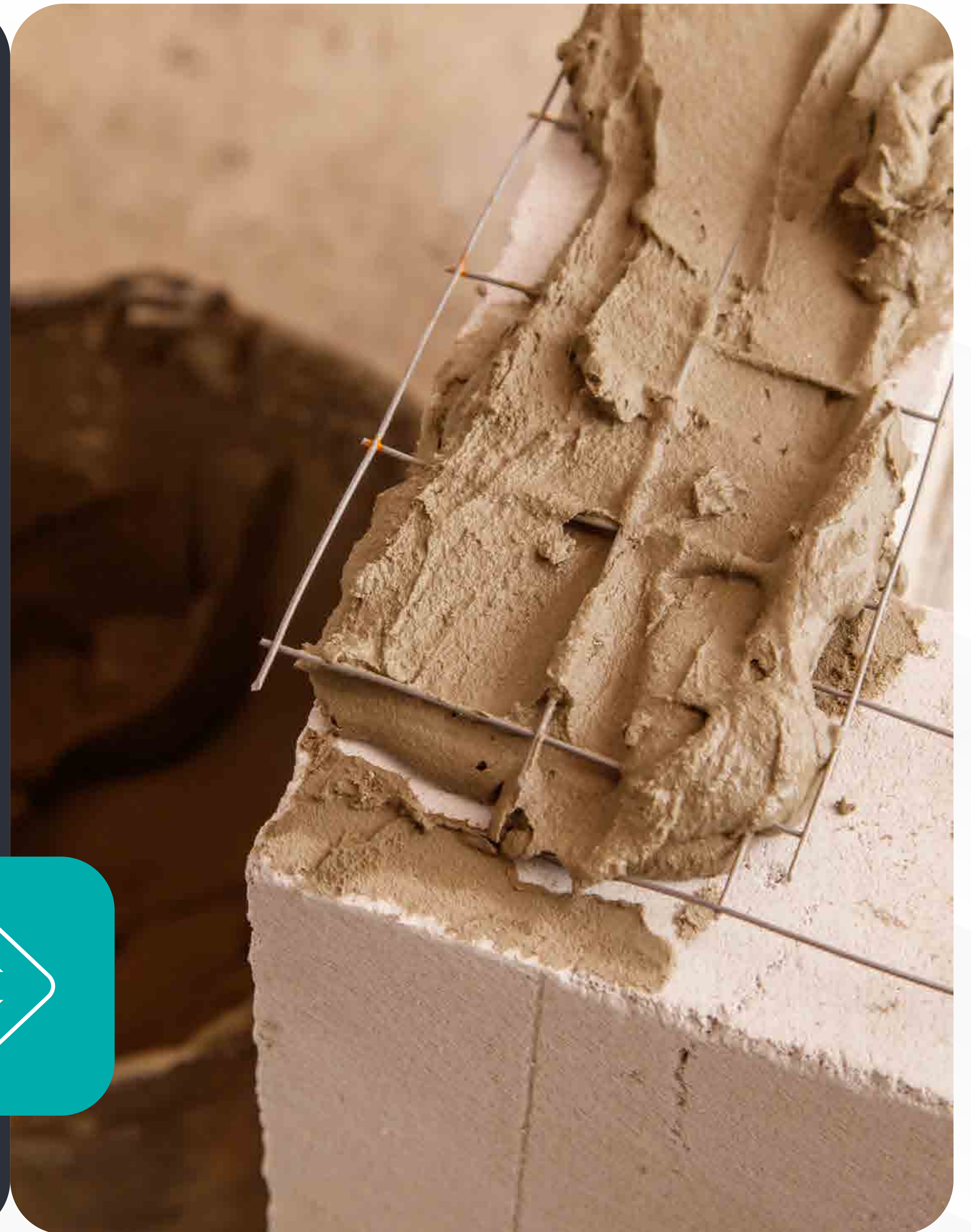




CONSTRUCTION CHEMICALS MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030



The construction industry, particularly building construction, is slowly beginning to recover from the crisis. **The year 2024 brought a long-awaited surge in new residential construction, with almost 24% more housing starts than the year before**, which is a positive sign indicating a recovery of the residential construction segment, following a downturn from 2022-2023. The mortgage market has also grown, with financial analysts forecasting a continuation of positive trends into 2025.

