



Private healthcare market in Central and Eastern Europe 2009

Development forecasts for 2009-2011

Publication date: March 2009

Language: English

A word from the expert



“The public healthcare system in CEE has been moribund during the past decade: underfunded, lacking solid infrastructure and thus unable to keep professional medical staff in the country. This situation has led to the emergence of a secondary healthcare market in the public system, on which patients are often paying for services which, in theory, should be free-of-charge. The majority of markets in CEE are now at initial stage of development in the context of private healthcare. However, it would be a mistake to treat Central and Eastern Europe as a homogenous block of post-communist states. Due to a number of political, social and economic circumstances, private healthcare sectors have taken a different shape in each country. Our report analyses thoroughly the seven most perspective countries in the region to give a reliable outlook not only for possible investors but also for companies already present in the region.”

Monika Stefanczyk,
Head Pharmaceutical Market Analyst

PMR MarketInsight Methodology

This report was prepared using PMR's MarketInsight Methodology. **PMR MarketInsight is a methodology developed by PMR which assists in the complex preparation of industry reports.** It defines the ways in which data should be collected for such reports and outlines the methods to be used in analysing the information collected in order to obtain a true picture of the market in question. It also contains special procedures to follow in the case of incomplete market.

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PMR MarketInsight is the result of over 10 years of experience in conducting industry analysis on Central and Eastern European markets.

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MarketInsight
Methodology

The market in the seven countries analysed was worth €14bn in 2008.

Report Description:

Private healthcare market in Central and Eastern Europe 2009, Development forecasts for 2009-2011 is a comprehensive informational resource that presents and analyses the latest findings of an in-depth study of the private healthcare sectors in the following CEE countries: **Czech Republic, Slovakia, Hungary, Poland, Romania, Bulgaria and Russia**. The report provides current data on market size and structure within these countries, while providing incisive analysis of major trends and offering solid projections to 2011.

The report also features an examination of major players in the private healthcare market in Central and Eastern European countries. It provides profiles of **providers** and **consumers** of private healthcare services as well as data on spending trends for various market segments such as **inpatient services, dental care or dialysis care**.

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Key sections

Private healthcare market in Central and Eastern Europe 2009 presents comprehensive and detailed market data and analysis in the following four sections:

Section One defines and analyses the current conditions and prevailing trends and events influencing the private healthcare market in CEE countries. It reviews information on the recent past and carries discussion of influential trends forward to the year 2011.

Section Two focuses on private healthcare market conditions that exist in each of these CEE countries: Czech Republic, Slovakia, Hungary, Poland, Romania, Bulgaria and Russia. Market values and trends are presented and analysed, along with recent developments and projections to 2011. Profiles of major market participants (medical companies and insurers) are given, along with information and analysis of the health insurance, medical health subscription, and private hospitals. Current conditions and projected developments with regard to the legal environment are also explored.

Section Three examines the consumer preferences and social trends underlying the growth and development of the private healthcare market in CEE. Demographic information and reasoning for choosing private healthcare options are used as a foundation to construct a real time profile of customer behaviour and patterns of use for today's consumer. Frequency of using private healthcare is also analysed.

Section Four focuses on economic data related to private healthcare market segments. Trends in private and public health spending are discussed here.

In 2011 private
healthcare
market CEE will
reach €24bn.

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The private health insurance market remains negligible in most countries of the region.

Report Overview:

Private healthcare market in Central and Eastern Europe 2009, Development forecasts for 2009-2011 provides a comprehensive overview of recent, current and future market size and trends, such as:

- Key events and trends: until 2009
- Forecast trends and influential events: 2009-2011
- Market size: 2008-2011
- Trends and perspectives of CEE health insurance market
- Trends and perspectives of CEE health medical subscription market

Countries within the CEE (Poland, Slovakia, Czech Republic, Russia, Hungary, Romania, Bulgaria) differ in the conditions and opportunities offered to private healthcare market participants and consumers.

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This report provides data and analysis on:

- Recent and current private healthcare market trends until 2011
- Size of the private healthcare market in each of the countries
- Profiles of key players in the health insurance markets
- Profiles of key players in the health medical subscription markets
- Private hospitals: number, details and prospects for future growth
- Analysis of other segments of the private healthcare market: dental and dialysis care
- Legal environment of health insurance and subscription markets
- Expected changes in legal environment and their market impact

Private healthcare market in Central and Eastern Europe 2009 is a vital resource for:

- Companies currently operating in the private healthcare markets of CEE countries
- Companies interested in private healthcare in general
- Companies interested in private healthcare market conditions in CEE countries
- Consulting and research companies and analytical institutes
- Government agencies, embassies and other trade organisations

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