

OTC MARKET IN POLAND 2023

MARKET ANALYSIS AND DEVELOPMENT FORECASTS FOR 2023-2028

IMPACT OF INFLATION AND WAR IN UKRAINE

About the report

Main objective

To provide a comprehensive overview of the OTC market with a breakdown by sales channels and categories.

Additional objectives

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

- sales channels for OTC products and provide forecasts for their development
- key macroeconomic, demographic, demand-side, supply-side, legal and technological factors and trends affecting the OTC market
- values of the main categories in the OTC market
- consumer behaviour when buying OTC products

What information can be found in the report?

- market value in 2019-2023.
- market structure in 2019-2023 by sales channel
- values of the main categories in the market in 2023
- sales structure for the main categories in 2023 by sales channel
- macroeconomic, demographic, demand-side, supply-side, legal and technological factors affecting the market
- Poles' purchases of OTC products over the past year and their plans for 2024
- profile of buyers of OTC products
- main places to purchase OTC products
- projections until 2028 for:
 - OTC market
 - main sales channels for OTC products
 - changes in the prices of OTC products and in other macroeconomic and demographic factors

Scope

Time span:..... 2019-2022

Forecast period:..... 2023-2028

Geographic coverage:..... Poland

SALES CHANNELS

- offline pharmacies
- online pharmacies
- health and beauty stores and other physical stores
- e-commerce platforms/online marketplace

PRODUCT STATUS

- OTC drugs
- dietary supplements
- other, including medical devices (in total market value)

MAIN CATEGORIES

- eye drops
- omega fatty acids and fish oils
- gastric drugs and other preparations: for indigestion, heartburn, etc.
- analgesics
- magnesium, including combined with vitamin B6 and potassium
- infant formula
- plasters
- cold products
- liver products
- preparations improving the condition of hair, skin and nails
- preparations used to improve the urinary tract function
- preparations supporting joints, bones and muscles
- preparations used to support the nervous system (sleeping pills, sedatives, antidepressants)
- multivitamin, vitamin and mineral supplements
- probiotics
- CBD-based products
- sore throat and hoarseness lozenges
- vitamin D



Subject matter

SUBJECT MATTER

- market value
- breakdown of the market value by product status
- breakdown of the market value by sales channel
- breakdown of the market value by main product category
- breakdown of the main categories in the market by sales channel
- forecasts for:
 - entire market
 - sales channels
 - OTC drugs, dietary supplements, other OTC products



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 sales channels, the report also features forecasts for 2023-2028 for selected demographic and macroeconomic indicators which influence the OTC market, including:

- per capita GDP and GDP real growth rate
- CPI, price index for OTC products
- 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

SALES CHANNELS / PURCHASING LOCATIONS

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

- frequency of making purchases in different places: trend analysis
- factors decisive when selecting a particular place of purchase
- most popular places to shop (pharmacy chains vs individual pharmacies, retail and health and beauty store chains)

PROFILE OF OTC PRODUCT BUYERS IN POLAND

- frequency of purchases by product category and demographic characteristics of the buyers
- changes in consumer behaviour as a result of current market trends, e.g. inflation – how much purchases of OTC drugs and dietary supplements are given up
- planned purchases of individual product categories
- situations in which individual categories are bought (on impulse/planned purchases)
- changes in package size bought (reasons for such changes)
- groups of products that are purchased together – basket analysis



Benefits of purchasing the report

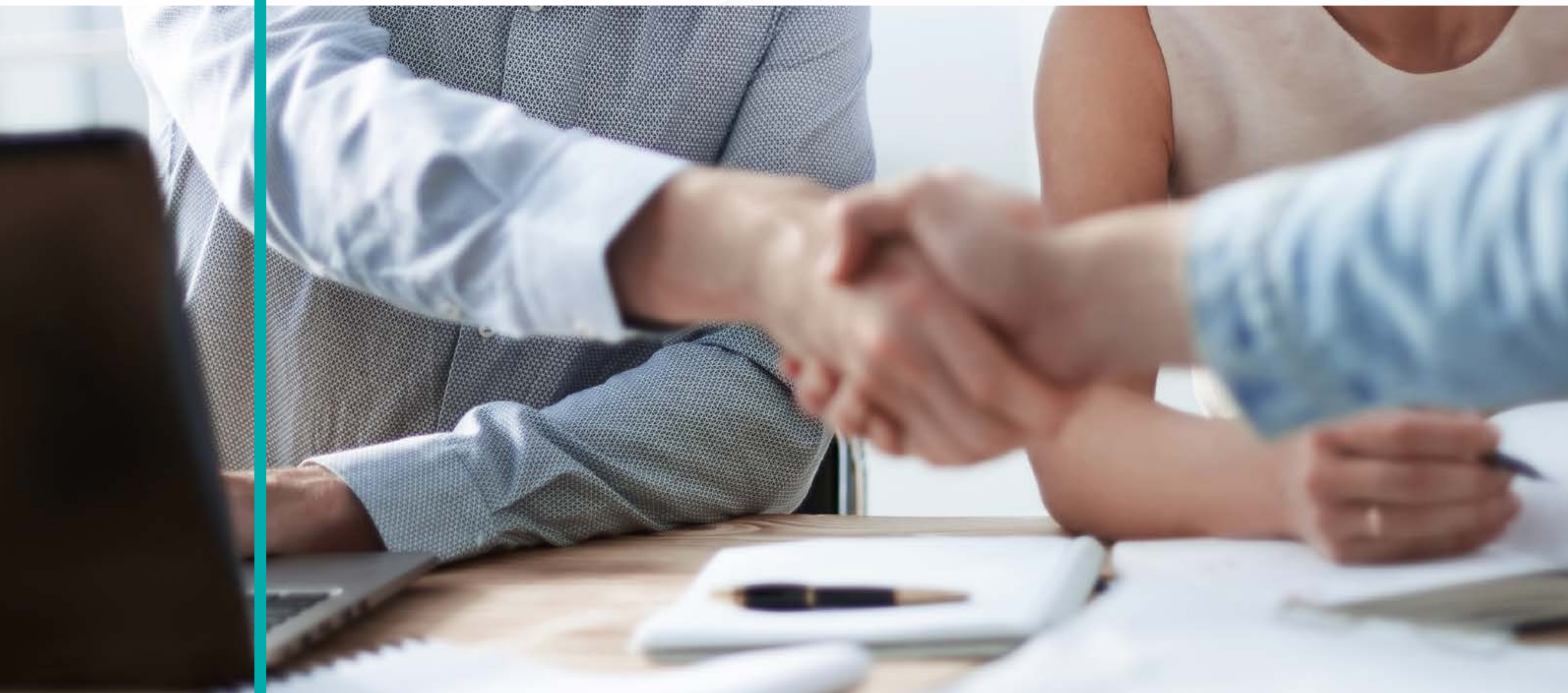
What questions does the report answer?

- What is the value of the OTC market in Poland?
- What is the value of various sales channels and projections for their growth over the next five years?
- What are the main categories in the market of OTC products in Poland?
- Are Poles planning to buy OTC products in 2023?
- What are the prevailing trends in the Polish OTC market?
- What is the impact of high inflation on the OTC market in Poland?
- What is the real growth rate of the OTC market in Poland?

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

Related publications:





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