

**PMR** MARKET  
EXPERTS

# CONSTRUCTION AGGREGATE MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT  
FORECASTS FOR 2025-2030





Diverging trends in civil engineering and building construction have led to clearly distinct patterns of demand in the aggregates market. A decline in investment activity in building construction has negatively impacted demand for sand and gravel aggregates. On the other hand, the stable growth of infrastructure investments, particularly in the transport sector, has sustained high demand for crushed aggregates, which are essential for such projects.

PMR experts forecast a gradual recovery in the Polish construction market, especially in the building construction segment. In 2024, construction started on 233.8 thousand residential units, marking an increase of 23.7% compared to the previous year. Of these, 152.5 thousand were developer-built units, with an even higher growth rate of 33.2% year-on-year. These figures allow for cautious optimism regarding the future of the housing market.

In 2024, shopping centre developers delivered 530 thousand m<sup>2</sup> of modern retail space - the best result since 2015. At the same time, the importance of public utility construction is growing rapidly, currently being the second-largest segment of the non-residential construction market. This is the result of record-high investment spending by local governments, with capital expenditures reaching around PLN 90 billion annually in 2023-2024.

The improving conditions in building construction will translate into increased demand for construction aggregates, especially sand and gravel. In the crushed aggregates segment, a significant increase in demand is expected, driven by the large scale of infrastructure investments. Civil engineering construction, particularly in the transport sector, will be one of the main drivers of the construction market in Poland in the coming years.

Alongside stable road investments, railway projects and new developments such as the Solidarity Transport Hub and the nuclear power plant are gaining increasing importance. In such an environment, the growth in demand for aggregates, particularly crushed ones, is evident. The question remains whether the industry can meet the accumulated demand. Answers to these questions can be found in the PMR Market Experts report: **"Construction aggregate market in Poland 2025."**

**Marcin Uryga**

Senior Construction Market Analyst  
PMR Market Experts/Hume's Institute

Author of the report „Construction aggregate market in Poland 2025”



## **Main objective**

A comprehensive presentation of information about the aggregates market in Poland, along with medium- and long-term forecasts for its development.

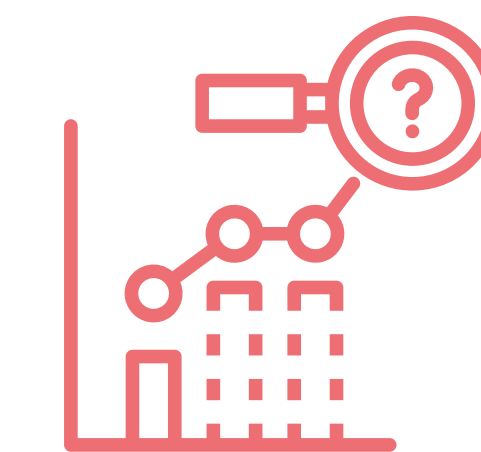
## **Additional objectives**

- analysis of the macroeconomic environment and the construction market in Poland, including forecasts up to 2030
- characterization of the market structure of aggregates (by type, consumption, and regional extraction)
- identification of key trends and factors driving and restraining the aggregates market
- analysis of resources, extraction, and foreign trade of crushed and block stones, as well as sands and gravels
- analysis of regional demand for aggregates based on the segmentation of the Polish construction sector
- presentation of market development forecasts for aggregates up to 2030 under various scenarios (volume and value for crushed aggregates and sand-gravel aggregates), including a competition analysis



## **Time span**

2020-2024



## **Forecast horizon**

2025-2030



## **Geographic coverage**

Poland



## What is included in the report?

- size and value of the construction aggregate market in Poland
- macroeconomic environment – current situation and development forecasts until 2030
- construction market environment – current situation and development forecasts until 2030
- overview of the Polish aggregates market
  - ↳ product structure of the Polish construction aggregate market (breakdown into crushed stone aggregates and sand & gravel)
  - ↳ regional structure of the Polish construction aggregate market
  - ↳ current situation – key trends and factors shaping market conditions
  - ↳ foreign trade
  - ↳ supply analysis – resources and largest deposits
  - ↳ demand analysis – estimated demand in the coming years
- market development forecast for the Polish construction aggregate market until 2030 – volume and value
- competitor analysis of the Polish construction aggregate market
  - ↳ largest producers of crushed stone aggregates
  - ↳ largest producers of sand and gravel
- profiles of the leading aggregate producers

## Scope

Segments:

- crushed stone aggregates
- sand & gravel



## Forecasts

Long-term market development forecasts were prepared for the report using econometric models and a 10-year time series. **The forecasts cover the period 2025-2030.**

**All of the forecasts were prepared based on three scenarios:**

- **baseline** – corresponding, in the opinion of the authors of the report, to the most likely situation in the economy and the market.
- **pessimistic** – assuming a slower pace of economic development, a prolonged reduction in inflation, delays in the inflow and incomplete use of EU funds under the KPO.
- **optimistic** – assuming a more favourable macroeconomic and market situation than in the baseline variant.

