

DEFENCE INVESTMENTS IN THE CONSTRUCTION SECTOR IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





Increased geopolitical tensions and new strategic priorities lead Poland to systematically increase its commitment to developing defence capabilities. **In 2025, defence spending is expected to exceed PLN 186bn – as much as 4.7% of GDP, with further increases announced for subsequent years.** Some of these funds will flow into the construction sector, both through the modernisation of the existing military infrastructure, the construction of brand new facilities and the development of defence industry facilities.

National projects such as “East Shield”, the expansion of NATO infrastructure in Poland or investments in ammunition factories and industrial facilities have made defence construction a rapidly growing segment of the construction market.

What is the current value of investment in the defence construction sector? Which regions are most active? What are the key sources of funding? For answers to these and many other questions, see our latest report:

“Defence investments in the construction sector in Poland 2025”.

Main objective

To present a comprehensive analysis of defence investments in the construction sector in Poland along with development forecasts for 2025-2030.

Additional objectives

- Assessment of the size of the defence investments market in the construction sector
- Identification of key market trends
- Overview of government and international programmes
- Regional breakdown of investments

Time span: 2021-2024

Forecast horizon: 2025 - 2030

Geographic coverage: Poland

Contents of the report

- **Value of the defence construction market** in Poland (infrastructure, armaments plants, training facilities, barracks)
- **Market** development forecasts for 2025-2030
- **Sources of funding** for strategic and defence infrastructure in Poland – official budgets and military programmes implemented in Poland (e.g. Ministry of National Defence (MON) budget, Armed Forces Support Fund, NATO budget, KPO)
- **List of major overt investments** – ongoing and planned
- **Impact of the allied presence on the Polish construction market** – infrastructural investments in cooperation with NATO and the U.S.
- **European programmes** (KPO, EDIP, Readiness 2030) and their impact on the critical infrastructure market
- **Key market trends** – drivers and barriers to segment development
- **Regional analysis** of investment activity in the sector

FORECASTS

Long-term market development forecasts were prepared for the report using econometric models and a 10-year time series.

The forecasts cover the period 2025-2030.

The report also includes **macroeconomic forecasts** (growth rate of GDP and its components, unemployment rate, interest rates, wages).

DATASET

Dataset of defence investments in the construction sector in Poland, Q1 2025

Format: .xls file

The dataset contains such data as:

- address details
- start and end dates
- completion stage
- estimated value of the investment
- name of the investor
- name of the contractor

Why is it worth it?

- **You will learn about the value and potential of the defence construction market in Poland.** Get detailed information on the rapidly growing defence construction sector in Poland, enabling a better understanding of its value and potential growth opportunities.
- **You will learn about budgets and funding programmes.** Access the latest data on domestic and international sources of funding for defence projects.
- **You will understand the impact of EU and transatlantic programmes on national projects.** Learn how initiatives such as the European Defence Fund or NATO programmes affect the implementation of infrastructure projects in Poland, allowing a better alignment of operational strategies with current trends.
- **You will assess your company's capabilities in this strategic segment.** Assess how your company can get involved in defence construction projects by analysing the information gathered and identifying potential areas of activity and collaboration.



Together with the report, we provide an **Excel spreadsheet with the investments dataset and the most important data presented in the report.**

We are one of the leading research and analytics companies in Poland!

As **PMR Market Experts**, we help our Clients to obtain and analyse data, enabling them to better understand market processes, plan strategic and operational actions, and ultimately develop their business.

We boast **30 years of experience** and a **team of nearly 100 experts**. In our reports, we use secondary data combined with proprietary primary databases and qualitative and quantitative research.

We provide **market analyses for four main sectors**:

- construction,
- retail,
- healthcare and pharmaceuticals,
- IT and telecommunications.

We also prepare **customised research projects** focused on the area specified by the Client. In addition, we offer **consultancy services** combining different areas, including marketing research, market sizing, forecasting, and sales management.





CONSTRUCTION

MARKET ANALYSIS AND 5-YEAR
DEVELOPMENT FORECASTS

- **Sustainable construction** in Poland
- **Construction chemicals** market in Poland
- **Facade** market in Poland
- **Construction sector** in Poland (additional data update: June, September, December)
- **Construction sector** in Poland – **Regional analysis** (additional data update: November)
- **Civil engineering construction** in Poland
- **Renewable energy** market in Poland
- **HVAC** market in Poland (2024)
- **Thermal insulation materials** market in Poland
- **Precast concrete** market in Poland
- **Roofing materials** market in Poland
- **Modular construction** market in Poland
- **Data centre** market in Poland
- **Investment prospects** in Poland – analysis of industries and development forecasts
- **Paving stone** market in Poland
- **Energy sector construction** market in Poland
- **Construction aggregate** market in Poland
- **Heating equipment** market in Poland
- **Construction sector in the Baltic states**
- **Construction sector in Central Europe**
- **ESG reporting** – challenges and development prospects in Poland
- **Hospital infrastructure analysis and investment plans** in Poland
- Monthly: **PMR Construction Insight** (Polish and English versions)

NOVELTIES

Forecasting methodology

The class and type of the developed **econometric models** are selected according to the **characteristics of the data analysed**. In practice, models using **multiple regression** (the least squares method) and **autoregression** (ARIMA, VAR) are the most common. We use both **primary variables** and their **transformations** (e.g. logarithms) to capture the relevant relationships.

The **final market value forecasts** are not just based on a single best model but are a **weighted average of forecasts** from a selected set of best models. The weights are selected based on model fit indices. This procedure makes it possible to consider **more factors** influencing market development, hence **improving the forecast precision**.

When developing the **final forecasts**, we take into account not only the **statistical quality of the models** (model adjustment to empirical data, normality and homoscedasticity of residuals, statistical significance of structural parameters) but also their **consistency** with market knowledge and **qualitative information** gathered by PMR's analytical team.

The models use data on industry sectors, macroeconomic indicators and demographics, as well as the results of our analyses. Most often, there are **60-80 types of indicators** considered.



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