

DESCRIPTION OF THE REPORT

# WINDOW MARKET IN POLAND

EDITION 2017



## About the report

**Window market in Poland, edition 2017** is another issue of the annual report prepared by Centrum Analiz Branżowych on the window market in Poland. The study was developed to provide window manufacturers, suppliers, and distribution companies with information about the Polish industry home and abroad.

The report discusses the results of the window industry in 2016 and presents the window export and sales forecast in Poland in the period 2017-2018.

The report is composed of 8 chapters, which describe:

- the macroeconomic environment in which Polish manufacturers operate,
- the position of the Polish industry against other EU countries,
- the window manufacturing in Poland, its product and material structure, and results of the leading manufacturers,
- the Polish window export volume, dynamics and directions,
- the window import results and 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 the period 2017-2018,
- the share of energy-efficient windows in the sales in Poland in 2016 with a forecast for 2019.



## 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 illuminators),
- and CN classification – codes 39252000 (plastic joinery), 441810 (wood windows), 73083000 (steel joinery), 76101000 (aluminium joinery).

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, corporate presentations.
- 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 2016. It is a survey aimed to obtain 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 120 window 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 and to provide the information about energy-efficient window sales.

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, fittings, reinforcements, and insulating glass units.



## Table of contents

Definition, methodology	4
Summary	6
<b>Chapter 1. Description of the situation in the Polish economy and on the construction market</b>	<b>9</b>
1.1. Polish economy in 2016. Outlook for the period 2017-2018	
1.2. Construction industry in Poland in 2016. Outlook for the period 2017-2018	
<b>Chapter 2. Polish window and door joinery against the European Union</b>	<b>12</b>
2.1. Manufacturing of window and door joinery in the EU	
2.2. Leading manufacturers (countries) of window and door joinery in the EU	
<b>Chapter 3. Window manufacturing in Poland</b>	<b>15</b>
3.1. Description of the Polish window sector	
3.2. Window manufacturing value in Poland	
3.3. Leading window manufacturers in Poland	
3.4. Window manufacturing volume and dynamics in Poland	
3.5. Window manufacturing structure divided into façade and roof windows	
3.6. Window manufacturing structure in Poland by material in which they were formed	
<b>Chapter 4. Window export from Poland</b>	<b>26</b>
4.1. Polish joinery exporters against other EU member states	
4.2. Volume and structure of window export from Poland	
4.3. Directions of window export from Poland	



## Table of contents

<b>Chapter 5. Window import to Poland</b>	<b>32</b>
5.1. Window import volume and structure	
5.2. Window import by country of origin	
<b>Chapter 6. Window sales in Poland</b>	<b>35</b>
6.1. Window sales value in Poland. Market share of the leading manufacturers	
6.2. Window sales volume and dynamics in Poland	
6.3. Window sales structure in Poland by material in which they were formed	
6.4. Window sales on the renovation market and to new construction projects in Poland	
<b>Chapter 7. Window sales forecast for the period 2017-2018</b>	<b>41</b>
7.1. Forecast assumptions	
7.2. Accuracy of CAB's forecast for 2016	
7.3. Window sales forecast for the period 2017-2018	
<b>Chapter 8. Energy-efficient window sales in Poland in 2016. Forecast for 2019</b>	<b>44</b>
8.1. Share of energy-efficient windows in the sales in Poland	
8.2. Influence of introducing the requirement for the coefficient of $U_w < 0.9 \text{ W}/(\text{m}^2 \cdot \text{K})$ on window manufacturing costs	



## List of tables and charts

1

Economic growth in Poland in the period 2012-2016. Forecast for the period 2017-2018

Unemployment in Poland in the period 2012-2016. Forecast for the period 2017-2018

Inflation rate in Poland in the period 2012-2016. Forecast for the period 2017-2018

Construction and assembly manufacturing sales in Poland in the period 2012-2016. Forecast for the period 2017-2018

Number of apartments the construction of which was commenced and which were delivered in the period 2012-2016

Number of non-residential buildings delivered in the period 2012-2016

2

Window and door manufacturing in the EU in the period 2011-2015 (in billion EUR)

Manufacturing structure of window and door joinery in the EU in 2015 by material (in value terms)

Top joinery manufacturers (countries) in the EU (in billion EUR, data for 2015)

Poland's share in the manufacturing value of window and door joinery in the EU in 2015

