



**The Polish imaging diagnostics
market will be worth more than
PLN 1bn in 2012**

In 2009 the Polish imaging diagnostics market was worth almost PLN 674m (€156m), according to the latest report by PMR, a research and consulting company, entitled "Imaging diagnostics market in Poland 2010. Development forecasts for 2010-2012". Between 2010 and 2012, sales on this market will increase, on average, by 16% per annum. The main driving forces behind the market growth will include increases in capital expenditure in the private sector, EU funds and ever greater emphasis on prevention in government healthcare policy. PMR estimates suggest that the imaging diagnostics market will be worth more than PLN 1bn (€230m) in 2012.

EU funds seen as major stimulant of growth

As with other countries, the private sector in Poland has been purchasing slightly less imaging diagnostic equipment during the crisis, whereas the public sector has been less susceptible to the adverse effects of the economic slowdown. *"This was because many investment projects were supported by EU funds. Sources of funding for the acquisition of imaging diagnostic equipment include the 2007-2013 Infrastructure and Environment Operational Programme and Regional Operational Programmes"* Agnieszka Stawarska, a Pharmaceutical Market Analyst at PMR and a co-author of the report, explains.

The Infrastructure and Environment Operational Programme supports six areas of the economy, including healthcare. The purchase of imaging diagnostic equipment is funded under Measure 12.2. So far, support for the purchase of imaging diagnostic equipment has been offered to several establishments. For example, the Gliwice branch of the Oncology Centre – Maria Skłodowska-Curie Memorial Institute of Warsaw received PLN 8.5m (€2m) for the replacement of nuclear medicine instruments, and the Cardinal Stefan Wyszyński Institute of Cardiology in Warsaw received PLN 7.7m (€1.8m) for the acquisition of imaging diagnostic equipment and medical products with a view to improving the quality and availability of medical services.

As part of the Regional Operational Programmes, entities can secure additional funding for the modernisation and acquisition of imaging diagnostic equipment and the modernisation and adaptation of the existing infrastructure for the deployment of the acquired equipment. For example, in 2009 PLN 1.3m (€0.3m) was offered as part of the Wielkopolski Regional Operational Programme to co-fund the purchase of digital X-ray diagnostic equipment for the Poznań-Stare Miasto Healthcare Facility. The Opolskie Regional Operational Programme helped to fund the acquisition of a CT scanner for the Independent Public Healthcare Facility in Glubczyce (a subsidy of PLN 1.3m or €0.3m).

Domestic funding also available

Additional funding for the purchase of imaging diagnostic instruments can be obtained from domestic sources. The National Programme to Combat Neoplastic Diseases is the main source of funding. Capital expenditure projects constitute one element of the Programme. These measures primarily include the establishment of an oncology radiotherapy system in Poland, a network of PET scanning facilities across the country and the acquisition of diagnostic instruments for the early detection of neoplasms. Imaging diagnostic equipment is purchased as part of the latter two measures. *"Between 2007 and 2010, several establishments received financial assistance for the purchase of magnetic resonance imaging scanners and other imaging diagnostic equipment, in addition to PET/CT scanning equipment and cyclotrons, and for the adaptation of infrastructure for the installation of the scanners"* Monika Stefanczyk, Head Pharmaceutical Market Analyst at PMR and a co-author of the report, explains.

Some purchases of imaging diagnostic equipment are funded by the Foundation of the Great Orchestra of Christmas Charity (the WOSP), a public benefit organisation. In 2009, the WOSP purchased 61 ultrasound scanners, and the results of a competitive tender pertaining to the purchase of six CT devices were announced in May 2010. The equipment acquired by the WOSP for the money raised in January is being donated to healthcare establishments free of charge. The aid is offered only to those institutions

which have valid contracts with the NFZ, and it is of crucial importance that the equipment is not used for commercial purposes.

Note: the monetary value of the imaging diagnostics market presented in the report is understood as the sales of imaging diagnostic equipment during the given period in terms of the following disciplines: nuclear medicine, x-ray diagnostics, magnetic resonance imaging, computed tomography and ultrasonography.

Authors of the report:



Agnieszka Stawarska, Pharmaceutical Market Analyst

Monika Stefańczyk, Head Pharmaceutical Market Analyst

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ul. Dekerta 24, 30-703 Kraków, Polska

tel. /48/ 12 618 90 00, fax /48/ 12 618 90 08

www.pmrporate.com