

PMR MARKET
EXPERTS

ENERGY SECTOR CONSTRUCTION MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





In the years 2024-2025, the demand for electricity is growing in Poland, driven by the electrification of the economy, electromobility, and digitalization. The increasing use of artificial intelligence is also an important factor in the growth of energy consumption. In 2024, the share of RES (Renewable Energy Sources) in the energy mix reached a record level of nearly 30%, while the importance of conventional energy decreased. The construction of a nuclear power plant in Lubiatowo and offshore wind farms has begun.

The growing share of RES requires the modernization of transmission and distribution networks. The largest distribution system operators planned capital expenditures of PLN 12.2 billion in 2024, and PLN 12.7 billion in 2025. Key projects include increasing throughput, digitalization, and developing the capacity to connect new sources.

The future of nuclear energy remains uncertain. Apart from the project in Lubiatowo, there is a lack of decisions on subsequent power plants, and the withdrawal of the Korean partner KHNP has delayed the schedule. Small Modular Reactors (SMRs) are gaining increasing importance. Orlen and Synthos plan their construction within the next few years, although the technology is pioneering, making it difficult to assess the chances of success for the development of this branch of the energy market.

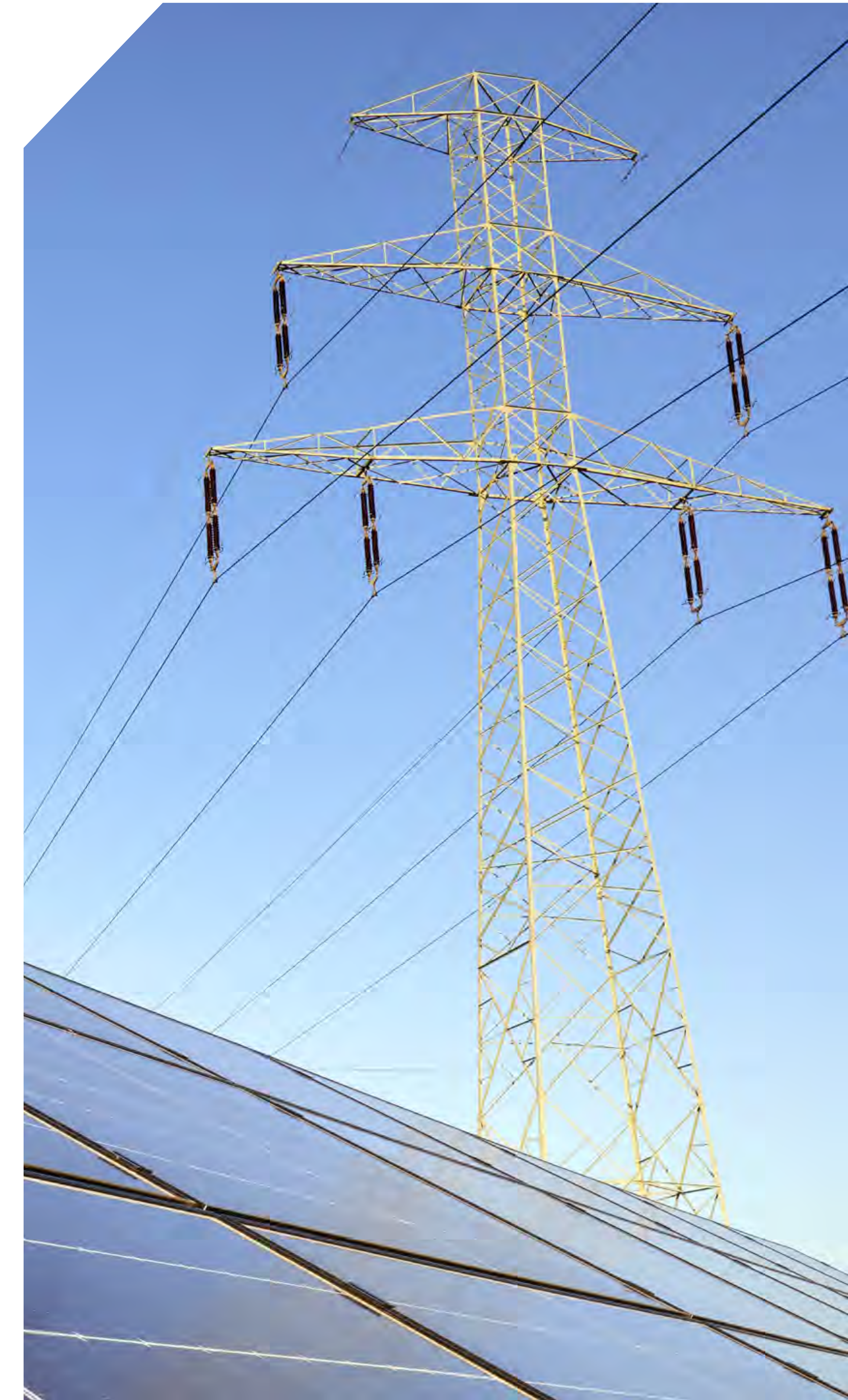
Based on an analysis of the engineering industry, we assess that energy construction will be one of the most capital-intensive segments of engineering construction in the coming years, creating significant contractual opportunities for contractors.