3

Estimated window manufacturing value in Poland in the period 2013-2016 (in billion PLN)

Window manufacturing structure in value terms by material in which they were formed in Poland in 2016

Total turnover of the top window manufacturers in the period 2015-2016 (in million PLN)

Estimated revenue from window sales generated by top manufacturers in 2016 (in million PLN)

Estimated shares of the top manufacturers in window manufacturing in Poland in 2016 (in value terms)

Window manufacturing volume in Poland in the period 2012-2016 (in million pieces)

Window manufacturing dynamics in Poland in the period 2013-2016

Estimated window manufacturing structure in Poland divided into façade and roof windows

Window manufacturing structure by material in which they were formed in Poland in 2016 (in quantitative terms)

Window manufacturing dynamics in individual segments in the period 2013-2016

Window manufacturing volume by material in which they were formed in Poland in the period 2013-2016 (in million pieces) <sup>6</sup>



## List of tables and charts

4

Top joinery exporters (countries) in the EU in 2016 (in million EUR)  
Top joinery exporters (countries) in the EU by segments in 2016 (in million EUR)  
Value of window export from Poland in the period 2013-2016 (in billion PLN)  
Volume of window export from Poland in the period 2012-2016 (in million pieces)  
Dynamics of window export from Poland in the period 2013-2016  
Window export structure by material in which they were formed in 2016 (in value and quantitative terms)  
Export share in window manufacturing in the period 2013-2016 (in quantitative terms)  
Window export volume by material in which they were formed in the period 2013-2016 (in million pieces)  
Main directions of window export from Poland in 2016 (in thousand pieces)  
Dynamics of window export from Poland to individual countries in the period 2014-2016  
Main directions of PVC window export from Poland in 2016 (in thousand pieces)  
Main directions of wood window export from Poland in 2016 (in thousand pieces)  
Main directions of metal window export from Poland in 2016 (in thousand pieces)

5

Value of window import to Poland in the period 2013-2016 (in million PLN)  
Volume and dynamics of window import to Poland in the period 2013-2016 (in thousand pieces)  
Volume and structure of window import to Poland in the period 2013-2016 (in thousand pieces)  
Window import by country of origin in 2016 (in thousand pieces)

6

Estimated window sales value in Poland in the period 2013-2016 (in billion PLN)  
Window sales structure by material in which they were formed in Poland in 2016 in value terms  
Estimated revenue from window sales generated by the top manufacturers in Poland in 2016 (in million PLN)  
Estimated shares of the top manufacturers in window sales in Poland in 2016 (in value terms)



## List of tables and charts

Window sales volume in Poland in the period 2012-2016 (in million pieces)  
Window sales dynamics in Poland in the period 2013-2016  
Window sales structure by material in which they were formed in Poland in 2016 (in quantitative terms)  
Window sales dynamics in Poland in individual segments in the period 2013-2016  
Window sales volume by material in which they were formed in Poland in the period 2013-2016 (in million pieces)  
Window sales structure in new construction projects and on the renovation market in Poland in 2016  
Window sales on the renovation market in the period 2013-2016 (in million pieces)  
Window sales to new construction projects in the period 2013-2016 (in million pieces)  
Distribution of window sales in new residential buildings by project type in 2016

---

7

Accuracy of the window sales forecast in 2016  
Forecast of window sales by Polish manufacturers in the period 2017-2018 (dynamics)  
Forecast of window sales by Polish manufacturers in the period 2017-2018 (in million pieces)

---

8

Share of energy-efficient windows in window sales in Poland in 2016  
Forecast of the share of energy-efficient windows in window sales in Poland until 2019  
Estimated energy-efficient window sales volume in Poland in the period 2013-2016. Forecast for 2019 (in million pieces)  
Influence of introducing the requirement for the coefficient of  $U_w < 0.9 \text{ W}/(\text{m}^2 \cdot \text{K})$  on window manufacturing costs



### Publication date

June 2017

### Language

Polish or English

### Format of the report

PDF sent to the indicated e-mail address

### Volume

47 pages, 58 charts and tables

### Net price

Polish version: PLN 2,600 / EUR 650  
English version: PLN 3,200 / 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**    
Sales and Marketing Specialist  
Phone: +48 722 330 255  
E-mail: [b.lau@cab-badania.pl](mailto:b.lau@cab-badania.pl)