

SUCCEED WITH POLAND

THE PHARMACEUTICAL SECTOR

Poland. Pharmaceuticals

Unprecedented growth

Highest growth rate in the OECD between 1990 and 2019

Superb market access

40% of the region's total GDP and a gateway to the wider EU market

Large, high-quality talent pool

300k+ of well-educated graduates annually

Resilient economy

Max score for Macroeconomic Stability in the Global Competitiveness

Almost 30 years of continuous growth

Almost 10 years of stable growth in foreign trade turnover

Transparent

Regional leader in the Transparency International Corruption Index

FDI magnet

3rd in the EU in terms of value of new greenfield projects (2018). One third of all FDI stock in the region

Top-notch infrastructure

1st in CEE in Airport Connectivity & Quality of Road Infrastructure (Global Competitiveness Report)

Largest share of the EU budget

EUR 160bn for Poland in subsidies and loans until 2027

Competitive, well-developed cities

European Cities of the Future (fDi Intelligence)

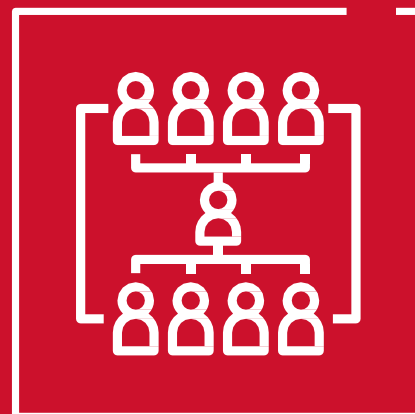
Warsaw: 7th position (ahead of Berlin and Stockholm)