Szymon Jungiewicz

Construction Business Unit Director w PMR Market Experts/Hume's Institute

Author of the report „Energy sector construction market in Poland 2025”





Main objective

Presenting a comprehensive analysis of the energy construction market in Poland, along with current trends and development prospects for the entire market and its individual segments.

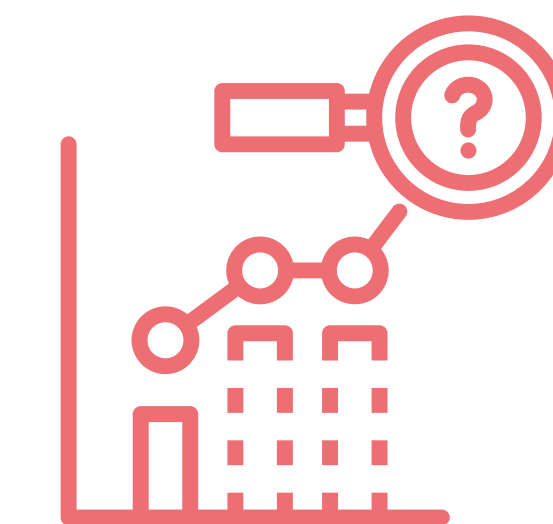
Additional objectives

- researching current trends and development prospects in Polish energy construction
- identifying the size and structure of the energy construction market and its segments
- preparing market development forecasts for the energy construction market for the years 2025-2030 under various scenarios (baseline, optimistic, pessimistic)
- indicating the main construction companies implementing energy projects and estimating their market share
- presenting the largest investments and investment plans in individual market segments (PV farms, wind farms, nuclear power plants, SMRs, transmission networks)
- analyzing key macroeconomic and geopolitical factors influencing the development of the energy construction market
- presenting the most important technological and investment trends
- preparing rankings of the largest RES investors and the largest construction companies in the energy sector



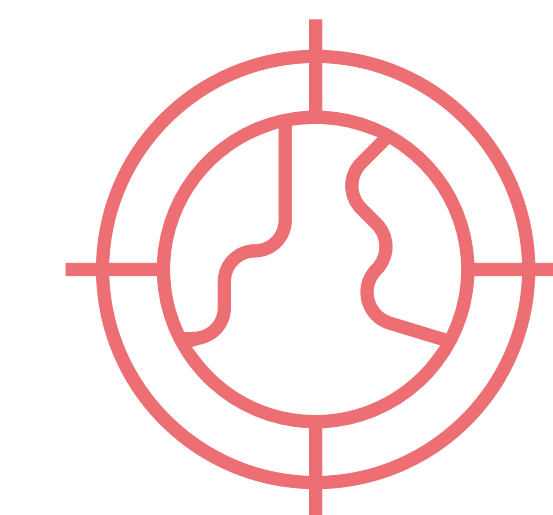
Time span

2020-2024



Forecast horizon

2025-2030



Geographic coverage

Poland



What is included in the report?

- **investments and development prospects**
 - ↳ RES segment (development forecasts broken down into photovoltaic farms, onshore, and offshore wind farms)
 - ↳ Conventional energy
 - ↳ Nuclear energy
- **construction and modernization of transmission networks** (capital expenditures realized by network operators)
- **construction and assembly output** realized and forecasted for the energy construction segment
- **largest construction companies** implementing energy projects
- **most important trends and key factors** determining the situation and development prospects of the energy construction market
- **market development forecasts until 2030**
- **macroeconomic forecasts for engineering construction** (GDP dynamics and its components, unemployment, interest rates, wages, demographics)
- **profiles of main construction companies** implementing energy construction projects (revenue, profitability, employment, order backlog)





Forecasts

For the purpose of the report, long-term market development forecasts were prepared using econometric models and 10-year time series. **The forecasts cover the period 2025-2030.**

All forecasts were prepared in three scenarios:

- basic - corresponding, in the authors' opinion, to the most probable behavior of the economy and the market,
- pessimistic - assuming a slower pace of economic development, prolonged inflation curbing, delays in the inflow, and incomplete utilization of EU funds under the KPO (National Recovery Plan),
- optimistic - assuming a more favorable macroeconomic and market situation than in the basic variant.

