

PMR MARKET
EXPERTS

DIETARY SUPPLEMENTS MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





Our data shows that in 2024, the dietary supplements market grew at a high single-digit rate. The consumption penetration of dietary supplements in the population stands at as much as 75%, meaning that over 23 million Poles are making purchasing decisions in this category. This scale generates significant growth potential, but at the same time increases the intensity of competition and pressure on market participants.

In the current market environment, companies operating in the dietary supplements sector face a growing number of challenges that affect both operational activities and strategic development directions. One of the key factors is the tightening of legal regulations, both at the national and EU level, which enforce greater transparency in advertising, as well as in product composition and effectiveness. In our June 2025 survey among dietary supplement manufacturers and distributors, legal regulations were indicated by one in five companies on the market as a key barrier to growth.

PMR Market Experts forecasts indicate that in the coming years, the dietary supplements market in Poland will continue to grow, both nominally and in real terms, although the pace of growth will stabilise. The regulatory and technological environment is undergoing changes that, in the medium term, may have a significant impact on its structure and profitability. Nevertheless, market value growth is supported by increasing health awareness, an ageing population, and the development of e-commerce.



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Author of the report „Dietary supplements market in Poland 2025”





Main objective

To provide a comprehensive and up-to-date analysis of the situation in the dietary supplements market in Poland, including a breakdown by main sales channels and product categories.

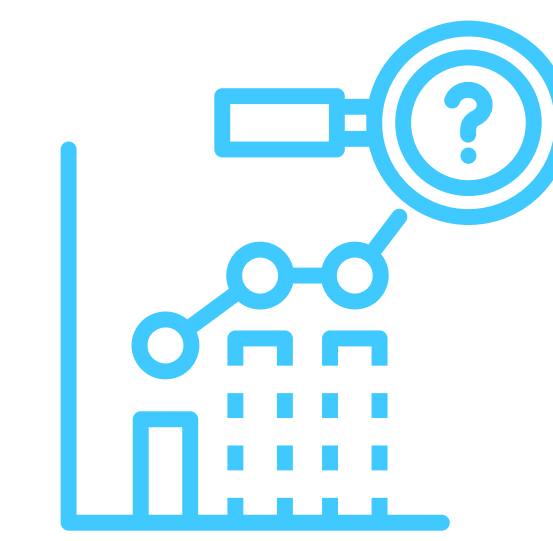
Additional objectives

- to analyse individual sales channels and present forecasts for their development
- to present key macroeconomic (including inflationary), demand-side, supply-side, and legal factors and trends in the dietary supplements market
- to analyse the largest dietary supplements categories in pharmacies
- to identify growth prospects for the main categories of dietary supplements in Poland
- to define the characteristics of dietary supplements buyers in Poland
- to present the most popular dietary supplement brands in Poland
- to identify the largest manufacturers overall and in individual sales categories



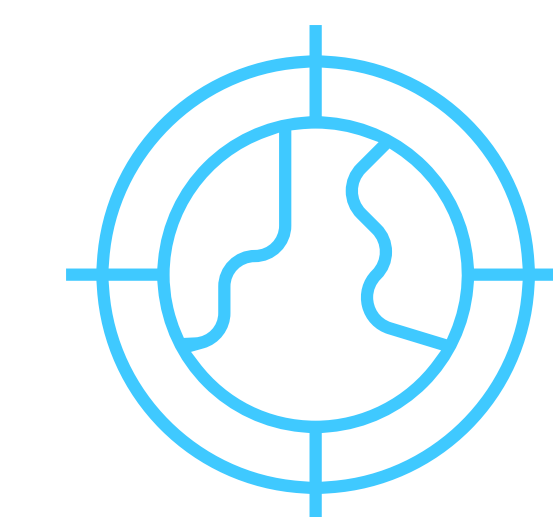
Time span

2021-2024



Forecast horizon

2025-2030



Geographic coverage

Poland



Subject matter

- market value
- breakdown of the total market value by sales channel:
 - ↳ offline pharmacies
 - ↳ grocery stores
 - ↳ health and beauty stores
 - ↳ herbal and medical stores, herbalist stores
 - ↳ stores with sports nutrition
 - ↳ sports stores
 - ↳ online stores
 - ↳ online pharmacies
 - ↳ e-commerce platforms
- breakdown of the total market value by offline and online sales
- breakdown of the total market value by pharmacy and non-pharmacy sales
- breakdown of the pharmacy market by product category
- forecasts for the total market
- forecasts for sales channels
- major manufacturers of dietary supplements
- major manufacturers by category of dietary supplements sold in pharmacies

