



# PRIVATE HEALTHCARE MARKET IN POLAND 2023

**MARKET ANALYSIS AND DEVELOPMENT FORECASTS FOR 2023-2028**

— **IMPACT OF INFLATION, WAR IN UKRAINE AND COVID-19**

## Main objective

To provide a comprehensive description of the private healthcare market, also broken down by its segments.

## Additional objectives

For the report, a number of studies and analyses were carried out with the specific aim to identify:

- segments of medical services financed privately by patients (outside the National Health Fund system) and present their development forecasts
- key factors and trends in the private healthcare market (macroeconomic and demographic, demand-side, supply-side, technological and legal)
- value of the service types paid for by patients
- behaviour of consumers using private healthcare services
- location of chain facilities within private medical companies

## What information can be found in the report?

- market value in 2019-2022
- market structure in 2019-2022 by segments
- macroeconomic, demographic, demand-side, supply-side, legal and technological factors affecting the market
- the extent at which private healthcare was used by Poles over the past year and their plans for 2023
- profile of patients using private healthcare services
- main players in the private healthcare market, also by segment
- projections until 2028 for:
  - private healthcare market
  - main segments of the private healthcare market
  - spending on public healthcare
  - changes in the prices of medical services and other macroeconomic and demographic factors

# Subject matter and scope

**Time span:**..... 2019-2022

**Forecast period:**..... 2023-2028

**Geographic coverage:**..... Poland

## SCOPE

Segments:

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

## SUBJECT MATTER

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



# Additional information

## NUMBER OF FACILITIES AND DOCTORS

We also present in the report the key parameters affecting the medical services market, including:

- number of medical facilities in Poland
- number of doctors, overall and by specialty
- number of companies by headcount

## PATIENT PROFILE

Profile of patients using private healthcare services in Poland:

- use of private medical services by segment in 2022
- giving up of private healthcare services in 2022
- private healthcare services used for oneself and for children in 2022
- use of private healthcare services in the FFS model, by type of service in 2022
- plans to change the place of using private healthcare services in the FFS model in 2023
- plans to change private subscription/health insurance in 2023

## FORECASTS

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

In addition to projections for the market value and its segments, the report also covers forecasts for 2023-2028 for selected demographic and macroeconomic indicators, including:

- per capita GDP and GDP real growth rate
- overall CPI and price index for medical services
- average annual LFS unemployment rate and real change of 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

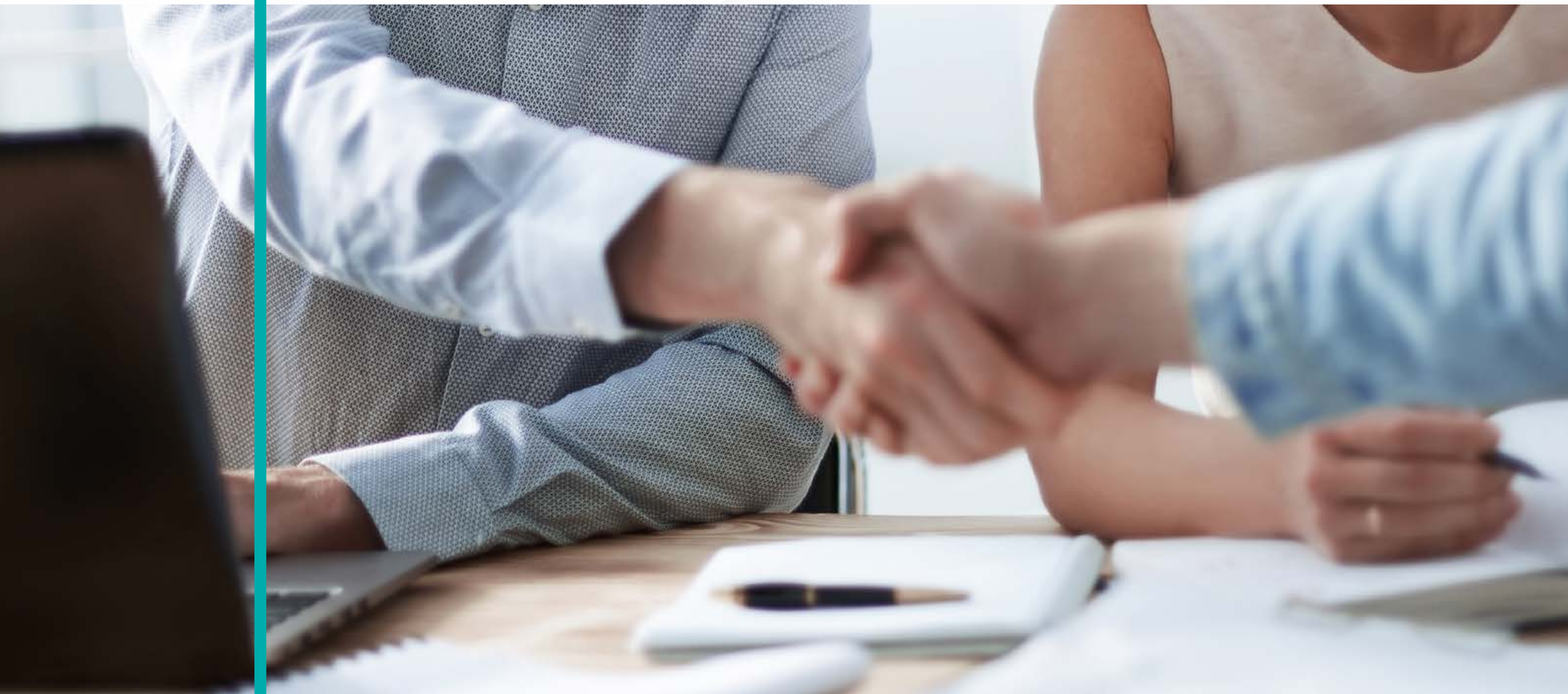
# Benefits of purchasing the report

## What questions does the report answer?

- What is the value of the private healthcare market in Poland?
- What are the value of the individual segments and projections for their development over the next five years?
- How are healthcare services funded in Poland?
- How do Poles plan to use private medical services in 2023?
- What are the dominant 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?

**Together with the report, you will be provided with the most important data in the Excel spreadsheet for individual aggregation.**





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