



POLISH WINDOWS AND DOORS ASSOCIATION MEMBERS CATALOG



CERTIFICATE

Certificate of the POiD – Poland-wide organization formed by a representative group of manufacturers and suppliers of construction joinery is confirmation of member reliability. Before granting a certificate POiD verifies members: quality of manufactured products and business credibility. Every company awarded certificate is trustworthy, which confirms POiD organization.

The 4th Congress of Polish Woodwork, the 16th of May 2013



on behalf of the management of
The Polish Windows and Doors
Association

Janusz Komurkiewicz

An Association with traditions



Credibility and reliability – these are the distinguishing characteristics of the POiD, a Poland-wide organization formed by a representative group of manufacturers and suppliers of construction joinery products. The members of the POiD are manufacturers of wooden, PVC, and aluminum windows and manufacturers of interior and garage doors. The member companies that supply accessories for the production of construction joinery products include suppliers of PVC and aluminum profiles, manufacturers of construction hardware, multiple-glazing units, chemical products for the construction sector, machines, and other products.

„Evaluation of the products and services offered by members of the association can be used as a basis for a comprehensive and reliable opinion about windows, doors, and facades made in Poland. ”

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laboration with important specialized and consumer media, the association provides professional information on the sector and comprehensive information for consumers. The POiD represents the sector in contacts with government agencies, various institutes, and the Main Construction Supervision Office and maintains a close relationship with consumer groups. As a part of its information and training objectives defined in its statute, the POiD enables its members to participate in a continuous program of improvement intended for manufacturers of doors and windows, which includes training sessions, consulting services, and technical support. The association guarantees active and professional promotion of the image of its members and their products in the market for construction products, helps them in their development, and promotes high levels of quality in their manufacturing and sales operations. The association of manufacturers, suppliers, and distributors has also initiated many projects. Its objective is to create for its members a forum for exchanging thoughts, sharing ideas, and holding discussions. It actively supports exports and creates a negotiation platform for members of the association with third-party suppliers of goods and services. The POiD does its best to eliminate products that do not hold appropriate certificates from public tenders and from the market in general. It is also working on preparing the so-called „sector ethics code” that would provide guidelines for its members. The association is open to all companies from the doors and windows manufacturing sectors that are ready to operate broadly with the goal to shape the future together. It is an appropriate venue for reliable companies, regardless of their size.

Polish construction joinery

The doors and windows manufacturing sector is one of the fifteen sectors awarded by the Ministry of Economy as a part of the Sector Program for Promotion of the best Polish products abroad. The sector is directly dependent on individual demand, on construction projects, on government orders, and on exports, with the latter appearing to be a promising area for development of doors and windows manufacturers.

“Level of production of doors and windows in Poland is equal to 21 million per year, with the export being equal to 1 billion euros.”

Groups influencing the demand for doors and windows in Poland

The largest group that influences the market for doors and windows is individual customers, namely all people who repair or upgrade their homes or apartments. It is estimated that window replacement projects generate about 58% of the entire demand in Poland, assuming that 30% of windows are exported. Another such group is developers who build and sell houses and apartments, as well as those who build non-residential buildings (shopping galleries, office buildings, hotels, etc.). Their selection of doors and windows depends on their strategies, among others the selection of their target group of customers.

Export is the last factor that influences the demand for doors and windows. Polish windows enjoy a good reputation as high-quality products, which has a positive impact on the export plans of our doors and windows manufacturers. Of note is the fact that, according to the European Union forecasts, Poland is to have the highest GDP growth rate this year, i.e. 2.5%. In 2011, the Polish export reached the value of 135.8 billion euro and

was 12.8%, i.e. by about 15.4 billion euro, higher than the year before.

Groups of customers buying doors and windows

Residential housing sector currently generates the highest demand for doors and windows, since as much as 60% of windows made in Poland are purchased by customers from this sector. The demand generated by home repairs involving replacement of doors and windows remains high. 82% of Polish households have declared their intent to replace their current facade windows in the years 2012-2013, which translates to nearly 500 thousand dwelling units. If you multiply this number with the average of 5 windows per household (information based on the responses given in the survey), it is easily to calculate that the demand for replacement facade windows in those years will be equal to about 2.5 million windows.

In the same years, 6.5% of households are planning to repair or replace their doors, of which 60.3% declared specifically that they intended to replace their interior doors. What this means that the demand for such doors will be equal to 2.1 million doors, assuming the specific number of doors that the customers are planning to replace.

In the group customers who install windows in new buildings, in 2011 the demand for facade windows was equal to 1.2 million; three out of every four windows were bought by individual homeowners and only 20% by developers.

In the case of non-residential buildings, windows are most often used in office buildings, retail and service buildings, as well as hotels and other buildings intended for accommodation of tourists. It is them that will have the greatest impact on the demand for windows and doors.

The situation of the Polish doors and windows manufacturing sector

Currently there are about 2,500 doors and windows manufacturers in the Polish market. In 2011, a 20% share of the Polish market for windows was held by the largest five companies and a 50% share of the market was held by about 35 companies. Polish companies have some of the best windows



manufacturing technologies and solutions; at the same time, their prices are attractive for foreign customers, which makes them competitive internationally.

According to some calculations, the current level of production of doors and windows in Poland is equal to 21 million, with the production of windows being equal to 13 million. There is less interest in wooden doors and windows and more interest in ones made from PVC.

The value of doors and windows sold in Poland is estimated at approximately 12.9 billion zlotys. 61% of the overall sales market are windows, when doors are only 17.8%. The other product groups have much smaller percentage of the market.

