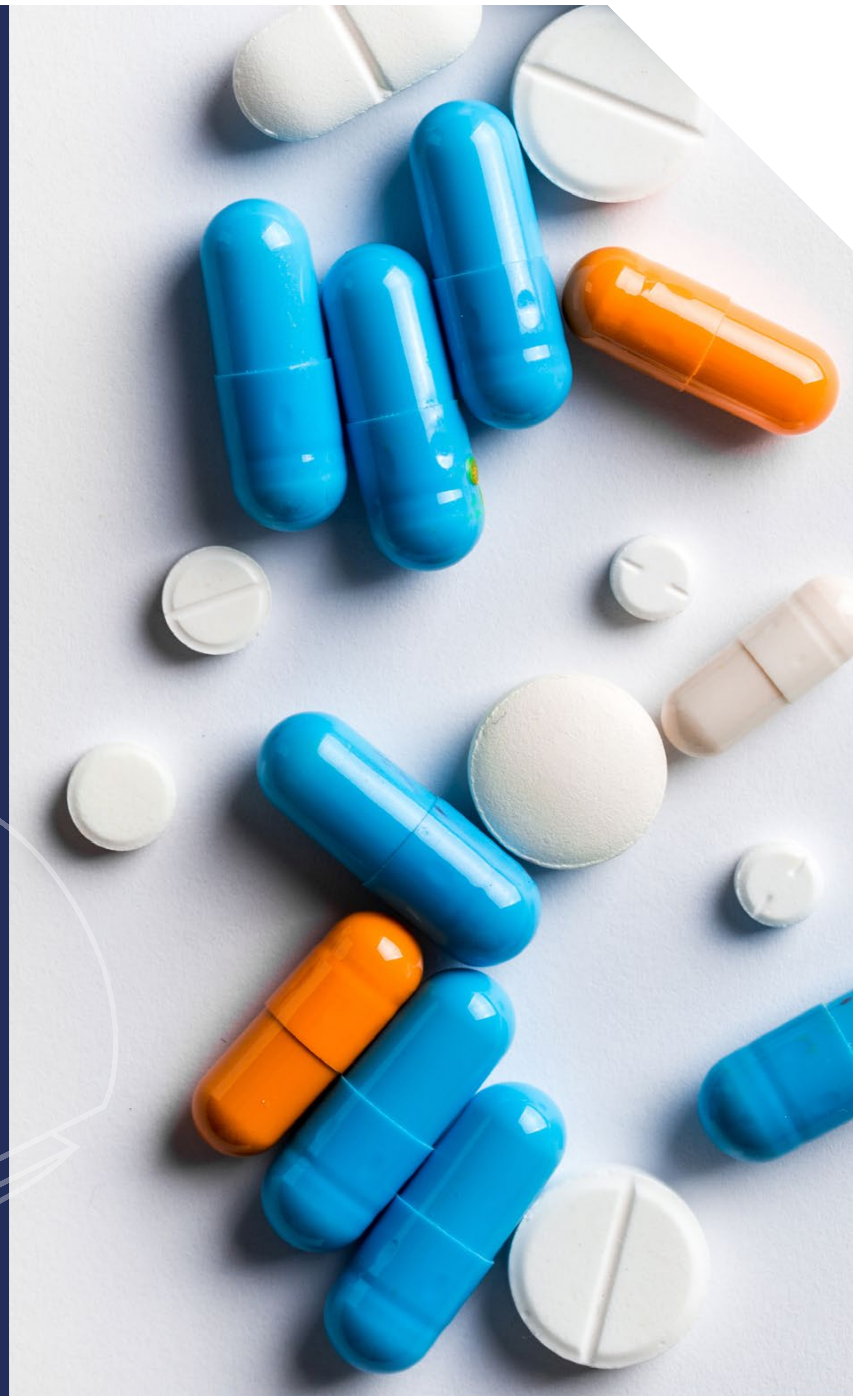


PMR MARKET
EXPERTS

NON-PRESCRIPTION PRODUCTS MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





Main objective

To provide a comprehensive and up-to-date analysis of the situation in the non-prescription products market in Poland, identify the latest trends and assess the sector's development directions.

