



# DENTISTRY SERVICES MARKET IN POLAND 2023

MARKET ANALYSIS AND DEVELOPMENT FORECASTS FOR 2023-2028  
IMPACT OF INFLATION, WAR IN UKRAINE AND COVID-19





# About the report



The dental services market in Poland is one of the faster growing in Europe, mainly because it is dominated by private facilities. Price increase is the key challenge for the market now and in the coming years. **Dental services price inflation will remain at a record high level in 2023.** In 2022 it was 15%.

High inflation will have a restraining effect on the dental services market in Poland, although PMR forecasts that its growth rate will be positive between 2023 and 2028. On the one hand, **inflation will result in higher prices in dental surgeries**, which will increase the nominal value of the market. On the other hand, it will limit the market real growth, among others due to Poles' reduced purchasing power. The reduced purchasing power will influence the decisions of Poles who may at least partially forgo luxury services such as certain dental services.

However, straight and beautiful teeth are becoming one of the indicators of social status. Today, aesthetics is the main reason for wearing braces. In recent years, we have seen very high interest in such services, which tendency is supported by the good financial condition of the Polish population and the situation in the labour market.

A comprehensive analysis along with development forecasts can be found in PMR's latest report: **„[Dental services market in Poland 2023](#)”**.





# Details about the report

## Main objective

To provide a comprehensive analysis of the dental services market in Poland, broken down into the main service segments, and to present the prospects for their development.

## Additional objectives

- to analyse **three main market segments**:
  - restorative dentistry,
  - orthodontics,
  - prosthetics with implantology.
- to present **key factors** and trends in the dental services market (macroeconomic, including inflationary, demographic, demand-side, supply-side, technological and legal factors).
- to identify **major dental clinic chains**
- to present and analyse **the behaviour of patients** using dental services in Poland, overall and for particular types of services.

## The report features, among others:

- **market value** for 2017-2022, together with its **development forecasts until 2028**
- market breakdown for the years 2017-2022 with development forecasts until 2028, **by service type**
- market breakdown for the years 2017-2022 with development forecasts until 2028, **by service funding**
- projections of **changes in the prices of dental services** and for other macroeconomic and demographic factors
- demand-side, supply-side, technological and legal **factors influencing the market**
- **chains operating** in the dental services market in Poland
- **main players** in the dental services market in Poland



# Details about the report

**Time span:**..... 2017-2022

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

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

## SUBJECT MATTER

### Type of service:

- restorative dentistry
- orthodontics
- prosthetics with implantology

### Funding source:

- public
- private

## SCOPE

- market value
- breakdown of the total market value by:
  - type of service
  - funding of services
- forecasts for:
  - entire market
  - particular types of services
  - various methods of service funding
- profiles of the largest players:
  - medical companies
  - dental clinics





# Details about the report

## FORECASTS

For the report, long-term market development forecasts were prepared using econometric models and historical time series. The forecasts cover the period 2023-2028.

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

- per capita PKB and GDP real growth rate
- overall inflation and inflation of prices for dental 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

## ANALYSIS

**Analysis of the behaviour of patients using dental services in Poland:**

- use of dental services in 2022, by type of service
- reasons for opting out of dental services in 2022
- ways of funding dental services for oneself and one's children in 2022
- plans to use dental services in 2023, by type of service
- planned ways of funding dental services in 2023, by type of service

### Number of facilities and doctors:

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

- number of dental practices and clinics in Poland
- number of dentists in total and by specialty
- largest medical chains and dental clinics, together with the number of facilities





# Benefits of purchasing the report

## The report answers, for instance, the following questions:

- What is the value of the dental services market in Poland?
- What is the value of each type of service and which categories will grow fastest over the next few years?
- How are dental services funded in Poland?
- How do Poles plan to use dental services in 2023?
- What are the prevailing trends in the dental services market in Poland?
- What is the impact of high inflation on the dental services market in Poland?
- What is the real growth rate for the dental services 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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