

**PMR** MARKET  
EXPERTS

# PRIVATE HEALTHCARE MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT  
FORECASTS FOR 2025-2030





*The report is not just a revamp of the figures. It is a fresh look at the changing market environment, identifying emerging trends, opportunities and threats.*

The market for private medical services in Poland is growing dynamically, with **56% of Poles already using private healthcare** and a similar percentage planning to use such services in 2025. Many patients see the advantage of the private sector:

- **59%** believe that private treatment is more effective than publicly-funded treatment,
- **58%** perceive private healthcare to be of high quality, while only **22%** have this view of the NFZ.

These figures represent real changes in Poles' attitudes to health, funding for treatment and expectations of the healthcare system. The patient in the private healthcare market is becoming increasingly aware and demanding, which is reflected in the market value growth rates achieved.

PMR Market Experts' report "**Private healthcare market in Poland 2025**" provides a comprehensive analysis of trends, patient views and forecasts for the value of the FFS (fee-for-service) sector, medical subscriptions and health insurance until 2030.

The publication identifies areas for investment, analyses competitors' plans and determines the areas with the greatest potential for growth in the coming years. With a reliable analysis and clear conclusions, you gain an advantage that can feasibly translate into your business results.





## **Main objective**

To provide a comprehensive analysis of the situation in the private healthcare market in Poland, together with an identification of the latest trends and an assessment of the development directions of the sector

## **Additional objectives**

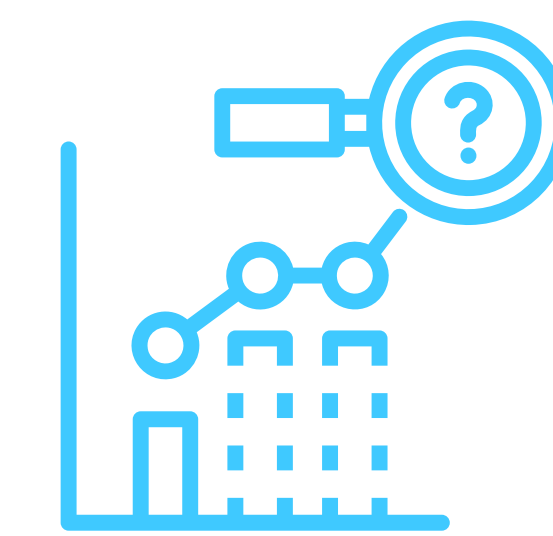
The specific objectives of the research and analysis carried out for the report were to identify:

- growth rates of the main segments of medical services financed privately by patients (outside the NFZ) and prospects for their development,
- the newest macroeconomic, demographic, demand-side, supply-side, technological and legal factors and trends in the private healthcare market,
- types of services paid for by patients,
- change in the behaviour of consumers using private healthcare services,
- change in the number of chain facilities within private medical companies.



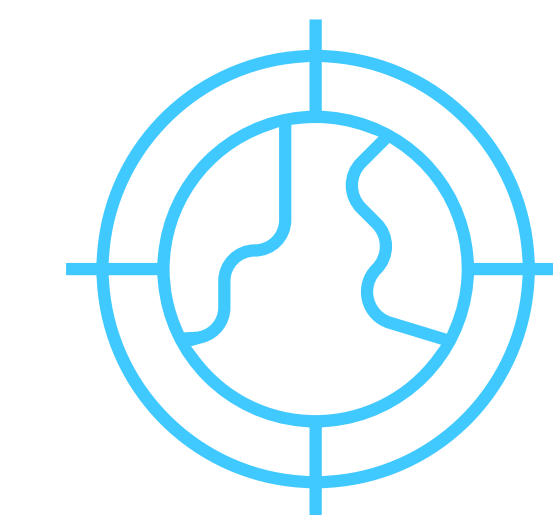
### **Time span**

2021-2024



### **Forecast horizon**

2025-2030



### **Geographic coverage**

Poland



## **What is included in the report?**

- **value and growth rate of the market** in 2021-2024
- **value structure of the market** in 2021-2024 by segment
- macroeconomic, demographic, demand-side, supply-side, technological and legal **factors affecting the market**
- **the extent to which private healthcare was used by Poles** over the past year and their plans for 2025
- **profile of patients** using private healthcare services
- **listings of the main players** in the private healthcare market, including by segment
- **forecasts up to 2030** for:
  - ↳ value of the private healthcare market
  - ↳ value of the main segments of the private healthcare market
  - ↳ public healthcare spending
  - ↳ changes in the prices of medical services and other macroeconomic and demographic factors

## **Subject matter**

- market value
- breakdown of the total market value by segment
- forecasts for:
  - ↳ entire market
  - ↳ individual market segments
- profiles of major players: medical and insurance companies

## **Scope – segments**

- FFS (fee-for-service)
- medical subscriptions
- private health insurance



## **Profile of patients using private healthcare services in Poland**

- use of private medical services in 2024, by segment and year-over-year change
- giving up private healthcare services in 2024
- private healthcare services used for oneself and for children in 2024, including changes over the last year
- use of private healthcare services in the FFS model in 2024, by type of service
- plans to change the place of using private healthcare services in the FFS model in 2025
- plans to change private subscription/health insurance in 2025



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## **Number of facilities and number of doctors**

The report also presents key parameters affecting the medical services market, including:

- number of medical facilities of the major players in Poland
- number of doctors overall and by specialisation
- number of companies by headcount



## 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.**

In addition to the forecasts for the value of the market and its segments, the report also covers forecasts for selected macroeconomic indicators, including:

- GDP per capita and real GDP change,
- 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.

**The accuracy of the forecasts published in PMR Market Experts' reports is high – the typical error rate (MAPE) is usually less than 3%.**





## What questions does the report provide answers to?

- What is the value of the private healthcare market in Poland?
- What are the value of individual segments and forecasts for their development over the next 5 years?
- How are healthcare services funded in Poland?
- How do Poles plan to use private medical services in 2025?
- What are the prevailing trends in the private healthcare market in Poland?
- What is the impact of high inflation on the private healthcare market in Poland?
- What is the real growth rate for the private healthcare market in Poland?

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



## **PMR Market Experts is a brand of market reports prepared by Hume's Institute**

At PMR Market Experts, we have been preparing cyclical industry reports for over 20 years. Our core specialisations:

- Digital & ICT
- Retail
- Pharma & Healthcare
- Construction

Our reports are more than just a compilation of facts – they are reliable knowledge based on proven methodology. We combine primary and secondary data, proprietary algorithms and econometric models to provide precise information about the market, its values, growth rates, segments and key players.

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# PHARMA & HEALTHCARE

MARKET ANALYSIS AND 5-YEAR  
DEVELOPMENT FORECASTS

- **Private healthcare** market in Poland
- **Dermocosmetics** 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 (2024)
- **Laboratory diagnostics services** market in Poland
- **Public and non-public hospital** market in Poland
- **Online non-prescription products** market in Poland (2024)

- **Pet care and products** market in Poland
- **Elderly care** market in Poland
- **Pharmaceutical distribution market** in Poland
- **Health of Poles:** attitudes towards preventive care and well-being

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