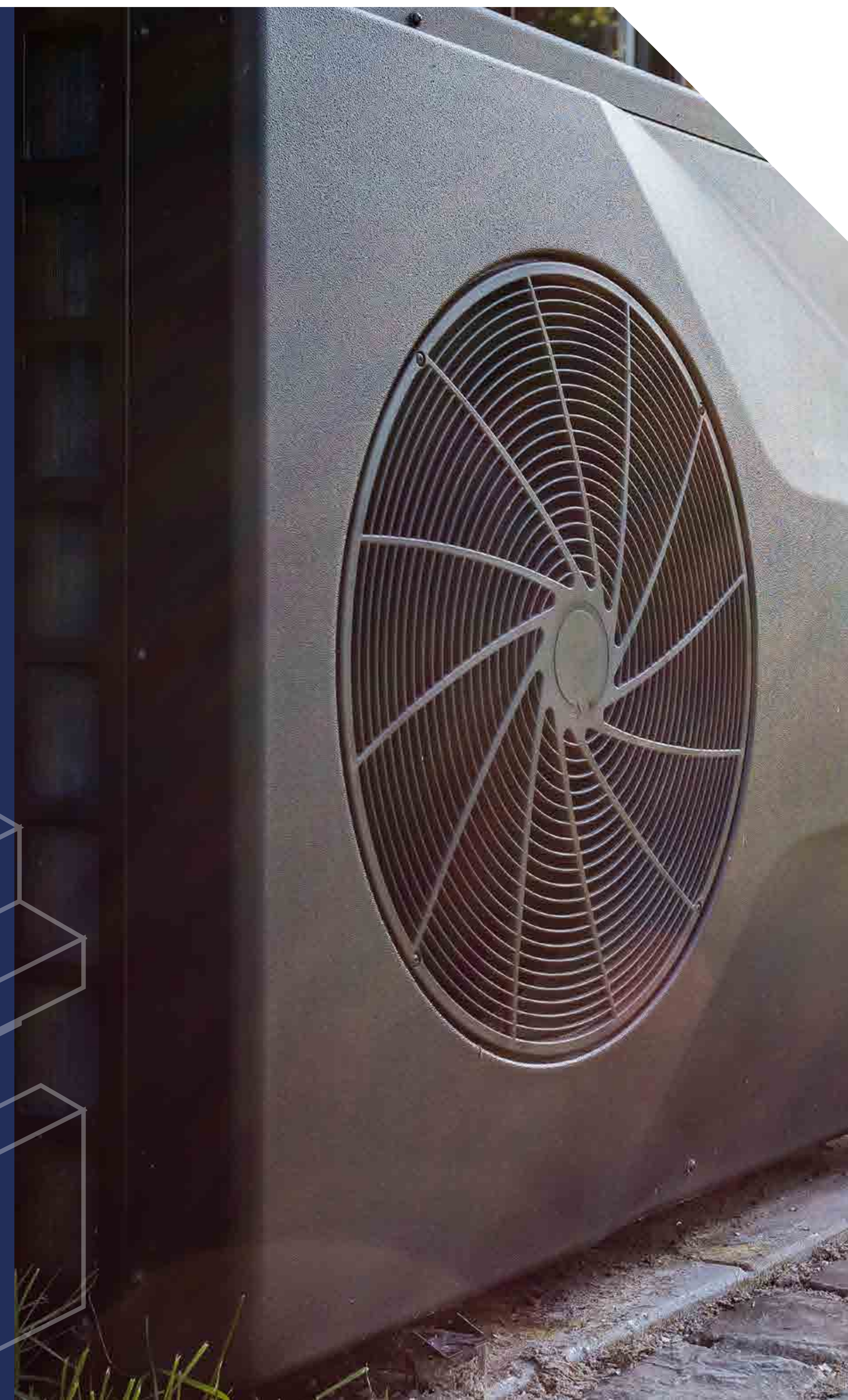


# HEATING EQUIPMENT MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT  
FORECASTS FOR 2025-2030





In recent years, the heating equipment market has been marked by dynamic changes. Sharp **increases in energy and raw material prices**, combined with **changes in regulations**, have led to changes in the share of heat sources used in heating systems. An additional factor contributing to market instability was the **suspension of the Clean Air programme at the end of November 2024**.