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

**The report also features:**

- macroeconomic forecasts (growth rate of GDP and its components, unemployment rate, interest rates, wages), demographic
- forecasts for the markets determining the demand in the construction aggregate market:
  - ↳ residential construction,
  - ↳ non-residential construction.

**The forecasts by PMR Market Experts published in the reports are highly accurate – the typical error rate (MAPE) is usually below 3%**





## What questions does the report provide answers to?

- What was the value of the Polish construction aggregate market in recent years?
- What are the market development forecasts until 2030?
- How is the demand for construction aggregates evolving?
- Which regions of Poland generate the highest demand for aggregates, and why?
- What are the main directions of aggregate exports and imports to and from Poland?
- What challenges do aggregate producers face in relation to environmental regulations and licensing?
- What technological trends and innovations influence aggregate extraction and production?
- Which aggregate deposits are considered strategic for meeting future demand?



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

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At PMR Market Experts, we have been preparing cyclical industry reports for over 20 years. Our core specialisations:

- Digital & ICT
- Retail
- Pharma & Healthcare
- Construction

Our reports are more than just a compilation of facts - they are reliable knowledge based on proven methodology. We combine primary and secondary data, proprietary algorithms and econometric models to provide precise information about the market, its values, growth rates, segments and key players.

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years of experience

**600+**

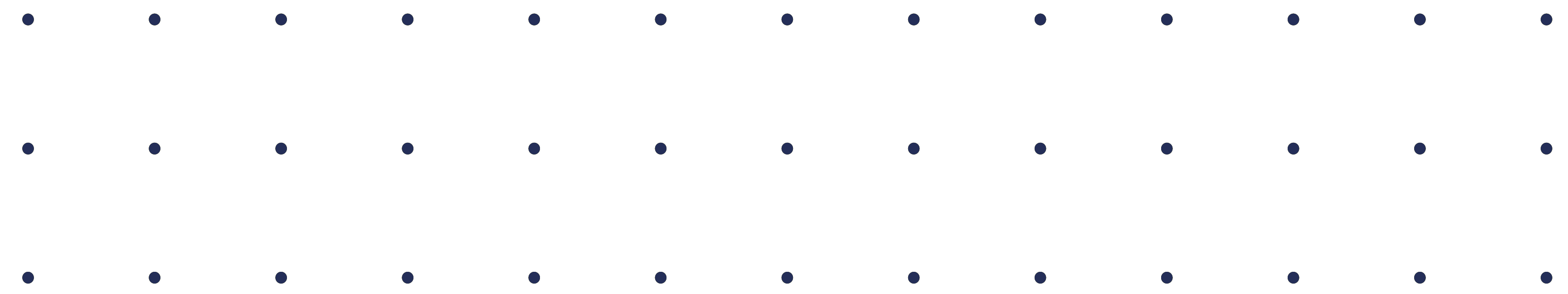
global clients

**5,000+**

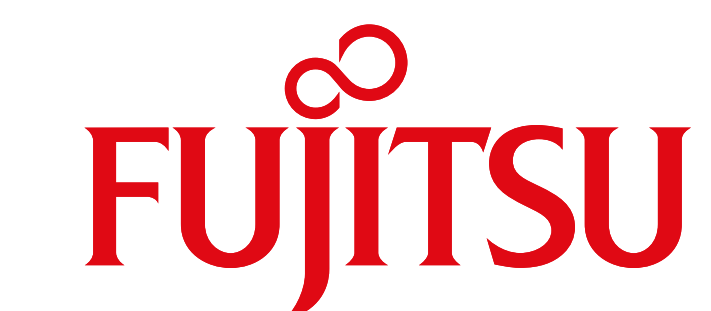
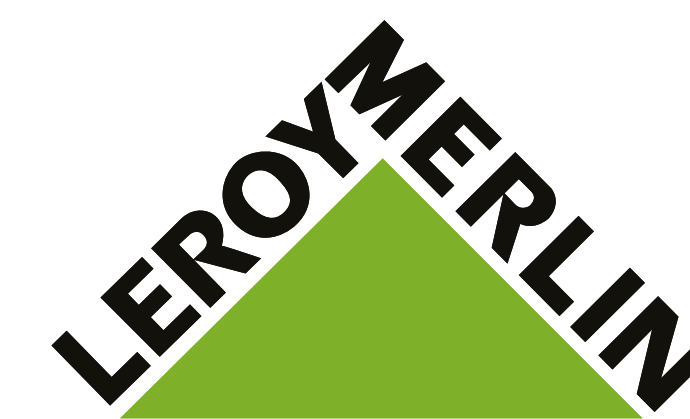
brands studied

