

DIY RETAIL IN POLAND 2024

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2024-2029





Main objective

providing a comprehensive overview of the renovation and building products retail market in Poland and its development forecasts

Additional objectives:

- in-depth analysis of sales channels for renovation and building products and presentation of their development prospects
- presentation of key macroeconomic, housing, demand-side, supply-side, and legal factors and trends in the renovation and building products retail market
- presentation of values of individual renovation and building product categories
- presentation and analysis of the purchasing behaviour of renovation and building products buyers
- analysis of DIY chain store locations – trade map

What can be found in the report?

- **market value** in 2020-2023
- **market structure** in 2020-2023, by sales channel
- **forecast changes in the prices** of renovation and building products, and for other macroeconomic and demographic factors
- **forecast for housing and mortgage loans** market situation
- renovations carried out by Poles in the last year and **renovation plans**
- profile of the renovation and building products buyer
- **major players** in the renovation and building products retail market, including breakdown by sales channel
- **market development forecasts** up to 2029

TIME SPAN: 2020-2023

FORECAST HORIZON: 2024-2029

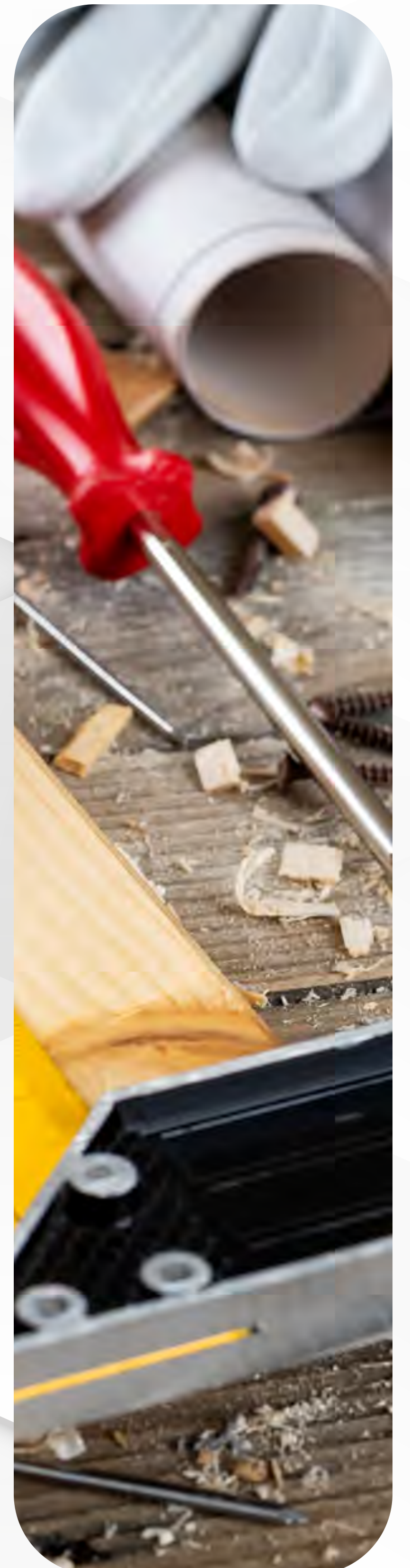
GEOGRAPHIC COVERAGE: Poland

SCOPE

- renovation and building products
- product categories, including:
 - finishing products
 - garden equipment and greenery
 - building supplies
 - tools and power tools

SUBJECT MATTER

- market value
- structure of the total market value, by sales channel:
 - DIY chains
 - non-chain stores
 - large-format grocery stores
 - internet
 - other store types
- structure of the total market value, broken down into product categories
- forecasts for:
 - the entire market (baseline + alternative development scenarios)
 - sales channels





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 of 2024-2029.

