

PUBLIC AND NON-PUBLIC HOSPITAL MARKET IN POLAND 2025

INVESTMENT PLANS AND COMPARATIVE
ANALYSIS BY VOIVODSHIP





Main objective

To provide a comprehensive overview and development prospects of the public and non-public hospital market in Poland, with a breakdown by main specialisations.

Additional objectives

- to define the size of the hospital market in terms of the number of facilities and hospital beds
- to identify the structure of the hospital market in Poland by public and non-public hospitals
- to determine the ward structure of the hospital market
- to present key macroeconomic (including inflationary), demand-side, supply-side and legal factors and trends in the public and non-public hospital market in Poland

What information is included in the report?

- **number of hospitals**, including a breakdown by public and non-public hospitals, voivodships and the largest cities
- **number of hospital beds** in individual wards, including a breakdown by public and non-public hospitals, voivodships and the largest cities
- **largest** public and non-public hospitals
- **value of NFZ contracts** for inpatient treatment in public and non-public hospitals
- **major NFZ contract holders** in hospital treatment
- **forecasts of price changes** for medical services and other macroeconomic factors
- demand-side, supply-side and legal **factors affecting the market**
- most and least **prospective specialisations**
- **investments planned for 2025-2027**, according to hospital managers in Poland

Time span: 2023-2024

Forecast horizon: 2025-2027

Geographic coverage: Poland

SCOPE

Detailed segments:

- public hospitals,
- hospitals run as companies with ST or LGU shareholding,
- private hospitals,
- other.

SUBJECT MATTER

- **market size** in terms of the number of facilities and hospital beds
- **market structure** in terms of the number of facilities and hospital beds, by public and non-public hospitals, voivodships and the largest cities
- **ward structure**, by public and non-public hospitals, voivodships and the largest cities
- **the most common specialisations**, by number of hospital beds
- **value of NFZ contracts for hospital treatment**, by public and private hospitals and the largest contract holders
- **value and number of hospitalisations** under the DRG
- **financial standing of hospitals** – revenues, net profit/loss, debt due in the public segment
- **investments in hospital infrastructure** – facilities built in 2022-2024, mergers and acquisitions in the hospital market, major investments planned for 2025-2027
- **the largest hospitals** overall and in individual voivodships in terms of the number of hospital beds



SURVEY

Survey of management staff of public and non-public hospitals in Poland (ninth edition since 2012):

- financial standing of hospitals in 2024,
- expected financial standing in 2025,
- types of investments planned for 2025-2027 and their funding sources,
- planned equipment purchases in 2025-2027,
- scope of implementation of HIS, RIS/PACS, EOD, BI, AI, VR/AR and Cloud,
- opinions on the level of the NFZ funding,
- PMR Hospital Outcomes Index – a measure of industry sentiment,
- best and worst developing specialisations (by change in the number of patients),
- most and least prospective specialisations, according to hospital managers.

INFORMATION ON MAJOR PLAYERS

- the largest public and non-public hospitals (including private hospital operators) in terms of the number of hospital beds overall, in individual voivodships and in the largest Polish cities
- the largest contract holders in terms of the value of NFZ contracts for hospital treatment in Poland, by public and non-public hospitals, voivodships and the largest cities



FORECASTS

For the purpose of the report, long-term development forecasts were prepared using econometric models and historical time series.

The report includes forecasts for 2025-2030 for selected macroeconomic indicators, including:

- GDP per capita and real GDP growth rate,
- overall CPI and price index for medical services,
- average annual LFS unemployment rate and real change in average monthly gross wage in Poland,
- real change in disposable income of Polish households and private consumption,
- number of Poland's residents and share of each demographic group.

FORECASTING METHODOLOGY



HOSPITALS DATASET IN AN EXCEL FILE

Detailed information on each of over 1,100 hospitals:

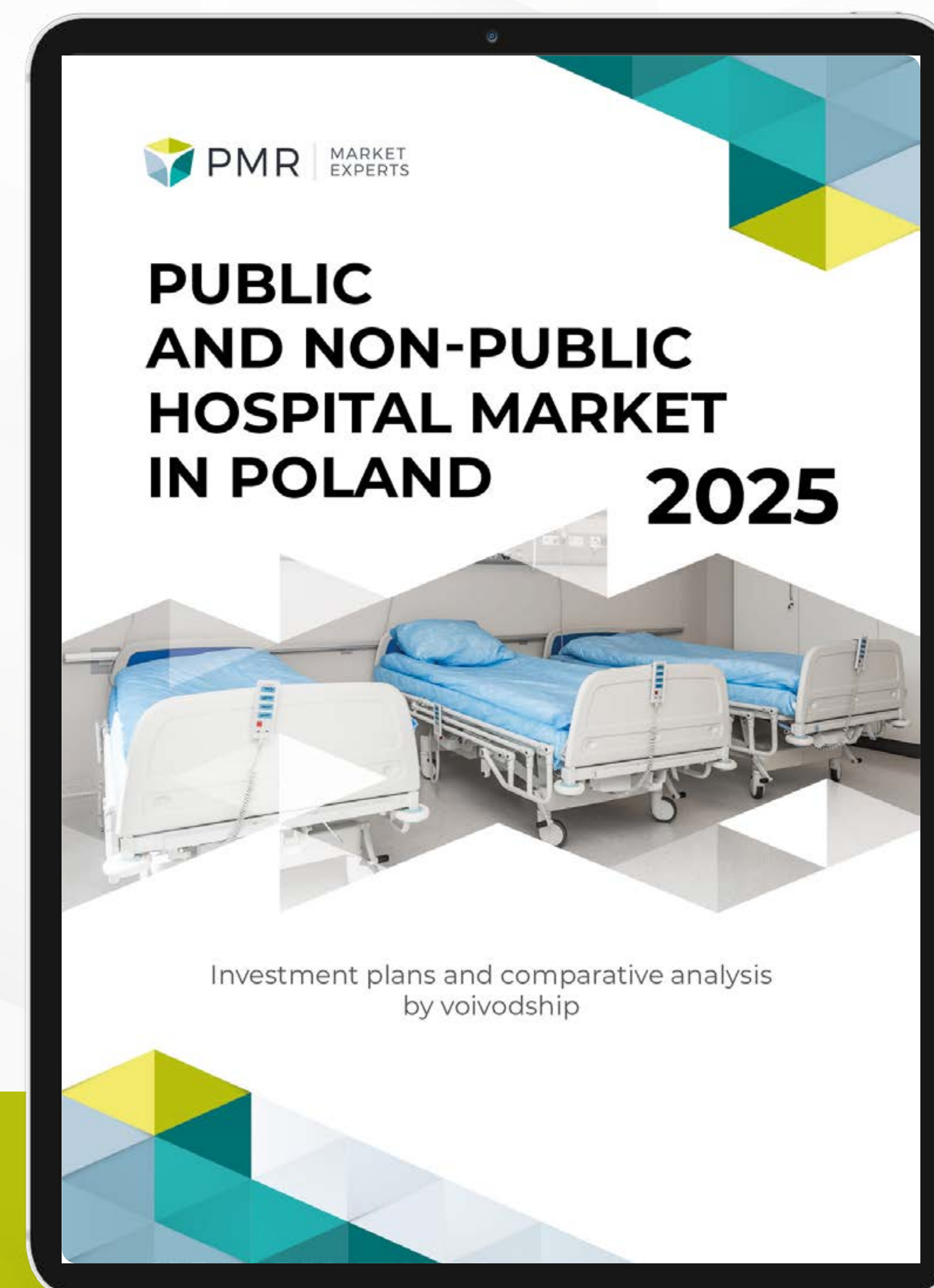
- full name, address and registry details (NIP, REGON),
- contact details (website, telephone number, e-mail address),
- information on the presence in the hospital network,
- profile (specialist, multi-specialty, etc.),
- form of ownership (public, company with ST or LGU shareholding, other),
- revenue and net profit/loss for 2021-2023,
- NFZ contract for hospital treatment (value in 2021-2024),
- NFZ contract for psychiatric care and addiction treatment (value in 2021-2024),
- NFZ contract for therapeutic rehabilitation (value in 2021-2024),
- total number of hospital beds,
- number of hospital beds in individual wards.



Why buy this report, i.e. what important questions does it answer?

- How many hospitals are there in Poland?
- What is the hospital beds saturation in individual wards in Poland?
- What is the hospitals' financial situation?
- What are the planned investments in hospital infrastructure in the coming years (construction, expansion, purchase of equipment)?
- What are the prevailing trends in the Polish hospital market?
- What will be the most prospective specialisations in 2025-2027?

Together with the report, we provide the **most important data in an Excel spreadsheet for individual aggregation.**



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 chosen by the Client. In addition, we offer **consultancy services** combining different areas, i.e. marketing research, market sizing, forecasting, and sales management.



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.



PHARMA & HEALTHCARE

MARKET ANALYSIS AND 5-YEAR
DEVELOPMENT FORECASTS

- **Dermocosmetics** market in Poland
- **Private healthcare** market in Poland
- **Dietary supplements** market in Poland
- **Dentistry services** market in Poland
- **Non-prescription products** market in Poland
- **Diagnostic imaging services** market in Poland
- **Laboratory diagnostics services** market in Poland
- **Public and non-public hospital** market in Poland
- **Pet care and products** market in Poland
- **Elderly care** market in Poland
- **Distribution on the pharmaceutical market** in Poland

NOVELTIES



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