

Description of the report

# Window market in Poland 2015

Forecast 2016-2017



## About the report

**Window market in Poland 2015. Forecast 2016-2017** is the latest edition of the annual report on the window market in Poland prepared by Centrum Analiz Branżowych. This study has been drawn up in order to provide comprehensive information about the development of the Polish industry home and abroad to managers of companies manufacturing windows, supplying materials for manufacturing windows, and distributing windows.

The report discusses the 2015 performance of the window sector and presents a window export and sales forecast for 2016-2017 in Poland.

The report consists of 7 chapters demonstrating :

- the macroeconomic environment in which Polish manufacturers operate,
- the position of the Polish industry against other EU member states,
- window manufacturing in Poland, its product and material structure, and performance of the leading manufacturers,
- the Polish window export volume, dynamics and directions,
- the window import results and the share of imported windows in the domestic sales,
- the window sales volume in Poland, including in new construction projects and on the renovation market,
- the forecast of window sales by Polish manufacturers, including the export and domestic sales forecast for 2016-2017.

## Market definition

The analysis covers the Polish window market, including façade and roof windows, made of plastic, wood, and metal.

Windows are understood as defined in:

- PKWiU (Polish Classification of Goods and Services) – codes 16.23.11-10 (windows, balcony windows and their frames, of wood), 22.23.14-50.01 (plastic windows for the construction industry, 25.12.10-30.02.01 (steel windows), 25.12.10-50.02.01 (windows, skylights, and aluminium portholes),
- and CN classification – codes 39252000 (doors, windows and their frames and thresholds for doors, of plastics), 441810 (windows, French windows and their frames, of wood), 73083000 (doors, windows and their frames and thresholds for doors, of iron or steel), 76101000 (doors, windows and their frames and thresholds for doors, of aluminium (excl. door furniture)).

Data on window manufacturing and foreign trade are collected in various units of measurement (pieces, m<sup>2</sup>, kg). The basic window unit adopted is the O32 window; the data are converted to this window size.

## Methodology

### Research methods and techniques

- analysis of secondary sources – the report uses data from external sources, such as statistical offices, Customs Service, credit agencies, stock exchange reports, press releases, video presentations, manufacturers' websites
- own research – two types of own research have been carried out for the purpose of the report:
  - CAWI (Computer-Assisted Web Interview). A survey conducted among window manufacturers and suppliers regarding the companies' performance in 2015. It is a survey aimed at obtaining information about sales performance, export share in a given company's performance and manufacturing/sales structure,
  - CATI (Computer-Assisted Telephone Interview). The interviews were made with 70 largest window manufacturers in Poland. Companies' heads, sales directors or marketing directors were asked to rate the sales in 2015 and make a forecast for the period 2016-2017.

An important aspect used to examine the changes on the window market in Poland is an analysis of data regarding suppliers of window manufacturing materials, including in particular profiles, reinforcements, insulating glass units, and fittings.

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