third largest exporter of LNG by 2019

## **Energy efficiency**

- Opportunities in remote renewables, including servicing the resources sector



# Mining industry accounts for nearly 10% of GDP

A world leader in the production of key mineral commodities:

**1<sup>st</sup>**

**iron ore, bauxite,  
ilmenite, rutile  
and zircon**

**2<sup>nd</sup>**

**gold, lead and  
zinc**

**3<sup>rd</sup> manganese,  
nickel and  
uranium**

**4<sup>th</sup>**

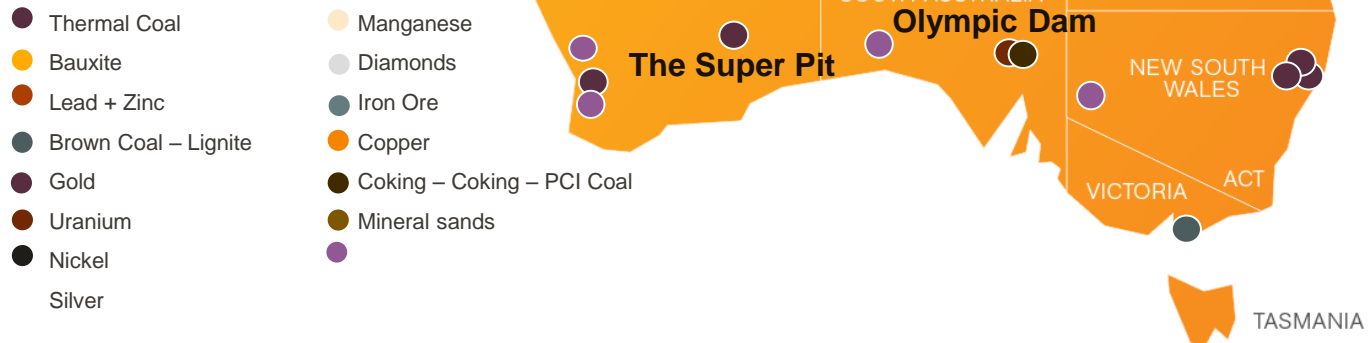
**black coal,  
antimony and  
silver**

**5<sup>th</sup>**

**diamonds**

# AUSTRALIAN MINING OPERATIONS ARE SPREAD ACROSS THE COUNTRY

555mt coal production  
817mt iron ore production



# Consumer

- High standard of living
  - Population with strong demand for high quality products.
  - Opportunities for a wide range of goods, from footwear, clothing, homewares to furniture.
-



