



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



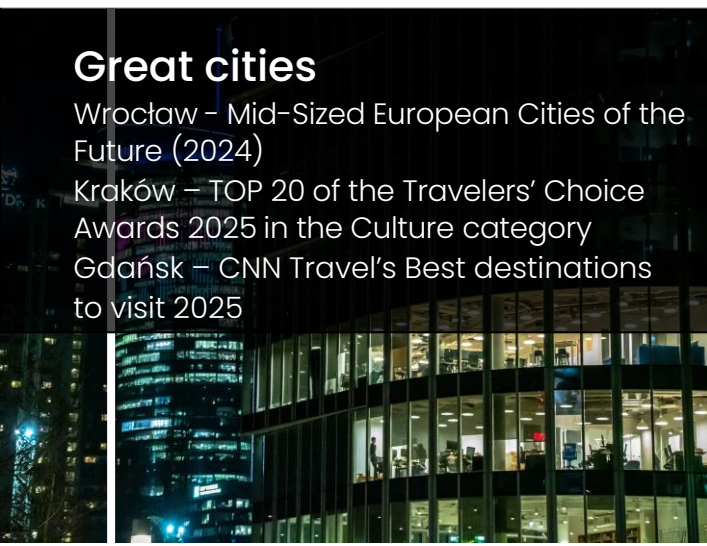
A place where East meets West

Dynamic business hub at the heart of Europe



Vibrant food scene

Warsaw among Top 20 Vegan-Friendly Cities in the World (HappyCow 2024)
Poland ranked 11th in the TasteAtlas awards 24/25 of the 100 best cuisines in the World



Great cities

Wrocław – Mid-Sized European Cities of the Future (2024)

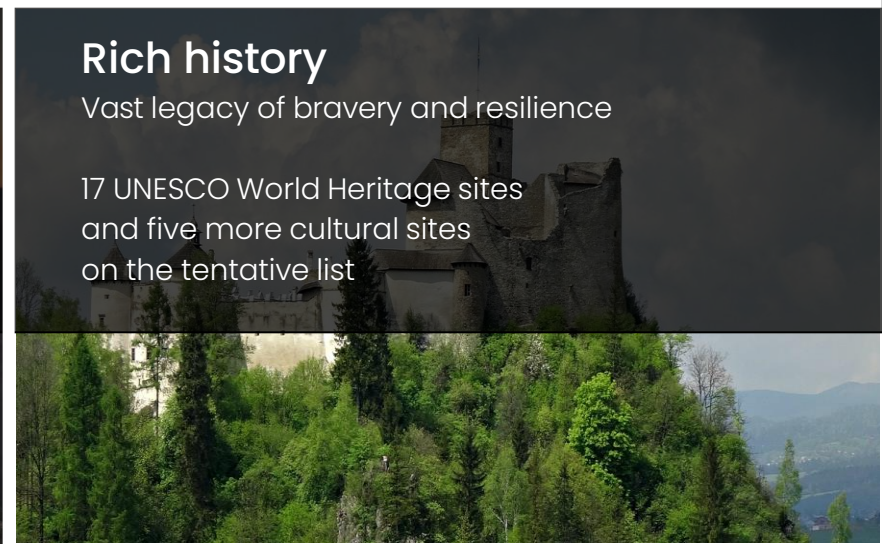
Kraków – TOP 20 of the Travelers' Choice Awards 2025 in the Culture category

Gdańsk – CNN Travel's Best destinations to visit 2025



Attractive place for expats

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



Rich history

Vast legacy of bravery and resilience

17 UNESCO World Heritage sites and five more cultural sites on the tentative list



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

Nearly 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 2023, Poland was ranked highest in the CEE region and sixth in Europe in terms of the number of inward foreign direct investments.