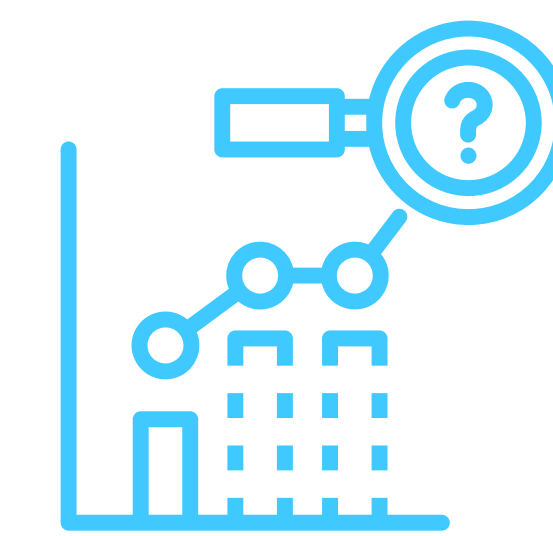
Additional objectives

- to analyse the growth rates of 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 non-prescription products market,
- to analyse the largest categories and the main sales channels in the non-prescription products market, and to present their development prospects,
- to identify the characteristics of buyers and changes in the behaviour of consumers of non-prescription products in Poland (CAWI B2C survey, June/July 2025).



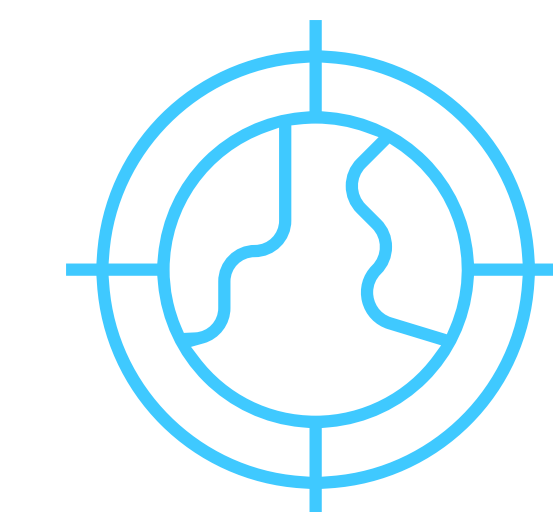
Time span

2021-2024



Forecast horizon

2025-2030



Geographic coverage

Poland



What is included in the report?

- **market value** in 2021-2025
- **market structure** in 2021-2025, by sales channel
- **value of the main categories** of the market in 2023-2025
- **sales structure of the main categories** in 2023-2025, by sales channel
- macroeconomic, demographic, demand-side, supply-side, technological and legal **factors affecting the market**
- **Poles' purchases of non-prescription products** over the past year and their plans for the near future
- **profile of consumers** of non-prescription products
- **main places to purchase** non-prescription products
- **forecasts up to 2030** for:
 - ↳ non-prescription products market
 - ↳ main sales channels for non-prescription products
 - ↳ changes in the prices of non-prescription products and in other macroeconomic and demographic factors





Subject matter

- market value
- breakdown of the market value by sales channel
- breakdown of the market value by main product category
- breakdown of the main categories of the market by sales channel
- forecasts for:
 - ↳ entire market
 - ↳ sales channels

Scope

Sales channels

- offline pharmacy sales (offline pharmacies)
- online sales (online pharmacies, online stores, e-commerce platforms)
- offline non-pharmacy sales (offline stores, including health and beauty stores, grocery stores, herbalist stores, sports stores and petrol station stores)

Product status

- OTC drugs
- dietary supplements

Main categories

1. Urinary tract
2. Blood circulation and varicose veins products, including cardiac drugs
3. Omega-3 fatty acids and fish oils
4. Analgesics and antipyretics
5. Magnesium, also combined with vitamin B6 and potassium
6. Muscles, bones and joints
7. Sports nutrition products
8. Probiotics
9. Cold, flu, sinuses and runny nose products, cough syrups
10. Sore throat or hoarseness
11. Digestion, gastric problems, liver and heartburn products
12. Nervous system products (sleep aids, tranquillisers and antidepressants)
13. Vitamin D
14. Vitamins and minerals (including vitamin complexes, electrolytes, single vitamins- other than magnesium alone and vitamin D alone)
15. Hair, skin, nails



Sales channels and places of purchase

In the report, we also present key parameters for sales channels, including:

- frequency of purchases in different places: trend analysis
- factors determining the choice of a particular place of purchase
- most popular places to shop (pharmacy chains vs non-chain pharmacies, retail and health and beauty store chains)



Profile of consumers of non-prescription products in Poland

- frequency of purchases of individual product categories and demographic characteristics of the consumers
- changes in consumer behaviour as a result of current market trends
- purchasing plans regarding non-prescription products in the near future (regular vs occasional purchases)
- situations in which individual categories are purchased (on impulse/planned purchases)
- changes in the quantity of products purchased
- groups of products purchased together – basket analysis



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 inflation and price inflation of non-prescription products,
- 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 forecasts by PMR Market Experts published in the reports are highly accurate – the typical error rate (MAPE) is usually below 3%.





10 reasons to invest in the report „Non-prescription products market in Poland 2025“

1 Comprehensive picture of the non-prescription products market in Poland
Market value, sales structure and outlook 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 Overview of product categories
Analysis of sales in 15 major product categories, including an assessment of growth potential and consumer profiles for each category.

