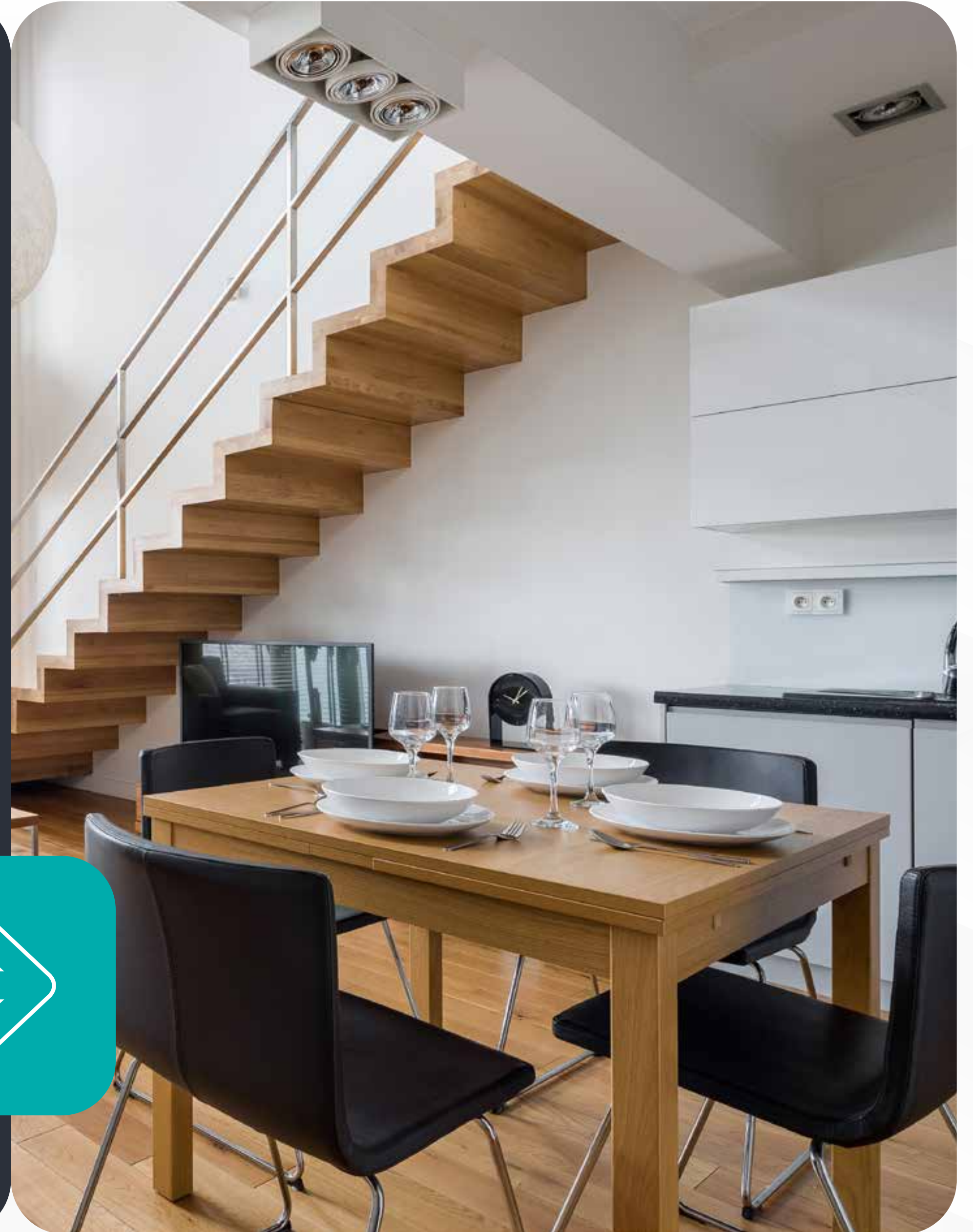


HOME FURNISHINGS RETAIL MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





Main objective

To provide a comprehensive overview of the home furnishings market, including a breakdown by category and channel

Additional objectives

the specific objectives of the research and analysis carried out for the report were to identify:

- key factors and trends in the home furnishings market
- value of individual home furnishings channels
- number of stores in each market segment
- consumer behaviour and preferences

What is included in the report?

