



# ELDERLY CARE MARKET IN POLAND 2025

ASSESSMENT OF POTENTIAL AND  
COMPARATIVE ANALYSIS BY VOIVODSHIP





## Main objective

To provide a comprehensive overview of the elderly care market in Poland and to present its development prospects.

## Additional objectives

- to define the size of the market in terms of the number of facilities and the number of beds
- to determine the structure of the market in Poland by public and commercial facilities
- to identify the nursing potential in Poland
- to identify the share of the various forms of elderly care in Poland (financing, ownership of facilities) in terms of the number of care homes and beds
- to determine average occupancy rates and average prices in elderly care facilities
- to present key macroeconomic (including inflationary), demographic, demand-side, supply-side and legal factors and trends in the elderly care market in Poland

## The report includes information on, among other things:

- **the number of facilities**, including a breakdown by private and public in-patient long-term care facilities for the elderly in Poland, i.e. 24-hour care facilities (POC), residential care homes (DPS) and nursing homes, including zakłady opiekuńczo-lecznicze (ZOL) and zakłady pielęgnacyjno-opiekuncze (ZPO)
- **the number of beds at each facility**, including a breakdown by public and commercial facilities, voivodships, major agglomerations
- **the value of NFZ contracts** for care services
- **the average occupancy rate in facilities** providing elderly care in Poland
- **the average prices for a monthly stay** in a care home in Poland
- **the major players** in the elderly care market in Poland

## Subject matter:

- **size of the market** in terms of the number of care homes and beds
- **structure of the market** by type of facility, financing of services and form of ownership
- **average occupancy rate in facilities** offering full-price stays nationwide and in individual voivodships
- **average prices for a monthly stay** in a care home nationwide and in individual voivodships
- **forecasts** for key indicators affecting the market, such as the number of people of post-working age, the potential support ratio and the nursing potential ratio, GDP, the average annual unemployment rate, the average monthly wage, disposable income and private consumption.

**Time span:** 2022 and 2025

**Forecast horizon:** 2025-2030

**Geographic coverage:** Poland



## Scope:

### Type of facility:

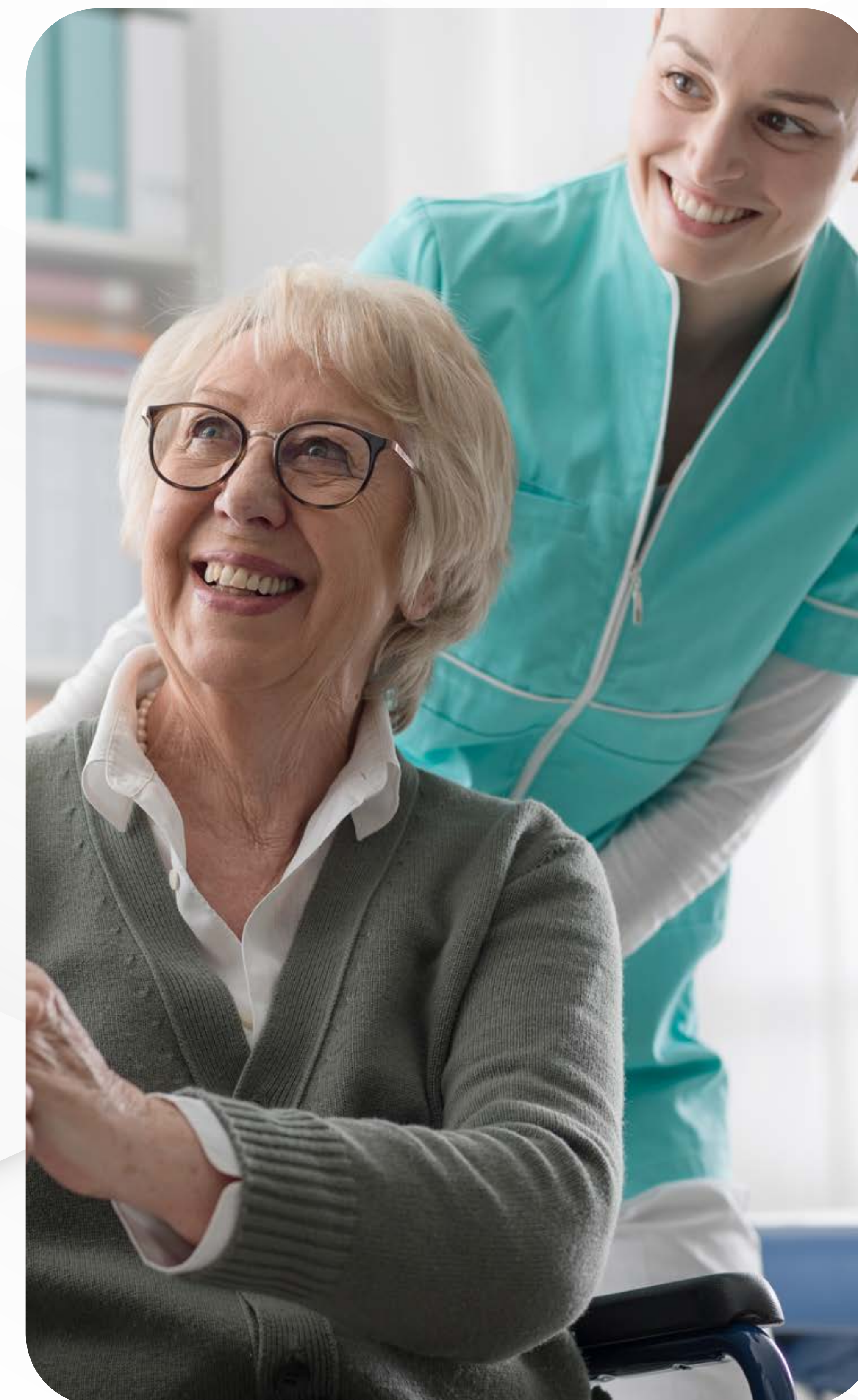
- residential care homes (DPS)
- 24-hour care facilities (POC)
- nursing homes – zakłady opiekuńczo-lecznicze (ZOL)
- psychiatric nursing homes – zakłady opiekuńczo-lecznicze o profilu psychiatrycznym
- nursing homes – zakłady pielęgnacyjno-opiekuńcze (ZPO)
- psychiatric nursing homes – zakłady pielęgnacyjno-opiekuńcze o profilu psychiatrycznym

### Funding sources for services:

- full-price stays
- NFZ and/or pension
- mixed model (offer for full-price stays and NFZ and/or pension)

### Form of ownership:

- public
- private
- companies with a share controlled by the State Treasury or local governments
- other





## Forecasts

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

**The forecasts cover the period 2025-2030.**

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

- GDP per capita and real GDP growth rate,
- 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

## Dataset of elderly care facilities in an Excel file

– detailed information on each care home:

- full name, address and registry details (NIP, REGON),
- contact details (website, telephone number, e-mail address),
- type of facility,
- form of ownership (public, company with ST or LGU shareholding, private, other),
- funding sources for services,
- total number of beds.

## **Why to buy this report, i.e. what important questions it answers:**

- How many elderly care facilities are there in Poland?
- What is the structure of the elderly care market in Poland?
- What are the average prices in the elderly care market in Poland?
- What is the occupancy rate in elderly care facilities in Poland?
- What are the prevailing trends in the market for elderly care facilities in Poland?
- What is the nursing potential in Poland?

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.



# 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

## Forecasting methodology

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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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