4 Support for strategic and investment decisions
A tool for management boards, banks, funds and strategy departments enabling the identification of developing categories and investment areas.

5 Synthesised overview of consumer trends and insights
Qualitative and quantitative survey results providing a better understanding of consumer profiles and purchasing behaviour.

6 Macroeconomic and demographic market conditions
The report provides forecasts for such indicators as CPI, GDP, disposable income, population and demographic groups.

7 Information about prevailing trends
Identification of key demand-side, supply-side and regulatory factors, along with survey results and expert commentary.

8 Assessment of the competitive strength and position
A list of the largest manufacturers operating in pharmacies overall and in key distribution channels in the non-prescription products market.

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 was the value of the retail market for non-prescription products in Poland in 2021-2024, and what are the forecasts for 2025-2030?
- What macroeconomic, demographic and demand-side factors influence the non-prescription products market in Poland?
- How are consumer preferences changing with regard to the purchase of OTC drugs and dietary supplements?
- What supply-side, technological and legal trends are shaping the non-prescription products market?
- Who is the typical consumer of non-prescription products in Poland, and what customer segments can be distinguished?
- How do sales of non-prescription products shape across different distribution channels?
- What are the most important product categories in the non-prescription products market and what are their development prospects?
- How is the share of online sales changing?
- Which manufacturers and brands prevail in the pharmacy market, and which products are best-selling?
- Which new product categories are gaining importance in the non-prescription products market in Poland?
- Do Poles plan to buy non-prescription products in the near future?



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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.**

20+

years of experience

600+

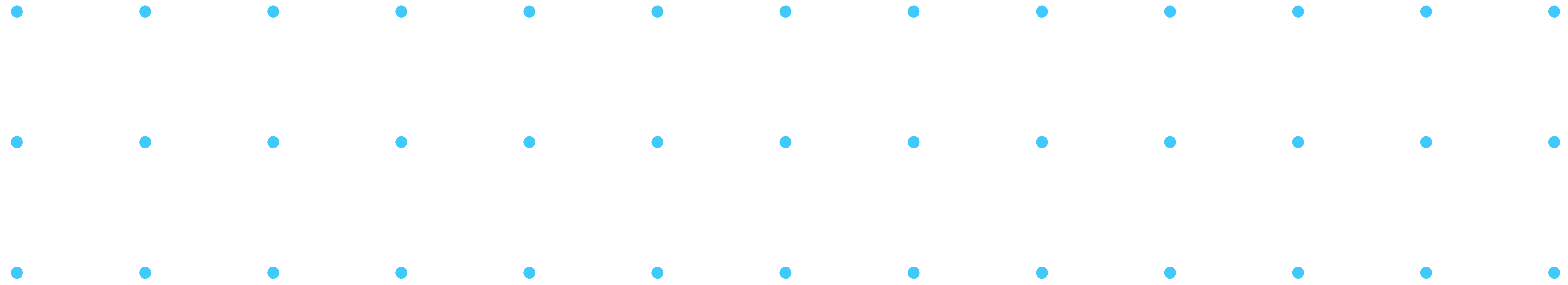
global clients

5,000+

brands studied

50+

analysed countries



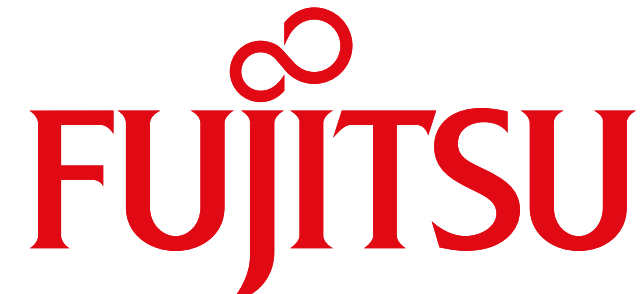
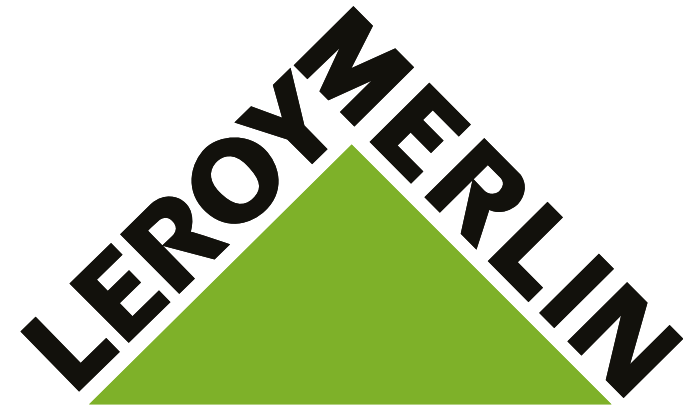
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PHARMA & HEALTHCARE

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)

NEW REPORTS

- **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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