

CONSTRUCTION SECTOR IN POLAND 2025 – REGIONAL ANALYSIS

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





Main objective

To provide a comprehensive analysis of the construction market in Poland at the voivodship level, both of the entire market and its individual segments: residential, non-residential and civil engineering.

Additional objectives

- to present three market development scenarios, based on the assumptions made in line with the latest data on the market environment
- to present the current situation and detailed forecasts (usually for a period of five years) at the nationwide and voivodship levels, broken down into three market segments (residential, non-residential and civil engineering)
- to present macroeconomic and demographic forecasts, as well as those related to construction and assembly output, by voivodship
- to compare the potential of voivodships by creating a ranking and identifying prospects for growth and decline

What is included in the report?

- **value of the market** in 2020-2024 along with forecasts for its development up to 2030
- **listing and analysis of the most important factors** influencing the situation in the construction market
- **key trends** influencing the development prospects for the individual segments of the construction market
- **number, structure, headcount and financial data** of construction companies
- **market structure in 2020-2024 by voivodship, along with development forecasts** up to 2030
- **forecast changes in prices** of construction and assembly output and other macroeconomic factors
- **key data on construction activity** in individual segments of the construction market, by voivodship (building permits, completed projects, construction starts)
- analysis and presentation of the **largest investments carried out and planned** in each voivodship
- **data on the progress of infrastructure programmes**, by voivodship



TIME SPAN: 2020-2024

FORECAST HORIZON: 2025-2030

GEOGRAPHICAL SCOPE: Poland and its voivodships

SUBJECT MATTER

The report examines in detail the **construction sector in Poland by voivodship**, taking into account the division into segments:

- **civil engineering construction** (road, rail, water and sewage, power engineering construction)
- **non-residential construction** (industrial and warehouse buildings, commercial and service buildings, offices, hotels, public buildings)
- **residential construction** (construction and assembly output, housing stock, building permits, housing starts, housing completions, housing loan market, housing prices, renovations)

The report identifies the size of the market and its structure by voivodship. It also presents the most important trends and key factors determining the situation and development prospects of the construction market in Poland.

FORECASTS

For the purpose of the report, long-term development forecasts were prepared using econometric models and historical time series.

The **forecasts cover the period 2025-2030** and present the value of the entire market and all its segments broken down by voivodship (data for the entire construction market).

In view of the very dynamic changes in macroeconomic indicators observed in recent months, the forecasts for market development are presented taking into account three scenarios:

- **baseline scenario** – corresponding, in the opinion of the authors of the report, to the most likely situation in the economy and the market
- **pessimistic scenario** – assuming a slower rate of economic development, stronger inflation and a greater delay in the release of the EU funds under the KPO
- **optimistic scenario** – assuming a more favourable macroeconomic and market situation than in the baseline scenario

These scenarios are dependent on factors that PMR analysts believe are crucial to the industry's future. All the scenarios are described in detail and present the assumed figures for key variables determining the situation in the construction market.

Importantly, the **assumptions behind each of the market development scenarios are discussed in detail** considering the regional breakdown. Key among these factors are:

- real GDP growth rate in Poland
- war in Ukraine and its further course
- inflation rate in Poland
- interest rates in Poland and impact of government programmes on the credit market
- labour market situation in Poland
- Poles' purchasing power
- building construction activity

In addition to projections for the market value and its segments, the report also covers **forecasts for 2025-2030 for selected macroeconomic indicators by voivodship**, including:

- real GDP growth
- overall inflation (CPI)
- average annual LFS unemployment rate and real change of average monthly gross wage in Poland
- number of residents in Poland

Why buy this report?

- the user-friendly and attractive form of data presentation makes the product easy to use (online access, report in the PDF format + PowerPoint presentation + Excel dataset)
- the materials allow for own data analysis and aggregation, facilitating the preparation of presentations, summaries and calculations
- support from the authors of the report is provided (possibility of telephone consultations and explanation of the presented data)
- it provides access to all the most important and up-to-date statistics
- it makes it easier to follow the most relevant trends in the construction industry
- it helps devise a business development strategy for the company
- it indicates the assumed risk levels in the market downturn scenario
- it makes data in business plans and budgets more realistic
- it helps to monitor the market and its growth potential
- it improves the analysis of the competitive landscape in Poland
- it reduces investment risk, e.g. when entering a new market or during a merger or acquisition

Together with the report, we provide the **most important data in an Excel spreadsheet for individual aggregation.**



We are one of the leading research and analytics companies in Poland!

As **PMR Market Experts**, we help our Clients to obtain and analyse data, enabling them to better understand market processes, plan strategic and operational actions, and ultimately develop their business.

We boast **30 years of experience** and a **team of nearly 100 experts**. In our reports, we use secondary data combined with proprietary primary databases and qualitative and quantitative research.

We provide **market analyses for four main sectors:**

- construction,
- retail,
- healthcare and pharmaceuticals,
- IT and telecommunications.

We also prepare **customised research projects** focused on the area specified by the Client. In addition, we offer **consultancy services** combining different areas, including marketing research, market sizing, forecasting, and sales management.





CONSTRUCTION

MARKET ANALYSIS AND 5-YEAR DEVELOPMENT FORECASTS

- **Sustainable construction** in Poland
- **Construction chemicals** market in Poland
- **Facade** market in Poland
- **Construction sector** in Poland (additional data update: June, September, December)
- **Construction sector** in Poland – **Regional analysis** (additional data update: November)
- **Civil engineering construction** in Poland
- **Renewable energy** market in Poland
- **HVAC** market in Poland (2024)
- **Thermal insulation materials** market in Poland
- **Precast concrete** market in Poland
- **Roofing materials** market in Poland
- **Modular construction** market in Poland
- **Data centre** market in Poland
- **Investment prospects** in Poland – analysis of industries and development forecasts
- **Paving stone** market in Poland
- **Energy sector construction** market in Poland
- **Construction aggregate** market in Poland
- **Heating equipment** market in Poland
- **Construction sector in the Baltic states**
- **Construction sector in Central Europe**
- **ESG reporting** – challenges and development prospects in Poland
- **Hospital infrastructure analysis and investment plans** in Poland
- Monthly: **PMR Construction Insight** (Polish and English versions)

NOVELTIES

Forecasting methodology

The class and type of the developed **econometric models** are selected according to the **characteristics of the data analysed**. In practice, models using **multiple regression** (the least squares method) and **autoregression** (ARIMA, VAR) are the most common. We use both **primary variables** and their **transformations** (e.g. logarithms) to capture the relevant relationships.

The **final market value forecasts** are not just based on a single best model but are a **weighted average of forecasts** from a selected set of best models. The weights are selected based on model fit indices. This procedure makes it possible to consider **more factors** influencing market development, hence **improving the forecast precision**.

When developing the **final forecasts**, we take into account not only the **statistical quality of the models** (model adjustment to empirical data, normality and homoscedasticity of residuals, statistical significance of structural parameters) but also their **consistency** with market knowledge and **qualitative information** gathered by PMR's analytical team.

The models use data on industry sectors, macroeconomic indicators and demographics, as well as the results of our analyses. Most often, there are **60-80 types of indicators** considered.



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