



Description of the report

Door market in Poland

2019 edition

About the report

Door market in Poland, 2019 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 door manufacturers, suppliers 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 2018, as well as presents a forecast of door export and sales in Poland in the period 2019-2020.

The report consists of 7 chapters demonstrating:

- the macroeconomic **environment** in which Polish manufacturers operate,
- the **position** of the Polish 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** in Poland, including in **new construction projects** and in the **renovation** market,
- a **forecast** of door sales by Polish manufacturers, including an export and domestic sales forecast for the period **2019-2020**.



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Definitions

The analysis covers the door market in Poland, including internal doors, external doors (entrance doors for dwellings 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 for construction), 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.

Metodology

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 2018. 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 120 largest door manufacturers in Poland. Companies' heads, sales directors or marketing directors were asked to rate the sales in 2018 and make a forecast for the period 2019-2020, as well as to provide the sales structure divided into internal and external doors.

The study uses annual average NBP exchange rates:

- 2014: *EUR 1 = PLN 4.1852*
- 2015: *EUR 1 = PLN 4.1839*
- 2016: *EUR 1 = PLN 4.3625*
- 2017: *EUR 1 = PLN 4.2576*
- 2018: *EUR 1 = PLN 4.2623*

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