



15th
edition!

Construction sector in Poland – H1 2008

Development forecasts for 2008-2010

Publication date: April 2008

Language: English, Polish

A word from the author



„Following the market revival in 2006 and 2007, the upward trend in the construction sector may continue well into 2008. Construction companies expect record high profits, which will certainly be reflected in larger construction output. We estimate that the strong growth in the construction sector in H2 2007 increased the construction and assembly output by companies with more than nine employees by approx. 25% in nominal terms in 2007.

The largest construction companies are still very optimistic about the market situation. The macroeconomic environment is very favourable for the construction sector, the level of investment is growing, more and more foreign investments are flowing into Poland, and utilization of EU funds will be on the rise. Despite a slight slowdown, both the number and value of granted mortgage loans are expected to grow, safeguarding favourable situation in the residential construction sector. In addition, more permits are granted to build modern office, retail and warehouse space. All these factors contribute to the very promising forecasts for the construction market.”

Bartłomiej Sosna, Construction Market Analyst, PMR

PMR MarketInsight Methodology

This report was prepared using PMR's MarketInsight Methodology. **PMR MarketInsight is a methodology developed by PMR which assists in the complex preparation of industry reports.** It defines the ways in which data should be collected for such reports and outlines the methods to be used in analysing the information collected in order to obtain a true picture of the market in question. **It also contains special procedures to follow in the case of incomplete market.**

PMR MarketInsight precisely defines report content and structure. Industry reports prepared using PMR MarketInsight are based on information from a variety of available statistical, industry (specialist press, the internet), general and official sources as well as information from PMR's own database and primary research independently carried out by PMR. The sources we use are individually tailored to each project. **PMR MarketInsight is the result of over 10 years of experience in conducting industry analysis on Central and Eastern European markets.**

PMR
MarketInsight
Methodology

In the near future the construction sector will continue to grow, yet the growth rate may start to decline.

Report description

This report comprises a sophisticated analysis of the construction industry in Poland, making it a useful guide in formulating strategic decisions and development plans for organisations active on the construction market. Additionally, it presents the newest findings of PMR's cyclical sector climate survey conducted among the management of the largest construction companies in Poland.

Further benefits include sector development forecasts for 2008-2010, presented by the individual types of construction work and prepared using time series analysis, augmented by macroeconomic projections.

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Key sections

The report has six sections, giving the reader a detailed and comprehensive picture of the situation in the Polish construction sector.

I. Polish construction and assembly industry

- Construction market size
- Construction and assembly output by type of work
- Construction and assembly output forecast for 2008-2010
- Construction companies – numbers and business profiles
- Construction sector workforce and wages
- Construction companies – standing and performance
- Construction sector performance
- Cement production
- Legislative changes affecting construction market
- Building permits – number of buildings

Engineering construction will be the main growth driver for the Polish construction sector in the coming years.

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PLN 121bn will be invested into the development of national roads between 2008 and 2012.

II. Results of survey conducted among Poland's largest construction companies

For this report, PMR Research – PMR's custom research unit (www.research-pmr.com) – surveyed Poland's largest construction companies in April 2008. The survey was conducted among 112 largest construction companies active on the Polish market, using the computer-assisted telephone interview (CATI) technique. This was the sixth cyclical survey of the sector (findings of previous surveys were published in previous report editions).

As earlier, the objective of the survey was to gather information on the current situation on the Polish construction market and on the development prospects for the industry and its individual segments. PMR also questioned respondents about factors, both positive and negative, with a bearing on the industry and gathered expert views on the impact of EU membership and other key factors material to success on the construction market. The latest edition of the survey includes an overview of trends and changes that have taken shape over the past three years, as illustrated by the findings of previous survey editions.

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III. Civil engineering construction

- Market situation
- Environmental projects
- Road transport
- Rail transport
- Air transport
- Heavy industry investments
- Development forecast for civil engineering construction 2008-2010

IV. Non-residential construction

- Market situation
- Commercial construction
- Industrial and warehouse construction
- Office construction
- Hotel construction
- Development forecast for non-residential construction 2008-2010

Polish power sector
needs enormous
investment
– up to PLN 100bn.

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Medium-sized cities, which until recently have been neglected by investors, show the greatest growth potential for shopping centres.

V. Residential construction

- Housing stock
- Buildings and homes completed
- Building permits and home starts
- Housing loans and prices
- Development forecast for residential construction 2008-2010

VI. Voivodship profiles

Key demographic and macroeconomic data as well as industry-defining statistics. The section also includes information on sales of construction and assembly output and on the number of construction firms in Poland.

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This is a must have report for anyone from:

- the top management of construction companies active on the Polish market
- the strategic planners and executives of firms considering market entry
- companies engaged in construction and those in production and distribution of building materials
- architectural and consultancy firms interested in this market.

The report is an invaluable source of information for any company wanting to launch operations or to fortify its position on one of the local construction markets of Poland.

Unlike in Western Europe, a majority of houses built in Poland are private projects.

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