Regulatory changes are one thing, but another factor significantly influencing the heating equipment market is **demand from new investments**. As of 2022, we are seeing a sharp decline in demand due to the smaller scale of new residential and commercial projects. **However, most of the indicators reflecting investment activity in building construction point to an improving market situation**.

It seems that the worst is over for the heating equipment market, too. The resumption of the key Clean Air programme at the end of March 2025, the improving economic situation in the country, the growing disposable income of Poles and falling interest rates - all this is **driving the heating system renovation and replacement segment**.

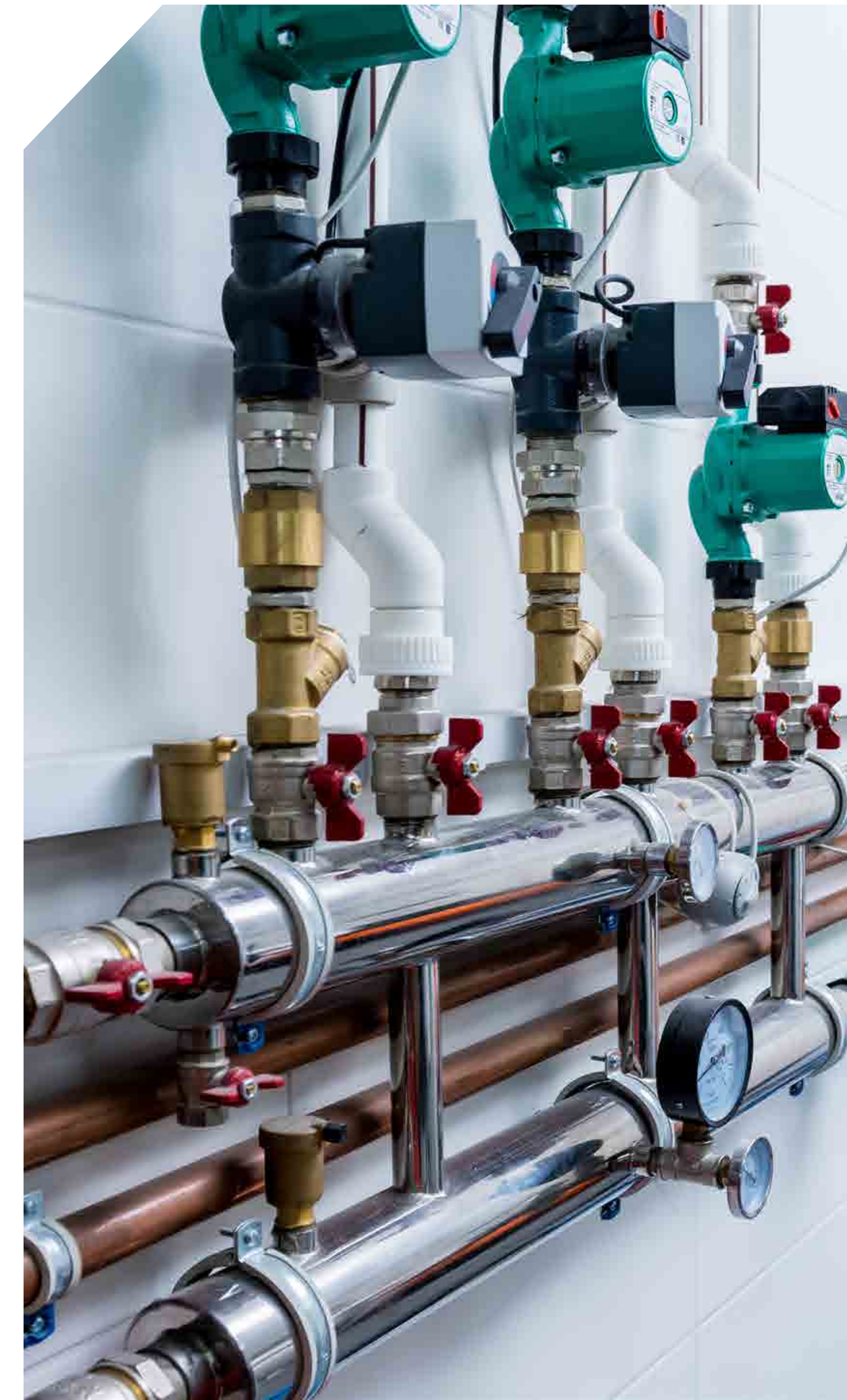
In the report **"Heating equipment market in Poland 2025"**, we present a detailed overview of the current market situation, suggest where to look for opportunities, and outline the future development of the key product categories.