Kraków: 2nd in EU in Business Friendliness among Large Cities

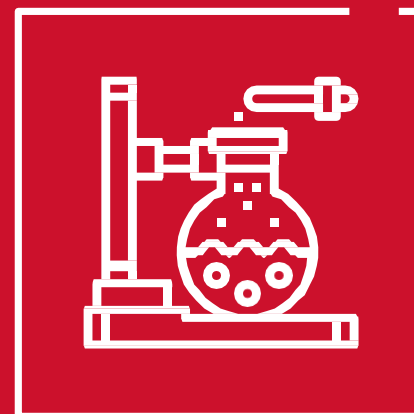




MATURE AND
STABLE
BUSINESS
ENVIRONMENT
FOR THE
**PRODUCTION
OF GENERICS**



**WELL-
EDUCATED**
TALENT POOL



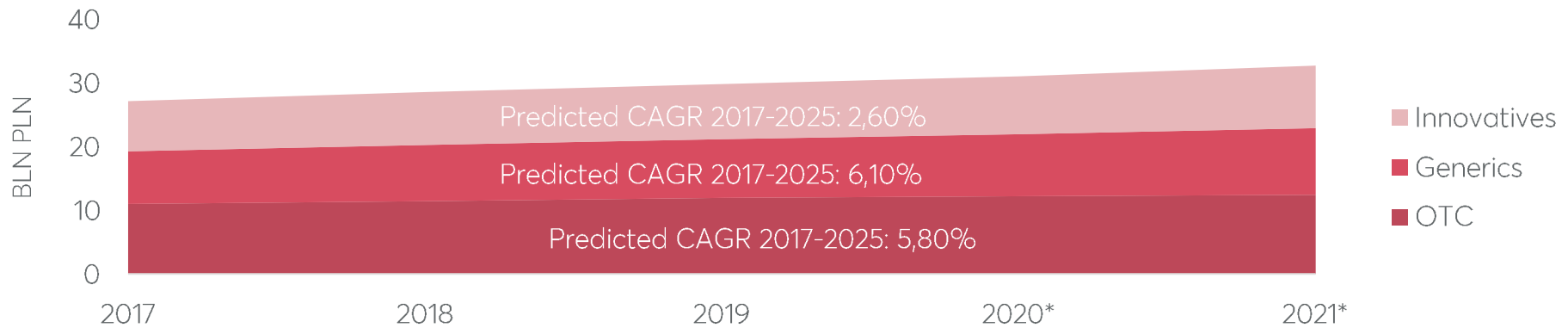
TRUSTED
BY THE
**LARGEST
PLAYERS**



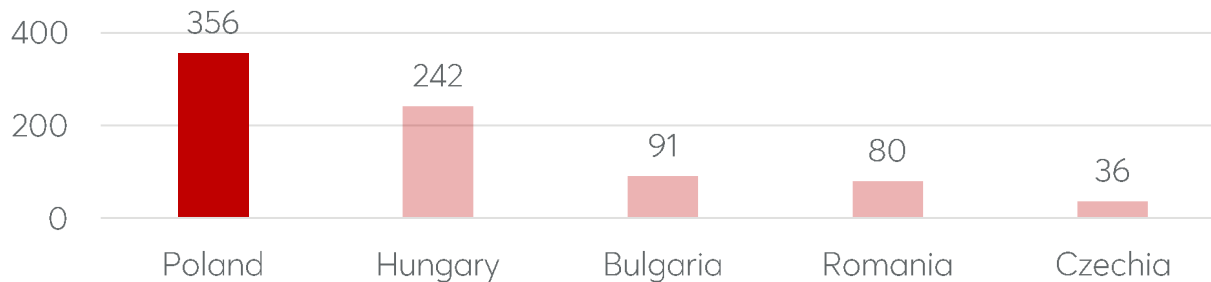
VIBRANT
**POLISH
COMPANIES**

Mature and stable business environment for the production of generics

Polish market compound annual growth rate forecast by segment in 2017-2021 ^



Pharmaceutical industry research and development in CEE countries (2018, in mln €)**



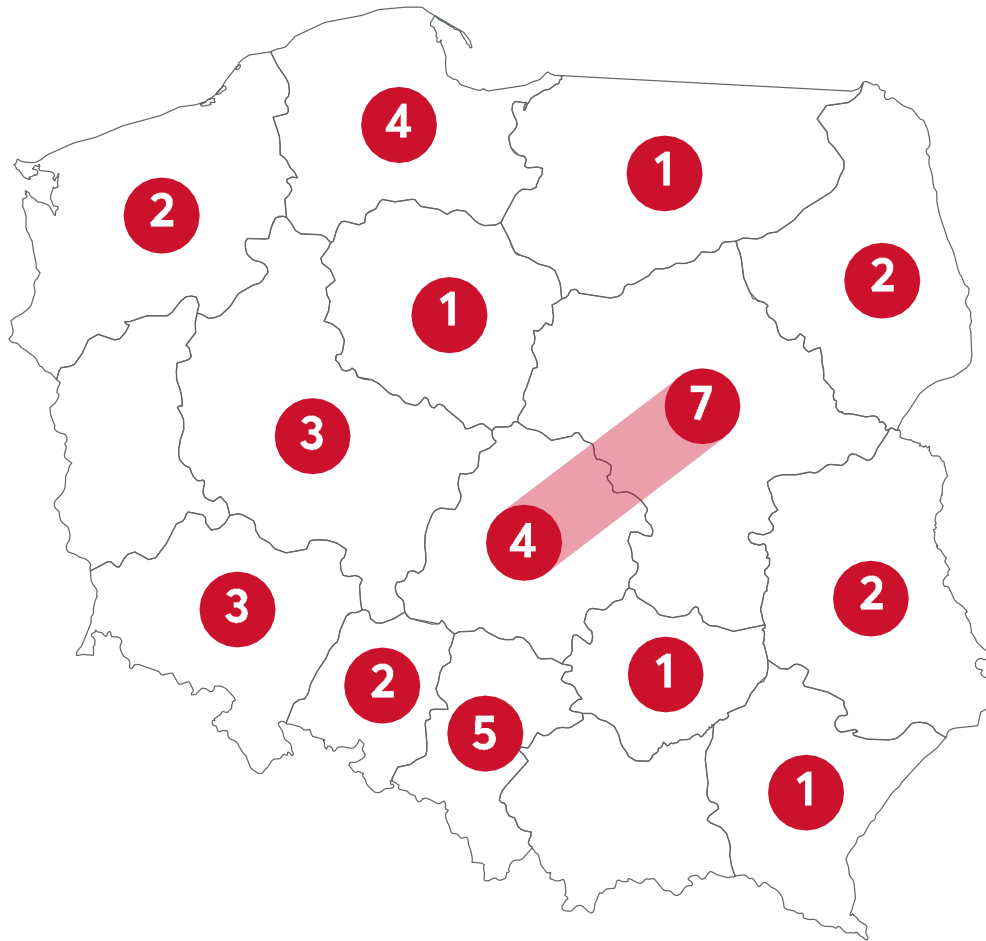
Despite being behind its Western counterparts, Poland's pharmaceutical sector leads among the CEE countries in R&D expenditure.

