

# Window market in Poland

edition 2022



# INTRODUCTION



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The Polish window industry has been developing for nearly 20 years. The development is generally perceived as a constant and fast one. In reality, however, there were both seasons with growths of a dozen or so per cent and ones with a decreasing quantity of manufactured windows. This happened in 2009, in the period 2012–2013, and finally in 2020. Nevertheless, most seasons ended with increased sales and nearly 80% more windows are manufactured per annum in Poland at present than on the country's accession to the EU. At the same time, the products manufactured in Poland are more technologically advanced and hence more expensive. CAB assesses that the industry has grown much more in terms of value, i.e. by approx. 300%.

Long-term prospects also seem promising. Windows fit well into the stream of deep energy retrofit, and let us not forget that the assumptions of the Renovation Wave programme are scheduled until 2050.

This does not mean, however, that the window industry is not facing difficulties. The 2021 window manufacturing increased markedly, but – as indicated by manufacturers themselves – the growth could have been even greater had it not been for the limited availability of raw materials. A major challenge of 2021 and the beginning of this season is definitely the issue of rising prices. While these factors did not reduce the demand for windows in the last season, the risk that sales will slow down in the present season is real.

What was the last season like and what can be expected is the present and the next ones? We asked this question to professionals associated with the Polish industry, component suppliers, and window manufacturers. The results of these interviews are presented in this study.

# ABOUT THE REPORT

**Window market in Poland, edition 2022** is the latest issue of CAB's annual report on the window market. The study is intended to provide 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 2021 and demonstrates price changes in the market at the beginning of 2022 and an outlook for the entire 2022 and 2023. It also offers a window sales forecast for 2022–2023.

The report is composed of 8 chapters, which present:



the macroeconomic environment in which Polish manufacturers operate /**economy, construction industry**/

the **position** of the Polish window and door joinery industry **against other European 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 in Poland**, including in **new construction projects** and in the **renovation** market,



**price changes** in the commodity exchange and window market in H1 2022. Outlook for subsequent months

the **forecast of window sales** by Polish manufacturers for **2022–2023**



Introduction

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Definition, methodology



# 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

The following research techniques were employed in the project:

- analysis of secondary sources: 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 2021. The aim of the survey was to obtain information about sales, export share and manufacturing/sales structure,
  - CATI (Computer-Assisted Telephone Interview): interviews were made with 89 managers from the industry (66 of whom represented window manufacturers and 23 worked in companies supplying components). The respondents were asked to rate the situation in the industry in terms of price changes in this season and the next one. The managers were also asked about their window sales forecasts for 2022–2023.

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

The study uses annual average NBP exchange rates:

- 2016: EUR 1 = PLN 4.3625
- 2017: EUR 1 = PLN 4.2576
- 2018: EUR 1 = PLN 4.2623
- 2019: EUR 1 = PLN 4.2980
- 2020: EUR 1 = PLN 4.4448
- 2021: EUR 1 = PLN 4.5674

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