However, it will take some time for new construction starts to translate into an increase in demand for specific construction materials; **for the time being, the residential construction market as a whole is recording even lower sales levels, as evidenced either by the data on housing completions (-10% in 2024) or the GUS' preliminary production output data for building construction for 2024 (-7%).**

The performance of the commercial construction market is also a positive sign, with **commercial investment volumes increasing by more than 130% in 2024**. These figures indicate a revival of investor confidence in the Polish commercial property market. In 2024, the market recorded its highest level since 2015. At the same time, the demand recovery in the logistics property market continues.

How will these positive trends translate into the building materials market, particularly construction chemicals? After what time will the increased number of new property developments translate into a market recovery in these segments? Lastly: what will be its growth rate in the long term? The answers to these key questions can be found in our latest report "**Construction chemicals market in Poland 2025**".



Main objective

To provide a comprehensive overview of the building materials market – the main segments of the construction chemicals market in Poland – and to present forecasts for its development.

Additional objectives

- to evaluate current trends and construction confidence index among contractors using the analysed construction chemicals categories
- to prepare development forecasts for the main construction chemicals market segments
- to identify the market volume, structure and consolidation level
- to present the latest trends in construction materials
- to provide information on purchasing trends – the most popular distribution channels

Product categories

The report analyses in detail the main segments of the factory-made construction chemicals market:

- tile adhesives
- plasters
- thermal insulation systems
- masonry mortars
- screeds

Time span: 2020-2024

Forecast horizon: 2025-2030

Geographic coverage: Poland



What is included in the report?

- **calculation of the market volume and value**, both for the entire market and for its segments: masonry mortars, tile adhesives, thermal insulation systems, thick coat plasters and floor screeds
- **identification of key** market trends – changes occurring in the construction chemicals market in Poland
- **findings of the survey** of small and medium-sized renovation and construction companies using construction chemicals in bricklaying, tiling, plastering, and when installing floor underlay and thermal insulation systems
- **PMR Construction Confidence** Index for the construction chemicals market, calculated on the basis of the survey
- **popularity ranking and assessment of the main brands** among renovation and construction companies in Poland
- **key purchasing trends**
- **shares of the leading brands in each product category** in the works carried out by the companies surveyed, developed on the basis of the survey
- detailed **profiles of the leading construction chemicals manufacturers**, together with financial data analysis
- **structure of individual construction chemicals segments**, by type of work (new buildings and renovations), type of building, type of material and distribution channel
- **overview of manufacturers** – profiles of the leading players
- **development forecasts for the construction chemicals market** in Poland up to 2030



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 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 pace of economic development, a prolonged reduction in inflation, delays in the inflow and incomplete use of EU funds under the KPO
- **optimistic scenario** – assuming a more favourable macroeconomic and market situation than in the baseline scenario.

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:

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

The detailed forecasts for the main construction chemicals market segments cover the volume and value of all the segments analysed:

- tile adhesives
- plasters
- thermal insulation systems
- mortars
- screeds



Why buy the report, i.e. what important questions does it answer?

- What are the volume and value of the construction chemicals market?
- What factors will influence the construction chemicals market in Poland?
- What is the structure of the factory-made construction chemicals market in its main segments?
- Which brand scored the most points in the overall ranking of construction chemicals manufacturers in Poland in 2024?
- What is the average number of orders completed by renovation and construction companies in Poland?
- What is the consumption of construction chemicals by new and existing buildings in Poland?
- Where do companies most often buy construction chemicals?
- What are the prospects for the Polish construction chemicals market between 2025 and 2030?

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 chosen by the Client. In addition, we offer **consultancy services** combining different areas, i.e. 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 center** market in Poland
- **Investment prospects** in Poland – analysis of industries and development forecasts for 2025-2026
- **Paving stone** market in Poland
- **Energy sector construction** market in Poland
- **Construction aggregate** market in Poland
- **Heating equipment** market in Poland
- **Construction sector in Central Europe**
- **Construction sector in the Baltic states**
- **Hospital infrastructure** analysis and investment plans for 2025-2030
- **ESG reporting** - challenges and development prospects 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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