

PMR MARKET
EXPERTS

LABORATORY DIAGNOSTICS SERVICES MARKET IN POLAND 2026

MARKET ANALYSIS
AND DEVELOPMENT PROSPECTS





PMR Market Experts data indicates that in 2025, the number of tests in the laboratory diagnostics market saw single-digit growth, despite a nearly 3% decline in the number of facilities (October 2025 vs. February 2024). This implies that the primary driver of sector development is the improvement of operational efficiency in existing laboratories rather than physical expansion. Such a growth structure increases pressure on process optimization and intensifies the battle for market share among the largest networks.

Significant changes are occurring in the current competitive landscape – the Alab Group, thanks to acquisitions, has significantly closed the gap with the leader. Consequently, in 2025, the number of tests performed in this group's laboratories grew at a high double-digit rate. The key factor behind this acceleration was the 2025 acquisition of a large laboratory network (CDL), whose facilities performed a total of nearly 14 million tests in 2024. For comparison, the number of laboratory tests conducted by the Diagnostyka Group in the first three quarters of 2025 increased by less than 9%.

The Polish IVD (In Vitro Diagnostics) equipment market does not have a single leader, but rather a group of strong international suppliers such as Roche, Siemens Healthineers, and Abbott - the dominance of individual companies depends on the specifics of particular equipment segments and technologies. A PMR study from late 2025 confirms that Roche remains the most recognized manufacturer of laboratory diagnostic equipment on the Polish market for another consecutive year.

**Marta Marszałek**

Head Pharmaceutical & Healthcare Market Analyst, PMR Market Experts by Hume's Institute

Author of the report "Laboratory diagnostics services market in Poland 2026"





Main objective

To provide a comprehensive analysis of the laboratory services market in Poland, including the identification of the latest trends and an assessment of the sector's future directions.

Additional objectives

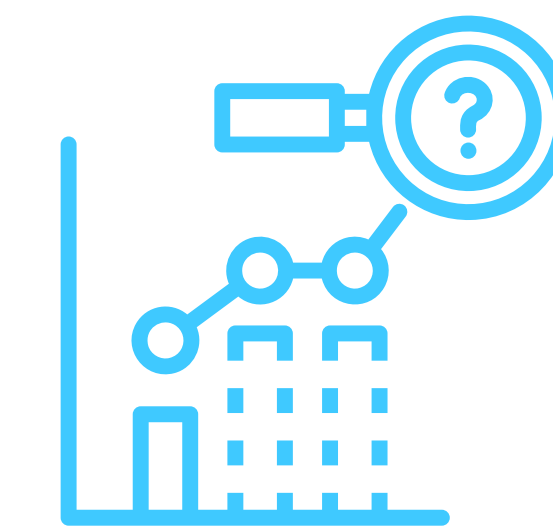
For the purposes of this report, a series of studies and analyses were conducted with the following specific goals:

- determining the market dynamics of laboratory services expressed by the number of tests performed,
- identifying changes in the market structure of laboratory services in Poland by laboratory type and networking status,
- determining the numerical change in diagnostic laboratories overall, as well as by type and ownership structure,
- establishing changes in the number of tests performed under the National Health Fund (NHF/NFZ) by healthcare level,
- presenting the latest drivers and trends in the Polish laboratory services market (including macroeconomic, inflationary, demand-side, supply-side, and legal factors).



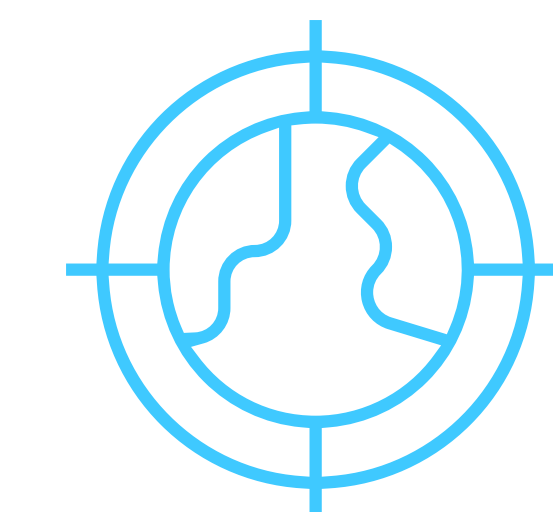
Period coverage

2021-2025



Forecast horizon

2026-2028



Geographical coverage

Poland



What information does the report contain?