**Szymon Jungiewicz**

Construction Business Unit Director at PMR Market Experts by Hume's Institute

Author of the report "Heating equipment market in Poland 2025"





### **Main objective**

To provide a comprehensive and up-to-date analysis of the situation in the heating equipment market in Poland, along with forecasts for its development up to 2030.

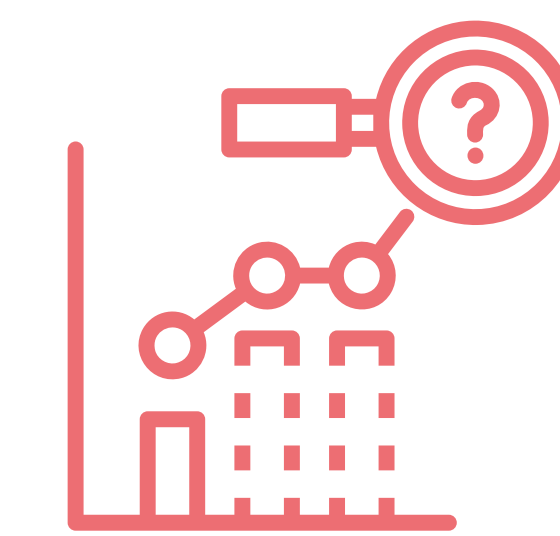
### **Additional objectives**

- to examine current trends and business climate among contractors installing heating equipment
- to identify the size, structure and consolidation level of the heating equipment market
- to analyse the structure of the heating equipment market
- to develop forecasts for the heating equipment market
- to identify the main players and estimate their market shares in the heating equipment market
- to present the latest installation trends and the breakdown of the installed heating systems
- to provide information on purchasing trends – the most popular distribution channels



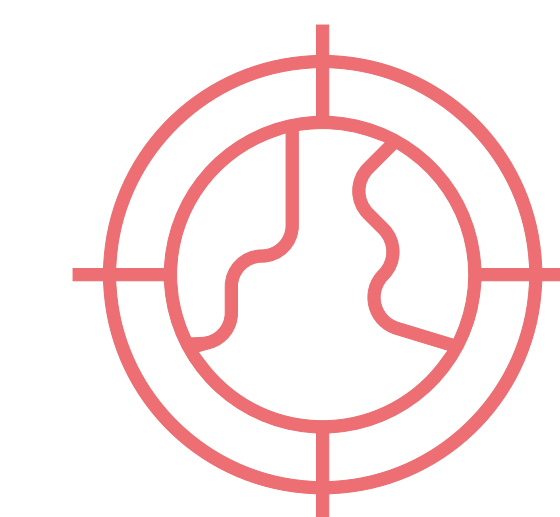
### **Time span**

2020-2024



### **Forecast horizon**

2025-2030



### **Geographic coverage**

Poland



## What is included in the report?

- **volume and value** of the heating equipment market
- **key market trends** – changes in the heating equipment market
- **ranking of manufacturers** of the most frequently installed heating equipment, together with market shares
- **key purchasing trends**
- **breakdown of the individual segments of the heating equipment market** by type of work (new buildings and renovations), building type, equipment segment and distribution channel
- **development forecasts for the market in Poland up to 2030**, prepared taking into account the macroeconomic environment, prospects for the building construction market, trends and regulations affecting the various categories of heat sources and the results of surveys of installation companies
- detailed profiles of the **leading heating equipment manufacturers**, including an analysis of their financial data



