



DESCRIPTION OF THE REPORT

# DOOR MARKET IN POLAND

EDITION 2025

# | introduction |



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The scale of the recession in the door industry in 2022-2023 is well illustrated by the decline in production, from over 10 million pieces in 2021 to fewer than 8 million pieces in 2023, i.e. by 23%. The next season was expected to bring an improvement in sales. And it did, but to a lesser extent than expected. Moreover, it concerned mainly doors made of wood and wood-based materials, i.e. interior design products. In the case of entrance doors, there was only token increase in demand. At the beginning of 2025, the situation has not changed. The wood door segment is recording a good rate of growth, while doors made of other materials show only token growth.

Producers will achieve better sales results both in 2024 and in the early months of 2025 on the domestic market than in exports. Unfavorable data from the new construction market in Europe, vague information about improvement in the renovation market, coupled with the still unresolved issue of US customs policy and its impact on the European economy, and finally, fading hopes for a quick end to the war in Ukraine are factors that certainly do not stimulate demand for windows in Europe.

The level of recession in the door industry is evidenced not only by falling sales but also by the declining profitability achieved by manufacturers. It was on the decline until 2023, and in 2024 most leading manufacturers improved their net sales profitability. Porta, Ekrado, Dierre, as well as companies such as KMT Stal, Capek, Mar-Tom, Radex, and others, were successful in this regard. The report—in addition to the traditional discussion of production, export, import, and domestic sales—includes an additional chapter focusing on the companies' profitability. We examined how the return on sales ratio of leading window manufacturers in Poland changed up to 2024.

I invite you to read the report, as it will help you assess how our industry and its leading manufacturers have coped with difficult seasons; whether it is possible to earn money in door manufacturing; and whether we can expect greater demand for doors in the coming quarters.

# | about the report |

**Door market in Poland, edition 2025** is the latest issue of our annual report, which focuses on a comprehensive presentation of the changes occurring in the Polish door industry. The report presents the door industry's performance in 2024 and in early 2025. We also prepared a forecast of door sales by Polish manufacturers until the end of 2026. We discuss in the report the sales results, but we also present the change in profitability of Polish companies' net sales.

The report is composed of 8 chapters presenting:

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 **door manufacturing** in Poland, its **structure** by **product** and material, and results of the **leading manufacturers**
4. The Polish door **export** volume, dynamics, and directions
5. The door **import** results, share of imported doors in domestic sales
6. The **door sales in Poland**, including in **new construction projects** and in the **renovation** market
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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.

The data by volume include door leaves (do not include frames that are not complete with leaves), while the data by value include door leaves and frames (even if they are sold separately).

# | methodology |

The following research techniques were employed in the project:

- computer-assisted telephone interviews (CATI), – interviews with managers of leading door manufacturing enterprises and of enterprises supplying manufacturing components (profiles, fittings, cores, weatherstrips, skins, 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 the period 2025–2026. We also asked about their assessment of the net sales profitability in the industry in 2024 and the sales results of their companies.
- desk research: data from external sources, such as statistical offices, Customs Service, credit agencies, stock exchange reports, press releases, corporate presentations, manufacturers' websites.

The study uses annual average National Bank of Poland exchange rates:

- |                            |                            |
|----------------------------|----------------------------|
| ▪ 2019: EUR 1 = PLN 4.2980 | ▪ 2022: EUR 1 = PLN 4.6869 |
| ▪ 2020: EUR 1 = PLN 4.4448 | ▪ 2023: EUR 1 = PLN 4.5430 |
| ▪ 2021: EUR 1 = PLN 4.5674 | ▪ 2024: EUR 1 = PLN 4.3064 |



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# | offer |

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