- **market value** in 2021-2024
- **largest** furniture and home furnishings chains
- **market value by category** (furniture, home textiles, lighting, decorative accessories, garden and balcony equipment, storage equipment, bathroom accessories)
- macroeconomic, demographic, demand-side, supply-side, technological and legal **factors affecting the market**
- **major players** in the home furnishings market
- **forecasts** up to 2030 for:
 - » the home furnishings market
 - » the main market channels (specialist chain stores, DIY chains, large-format grocery stores, internet, non-food discounters and other types of stores)

TIME SPAN: 2021-2024

FORECAST HORIZON: 2025-2030

GEOGRAPHIC COVERAGE: Poland

Scope

- home furnishings
- product categories, including:
 - » furniture
 - » home textiles
 - » lighting
 - » decorative accessories
 - » garden and balcony furnishing
 - » storage equipment
 - » bathroom accessories

Subject matter

- market value
- structure of the market value by sales channel
- forecasts for:
 - » the entire market (baseline + alternative development scenarios)
 - » the individual market channels
- product structure of the market
- ranking and profiles of the main players in the market
- renovations carried out by Poles and the **profile of home furnishings buyers:**
 - » time and scope of the last renovation, including types of rooms renovated and types of works carried out
 - » renovation cost and source of funding
 - » renovation plans, including types of rooms to be renovated and the scope of works to be carried out
 - » planned renovation budget
 - » preferred places to shop for home furnishings
 - » path to purchase for home furnishings
 - » planned purchases of home furnishings



Forecasts

Given the high uncertainty of the market situation and the significant impact of political and regulatory factors, we have prepared **three scenarios regarding the outlook for the home furnishings retail market. The key factors for which we have developed alternative forecasts include:**

- construction market – residential construction,
- real GDP growth,
- labour market situation in Poland,
- Poles' purchasing power.

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 the following series of data:

- value of the home furnishings market in Poland,
- value of retail sales of home furnishings in offline specialist stores,
- value of online sales of home furnishings,
- value of sales of home furnishings in DIY chains,
- value of retail sales of home furnishings in offline grocery stores,
- value of sales of home furnishings in offline non-food discounters,
- value of sales of home furnishings in offline non-chain stores, non-specialist chain stores with home furnishing offerings (clothing stores, mixed-assortment stores), at open-air markets and carpentry companies.

