



Polish Investment  
& Trade Agency  
PFR Group

# THE SECURITY AND DUAL USE GOODS SECTOR

**Poland.** Business Forward







**Poland is an internationally acclaimed destination for:**



### **Pristine nature**

A top 10 country to visit according to Lonely Planet



### **A place where East meets West**

Dynamic business hub at the heart of Europe



### **Vibrant food scene**

Warsaw among Top 10 Vegan-Friendly Cities in the World



### **Great cities**

Wrocław – most business friendly medium – sized European city (2022)  
Kraków – a TOP 25 Travellers' Choice 2022  
Łódź – in the „Best of the World 2022” List by National Geographic



### **Attractive place for expats**

Young, increasingly international society, with a very high level of English proficiency



### **Rich history**

Vast legacy of bravery and resilience





WHY  
POLAND



FACTS ABOUT  
THE POLISH SECURITY  
AND DUAL USE  
GOODS  
SECTOR



WHAT MAKES  
US DIFFERENT



DID YOU KNOW  
THAT



SUPPORT  
INSTITUTIONS



HOW WE CAN  
HELP YOU

## Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

## Superb market share

Poland is the sixth largest economy in the European Union in terms of GDP

## Large, high-quality talent pool

300k+ of well-educated graduates annually

## Resilient economy

Poland is considered to be one of the most economically stable and fastest developing countries in the world.

## Transparent

Regional leader (2nd in CEE) in the Transparency International Corruption Perceptions Index

## FDI magnet

In 2022, Poland was ranked highest in the CEE region and eighth in Europe in terms of the number of inward foreign direct investments.

## Top-notch infrastructure

5th longest highway network in the EU  
Over 5,115 km total length of motorways and expressways

## Ratings remain high despite the turbulent times

Moody's: A2, S&P: A-, Fitch: A-, as of the second half of 2023

## Competitive, well-developed cities

European Cities of the Future 2023 (fDi Intelligence):

Warsaw – 6th position overall (ahead of Berlin and Stockholm)  
and 2nd in the business friendliness category among major cities;

The Silesia Region – European Entrepreneurial Region in 2021-2022,

among the top ten European regions in terms of attracting FDI and cost-effectiveness



# FACTS ABOUT THE POLISH SECURITY AND DUAL USE GOODS SECTOR



## Significant importance of military situation in Ukraine

The export of Polish military product has been growing fast in last 10 years (+18,9% CAGR). In 2023, export has grown to 1059.70 m. USD.



## Main Polish military producer

Polska Grupa Zbrojeniowa (PGZ) is one of the largest defense concerns in Europe. More than 50 smaller producers are associated within the Group, and the Group additionally holds shares in 32 other companies.

## Value of Polish export:

\$27.25 m. (2012)



\$933.79 m. (2022)

## CAGR (2012 - 2021):

+18,9% annually



Sources:  
Statistics Poland, Foreign Trade Database  
Export – industry defined by CN code 93.  
money.pl

# WHAT MAKES US DIFFERENT

## Central localization

*Poland is a part of NATO located in Central Europe*



Source:  
Statistics Poland

## Access to highly educated workforce



**Military University of Technology** – both a military and civilian university dedicated to the development of security and defense technologies, in the academic year 2022/23 provides education for over 7,500 students. Its graduates often are a valuable experts for entire Polish defense industry.

## Poland as the logistic hub



Since the outbreak of the conflict in Ukraine, Poland, as a neighbor of Ukraine, has become a key country and a logistics hub ensuring supplies to this country. The border airport next to the city of Rzeszów is an important point on the map and the Podkarpackie region plays a key logistic role for military supplies to Ukraine.

# DID YOU KNOW THAT



## Modular firearm of the 21st century

The Polish MSBS-5.56 "Grot" carbine is the latest design produced by the Polish company Fabryka Broni "ŁUCZNIK" - Radom. The modular design based on the requirements of the modern battlefield make it considered a versatile and effective weapon. The carbine is currently being tested in combat in the conflict in Ukraine, where it is considered one of the best shooting weapons helping this country to protect its independence.



## FlyEye: sky-high innovation for providing security

The aircraft system „FlyEye”, developed by Flytronic (part of the Polish WB Group), an advanced military surveillance drone, is offered by NSPA, i.e. NATO Support and Procurement Agency - the main logistics and procurement agency of the North Atlantic Treaty Organisation.



## Safe sky and ground thanks to Polish defense products

The portable anti-aircraft missile system "Piorun", manufactured by the Polish company Mesko, has proven to be an effective anti-aircraft weapon, providing protection against airborne threats.

Another example of Polish defense product is self-propelled tracked gun-howitzer „AHS Krab”. Produced by Polish state company Huta Stalowa Wola (HSW) vehicle is aimed to effectively provide an advantage on the battlefield.

