

Description of the report

# Door market in Poland

2017 edition



## About the report

**Door market in Poland, 2017 edition** is the latest edition of the annual report by Centrum Analiz Branżowych regarding the door market in Poland. This study is aimed at supplying the managers of door manufacturing enterprises, manufacturing material supplier enterprises, as well as distribution enterprises, with comprehensive information concerning the development of the Polish industry home and abroad.

The report discusses the results of the door industry in 2016 and in the first half of 2017, as well as presents a forecast of door export and sales in Poland in the period 2017-2018.

The report consists of 7 chapters demonstrating:

- the macroeconomic environment in which Polish manufacturers operate,
- the position of the Polish joinery industry against other EU countries,
- door manufacturing in Poland, its product and material structure, and performance of the leading manufacturers,
- the volume, dynamics and directions of door export from Poland,
- results of door import and share of imported doors in domestic sales,
- door sales volume in Poland, including in new construction projects and on the renovation market,
- a forecast of door sales by Polish manufacturers, including an export and domestic sales forecast for the period 2017-2018.



## Market definition

The analysis covers the door market in Poland, including internal doors, external doors (entrance doors for apartments and buildings) as well as special-purpose doors, formed in plastics, wood or wood-based materials, steel and aluminium.

Products defined in accordance with the following classifications are regarded as doors:

- NACE Rev.2 – codes 16.23.11-50.01 (wood doors), 22.23.14-50.02 (plastic doors), 25.12.10-30.01.01 (steel doors), 25.12.10-50.01.01 (aluminium doors),
- and CN – codes 39252000 (plastic joinery), 441820 (wood doors), 73083000 (steel joinery), 76101000 (aluminium joinery).

Note: the term wood doors includes products made of solid wood and wood-based materials.

## 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 were carried out for the purposes of the report :
  - CAWI (Computer-Assisted Web Interview). A survey conducted among door manufacturers and suppliers regarding the companies' performance in 2016. It is a survey aimed at obtaining information about sales performance, export share in a given company's performance and manufacturing structure,
  - CATI (Computer-Assisted Telephone Interview). The interviews were made with 120 largest door manufacturers in Poland. Companies' heads, sales directors or marketing directors were asked to rate the sales in 2016 and make a forecast for the period 2017-2018, as well as to provide the sales structure divided into internal and external doors.



## Table of contents

Definition, methodology	4
Key findings	7
<b>Chapter 1.</b> Description of the situation in the Polish economy and on the construction market	9
1.1. Polish economy in 2016 roku. Outlook for the period 2017-2018	
1.2. Construction industry in Poland in 2016 and in HY1 2017	
<b>Chapter 2.</b> Polish window and door joinery sector against the European Union	12
2.1. Manufacturing of window and door joinery in the EU	
2.2. Top manufacturers (countries) of window and door joinery in the EU	
<b>Chapter 3.</b> Door manufacturing in Poland	15
3.1. Description of the Polish door sector	
3.2. Door manufacturing value in Poland	
3.3. Leading door manufacturers in Poland	
3.4. Door manufacturing volume in Poland	
3.5. Door manufacturing structure in Poland by material in which they were formed	
3.6. Door manufacturing structure in Poland divided into internal and external doors	
<b>Chapter 4.</b> Door export	26
4.1. Polish joinery exporters against other EU member states	
4.2. Polish door export volume and structure	
4.3. Polish door export directions	



## Table of contents

<b>Chapter 5.</b> Door import	32
5.1. Volume and structure of door import to Poland	
5.2. Door import by country of origin	
<b>Chapter 6.</b> Door sales in Poland	36
6.1. Door sales value in Poland. Market shares of the leading enterprises	
6.2. Door sales volume and structure in Poland	
6.3. Door sales on the renovation market and for new construction projects in Poland	
<b>Chapter 7.</b> Door sales forecast until the end of 2018	43
7.1. Forecast assumptions	
7.2. Accuracy of CAB forecast for 2016	
7.3. Door sales forecast for the period 2017-2018	



## List of tables and charts

- 1
  - Economic growth in Poland in the period 2013-2016. Forecast for the period 2017-2018
  - Unemployment in Poland in the period 2013-2016. Forecast for the period 2017
  - Inflation rate in Poland in the period 2013-2016. Forecast for the period 2017-2018
  - Construction and assembly manufacturing sales in Poland in the period 2013-2016 and in HY1 2017
  - Number of dwellings the construction of which was commenced in the period 2014-2016 and in HY1 17
  - Number of dwellings delivered in the period 2014-2016 and in HY1 2017
- 2
  - Window and door manufacturing in the EU in the period 2012-2016 (in billion EUR)
  - Manufacturing structure of window and door joinery in the EU in 2016 by material
  - Top joinery manufacturers (countries) in the EU (in billion EUR, data for 2016)
  - Poland's share in the manufacturing value of window and door joinery in the EU in 2016
- 3
  - Door manufacturing value in Poland in the period 2013-2016
  - Door manufacturing structure in value terms in Poland in 2016 by material in which they were formed
  - Total turnover of the top door manufacturers in the period 2015-2016 (in million PLN)
  - Estimated revenue from door sales generated by the top manufacturers in 2016 (in million PLN)
  - Estimated shares of the top manufacturers in door manufacturing in Poland in 2016
  - Door manufacturing volume in Poland in the period 2013-2016 and in HY1 2017 (in million pieces)
  - Door manufacturing structure in Poland in quantitative terms in 2016 by material in which they were formed
  - Door manufacturing dynamics in Poland in the period 2014-2016 and in HY1 2017
  - Door manufacturing volume in Poland by material in which they were formed in the period 2014-2016 and in HY1 2017 (in million pieces)