The assumptions behind each of the presented market development scenarios are discussed in detail. The key factors include:

- real GDP growth rate in Poland,
- pace of EU funds inflow to Poland,
- war in Ukraine and its further scenario,
- inflation level in Poland,
- level of interest rates in Poland and the impact of government programs on the credit market,
- geopolitical situation
- situation in the Polish labour market
- purchasing power of Poles
- construction activity, particularly in civil engineering.

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





10 reasons to invest in the report „Energy sector construction market in Poland 2025“

1 **Comprehensive overview of the market and its structure**
Value and volume of the energy construction market, broken down by segments.

2 **Access to reliable forecasts until 2030**
Precise scenarios taking into account the macroeconomic situation, inflation, interest rates, and EU funds.

3 **Plans of transmission network operators**
Analysis of planned expenditures of the five largest DSOs in Poland, with a detailed breakdown by network modernization, infrastructure digitalization, and investments related to connecting RES.

4 **Analysis of RES Investments**
Detailed forecasts for PV, onshore, and offshore wind farms, including an assessment of market barriers, opportunities, and development trends.

5 **Nuclear energy without secrets**
Assessment of the realistic prospects for Polish nuclear power plants and SMRs, including the status of ongoing investment projects.

6 **Ranking of the largest construction companies**
Profiles of the 25 market leaders with data on revenues, profitability, employment, and the value of their order backlogs.

7 **Forecasts for construction and assembly production**
Analysis of construction and assembly production performed and forecasted for the energy construction segment.

8 **Technological trends in the energy sector**
Overview of innovations: energy storage, new nuclear technologies, and their real impact on the development of energy construction in Poland.

9 **Additional materials - source data in an Excel spreadsheet**
Enable independent data aggregation, analysis and in-house model development.

10 **Proprietary survey and experience**
Combined data sources (primary, secondary), 20+ years of expertise in the market, methodology based on dozens of variables.



What questions does the report provide answers to?

- Which trends and phenomena are currently shaping the energy construction market in Poland?
- What is the market structure like – which segments are the most significant?
- In what direction will RES (Renewable Energy Sources) investments develop in 2025-2030?
- What stage are the nuclear projects at, and what are their prospects?
- What capital expenditures are allocated for the modernisation and expansion of transmission and distribution networks?
- Who are the largest construction companies executing energy projects, and what is their market share?
- How do macroeconomic and geopolitical factors influence the sector's development?
- What challenges and barriers will the energy construction sector in Poland have to face in the coming years?
- Which construction companies execute the most orders related to energy construction?



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

PMR Market Experts is a brand of market reports prepared by Hume's Institute

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.

We are part of Hume's Institute - a 360° research agency specialising in quantitative and qualitative research, forecasting and market predictions.

PMR Market Experts' **data analysis and verification expertise, unique insights and proven forecasts** provided by Hume's Institute give real insight and advantage to our Clients.

More than 600 clients worldwide have already benefited from our services. **We have analysed more than 5,000 brands, operating in over 50 markets.** We are trusted by major companies - **we work with 70% of the prestigious Fortune 500 brands.**