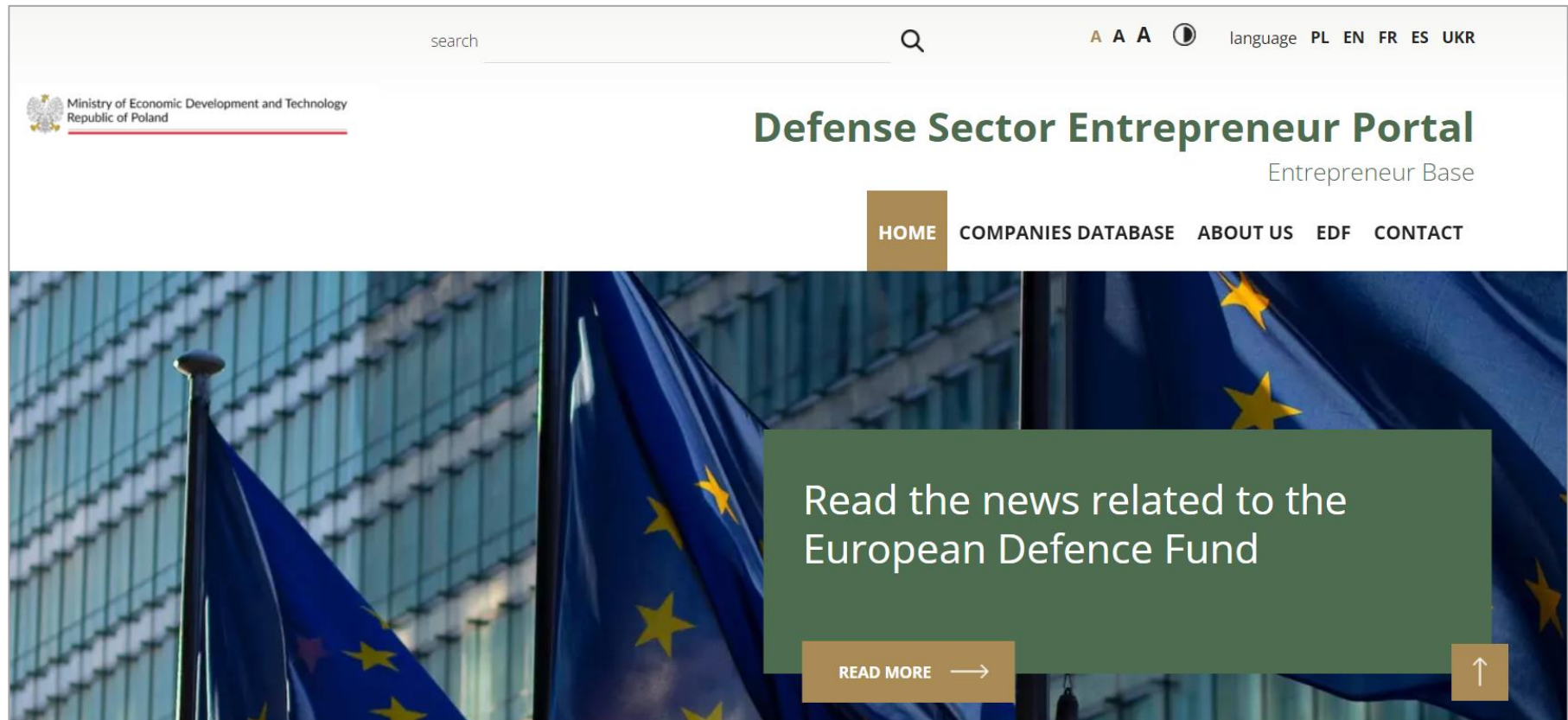
From almost the first moments of the invasion of Ukraine, when Polish weapons have been delivered to Ukraine and strengthened the Ukrainian defenders, they have proved its usefulness in military operations supporting national defense.

# SUPPORT INSTITUTIONS

## Ministry of Economic Development and Technology *Defense Sector Entrepreneur Portal*

Portal of the Polish Ministry for the exchange of knowledge about Polish companies in the defense industry. A database tallows the user to search for companies and integrates knowledge and potential about industry.

[polishdefenceindustry.gov.pl/en](http://polishdefenceindustry.gov.pl/en)





# The Polish Investment and Trade Agency

The Polish Investment and Trade Agency's (PAIH) mission as a Government Agency is:

- To enable small- and medium-sized companies to reach their full potential in exporting their products and services around the world
- To support potential investors in Poland by providing comprehensive and up-to-date information services regarding legal and tax aspects, location and human capital, as well as on the available financial incentives
- To promote 'Poland as a Brand'

## How we can help

PAIH's experienced team of experts with a hands-on approach and excellent understanding of the needs of entrepreneurs will ensure that your projects will move as fast and smooth as possible.



**Information packs**  
macroeconomic, HR,  
legal, sectoral data



**Analysis  
of export  
potential**



**Preparing  
information  
packs**



**Verifying  
business  
partners**



**Organising  
business  
missions**



**Preparing lists  
of possible  
business partners**



**Organising  
B2B meetings**



**Support in contacts  
with Government  
Agencies**

# Contact us

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