

## SPOTLIGHT ON THE GROWTH OF THE MEDICAL INDUSTRY IN POLAND

### Introduction:

Boosted by the European funds and by a real need for modernization on the existing infrastructures, the medical industry market is one of the most dynamic markets in Poland. Important investments are currently taking place with increased needs for medical equipment.

→ Many business opportunities for foreign companies



### Fact sheet: Poland



#### Area

312,679 Km<sup>2</sup>  
(2/3 of France)

#### Population

38,5 millions inhabitants  
(Urban population: 60%)

#### Currency

Zloty  
(1€ = 4,29 zł, oct. 2017)

#### 82,5 Mds €

European funds for  
2014 -2020

#### + 3,5 %

GDP growth rate  
estimated for 2017

#### 13 205€

GDP per capita

#### Basic Facts

- ✓ Spending on health : **€ 26,7 billion** (6,5% of GDP)
- ✓ **960 hospitals** for 220 000 beds
- ✓ **420 private clinics**
- ✓ **15 600 medical centres**
- ✓ Value of the medical equipment market: **over € 2 billion per year** since 2015

#### Private healthcare sector

The private healthcare sector is booming with a growth forecast of **7% per year** to reach a value of **€ 7,4 billion in 2022**.

Main private clinics in Poland:



#### Medical tourism

Medical tourism is developing at the rate of 12-15% p.a. and is one of the priority of polish export policy. (dental clinics, plastic surgeries, obesity treatment, cardiology, oncology and ophthalmology.) Nearly **400 000 foreign patients** per year are already coming to Poland.



### Growth drivers

- ✓ Increase on government health expenditure (2 times faster than the country GDP since 4 years)
- ✓ Important financial support from the EU (about € 3 billion will be invested in healthcare between 2014-2020)
- ✓ Modernization of existing infrastructure, construction of new R&D centres, laboratories, hospitals and clinics
- ✓ New technologies considering as the future of healthcare (e-health, m-health, telemedicine, IoT, software...)
- ✓ Booming in healthcare sector
- ✓ Aging of the population
- ✓ Important growth for the coming years:
  - Telemedicine: +22% in 2017
  - Medical imaging: 6 % p.a. for the 5 coming years
  - Medical devices: 5-8% p.a. for the 5 coming years

#### Business opportunities for foreign companies

The growing demand will continue after 2017 due to the important needs of the country for specialized medical equipment: Medical imaging (X-rays, MRI scanners, CT, endoscopy), material for dialysis, cardiac pacemakers. Needs in orthopedics and prosthetics (consequence of the aging of the population). Medical devices. Development of e-health (modern technology, specialized software)... Third age infrastructures and services.

**More than 80% of medical equipment are imported, especially sophisticated equipment Poland is not able to produce.**



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