

description of the report

# DOOR MARKET IN POLAND

edition 2022



# INTRODUCTION



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Although door manufacturing in Poland has been accelerating since the 2013 crisis, it cannot be said to have achieved a sprint speed. Leaving aside the slight shortness of breath in the period 2019–2020, the manufacturing did not accelerate at a double-digit pace in any of the previous seasons.

Against this background, the 2021 performance can be evaluated as very good. The increase in volume by over 9% and in value by 1/5 is impressive. And, what is worth emphasizing, Polish manufacturers climbed above the level of 10 million manufactured doors for the first time.

That result and, generally, the output higher by 45% relative to 2013 would not have been achievable had it not been for the active export growth. While domestic sales increased by merely just over 0.5 million pieces over those almost 10 years, the export volume grew by 2.7 million doors at that time and it currently accounts for a significant portion of sales by Polish enterprises.

Long-term prospects for a further export growth are also promising due to, for instance, deep energy retrofit programmes.

This does not mean, however, that the door industry is not facing difficulties. A major challenge of 2021 and this season is definitely the issue of soaring prices. While this factor did not reduce the demand for doors in the last season, the risk that sales will slow down in the present season is real, in particular in the face of the omnipresent rises in the cost of living for households.

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 door industry. The results of these interviews are presented in this study.

# ABOUT THE REPORT

**Door market in Poland, edition 2022** is the latest issue of CAB's annual report on the door market. The report discusses the manufacturing, foreign trade, and domestic sales results of the door industry in 2021 and preliminary manufacturing results of H1 2022. It also demonstrates price changes in the market in H1 2022 and an outlook for the entire 2022 and 2023. It also offers a door 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 **door manufacturing** in Poland, its **product** and material **structure**, and results of the **leading manufacturers**,

the Polish door **export** volume, dynamics, and directions,



the door **import** results and share of imported doors in domestic sales,

the **door sales in Poland**, including in **new construction projects** and in the **renovation** market,



**price changes** in the raw material and door markets in H1 2022. Outlook for subsequent months

**forecast of door sales** by Polish manufacturers for **2022–2023**



# CONTENTS

Introduction

Key findings

## Chapter 1. Economy and construction industry in Poland

1.1. Polish economy in 2021. Outlook for 2022–2024

1.2. Construction industry in Poland in 2021 and in H1 2022

## Chapter 2. Polish joinery sector against other countries

2.1. Manufacturing of window and door joinery in Europe

2.2. Leading manufacturers (countries) of window and door joinery in Europe

## Chapter 3. Door manufacturing in Poland

3.1. Description of the Polish door sector

3.2. Door manufacturing volume and dynamics in Poland

3.3. Door manufacturing structure by material in which they were formed

3.4. Manufacturing structure divided into internal and external doors

3.5. Door manufacturing value in Poland

3.6. Leading door manufacturers in Poland

## Chapter 4. Door export from Poland

4.1. Polish joinery exporters against other European countries

4.2. Volume and structure of door export from Poland

4.3. Directions of door export from Poland

## Chapter 5. Door import to Poland

5.1. Volume and structure of door import

5.2. Door import by country of origin

## Chapter 6. Door sales in Poland

6.1. Door sales volume and dynamics in Poland

6.2. Door sales structure in Poland by material in which they were formed

6.3. Door sales value in Poland. Market shares of the leading manufacturers

6.4. Door sales in the renovation market and for new construction projects in Poland

## Chapter 7. Prices of doors and commodities in H1 2022. Outlook for 2023

7.1. Prices of commodities

7.2. Prices of doors

## Chapter 8. Door sales forecast for 2022–2023

8.1. Preliminary performance of the door sector in H1 2022

8.2. Forecast assumptions

8.3. Door sales forecast for 2022–2023

Definition, methodology



## 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.

## METHODOLOGY

The following research techniques were employed in the project:

- desk research – 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 door manufacturers and suppliers regarding the companies' performance in 2021. It is a survey aimed to obtain information about sales, export share in a given company's performance and manufacturing/sales structure in 2021,
  - CATI (Computer-Assisted Telephone Interview): interviews made with 80 managers representing door manufacturers. 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 door sales forecasts for 2023.

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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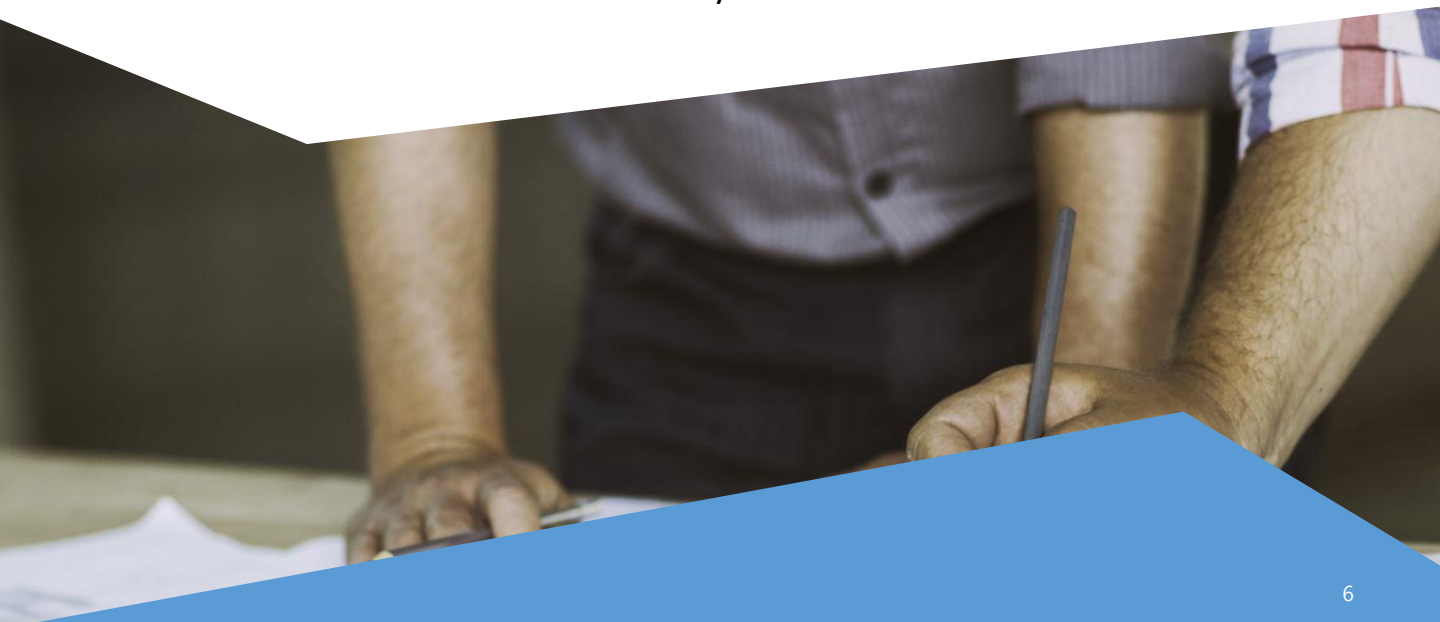
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