Scope – product categories

1. Urinary tract and intimate infections products
2. Bones, muscles, joints
3. Blood circulation and varicose veins products, including cardiac drugs
4. Omega fatty acids and fish oils
5. Magnesium
6. Sports nutrition products
7. Products for erectile dysfunction
8. Probiotics
9. Hemp, CBD-based products
10. Cold, flu, sinuses and runny nose products, including cough syrups
11. Superfoods
12. Sore throat and hoarseness lozenges
13. Digestion, gastric problems, liver and heartburn products
14. Nervous system products (sleep aids, tranquillisers and antidepressants)
15. Vitamin D
16. Vitamins and minerals (including vitamin complexes, electrolytes, single vitamins – excluding magnesium and vitamin D)
17. Hair, skin and nails



What is included in the report?

- value of the dietary supplements market in 2021-2024
- breakdown of the dietary supplements market in 2021-2024 by:
 - ↳ sales channel
 - ↳ offline and online sales
 - ↳ pharmacy and non-pharmacy sales
- **breakdown of the pharmacy market** for dietary supplements in 2021-H1 2025 by product category
- **forecasts of price changes** for dietary supplements and other macroeconomic factors
- demand-side, supply-side and legal **factors affecting the market**
- **consumer behaviour**, including places where dietary supplements are purchased and the characteristics of dietary supplements buyers
- **major manufacturers** in the pharmacy market overall and by product category
- **most popular dietary supplements brands** in Poland
- **market development forecasts** up to 2030





Survey of dietary supplement manufacturers and distributors in Poland:

- assessment of the current and future situation in the dietary supplements market in Poland
- evaluation of the financial health of companies
- identification of the most prospective categories in the dietary supplements market in Poland
- identification of the most prospective distribution channels in the dietary supplements market in Poland



Other parameters

In the report, we present key parameters on sales of dietary supplements, including:

- store count of selected major grocery, health and beauty, herbal and medical, sports nutrition and dietary supplements chains
- number of packets of dietary supplements sold in pharmacies in Poland and analysis of the trend over time
- average prices of dietary supplements in pharmacies by product category

**The report contains final
pharmacy data on dietary
supplements sales
in H1 2025**



Forecasts

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

The forecasts cover the period 2025-2030.

In addition to the forecasts for the value of the market, sales channels and market 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 lower than 3%.





10 reasons to invest in this report

1 Comprehensive overview of the market in Poland
Market value, sales structure (distribution channels, pharmacy vs. non-pharmacy sales) and development prospects up to 2030

2 Access to accurate forecasts for 2025-2030
The report contains 5-year forecasts based on econometric models (including ARIMA, VAR, multiple regressions).

3 Product category overview
Analysis of pharmacy sales for the 20 leading product categories, along with an assessment of growth potential for 17 groups of dietary supplements identified in the study.

4 Synthetic overview of trends and consumer insights
Findings from qualitative and quantitative research providing a better understanding of consumer profiles and purchasing behaviours.

5 Assessment of competitive strength and market position
Overview of the largest pharmacy manufacturers and key market categories, with a ranking of top products and their sales data.

6 Macroeconomic and demographic market conditions
Forecasts for such indicators as CPI, GDP, disposable income, population and demographic groups.

7 Knowledge of dominant trends
Identification of key demand, supply, and regulatory factors, accompanied by research findings and analytical commentary.

