



Description of the report

# WINDOW MARKET IN POLAND

EDITION 2018



## About the report

**Window market in Poland, edition 2018** is another issue of the annual report prepared by Centrum Analiz Branżowych on the window market in Poland. The study is intended to provide window manufacturers, suppliers, and distribution companies with comprehensive information about the development of the Polish industry home and abroad.

The report discusses the results of the window industry in 2017 and presents the window export and sales forecast in Poland in the period 2018-2019.

The report is composed of 8 chapters, which present:

- 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 **2018-2019**,
- the analysis of PVC, wood, aluminium window **export prices** in selected countries.



## Definitions

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, 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 2017. 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 100 window manufacturers in Poland. Companies' heads, sales directors or marketing directors were asked to rate the sales in 2017 and make a forecast for the period 2018-2019.

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.

The study uses annual average NBP exchange rates:

- 2012: EUR 1 = PLN 4.1850
- 2013: EUR 1 = PLN 4.1975
- 2014: EUR 1 = PLN 4.1852
- 2015: EUR 1 = PLN 4.1839
- 2016: EUR 1 = PLN 4.3625
- 2017: EUR 1 = PLN 4.2576



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## About the report

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