



# Consumer Health in Poland

September 2023

Table of Contents

## Consumer Health in Poland

### EXECUTIVE SUMMARY

Consumer health in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for consumer health?

### MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2018-2023

Table 2 - Life Expectancy at Birth 2018-2023

### MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2018-2023

Table 4 - Sales of Consumer Health by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Consumer Health: % Value 2019-2023

Table 6 - LBN Brand Shares of Consumer Health: % Value 2020-2023

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2018-2023

Table 8 - Distribution of Consumer Health by Format: % Value 2018-2023

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2023

Table 10 - Forecast Sales of Consumer Health by Category: Value 2023-2028

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2023-2028

### APPENDIX

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

Summary 1 - OTC: Switches 2022-2023

### DISCLAIMER

### DEFINITIONS

### SOURCES

Summary 2 - Research Sources

## Analgesics in Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Poles continue to seek out immediate remedies for pain relief

Ketoprofen sees rapid growth, amid growing preference for stronger painkillers

Wide availability of painkillers supports further expansion

#### PROSPECTS AND OPPORTUNITIES

Growth returns to pre-pandemic and war levels

High rate of inflation will be reflected in enduring demand for affordable alternatives

Market for analgesics will remain consolidated

### CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2018-2023

Table 13 - Sales of Analgesics by Category: % Value Growth 2018-2023

Table 14 - NBO Company Shares of Analgesics: % Value 2019-2023

Table 15 - LBN Brand Shares of Analgesics: % Value 2020-2023

Table 16 - Forecast Sales of Analgesics by Category: Value 2023-2028

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2023-2028

## Sleep Aids in Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Financial and health-related anxieties have negative impact on sleep quality

Dietary supplements and herbal products pose competitive challenges

Switch of doxylamine enables new product launches

#### PROSPECTS AND OPPORTUNITIES

Outlook looks promising for sleep aids, given fast-based nature of modern lifestyles

Interest in herbal products, including CBD sleep aids, will continue to rise

Melatonin trends will continue into the forecast period

#### CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2018-2023

Table 19 - Sales of Sleep Aids: % Value Growth 2018-2023

Table 20 - NBO Company Shares of Sleep Aids: % Value 2019-2023

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2020-2023

Table 22 - Forecast Sales of Sleep Aids: Value 2023-2028

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2023-2028

## Cough, Cold and Allergy (Hay Fever) Remedies in Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Influenza cases surge in 2023, amid decline in take-up rate of vaccinations

Growth in demand of allergy medications, thanks to return to pre-pandemic lifestyles

GSK healthcare leads intensely competitive category

#### PROSPECTS AND OPPORTUNITIES

Continued growth expected, although elevated manufacturing costs will place pressure on pricing

Focus on further development of umbrella brands and "all-in-one" solutions

Advertising to remain paramount for success

#### CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

## Dermatologicals in Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Continued growth in 2023, with hair loss treatments leading the way

Multifunctional products are on the rise, while dermocosmetics gain traction  
Competitive landscape remains diverse with players focusing on their own areas of expertise

#### PROSPECTS AND OPPORTUNITIES

Further growth anticipated, although market is increasing saturated  
Nutricosmetics will continue to emerge  
Rising preference for herbal solutions

#### CATEGORY DATA

Table 30 - Sales of Dermatologicals by Category: Value 2018-2023  
Table 31 - Sales of Dermatologicals by Category: % Value Growth 2018-2023  
Table 32 - NBO Company Shares of Dermatologicals: % Value 2019-2023  
Table 33 - LBN Brand Shares of Dermatologicals: % Value 2020-2023  
Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023  
Table 35 - Forecast Sales of Dermatologicals by Category: Value 2023-2028  
Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

### Digestive Remedies in Poland

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Busier lifestyles and poor dietary habits fuel sales in 2023  
Competition from dietary supplements is on the rise  
Private labels are on the rise

#### PROSPECTS AND OPPORTUNITIES

Healthy growth expected, despite expected price increases  
Broad accessibility will be crucial for growth  
Ease of use will be an important consideration for customers

#### CATEGORY DATA

Table 37 - Sales of Digestive Remedies by Category: Value 2018-2023  
Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023  
Table 39 - NBO Company Shares of Digestive Remedies: % Value 2019-2023  
Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023  
Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2023-2028  
Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

### Eye Care in Poland

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Prolonged exposure to electronic devices is linked to wide range of vision issues  
Demographic shifts give rise to increase in eye problems  
Private labels go from strength to strength, thanks their favourable quality-price ratio

#### PROSPECTS AND OPPORTUNITIES

Future looks promising for eye care  
Rebound in demand for allergy products  
Eye health supplements prove to be increasingly popular, as consumers seek out natural, preventative remedies

#### CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2018-2023

Table 44 - Sales of Eye Care by Category: % Value Growth 2018-2023

Table 45 - NBO Company Shares of Eye Care: % Value 2019-2023

Table 46 - LBN Brand Shares of Eye Care: % Value 2020-2023

Table 47 - Forecast Sales of Eye Care by Category: Value 2023-2028

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

## NRT Smoking Cessation Aids in Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Incidence of smoking in Poland remains high, especially amongst men

