



REHABILITATION SECTOR IN UKRAINE

ESSENTIAL INFORMATION FOR ENTERING A GROWING SECTOR

AT A GLANCE: SECTOR SNAPSHOT



Rehabilitation in Ukraine is a person-centered, interdisciplinary process—encompassing **physical, psychological, and social interventions**—with the overarching goal of restoring functional abilities and participation for millions affected by war, disability, or chronic conditions.



Estimated Market Size: Ukraine has a population of **31.1M** (down from 41M in 2021), and a GDP of **\$190.8B** in 2024 (+2.9% growth; +12% inflation). The war has increased the demand for integrated, long-term rehabilitation services for both civilians, military, and veterans. **5–6M** veterans will require rehabilitation services and assistive technologies by war's end.



Sector Overview: Public sector dominant; private clinics growing but limited in scope. Fragmented service delivery, gaps in infrastructure and workforce. Policy moving toward openness, European alignment, and competitive entry. Overall, Ukraine's 2024 macroeconomic performance demonstrated a resilient yet fragile recovery, heavily supported by international aid amid wartime disruptions.



Sector Stakeholders: **Service Users** (people with trauma requiring rehabilitation, persons with disabilities, veterans, military, caregivers), **government bodies** (Ministries of Health; Social Policy; Veteran's Affairs), **healthcare providers** (public hospitals/clinics; private rehabilitation centers; NGOs), **manufacturers & producers** (assistive technologies, pharmacies, insurance firms), **education & research institutions, international organizations & donors** (WHO, USAID, EU), **health professional's associations** and **business associations**.

Healthcare Funding By The Numbers

\$4.2B

Program of Medical Guarantees
(State Program, 2025)

\$123M

Social Protection Fund
(Assistive Products, 2024)

\$7.6M

Social Protection Fund
(Child Rehabilitation, 2024)

\$117.9M

**Prosthetics/
Advanced Technologies**
(Planned, 2026)

UKRAINE'S REGULATORY ENVIRONMENT

Ukraine's legal framework is evolving to provide transparency, legal stability, and protection for foreign investors. Despite the challenges of war, reforms are accelerating toward European integration. This environment offers both safeguards and opportunities to participate in Ukraine's reconstruction and long-term growth.

- The **Civil Code of Ukraine** is the foundation of private law, regulating contracts, property, inheritance, and obligations.
- The **Tax & Customers Code** provides clear rules for taxation and customs operations, ensuring predictability.
- The **Budget Code** governs public finance management, guaranteeing transparency and fiscal discipline.
- The **Law on Foreign Economic Activity** defines rules for cross-border trade and investment. Ensures transparency and fairness in public procurement, supported by the electronic **Prozorro public procurement system**, minimizing corruption risks.
- The **Law on the Protection of Economic Competition** protects competition, overseen by the Antimonopoly Committee of Ukraine.
- The **Law on Prices and Pricing** regulates pricing policies and prevents unjustified price increases and ensures market stability.
- The **Labor Code** safeguards workers' rights and defines employment relations.
- The **Law on Public-Private Partnerships** (effective Oct. 2025) expands cooperation between the state and the private sector by introducing hybrid financing models, investor protections, and streamlined project procedures.
- **Healthcare-related laws** (e.g. *Fundamentals of Legislation on Healthcare; Law on State Financial Guarantees for Medical Care*) demonstrate Ukraine's commitment to aligning with international standards in health and social protection.
- **Sector-specific regulations** support rehabilitation services, social protection, and innovation. Government strategies (e.g., *Small and Medium-Sized Enterprises (SME) Development Strategy* and the *Barrier-Free Space Strategy*) aim to modernize business infrastructure and create inclusive opportunities.