

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.

Key figures in Poland

- **EUR 35,3 billion** of health spending in Poland in 2022 (**7%** of GDP)
- By 2024, health spending will reach **8-9%** of GDP
- **744 hospitals** with approximately **213,000 beds**
- **420** private clinics
- **15,600** practices and medical centres
- The market value of medical equipment exceeds **EUR 3.3 billion** in 2022 (the largest one in CEE).

Needs for medical equipment

300 manufacturers of medical equipment and basic supplies, (50% employ 49 or more people)
Poland imports **95%** of the specialized medical equipment (50% comes from Germany, China and Netherlands).

Polish imports of medical devices (in mln EUR, 2021)

Origin	Value in EUR (mln)
Total	1,340,000
Germany	466,000
China	114,06
Netherlands	113,09
Denmark	69,210
France	65,260

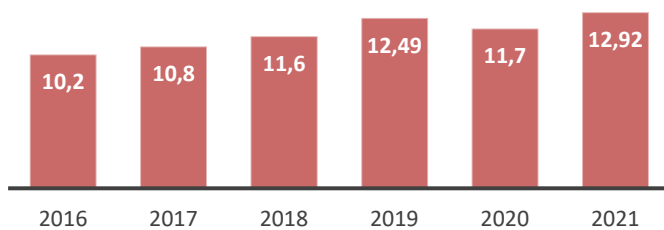
Source: GUS

The private health sector

The private health sector is growing at an average annual rate of almost **10%** per year and is expected to maintain this level of growth. In 2021, it was already worth **EUR 12,9 billion** and **by 2024** it should increase to **EUR 17,3 billion**.

In 2022, 4,2 million Poles had private medical insurance (up 10% / 2021)

Value of private healthcare in Poland (billion euros)



Source: GUS, PMR

Main private healthcare providers in Poland:



Expected specific products:

- Advanced diagnostic equipment (nuclear medicine) and diagnostic kits
- Surgical equipment, especially for minimally invasive procedures
- Patient monitoring systems also solutions minimising hospitalisation
- Cardiovascular and oncology treatments and associated devices
- Elderly care products for home care in nursing homes and orthopedic assistants
- Infection prevention products and safety products

Opportunities for foreign companies

- ✓ Aging population: Many funding and projects to improve the quality of life for seniors
- ✓ Strong interest in new technologies (e-health, m-health, IOT, applications...)
- ✓ Development of telemedicine which is a strong trend confirmed during the Covid-19 pandemic of 2020/21
- ✓ **75% of Polish patients want to use telemedicine solutions.**
- ✓ Growth in medical tourism (dental care, cosmetic surgery, ophthalmology, obesity treatment, etc.) in the range of **12-15%** per year.
- ✓ Aesthetic medicine: 2.3% of the Polish adult population uses aesthetic medicine.

Sources: Ministerstwo Rozwoju, Ministerstwo zdrowia, PAIH, Główny Urząd Statystyczny, PMR
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