20+

years of experience

600+

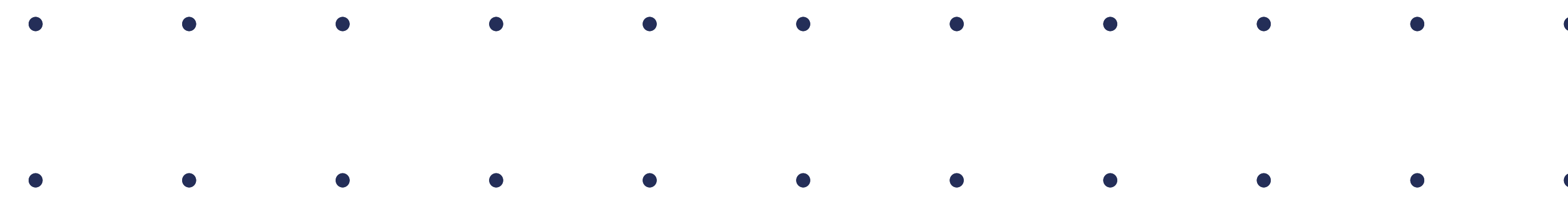
global clients

5,000+

brands studied

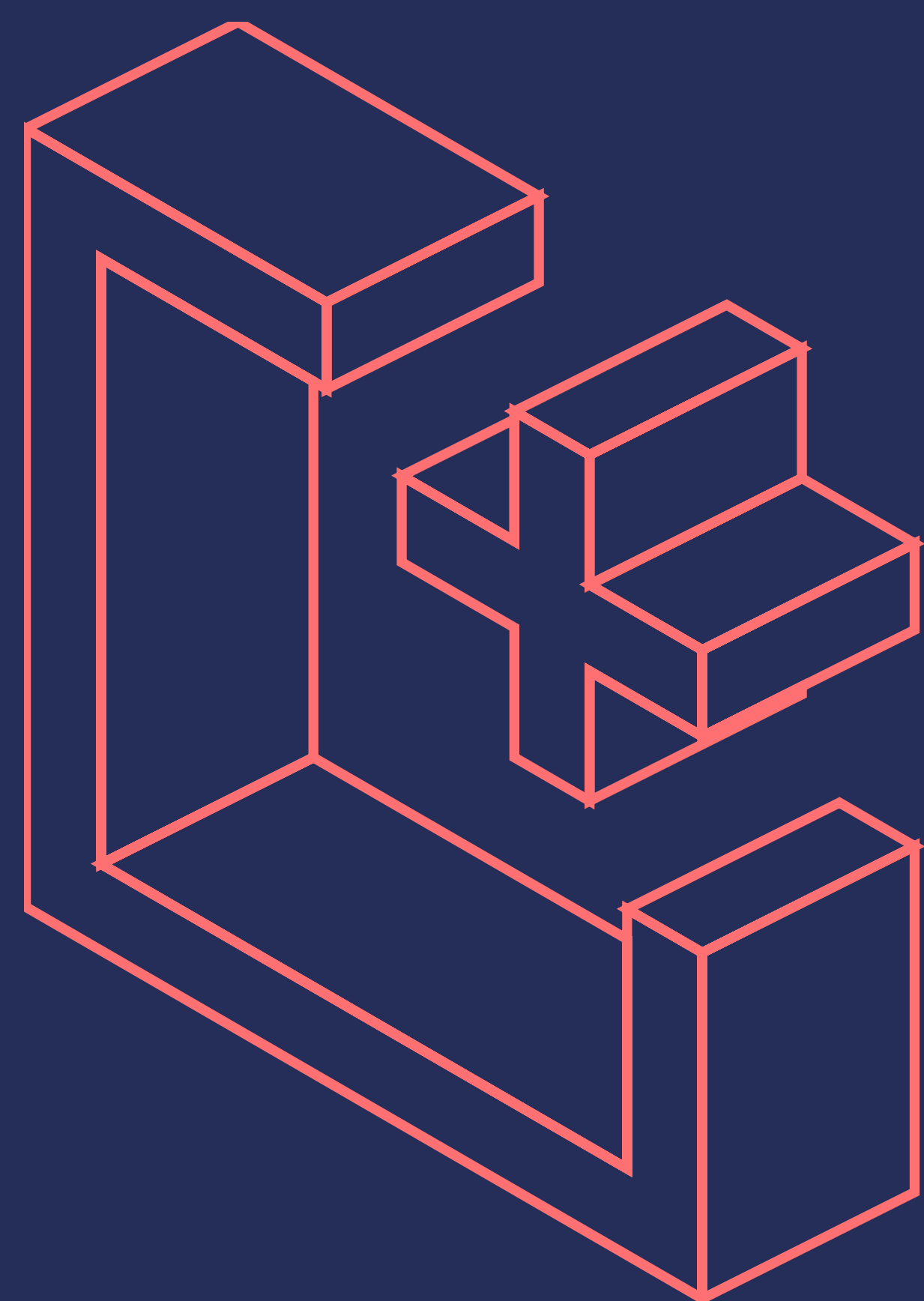
50+

analysed countries



Over 600 companies have already trusted us, including:





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)

**NEW
REPORTS**



CONTACT:

Monika Szczypta

Business Development Manager

tel.: +48 607 979 580

monika.szczypta@pmrmarketexperts.com



OFFICE

Królewska 57
30-081 Kraków, Poland



CONTACT

tel.: +48 609 290 093
+48 782 011 000
sales@pmrcorporate.com
info@pmrcorporate.com



WWW

pmrmarketexperts.com
mypmr.pro
humes.pl