Top-notch infrastructure

5th longest highway network in the EU
Over 5,205 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 2024

Competitive, well-developed cities

European Cities of the Future 2024 (fDi Intelligence):
Warsaw – 4th position overall (ahead of Paris and Munich)
and 2nd in the business friendliness category among major cities;
The Silesia region ranked 3rd in the “cost-effectiveness” category;
Western Pomerania – European Entrepreneurial Region in 2022–2023,



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 (+52,0% CAGR). In 2023, export has grown to 1519.54 m. USD.



Main Polish military producer

Polska Grupa Zbrojeniowa (PGZ) is one of the largest defense concerns in Europe. More than 65 smaller producers are associated within the Group, with over 20 500 employees total.

Value of Polish export:

\$67.10 m. (2014)



\$2,666.28 m. (2024)

CAGR (2014 - 2024):

+44.5% annually



Sources:

Statistics Poland, Foreign Trade Database

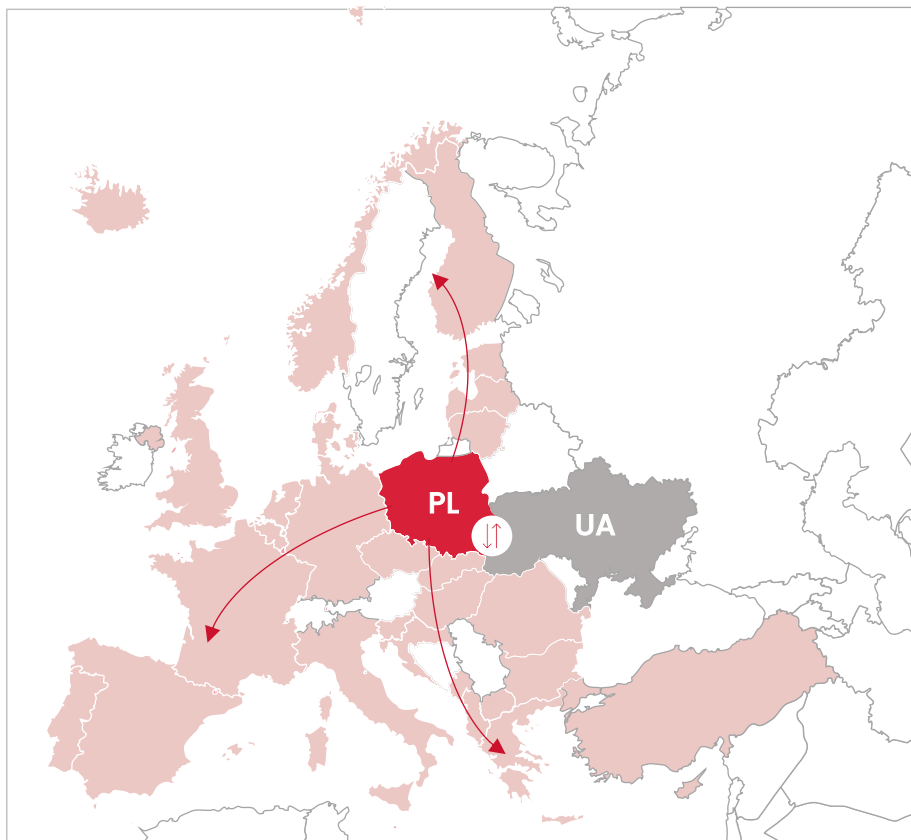
Export – industry defined by CN code 93.

<https://www.rp.pl/biznes/art41713341-dojrzaly-jak-pracownik-panstwowej-zbrojeniowki>

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 2024/25 provides education for over 8,300 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.



WARMATE: Air advantage using innovative UAV

The WARMATE loitering munitions system is an innovative product in the WB Group's portfolio. It is characterized by a lightweight design and the ability to perform a wide range of missions. The system allows for both surveillance and combat use, universally supporting security operations.



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.

The new amphibious infantry fighting vehicle "Borsuk" was introduced to enable crossing wide water obstacles and be used in diverse weather and terrain conditions. The vehicle protects the crew and infantry soldiers from threats and enemy fire while ensuring efficient transport.