The report features forecasts for the following indicators:

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

FORECASTS FOR HOUSING MARKET SITUATION

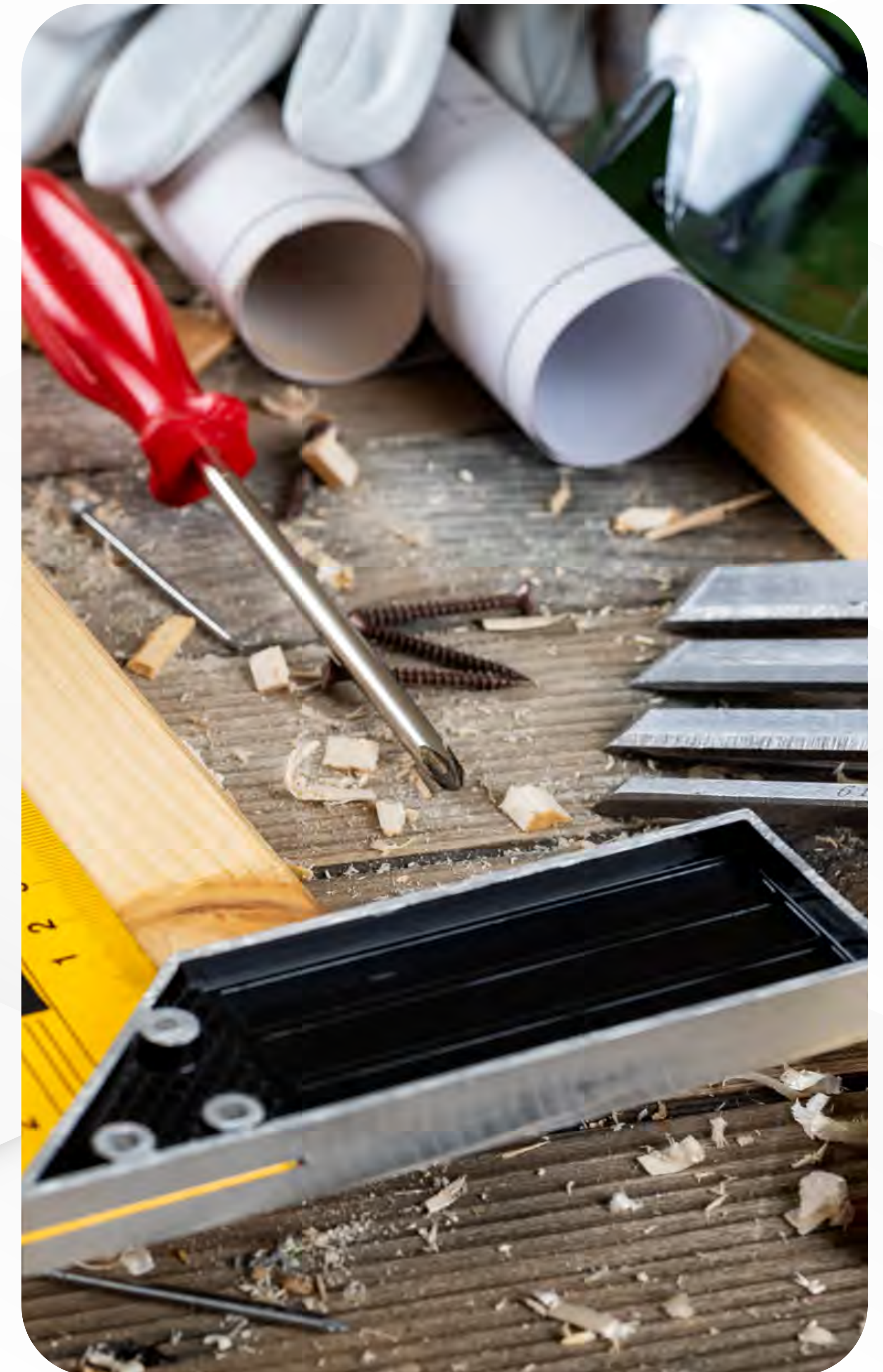
Long-term market development forecasts for the housing market were prepared for the report. These cover the period of 2024-2029. The projections include, in particular:

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

Given the high uncertainty of the market situation and the significant impact of political and regulatory factors, we have prepared three scenarios for the DIY retail market outlook.

POLISH RENOVATIONS AND THE PROFILE OF THE RENOVATION AND BUILDING PRODUCTS BUYER

- time and scope of the last renovation, including types of rooms renovated and types of works carried out
- 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 DIY products
- path to purchase of renovation and building products
- planned purchases of DIY products



Why to buy this report, i.e. what important questions it answers:

- What is the value of the renovation and building products market in Poland?
- What are the prevailing trends in the Polish DIY market?
- How do inflation and the situation in the housing market affect the DIY market in Poland?
- What is the real growth rate for the DIY market?
- What are the largest categories of renovation and building products?
- What is the share of the online channel in renovation and building products sales?

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





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