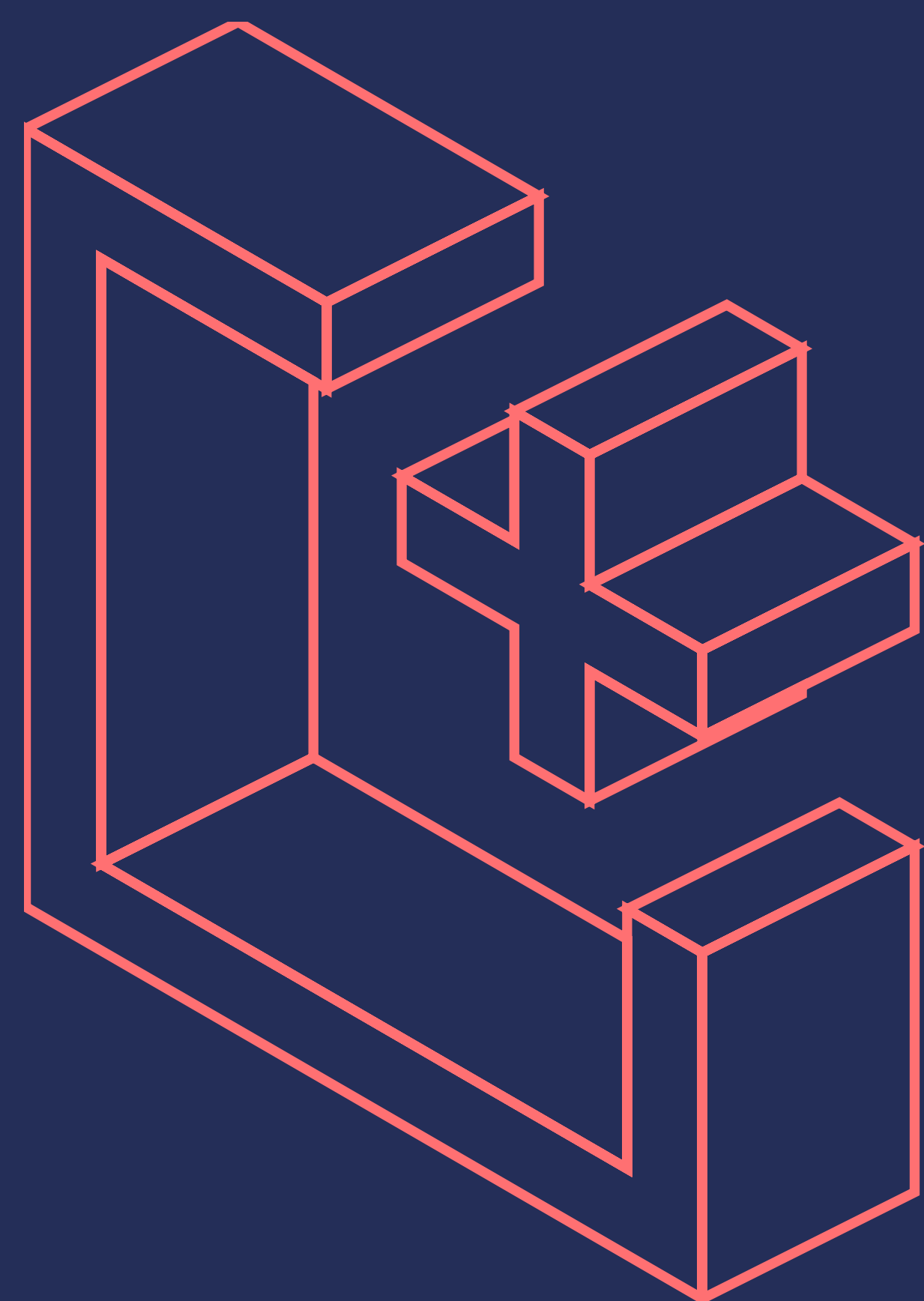
**50+**

analysed countries



# Our clients





# 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
- **Paving stone** market in Poland (2026)
- **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)

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**CONTACT:**

**Monika Szczypta**

Senior Sales & Business Development Manager

tel.: +48 607 979 580

[monika.szczypta@pmrmarketexperts.com](mailto:monika.szczypta@pmrmarketexperts.com)



**OFFICE**

Królewska 57  
30-081 Kraków, Poland



**CONTACT**

tel.: +48 609 290 093  
+48 782 011 000  
[sales@pmrcorporate.com](mailto:sales@pmrcorporate.com)  
[info@pmrcorporate.com](mailto:info@pmrcorporate.com)



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