

DESCRIPTION OF THE REPORT

WINDOW MARKET IN POLAND

EDITION 2024



introduction



Maksymilian Miros
Centrum Analiz Branżowych



A dozen or so months of economic downturn were enough for the **window manufacturing in Poland to plunge to a level that had been recorded previously ... in 2014.**

2023 will be remembered for a long time as one of the most difficult years for the Polish joinery sector. The decreased demand for windows in the majority of European countries did not miss the windows fabricated in Poland. And although sales in Scandinavia plummeted the most, the Polish industry was afflicted to the greatest extent by the much smaller demand by German customers, where a stunning 1/5 of the entire manufacturing output of the Polish sector goes. **This is why a whole chapter in the report is devoted to the performance and outlook of the German industry.**

We sell more windows than in Germany only on the home market, where we can talk about a real sales collapse. In 2023, the home market shrunk by over 1/3.

The initial months of 2024 did not bring a long awaited revival, but first symptoms of improvement (or more precisely, of incoming improvement) can already be seen. And they come from a direction that is not usual for our industry, namely the Polish consumers. At the same time, unfavorable export conditions maintain, and the majority of the windows manufactured in Poland are exported. Where do the sales decrease and where do they increase, what is the **outlook for this year and the two coming seasons** – we are trying to describe that in this report. Have a good read!

about the report

Window market in Poland, edition 2024 is the latest issue of our annual report, which focuses on a comprehensive presentation of the changes occurring in the Polish window industry.

The report discusses the window industry's performance in 2023 and in early 2024. We also prepared a forecast of window sales by Polish manufacturers home and abroad until the end of 2026. In addition, we investigated the performance of the German industry, which is the largest foreign partner of Polish enterprises.

The report is composed of 8 chapters, which present:

1. The macroeconomic environment in which Polish manufacturers operate
/economy, construction industry/



2. The **position** of the Polish window and door joinery industry
against other European countries



3. The **window manufacturing** in Poland, its **product** and material
structure, and results of the **leading manufacturers**



4. The Polish window **export** volume, dynamics and directions



5. The window **import** results, share of imported windows
in the domestic sales



6. The **window sales in Poland**, including in **new construction projects**
and in the **renovation** market



7. **Window manufacturing and sales in Germany**, share of windows from
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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, m², 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:

- computer-assisted telephone interviews (CATI), – interviews with managers of leading window manufacturing enterprises and of enterprises supplying manufacturing components (profiles, fittings, insulating glass units, weatherstrips, reinforcements, etc.). We asked several dozen managing directors, heads of sales or marketing to assess the situation in the industry in terms of changes in sales in the previous and current seasons, and to give forecasts of sales in whole 2024 and in the period 2025–2026. We also asked them about the sales results of their companies, the prices, and geographic and product structure.
- desk research: data from external sources, such as statistical offices, Customs Service, credit agencies, stock exchange reports, press releases, corporate presentations, manufacturers' websites.

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 insulating glass units.

The study uses annual average NBP exchange rates:

- | | |
|----------------------------|----------------------------|
| ▪ 2018: EUR 1 = PLN 4.2623 | ▪ 2021: EUR 1 = PLN 4.5674 |
| ▪ 2019: EUR 1 = PLN 4.2980 | ▪ 2022: EUR 1 = PLN 4.6869 |
| ▪ 2020: EUR 1 = PLN 4.4448 | ▪ 2023: EUR 1 = PLN 4.5430 |

offer

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Centrum Analiz Branżowych

contact

Centrum Analiz Branżowych
ul. Turmoncka 22/110
03-254 Warszawa
www.cab-badania.pl

Justyna Hennig
Phone: +48 661 010 818
Email: justyna.hennig@cab-badania.pl

Barbara Lau
Phone: +48 722 330 255
Email: b.lau@cab-badania.pl

Grzegorz Tarnowski
Phone: +48 782 866 258
Email: g.tarnowski@cab-badania.pl

Maciej Pastor
Phone: +48 797 940 910
Email: m.pastor@cab-badania.pl