E-cigarettes offer an alternative to NRT solutions

NRT gums are the preferred choice for quitting smoking

#### PROSPECTS AND OPPORTUNITIES

More optimistic outlook expected

Government efforts, including excise tax hikes, could support smoking cessation moving forward

NRT chewing gums set to remain popular, thanks to choice of flavours and breath-freshening attributes

### CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2018-2023

### CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

## Wound Care in Poland

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Wound care products see more stable demand

Wound care for Ukrainian refugees is still essential

Convenience of use becomes more important factor in purchasing decisions

#### PROSPECTS AND OPPORTUNITIES

Growth opportunities appear to be limited

Private labels will continue to rise

Bricks-and-mortar pharmacies will continue as most important distribution channel

### CATEGORY DATA

Table 56 - Sales of Wound Care by Category: Value 2018-2023

Table 57 - Sales of Wound Care by Category: % Value Growth 2018-2023

Table 58 - NBO Company Shares of Wound Care: % Value 2019-2023

Table 59 - LBN Brand Shares of Wound Care: % Value 2020-2023

Table 60 - Forecast Sales of Wound Care by Category: Value 2023-2028

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

## Sports Nutrition in Poland

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Sports nutrition continues its positive growth trend in 2023  
Protein supplements still lead, but other segments gain traction  
Plant-based and organic products are becoming more popular

### PROSPECTS AND OPPORTUNITIES

Positive outlook for sports nutrition  
Online distribution will be key to future expansion  
CBD products will gain traction

### CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2018-2023  
Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023  
Table 64 - NBO Company Shares of Sports Nutrition: % Value 2019-2023  
Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023  
Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028  
Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

## Dietary Supplements in Poland

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Demand for dietary supplements continues unabated in 2023  
Manufacturers continually diversify their product offer  
Minerals and combination dietary supplements remain most popular choices

### PROSPECTS AND OPPORTUNITIES

Pharmacies will retain their stronghold on sales, despite inroads made by e-commerce  
Upcoming changes to dietary supplement advertising regulations  
Ease of use and customisation will gain traction

### CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2018-2023  
Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023  
Table 70 - Sales of Dietary Supplements by Positioning: % Value 2018-2023  
Table 71 - NBO Company Shares of Dietary Supplements: % Value 2019-2023  
Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2020-2023  
Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028  
Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

## Vitamins in Poland

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Modest growth for vitamins in 2023, following surge during the pandemic  
Specialised product lines prove to be popular  
Multivitamins gain traction

### PROSPECTS AND OPPORTUNITIES

Positive outlook moving forward as consumers continue to embrace preventative health measures  
Demand for children's supplements will continue

Bricks-and-mortar pharmacies will remain popular among consumers

#### CATEGORY DATA

Table 75 - Sales of Vitamins by Category: Value 2018-2023

Table 76 - Sales of Vitamins by Category: % Value Growth 2018-2023

Table 77 - Sales of Multivitamins by Positioning: % Value 2018-2023

Table 78 - NBO Company Shares of Vitamins: % Value 2019-2023

Table 79 - LBN Brand Shares of Vitamins: % Value 2020-2023

Table 80 - Forecast Sales of Vitamins by Category: Value 2023-2028

Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

#### Weight Management and Wellbeing in Poland

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Growing interest in quick-fix weight management solutions

Fitness aspirations fuel market growth

Subscription meal replacements benefit from increased consumer interest

##### PROSPECTS AND OPPORTUNITIES

Weight management and wellbeing products have promising future

Protein and natural ingredients will be highly desirable features

Other weight loss methods could pose threat to sales

#### CATEGORY DATA

Table 82 - Sales of Weight Management and Wellbeing by Category: Value 2018-2023

Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023

Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023

Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023

Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028

Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

#### Herbal/Traditional Products in Poland

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Demand for herbal products continues to rise

Herbal sleep aids are gaining traction

Herbal sleep aids are gaining traction

##### PROSPECTS AND OPPORTUNITIES

Bright future for the herbal segment

While safety is a clear benefit, the efficacy of herbal remedies will be questioned

Bricks-and-mortar outlets will remain the main sales channel, with e-commerce being integral to omnichannel strategies

#### CATEGORY DATA

Table 88 - Sales of Herbal/Traditional Products by Category: Value 2018-2023

Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023

Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023

Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023

Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2023-2028

Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Improved performance in 2023, assisted by return to pre-pandemic lifestyles

Paediatric medicines are no longer a niche

Trend towards variants for infants under one year old, driven by social pressures

### PROSPECTS AND OPPORTUNITIES

Optimistic prospects for the future

Falling vaccination rates could place children at risk of illness

Seasonality is still an important factor

### CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/consumer-health-in-poland/report](http://www.euromonitor.com/consumer-health-in-poland/report).