* Kuźmierkiewicz, Rachoń & Gryniewicz (2019) Pharmaceutical industry and its influence on the state of healthcare in Poland, in view of the local innovative potential. Polish Technical Review No. 2/2019.

** Adapted from the Pharmaceutical Industry in Figures. Key data 2020, EFPIA: European Federation of Pharmaceutical Industries and Associations, p. 7.

Well-educated talent pool

Strong academic base for pharma & biopharma



- Higher education institution relevant to biopharma industry
- Location of Biopharma & MedTech cluster

25 707

Number of graduates in the Health sector in 2019

1st in CEE

Number of graduates with biopharma-related degrees

5th in Europe

Number of graduates with biopharma-related degrees

>40

Number of higher education institutions focused on skills relevant to the biopharma industry

Trusted by the largest players

Proven manufacturing, BSS and R&D location



78,2

FDI inflows in 2019 in the pharmaceutical manufacturing sector (mln EUR)

17

Number of top biopharma companies in Poland

31

Number of successful investments

640

Total value of investments (mln EUR)

3300

Number of jobs created

*The companies were selected on the basis of PAIH's experts' assessment, companies that have agreed to use their logo

Trusted by the largest players

Successful cooperation with Polish scientists



Mutual agreement with AstraZeneca opened numerous opportunities and options for building future collaboration to work on unique technologies and tools, to develop new scientific solutions, to improve patient care and quality of life



Partnering with Polish Association of Centres for Technology Transfer and supporting over 70 Polish Institutions of Higher Education in delivering innovation in healthcare, patient treatment and beyond is an important milestone in building private-public partnership and future projects



The collaboration of AstraZeneca and Klaster LifeScience Krakow is building the platform to share scientific ideas in order to better understand needs of healthcare ecosystem and provide solid foundation to translate innovation into optimised and effective treatments

*The companies were selected on the basis of PAIH's experts' assessment

Trusted by the largest players

Successful cooperation with Polish scientists



Supporting the entrepreneurship of young people by promoting their innovative ideas

5 years of strategic cooperation – attracted nearly 500 students & graduates in joint project between the University and Pfizer



Commitment to scientists – in order to strengthen and develop the competences of scientists and researchers in the field of design, conducting and the subsequent commercialisation of scientific research

4 years of strategic cooperation – II editions of the PACTT Pfizer Academy: with participation of nearly 60 scientists from 18 academic centers

Trusted by the largest players

Successful cooperation with Polish scientists



The Roche Group invested in the development of a mRNA stability mechanism discovered by a group of scientists from the University of Warsaw, which may play an important role in developing innovative anti-cancer vaccines, cancer therapies, as well as in the treatment of various genetic diseases



Joint R&D cooperation in biotechnology and genomic profiling

Vibrant Polish companies

Innovative Polish pharma players



200

**patents in
biopharma area**

Research of new drugs in the field of oncology, NCS and diabetology as well as drug production



1823

**was the year that Polfa
Tarchomin was founded**

One of the largest generic companies operating in Poland and a leader in the anti-infectives market, with 30 production lines and 1000 employees.