- Number of laboratory tests in Poland.
- Number of diagnostic laboratories, including a breakdown by type, ownership structure, and laboratory category (networked vs. individual/non-networked).
- Top laboratory networks in Poland.
- Forecasts for changes in medical service prices and other macroeconomic factors.
- Demand-side, supply-side, and legal drivers impacting the market.
- Most and least promising fields of laboratory diagnostics.

Subject matter

- Market size of laboratory diagnostics in terms of the number of tests performed
- Market structure broken down by funding source and laboratory type.
- Forecasted CAGR for the number of tests (2026-2028) across specific fields:
 - ↳ Immunology and immunochemistry
 - ↳ Hematology and coagulation
 - ↳ Clinical biochemistry
 - ↳ Microbiology
 - ↳ Molecular biology
 - ↳ Critical care testing
 - ↳ Histology and cytology
- Most promising fields of laboratory diagnostics for the 2026-2028 period
- Key market players (including both service providers and equipment/reagent manufacturers).
- Development outlook along with an analysis of the most critical drivers impacting the market during the forecast period.



Scope

Laboratory type

- hospital-based
- non-hospital
- blood donation centers

Laboratory ownership structure

- public
- state-owned or local government company
- private
- other

Laboratory networking status

- networked
- individual

Healthcare level

- primary care (including its private healthcare equivalent)
- outpatient specialized care
- hospital care (inpatient care)

Funding source

- publicly funded
- private (paid by the patient)





Executive survey: Public and private laboratory management in Poland (Laboratory heads and managers)

- Main needs of diagnostic laboratories.
- Equipment procurement plans for diagnostic laboratories.
- Information sources on laboratory diagnostic equipment used by diagnostic labs.
- Brand awareness among laboratory management personnel.
- Brand usage broken down by specific fields of laboratory diagnostics.

Key market players

- Top diagnostic networks in Poland by number of laboratories – key insights including the number of facilities, collection points, outsourcing laboratories, and revenue.
- Leading suppliers of reagents and analyzers.





Detailed information on

1 600+

laboratories in Poland

Database of diagnostic laboratories in Poland in Excel format

The report includes a database of diagnostic laboratories operating in Poland, containing the following:

- Name
- Facility address details
- Entity name and Tax ID (NIP) of the operating body
- Ownership structure
- Contact details (phone, email, website)
- Network affiliation
- Legal form
- Laboratory location (hospital-based/non-hospital), including the name and location of the hospital.



Forecasts

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

The report contains forecasts for the years 2026-2031 for selected macroeconomic indicators, including:

- GDP per capita and real GDP dynamics,
- headline inflation and medical services price inflation,
- average annual LFS (BAEL) unemployment rate and real dynamics of the average monthly gross wage in Poland
- real dynamics of household disposable income in Poland and individual consumption,
- number of residents in Poland and the share of specific demographic groups.

The accuracy of forecasts published by PMR Market Experts in their reports is high – the typical error level (MAPE) is usually under 3%.