## List of tables and charts

- Door manufacturer structure in Poland by the type of manufactured doors
- Door manufacturing structure in Poland in 2016 divided into internal and external doors
- Estimated door manufacturing volume in Poland in 2016 divided into internal and external doors

4

- Top joinery exporters (countries) in the EU in 2016 (in million EUR)
- Top joinery exporters (countries) in the EU in 2016 by segments (in million EUR)
- Volume of door export from Poland in the period 2012-2016 and in HY1 2017 (in million pieces)
- Share of export in door manufacturing in the period 2012-2016 and in HY1 2017
- Value of door export from Poland in the period 2014-2016 and in HY1 2017
- Volume of door export from Poland by material in which they were formed in the period 2014-2016 and in HY1 2017 (in thousand pieces)
- Door export structure by material in which they were formed in 2016
- Door export dynamics in the period 2014-2016 and in HY1 2017
- Primary directions of door export from Poland in 2016 (in thousand pieces)
- Structure of door export from Poland to individual countries in 2016 (in thousand pieces)
- Volume and dynamics of door export to individual countries in 2016 and in HY1 2017 (in thousand pieces)

5

- Volume of door import to Poland in the period 2012-2016 and in HY1 2017 (in thousand pieces)
- Value of door import to Poland in the period 2012-2016 and in HY1 2017 (in million PLN)
- Share of imported doors in sales on the Polish market in 2016
- Door import structure by material in which they were formed in 2016
- Door import to Poland by material in which they were formed in the period 2014-2016 and in HY1 2017 (in thousand pieces)



## List of tables and charts

- Door import dynamics in the period 2014-2016 and in HY1 2017 (n-1=100)
- Door import by country of origin in 2016 (in thousand pieces)
- Volume and dynamics of door import from individual countries in 2016 and in HY1 2017 (in thousand pieces)

- 6
- Door sales value in Poland in the period 2013-2016
  - Door sales structure in value terms in Poland in 2016 by material in which they were formed
  - Estimated revenue from door sales generated by the top enterprises in Poland in 2016 (in million PLN)
  - Estimated shares of the top enterprises in door sales in Poland in 2016
  - Door sales in Poland in the period 2013-2016 and in HY1 2017 (in million pieces)
  - Door sales structure in quantitative terms in Poland in 2016 by material in which they were formed
  - Door sales dynamics in Poland in the period 2014-2016 and in HY1 2017
  - Door sales in Poland by material in which they were formed in the period 2014-2016 and in HY1 2017 (in million pieces)
  - Door sales structure in new construction projects and on the renovation market in Poland in 2016
  - Door sales on the renovation market in the period 2013-2016 and in HY1 2017 (in million pieces)
  - Door sales to new construction projects in the period 2013-2016 and in HY1 2017 (in thousand pieces)
  - Distribution of door sales in new residential buildings by project type in 2016

- 7
- Accuracy of door sales forecast in 2016
  - Forecast of door sales by Polish enterprises in the period 2017-2018 (dynamics)
  - Forecast of door sales by Polish enterprises in the period 2017-2018 (in million pieces)





## Publication date

October 2017

## Language

Polish or English

## Format

PDF sent to the indicated e-mail address

## Volume

46 pages, 55 tables and charts

## Net price

Polish version: PLN 2600 / EUR 650

English version: PLN 3200 / EUR 800

## Copyright

Centrum Analiz Branżowych



## Contact

Centrum Analiz Branżowych  
ul. Turmoncka 22/110  
03-254 Warszawa  
[www.cab-badania.pl](http://www.cab-badania.pl)  
[www.cab-badania.com](http://www.cab-badania.com)



**Maciej Pastor**

Sales and Marketing Specialist

Phone: +48 797 940 910

E-mail: [m.pastor@cab-badania.pl](mailto:m.pastor@cab-badania.pl)



**Barbara Lau**

Specjalista ds. sprzedaży i marketingu

Phone: +48 722 330 255

E-mail: [b.lau@cab-badania.pl](mailto:b.lau@cab-badania.pl)