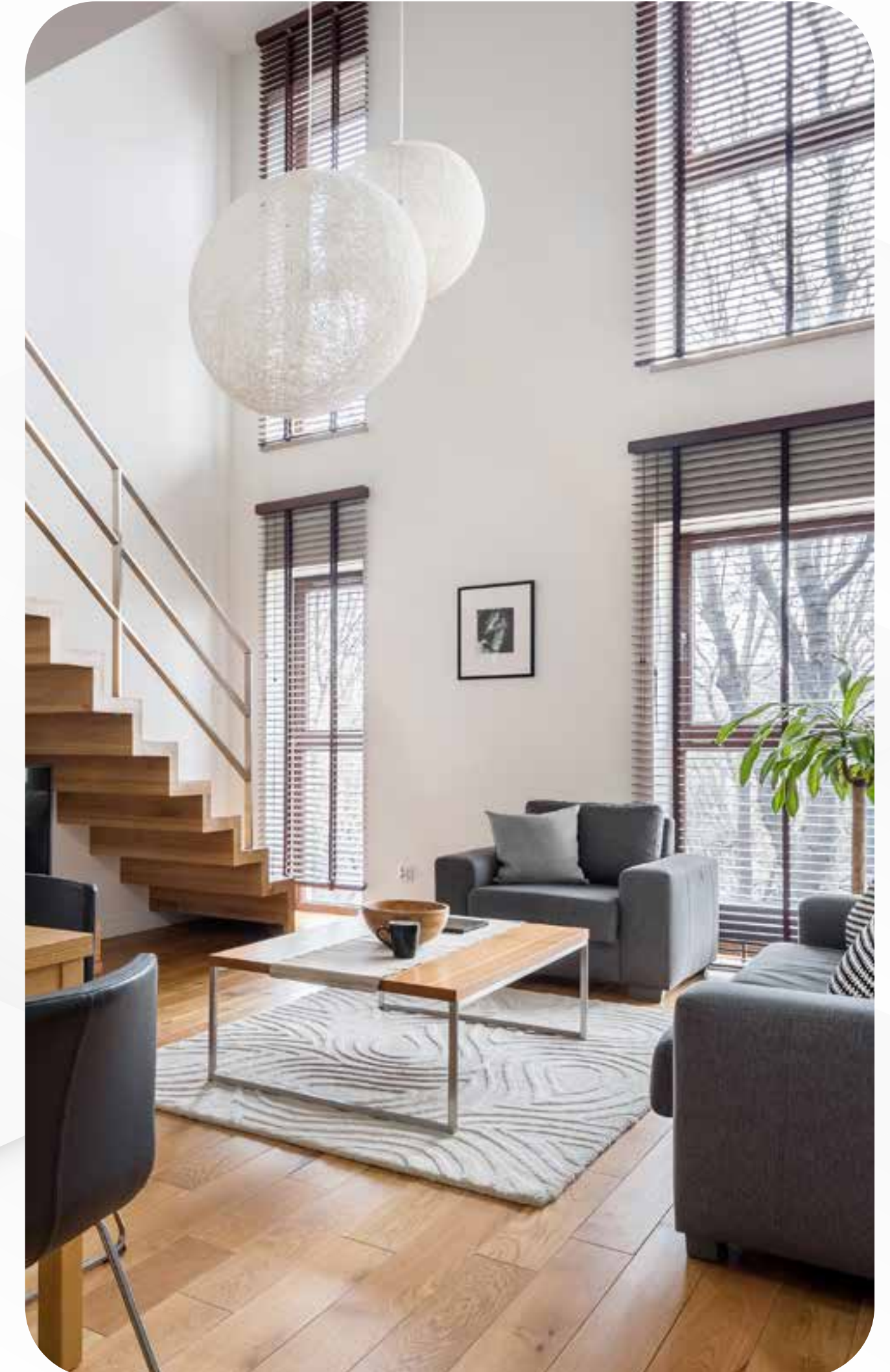


In addition to projections for the market value, the report also covers **forecasts for 2025-2030 for selected demographic and macroeconomic indicators**, including:

- GDP per capita and real GDP growth rate,
- CPI inflation and price index for home furnishings,
- average annual LFS unemployment rate and real change in average monthly gross wage in Poland,
- real growth rate of household disposable income in Poland and private consumption,
- number of Poland's residents and share of each demographic group.

For the purposes of the report, **long-term development forecasts for the housing market** were also prepared. The forecasts cover the period 2025-2030, and in particular:

- number of housing starts,
- number of housing completions,
- Polish WIBOR average annual interest rate,
- change in the number of mortgage loans granted,
- nominal change in the value of mortgage loans granted.



The report answers, among others, the following questions:

- What is the value of the home furnishings market in Poland?
- What are the value and development forecasts for each market segment over the next 5 years?
- What are the prevailing trends in the home furnishings market?
- What is the real growth rate of the home furnishings market in Poland?
- What are Poles' renovation plans for the coming year?
- Are Poles cutting back on buying home furnishings due to inflation?
- What will be the shares of individual distribution channels in the home furnishings market in Poland over the next few years?
- What are the market shares of the largest players in the Polish home furnishings market?
- What is the profile of Poles buying home furnishings?

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





The report includes information such as:

- **market value** in 2021-2024
- **market value** by product category, including, among others, finishing products, garden equipment and greenery, building supplies, tools and power tools, fitting and metal products
- **market structure** in 2021-2024 by sales channel (DIY chains, non-chain stores, large-format grocery stores, internet and other types of stores)
- **forecast changes in the prices** of renovation and building products and other macroeconomic and demographic factors
- **forecast for the housing and mortgage loans markets situation**
- renovations carried out by Poles in the last year and their **renovation plans**
- **consumer profile** of the renovation and building products buyers
- **major players** in the retail market for renovation and building products
- **market development forecasts** up to 2030



The report includes information such as:

- **value of the non-food discounters market** in 2020-2024
- **market value** by product category, including, among others, clothing and footwear, home furnishings, pet products, household chemicals
- **market structure** in 2020-2024 by key discount chains
- **number of discount stores** and forecast expansion of chains by 2030
- **competitive landscape** of non-food discounters compared to other retail formats
- **profile of consumers** shopping at non-food discounters, including brand awareness and frequency of visits
- **analysis of the development plans** of the largest discount chains
- **market development forecasts** up to 2030

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.





RETAIL

MARKET ANALYSIS AND 5-YEAR
DEVELOPMENT FORECASTS

- Retail market of **home appliances, electronics and digital media** in Poland
- **Food to Go** retail market in Poland
- **Cosmetics** retail market in Poland
- **DIY** retail in Poland
- **Home furnishings** retail market in Poland
- **HoReCa** market in Poland (additional data update: March, September, December)
- **Grocery** retail market in Poland
- **Clothing and footwear** retail market in Poland
- **Sports goods** retail market in Poland
- **Children's products** retail market in Poland
- **Online retail** market in Poland (additional data update: March)
- **Diet catering** market in Poland
- **Retail** market in Poland
- **Pet care and products** market in Poland
- **HoReCa supply** market in Poland
- **Non-food discounters** market in Poland
- **Diet catering** market in Czech Republic
- **Clothing and footwear** retail market in Czech Republic
- Weekly: **PMR Retail Insight** (Poland, Hungary, Romania, Slovakia, Czech Republic)

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