## Industry at a Glance

### Key Statistics Snapshot

Revenue

**\$7.0bn**

Annual Growth 14–19

**-0.9%**

Annual Growth 19–24

**3.9%**

Profit

**\$118.9m**

Wages

**\$913.8m**

Businesses

**3,393**

### Market Share

Harvey Norman Holdings Ltd

**23.2%**

IKEA Pty Limited

**13.2%**

Greenlit Brands Pty Ltd

**13.1%**

BBQSAM Holdings Pty Ltd

**11.4%**

### Key External Drivers

Real household discretionary income

Consumer sentiment index

Demand from residential building construction

10-year bond rate

Revenue vs. employment growth

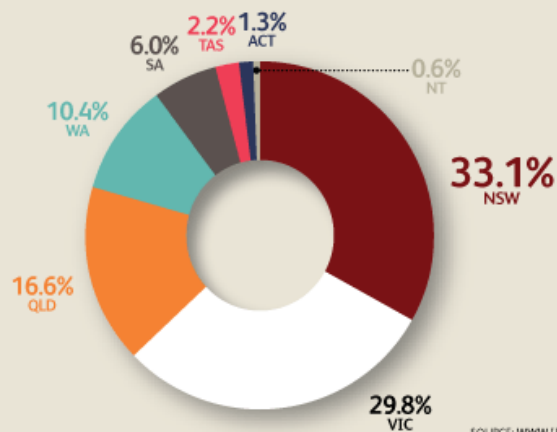


Real household discretionary income



SOURCE: WWW.IBISWORLD.COM.AU

### Enterprises



SOURCE: WWW.IBISWORLD.COM.AU

## Industry Structure

Life Cycle Stage

**Mature**

Regulation Level

**Medium**



# Furniture Retailing in Australia

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## Products & Services

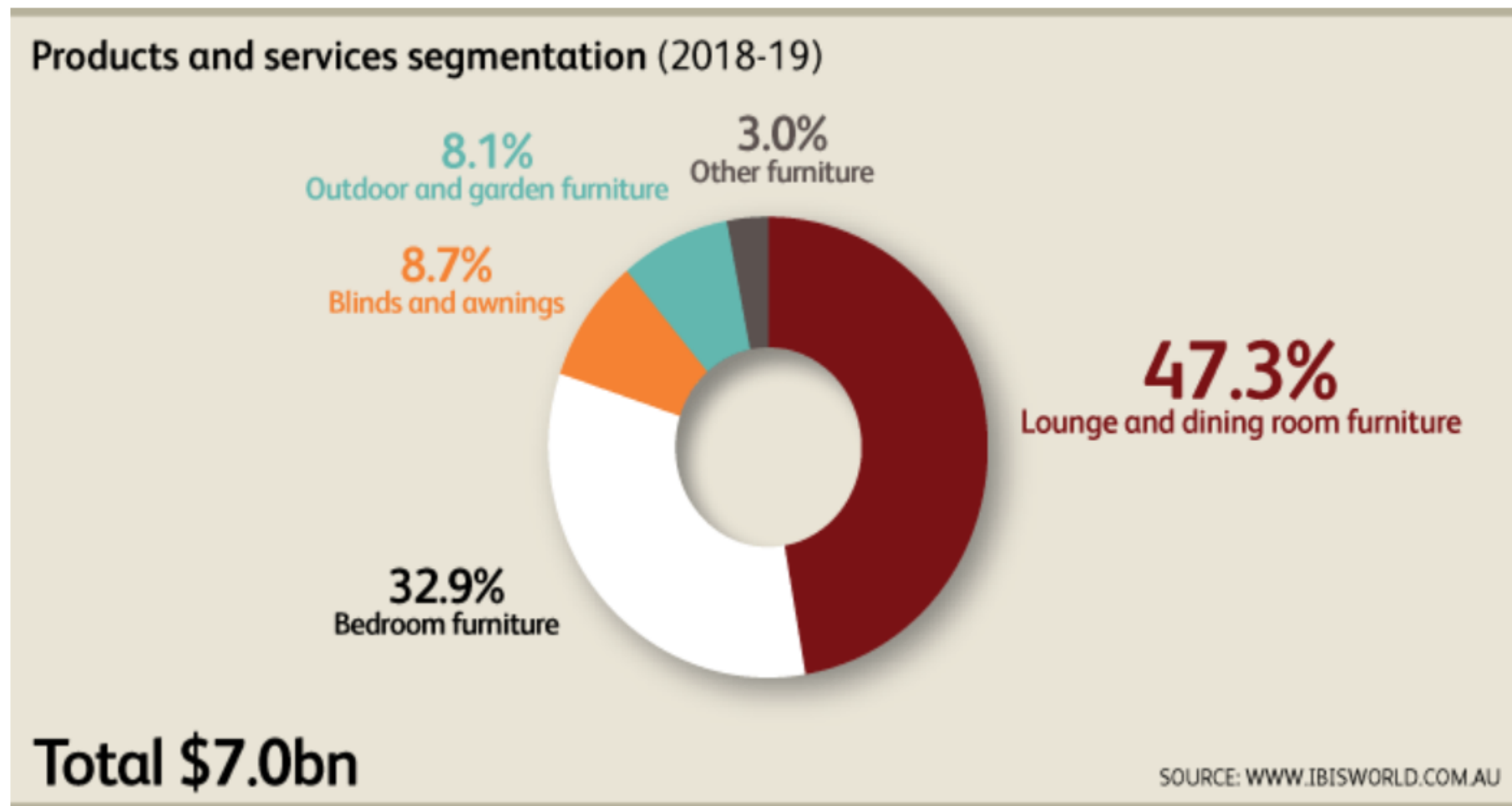


Chart Info

Industry products can be segmented into different categories, dependent on the intended location in the home. This includes lounge and dining room furniture, bedroom furniture and outdoor and garden furniture. Other non-specific location categories include blinds and awnings.

**Want to learn more?**

**[www.dfat.gov.au](http://www.dfat.gov.au)**

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