8 Support for strategic and investment decisions
Data as a basis for decision-making by the management board, strategy, sales and marketing departments, as well as for analysis by banks and investment funds.

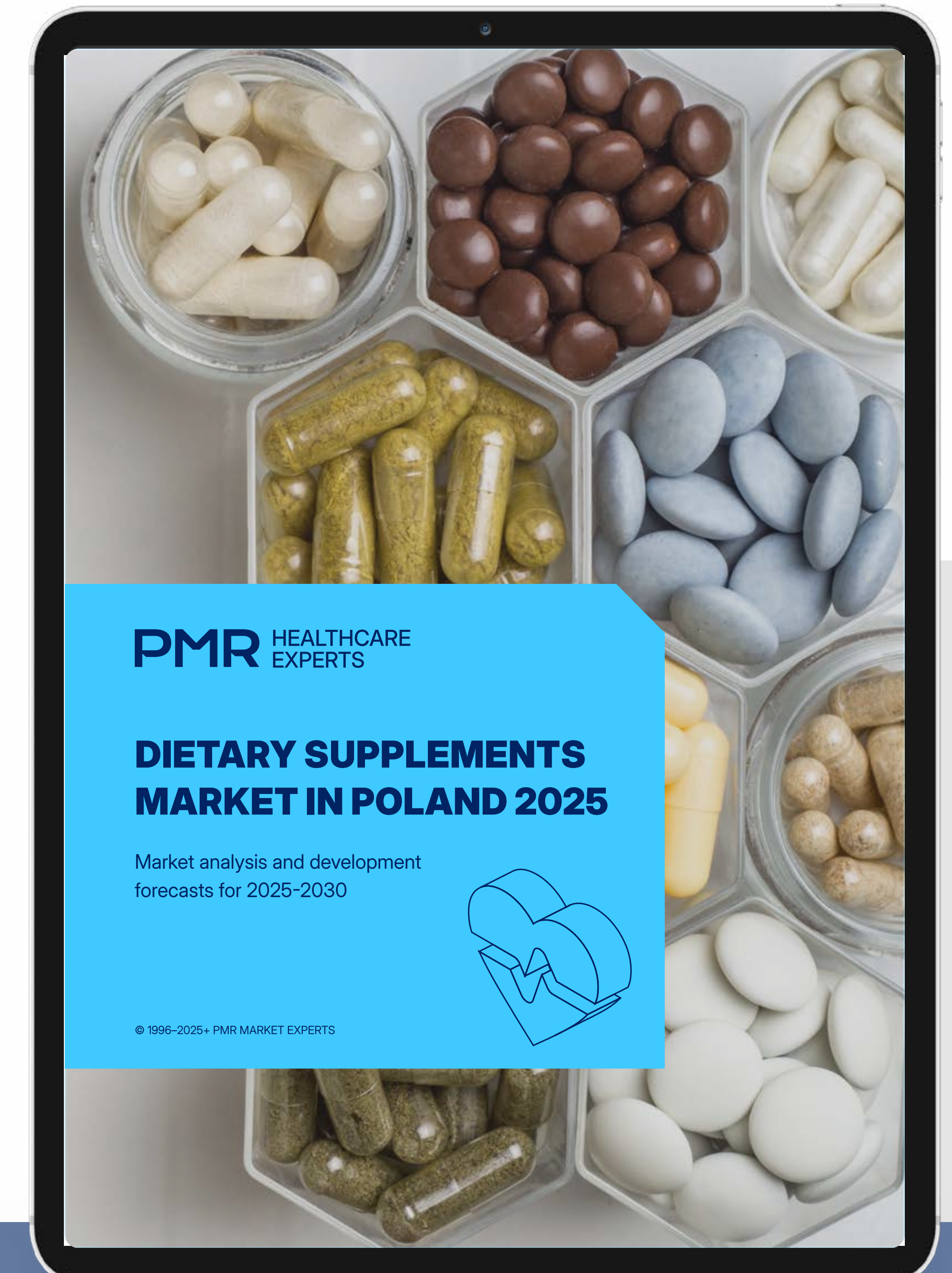
9 Additional materials – source data in an Excel spreadsheet
Enable independent data aggregation, analysis and in-house model development.