## Survey among heating installers

The study presents the results of a survey among heating equipment installers regularly installing the heat sources covered by the analysis:

- average number of orders in installation companies
- value of a typical order in 2024
- change in the value of a typical order in 2024
- heating systems based on heat pumps
  - structure and change of the value of a typical order
- sources of supply of heating equipment



## 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

The scenarios are dependent on factors that PMR Market Experts 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:**

- demographic and macroeconomic forecasts (growth rate of GDP and its components, unemployment rate, interest rates, wages)
- forecasts for the markets shaping the demand in the heating equipment 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 heating equipment market in Poland in recent years?
- What are the market growth forecasts up to 2030?
- What is the sales volume of the key heating equipment categories, such as gas, oil and solid fuel boilers or heat pumps?
- What are the market shares of the main manufacturers of boilers and heat pumps in Poland?
- What trends are currently influencing the market, including those related to central heating boilers and heat pumps?
- How are the average value and number of orders for heating installations changing?
- What is the structure of heating systems based on heat pumps and how does the value of a typical order of this type change?
- What are the main heating equipment supply channels for installation companies?
- What economic factors (e.g. inflation, energy costs, raw material prices) influence the prices of heating equipment in Poland?
- What government and EU programmes are influencing the development of the heating equipment market?

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



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years of experience

**600+**

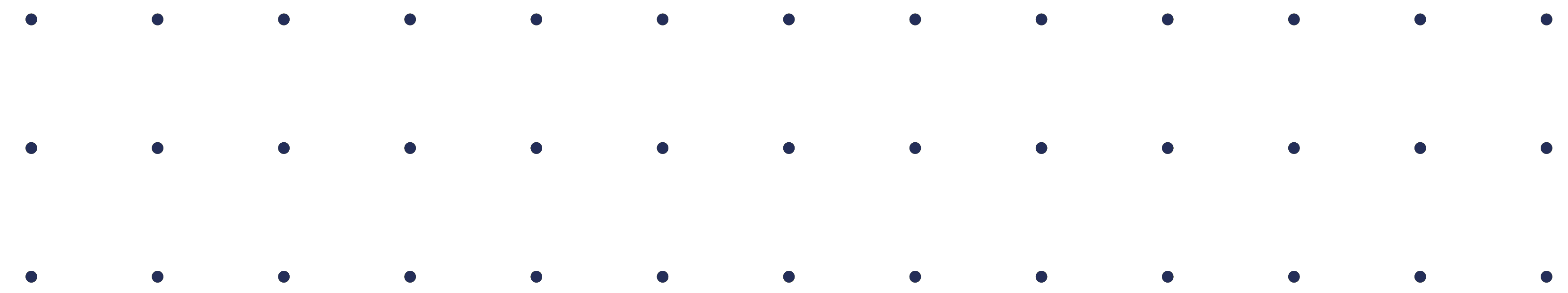
global clients

**5,000+**

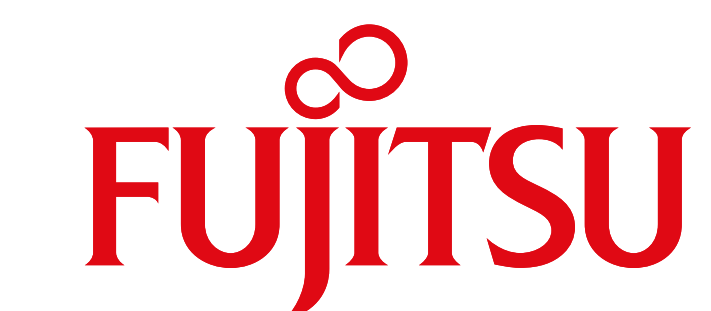
brands studied

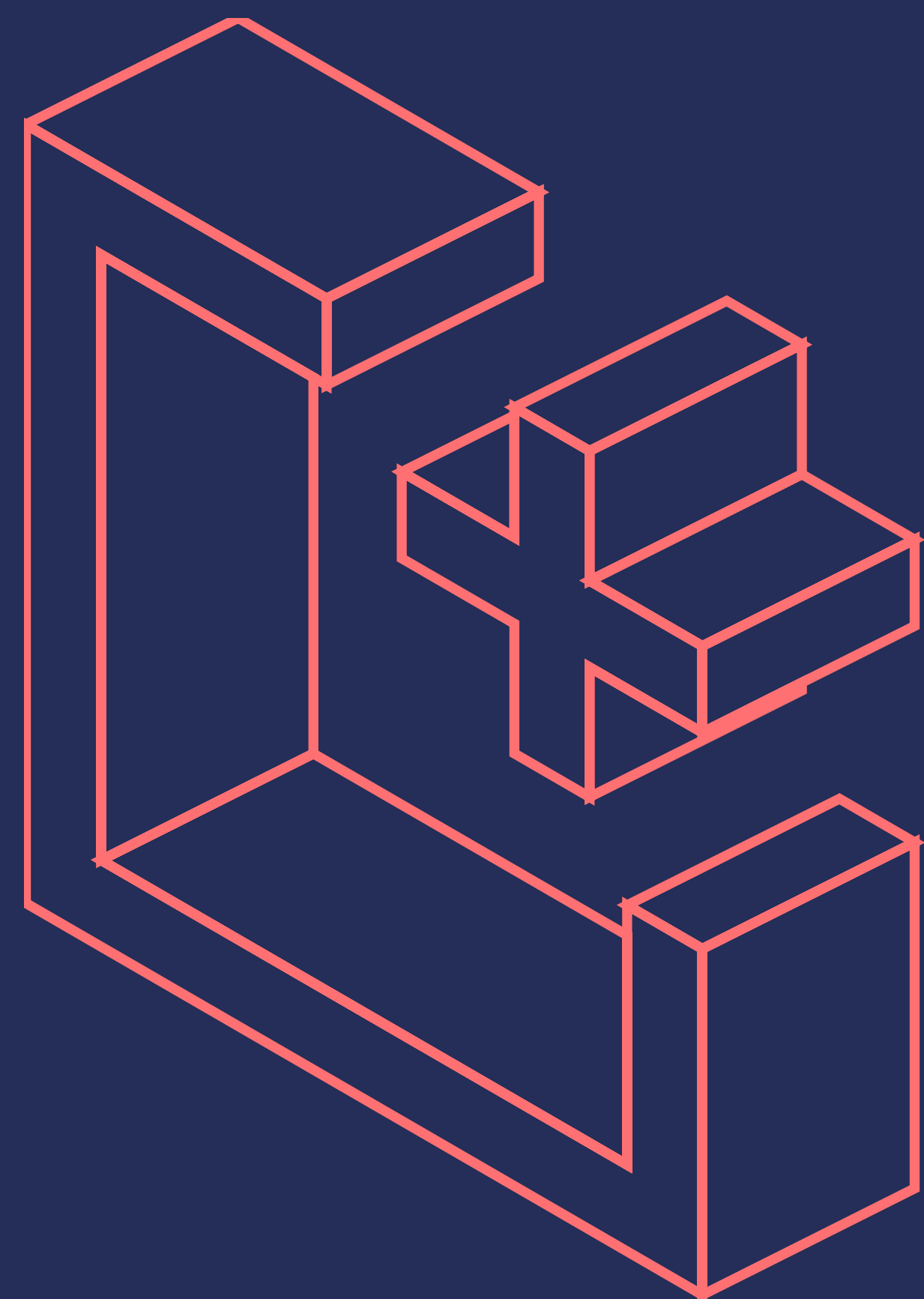
**50+**

analysed countries



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- Construction sector in Poland – **Regional analysis** (additional data update: November)
- Civil engineering construction in Poland
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- HVAC market in Poland (2024)
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- Paving stone market in Poland (2026)
- Energy sector construction market in Poland
- Construction aggregate market in Poland
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## CONTACT

### **Monika Szczypta**

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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