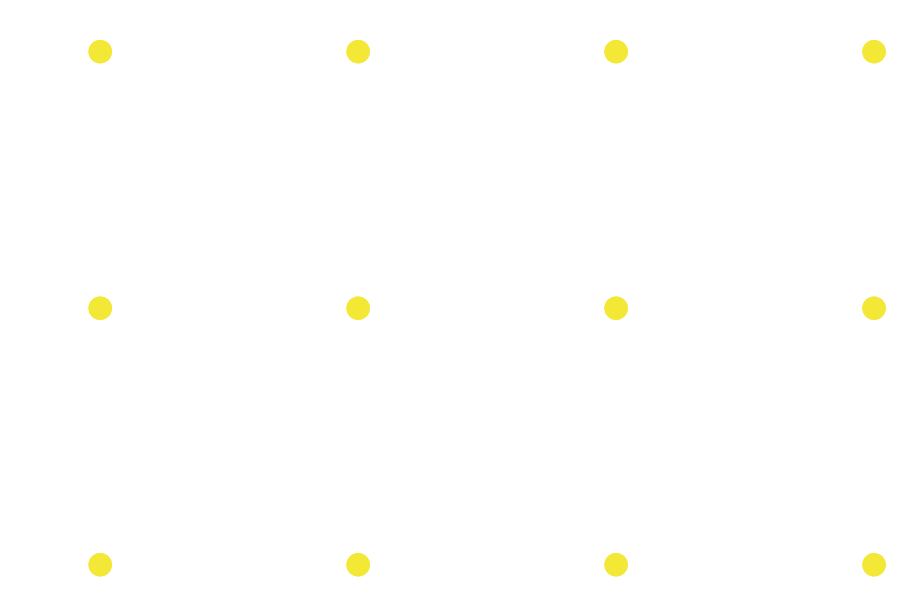


Key questions answered in the report

- How many laboratory diagnostic tests are performed annually in Poland?
- How many diagnostic laboratories are currently operating in Poland?
- What is the financial standing of these laboratories?
- What are the dominant trends currently shaping the laboratory market in Poland?
- Which fields of laboratory diagnostics will be the most promising between 2026 and 2028?
- Which macroeconomic, demographic, and legal factors have the greatest impact on the Polish laboratory diagnostics market?
- What is the current structure of laboratories in Poland in terms of type, ownership, and location?
- What challenges are laboratories facing – what growth barriers are identified by their managers?
- What are the planned investments in equipment and technology for the coming years?
- Who dominates the market – which service providers and suppliers are the largest, and which brands of equipment and reagents are most commonly used?

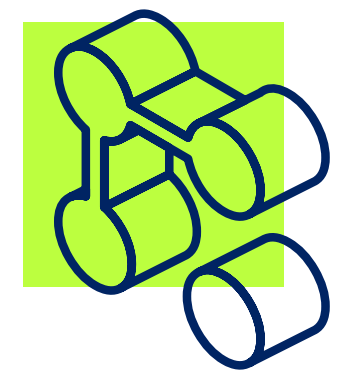


DATASET – together with the report, we provide the most important data in an Excel spreadsheet for individual aggregation.

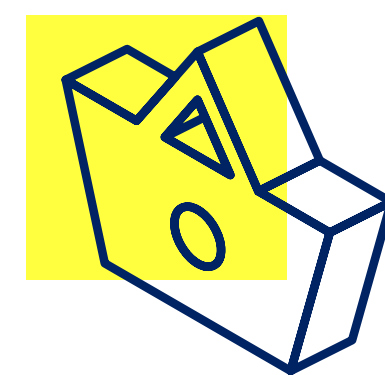


PMR Market Experts is a brand of market reports developed by Hume's Institute.

At **PMR Market Experts**, we have been producing cyclical industry reports for over 20 years. Our core specializations include::



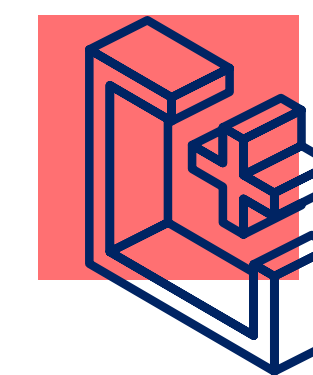
Digital & ICT



Retail



Pharma & Healthcare



Construction

Our reports are more than just a collection of facts – they provide reliable knowledge built on proven methodology. By combining primary and secondary data with proprietary algorithms and econometric models, we deliver precise insights into market value, dynamics, segmentation, and key industry players.