10 Proprietary survey and experience
Combined data sources (primary, secondary), 20+ years of expertise in the market, methodology based on dozens of variables.



What questions does the report provide answers to?

- What is the current and forecasted value of the dietary supplements market in Poland through 2030?
- What is the sales value of dietary supplements across individual distribution channels, and which channels are expected to grow the fastest over the next few years?
- What are the dominant trends in the dietary supplements market in Poland?
- Which categories will be the most promising in 2025–2028?
- What is the actual growth rate of the dietary supplements market in Poland?
- What are the sales figures for the most important categories in pharmacies?
- Why do Poles choose dietary supplements, and what factors influence their decisions?
- What are the typical profiles and segments of dietary supplement consumers?
- How are the prices and availability of supplements changing across different channels?
- Which manufacturers and brands dominate the supplements market?
- What regulatory changes could affect the market in the coming years?



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

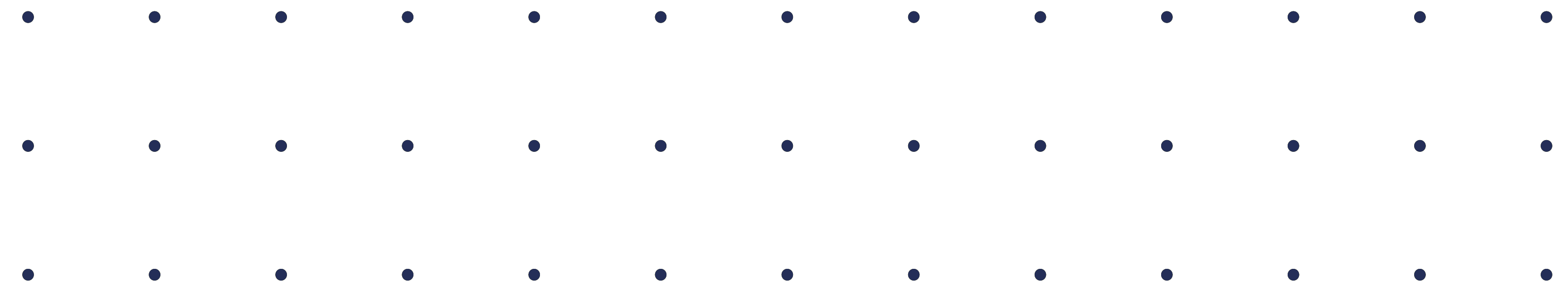
Our reports are more than just a compilation of facts – they are reliable knowledge based on proven methodology. We combine primary and secondary data, proprietary algorithms and econometric models to provide precise information about the market, its values, growth rates, segments and key players.

We are part of Hume's Institute – a 360° research agency specialising in quantitative and qualitative research, forecasting and market predictions.

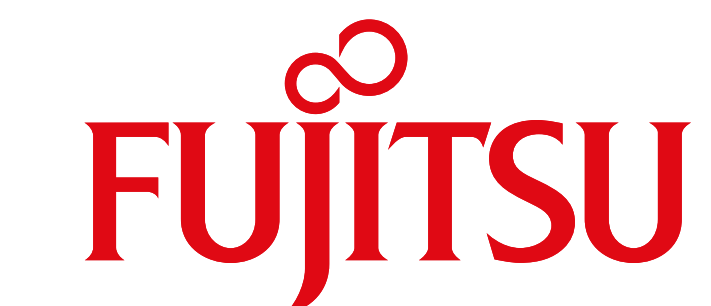
PMR Market Experts' **data analysis and verification expertise, unique insights and proven forecasts** provided by Hume's Institute give real insight and advantage to our Clients.

More than 600 clients worldwide have already benefited from our services. **We have analysed more than 5,000 brands, operating in over 50 markets.** We are trusted by major companies – **we work with 70% of the prestigious Fortune 500 brands.**





Our clients





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**

**NEW
REPORTS**



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