

Healthcare Sector in Poland: A Market in Full Transition Offering Significant Opportunities for European Companies

Introduction

Driven by a growing demand for medical care and a genuine need to modernize existing infrastructure, the medical sector stands as one of Poland's most dynamic industries, expected to reach 8 to 9% of the GDP by 2024. Substantial investments are underway, emphasizing increased needs for infrastructure and equipment. Medical device imports continue to rise, reaching 1.39 billion euros in 2022, with further growth anticipated in 2023. Poland faces a general need to replace outdated medical equipment in public hospitals, while private healthcare experiences rapid expansion, fueled by innovative devices and rising wages enabling access to previously unattainable private care.



A Shared Healthcare System:

Poland's public healthcare sector operates on an antiquated model with lengthy procurement processes, contrasting the private sector's rapid development through various investment sources. Private healthcare in Poland is set to grow by 10% annually, with the value of services expected to reach 17.3 billion euros by 2024. Key players in this sector include entities like Medcover, Luxmed, and the influential PZU.

At the Forefront of Digitalization and E-Health:

Poland excels in innovative technologies, particularly in online healthcare. Nearly 60% of Polish patients have embraced telemedicine solutions, such as teleconsultation, and telerehabilitation. Over 150,000 R&D projects, focusing on areas like rehabilitation and telecardiology, contribute to Poland's digital health advancements. Additionally, a coalition for artificial intelligence in healthcare has been formed to harness AI's potential, supervised by the Polish Federation of Hospitals.



Streamlined Regulations and Excellent Reimbursement System:

The Regulation on Medical Devices (RDM) enhances safety and quality in Europe, impacting manufacturers, notified bodies, and competent authorities. In Poland, the April 7, 2022 law modifies the current framework for medical device markets, especially those eligible for state reimbursement. Pricing for medical devices is generally unregulated in Poland, except for those falling under reimbursed categories.

Rising Imports of Medical Equipment:

Poland is a significant market for specialized medical equipment, importing 95% of its used materials. Major suppliers include Germany, China, and the Netherlands. The country also boasts around 300 local manufacturers of medical equipment and basic supplies. Specific products in demand include advanced diagnostic equipment, surgical instruments, patient monitoring systems, cardiovascular and oncological treatments, elderly care products, and infection prevention items.

Numerous Opportunities to Seize:

Poland prioritizes the health of its citizens, particularly seniors, investing in projects to enhance their quality of life. Embracing new technologies like e-health, mobile health, and IoT, the country offers innovative and practical solutions. It's also a growing destination for medical tourism, witnessing annual growth between 12% to 15%, with dentistry, ophthalmology, obesity treatment, and esthetic medicine being highly sought-after.

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