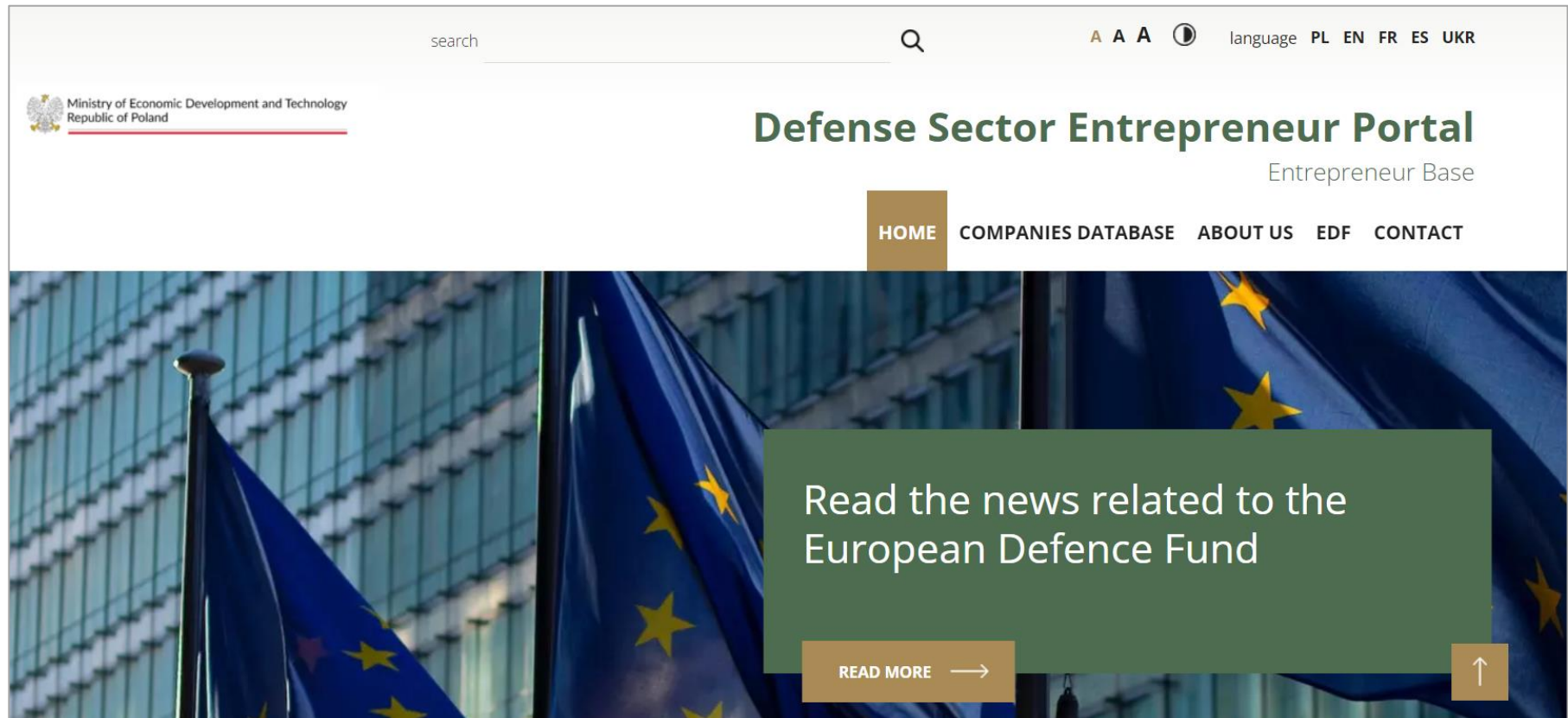
From almost the first moments of the invasion of Ukraine, when Polish weapons have been delivered to Ukraine and strengthened the Ukrainian defenders, they have proved its usefulness in military operations supporting national defense.

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



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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Polish Investment
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Strategy and Analysis Division
Promotion Department
2025



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