We are part of the **Hume's Institute** – a 360-degree research agency specializing in quantitative and qualitative research, market forecasting, and predictive analytics.

The synergy between PMR Market Experts' data verification experience and Hume's Institute's unique insights and verified forecasts provides our clients with actionable knowledge and a competitive edge.

To date, over 600 clients worldwide have trusted our services. We have analyzed more than 5,000 brands across over 50 markets. Our reputation is built on the trust of global leaders – **we cooperate with 70% of the Fortune 500 companies.**

20+

years of experience

600+

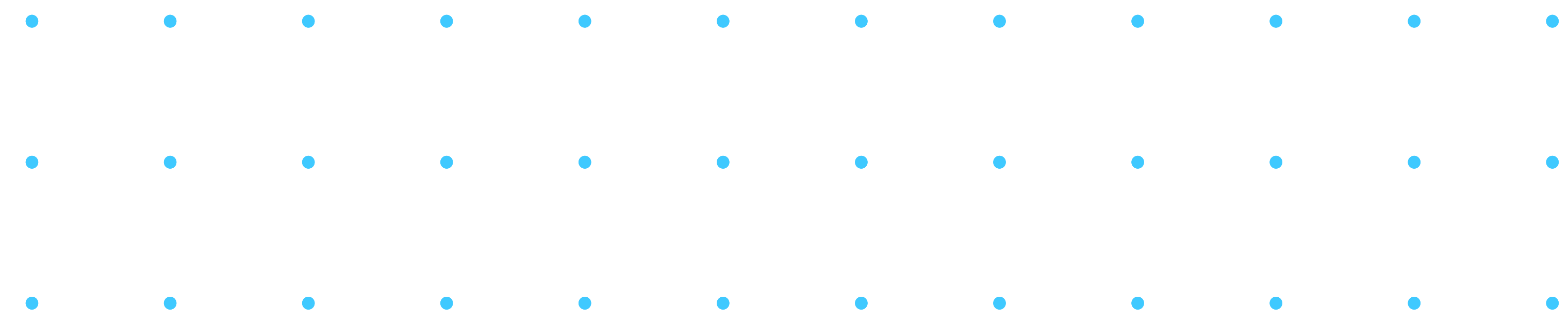
global clients

5 000+

brands researched

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countries analyzed



Trusted by over 600 companies, including:





REPORTS PHARMA & HEALTHCARE 2026

HEALTHCARE

- **Private healthcare** market in Poland
- **Dentistry services** market in Poland
- **Public and non-public hospital** market in Poland
- **Wellbeing in Poland** - How do we really take care of ourselves? Prevention in numbers
- **Elderly care** market in Poland (2025)

NON- PRESCRIPTION PRODUCTS

- **Dermocosmetics** market in Poland
- **Dietary supplements** market in Poland
- **Non-prescription products** market in Poland

MEDICAL DIAGNOSTICS

- **Diagnostic imaging services** market in Poland
- **Laboratory diagnostics services** market in Poland

Can't find the answer you need? **We will dive deep into your specific topic and deliver a custom solution!**

At Hume's Institute, we offer customized, in-depth analyses, focusing on research ranging from trend exploration and market future modeling to customer segmentation and innovation testing. We help our clients find answers to their key questions by delivering reliable, fact-based knowledge in both the B2B and B2C sectors.

WE CAN SUPPORT YOU IN 6 STRATEGIC BUSINESS AREAS:

Market

Market potential and structure analysis. 5-year forecasts, scenario modeling, and trend identification.

Customer

Segmentation and decision-making process mapping. Satisfaction surveys and identification of hidden needs.

Products

Innovation and product concept testing, optimization of product portfolio, pricing, and key decision-making attributes.

