

## INTRODUCTION :

The current situation in Ukraine has generated massive needs and investments for the country itself but also indirectly for the neighbouring countries. Poland is recognized as a strategic ally in Ukraine's reconstruction endeavors and at the same time plays a crucial role in the whole region for strategic investments. Three fundamental drivers are leading this trend: reinforcing security within the EU and NATO, diversifying energy sources from Russia, and integrating Ukrainian emigrants. In this context, some key industries are directly impacted with major investment generated : Defense & Aerospace, Energy, Infrastructure & Construction, Healthcare & Medtech, IT & Cybersecurity. Here is a focus on the major opportunities created:

### Defense & Aerospace

- **4,3%** of Polish GDP (**\$14 billion**) to its military – the highest share among the NATO member states
- Multiple defense contracts have been signed since 2022 including US F-16 sustainment, anti-missiles, and a milestone **\$2 billion** Foreign Military Financing (FMF) direct loan agreement from the US to support Poland's defense modernization
- Major Aerospace cluster in south-East Poland: **193 members** (Sikorski, Pratt&Whitney, Goodrich,...) / **35 000 employees** => acting as a growing hub for European operations

### Energy

Swift in energy mix:

- One of **Europe's leading solar photovoltaics market** and major investments in renewable Energy especially **offshore windfarms (up to 33 GW planned in the baltic sea)**
- **1st** nuclear plant by 2033
- Poland's energy transition: approx. **€135 billion** in new investments by 2030
- Diversification of gas supply from US, Scandinavia and UAE

### Infrastructure & Construction

- **\$46.2 billion** planned to be spent on investment in new road infrastructure
- **\$16.3 billion** for the railway infrastructure
- **\$16.3 billion** to be invested until 2030 in the enhancement of navigation along Poland's main rivers
- **New Solidarity Transportation Hub (STH)** will handle 45 million passengers and up to **100 million** with an estimated cost of **\$9 billion**
- **6th** largest construction market in Europe, **10% of GDP**, 3,2% average annual growth until 2026 with strong Focus on Green building and RES
- Bridgehead for reconstruction projects in Ukraine

### Healthcare & Medtech

- Import levels of medical devices in Poland: **\$1,5 billion** in 2022 and growing Y/Y.
- Need to replace old medical equipment in public hospitals
- The private health sector: **10% growth Y/Y**. In 2021 worth **\$14 billion** and by 2024 **\$18,7 billion**
- Strong development of medical tourism and e-medicine, and development of services for Ukrainian citizens
- Appetite to modernise local manufacturing industry (transfer of technology / M&A) and act as a hub for market expansion in EU
- Potential bridgehead to address the needs on Ukrainian healthcare market

### IT & Cybersecurity

- **\$29 billion** in 2023 with a **12.4%** growth rate.
- The value of the cybersecurity market in Poland is projected to reach **\$650 million** by 2024
- **60,000** technology companies & home to 10 "unicorns"—startups valued at over **\$1 billion**.
- Poland is the largest exporter of ICT services in Europe
- A prime destination for software development and technology services.



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