60+

countries exported to

Largest API and drug producer in Poland with strong export capabilities and 86 years of experience

7 065 employees, including 290 in the B+R area

Vibrant Polish companies

Innovative Polish biopharma players



>40 patents
in the modification
of mRNA

A biotech company that invents and develops technology for innovative mRNA therapies



>4000
CRO projects carried out

CRO operations in cooperation with blue chip global customers



150
scientists employed

A biotech company that discovers innovative medicines in the field of oncology



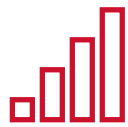
7
biosimilar programs in
the portfolio

The largest biotechnology company in the CEE Region which develops and manufactures biosimilars. Over 800 employees, 3 operational sites and a full spectrum of development and manufacturing capabilities with 10,000L of bioreactor capacity across all facilities

The pharmaceutical sector in Poland

- As Western Europe's and Poland's society ages, so does the demand for medical care for patients with chronic diseases increase, and with this the demand for digital and innovative solutions.
- The largest pharmaceutical companies continue to invest in building new research teams in Poland. The demand for specialists in the area of quality - control, systems or validation - is still growing. The year 2021, and the time after the Coronavirus pandemic, is an ideal time for experts from these fields to develop their careers. There are also many opportunities for new employees in the area of clinical trials - here we can observe the highest salary increases.

Why is the Polish pharmaceutical sector so attractive?



Employment growth

According to Hays data more than 3/4 of employers from the Life Sciences sector planned to hire new employees in 2021.



Sector potential

In 2019, the pharmaceutical and biotechnological exports increased by 11% compared to the previous year, and this growth was twice as fast as Poland's total exports' growth.



An important sector

The pharmaceutical sector generates around 1 percent of Polish GDP, and directly and indirectly creates nearly 100,000 jobs.

According to GUS, the pharmaceutical industry is a leader in product innovation, placing it ahead of the computers, electronic and optical goods production.

Overview of investment support incentives

Polish Investment Zone

Tax incentives available in all of Poland

EU Funds

Poland is the biggest beneficiary of the EU budget for 2021-2027 - EUR 160bn in subsidies and loans.
EU Funds available for specific projects

Cash grants

Government cash grants between 5-25% of investment costs, depending on the location, size of the company and type of the project

Cash Grant Programme

In order to meet business expectations and encourage companies to invest despite the Covid-19 pandemic, in 2021 the Council of Ministers adopted changes to the Programme for supporting investments of significant importance to the Polish economy for the years 2011-2030.

Support is provided in the form of a grant, based on an agreement concluded between the Minister responsible for the economy and the investor. The quantitative criteria have been lowered and the qualitative criteria for the evaluation of investments have been modified and aligned with the criteria within the Polish Investment Zone. Assessment as to the fulfilment of the required criteria has been simplified and made more precise.

Available tax exemptions



CIT exemption

Available in all of Poland
10-15 years tax free



R&D tax relief

Up to 250% deductions from income tax for R&D Centres
An easy-to-apply tax instrument



RET exemption

Available as a local exemption tool



5% tax on IP-related income

Long-term tax benefit

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 investor's needs will ensure that your investment process is as fast and smooth as possible



Information packages
(macroeconomic, HR, legal, sectoral data)



Information on investment incentives



Location consulting
(help in choosing the right location for the investment)



List of available investment properties



Organisation of site visits for prospective investors



Identification of potential suppliers and subcontractors



Organisation of B2B meetings



Facilitation of contacts with local and State authorities

Contact us

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