Competition

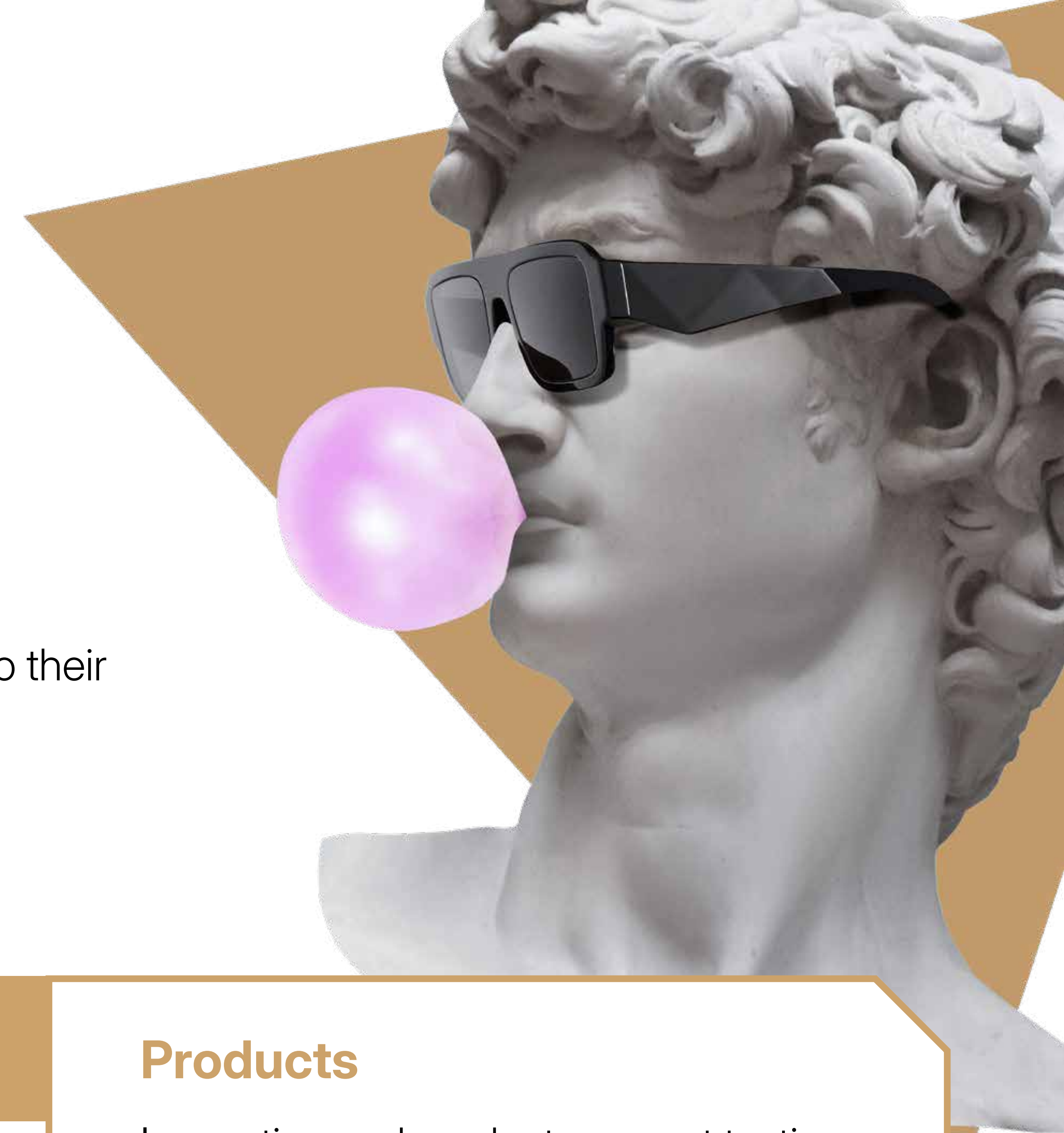
Benchmarking, analysis of key players' strategies, and monitoring of competitors' future actions.

Distribution

Optimal sales channel analysis and effectiveness. Research into purchasing processes across channels.

Marketing and Communication

Effectiveness research of campaigns and communication alignment. Brand image and positioning audit.



Contact



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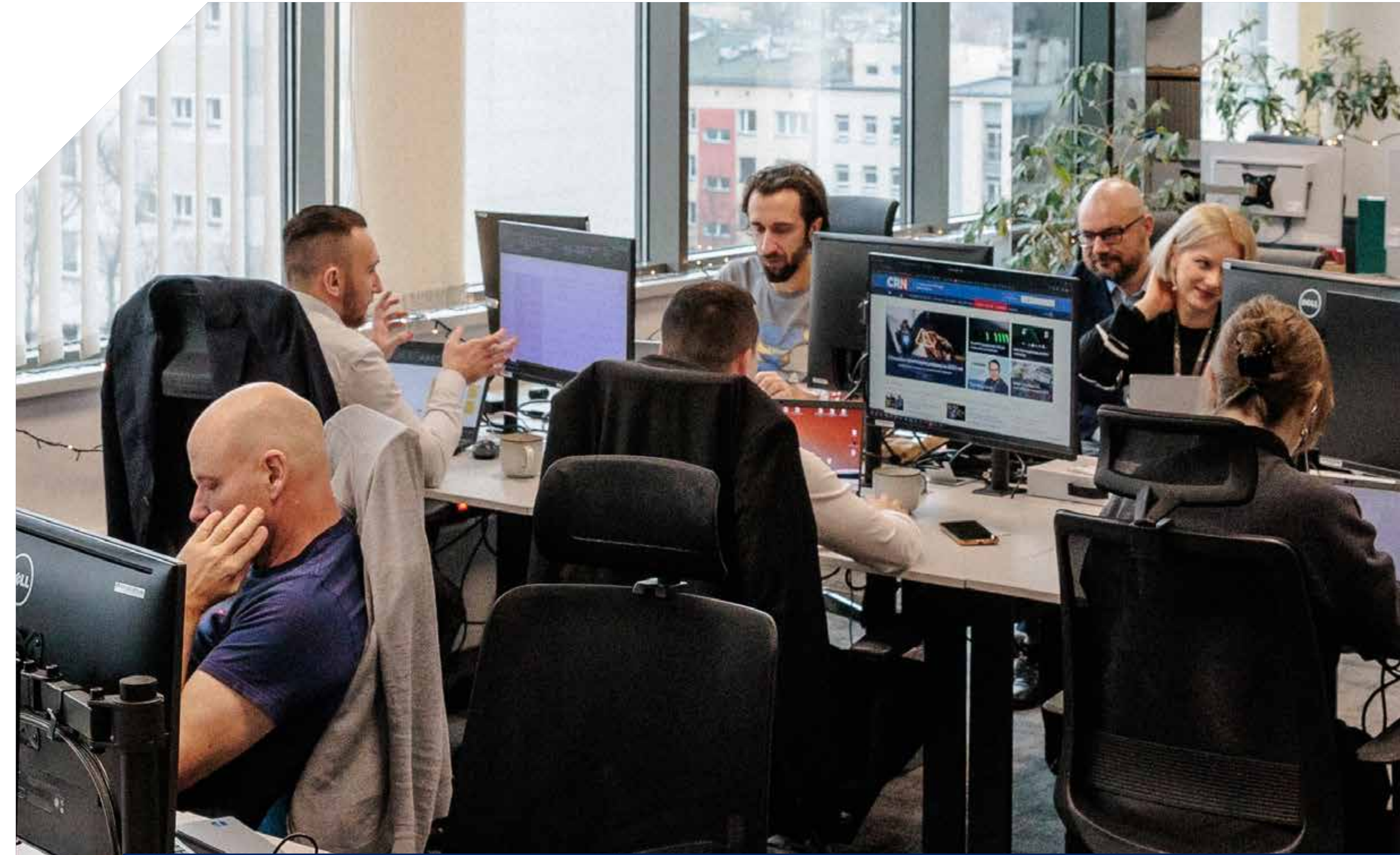
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