Poland compared to other EU countries

Poland is one of the leading manufacturers of doors and windows in Europe and in the case of roof windows – worldwide. Poland's high position is due to the fact that it is a leading exporter of wooden and PVC windows in the EU. In Poland we have a very dynamic manufacturers with innovative, high-quality products – these are the main reasons for our strong position. Furthermore, the greatest European companies producing joinery located their production sites in Poland (including Danish Group VKR, the Swedish Group Invado, the Swiss AFG Group, a German manufacturer Roto).

Poland is the fourth largest manufacturer of the most popular wooden and PVC windows. In 2011, Polish factories made about 7.1 million PVC windows.

Also, Poland is one of the leaders in the production of wooden windows. In 2011, the value of wooden windows and window frames made in Poland was equal to 510.5 million euro which means that nearly 3 million of them were made.

Exports

The value of the doors and windows exported from Poland keeps growing, on average by 18.3% per year. In 2011 Polish companies exported doors and windows worth approximately 900 million euro. What this means that about 3.5 million Polish windows were sold abroad. It is worth mentioning that the production capacity is used at the rate of 70-80%; thus, in a short time Poland is able to put a much larger number of doors and windows on the market without the need to invest in new machinery.

Most windows that people buy – in Poland and abroad – are made from PVC. Joinery sector sales increased seven-fold in less than seven years – for the year 2011 it gives a figure of 485 million euros. For comparison, at the same time wooden windows was estimated to be only two-fold growth. According to the data, Poland since 2011/2012 has been a leader in wooden

and PVC windows export. Moreover, the results of other countries differ significantly from high-ranking Poland. For example, value of exports of Slovakia – classified in the third place in 2011 – is four times smaller than our. The upward trend of our export may lead to Polish leadership on the international stage of joinery. As for wooden doors, frames and thresholds, we are also in the forefront. In 2011 export level approximately 106,9 million euros gave us a fourth place in the ranking.

In 2011, Polish doors and windows were sold in more than 90 countries around the world – but mainly in the European Union, which is 95% of our exports. As for main export destinations – they depend on the material from which joinery is made. Wooden doors and windows are mainly addressed to the United Kingdom, Denmark and Scandinavian countries. The PVC doors and windows are mostly sold in Germany – 30%, Czech Republik – 15%, Slovakia – 9%.

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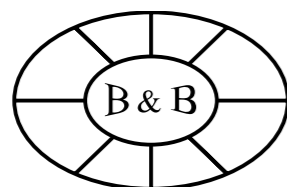
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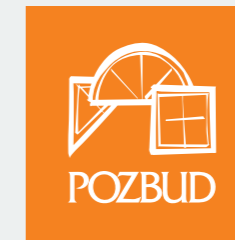
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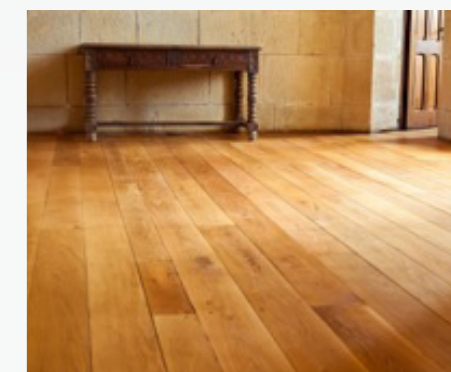
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Carpentry Plant Zbigniew Kozłowski was established in Chwałowice (Province Podkarpackie) in Poland. The founder is Zbigniew Kozłowski – the master of carpentry who learnt his first crafts from his father, also a carpenter. Therefore the Plant has been characterized by the **long family tradition**. Initially, the Plant provided the services connected with broadly comprehended carpentry and woodwork and that is doors, windows, chairs etc. This was the added value and helped better understanding as far as the individual needs of our Clients. With time, market tendencies have determined high demand for wooden doors and windows and so, in order to meet the needs, the Plant followed the trend by investing in **innovative technological solutions**. Thanks to very **efficient management** and large investments the Plant strengthened its position on the market. Gradually, the production focus shifted mainly to the manufacture of wooden exterior and interior doors. What went with this was the big number of investments. The Plant purchased modern machinery centres which made for appliance of the board technology in manufacture of doors, what to a great extent improved on the product quality. Further investments in 2005 allowed to establish another factory located in Gościeradów. Old industrial area turned into a **blooming production centre**. Smooth production is the effect of **qualified staff** as well as modern technical equipment present in the factory. This enables us to produce more than **30 thousand pieces of interior doors**, more than **30 thousand pieces of door frames** and around **250 wooden exterior doors** a month. The recent investment, already received, was a **modern conference centre** which functions as the base of theoretical and practical knowledge to our APS. Apart from investing in high end machinery **ERKADO** puts a great focus on its staff.

‘ Employees working here are not random. We do take care each employee [currently circa 250 people] to feel crucial, significant and irreplaceable and have space to personal and professional growth. Thanks to this, work becomes a pleasure, which positively influences upon the staff reliability and works well for good spirits in our company’ - says Zbigniew Kozłowski, the owner of **ERKADO**.

As one of the leaders in the branch, the company also takes up numerous initiatives and supports charities as well as individuals. The policy we truly believe in is – **Satisfaction – Innovation – Product – Price**.

We cooperate with the wholesalers in Poland and abroad and also we enjoy individual orders. The new collection of **STILE** and **TWIN** doors is yet another step into mastering the technology and quality policy. The **quality** which is the **priority** for us leading to the increase of our **most valuable asset – our Clients**.

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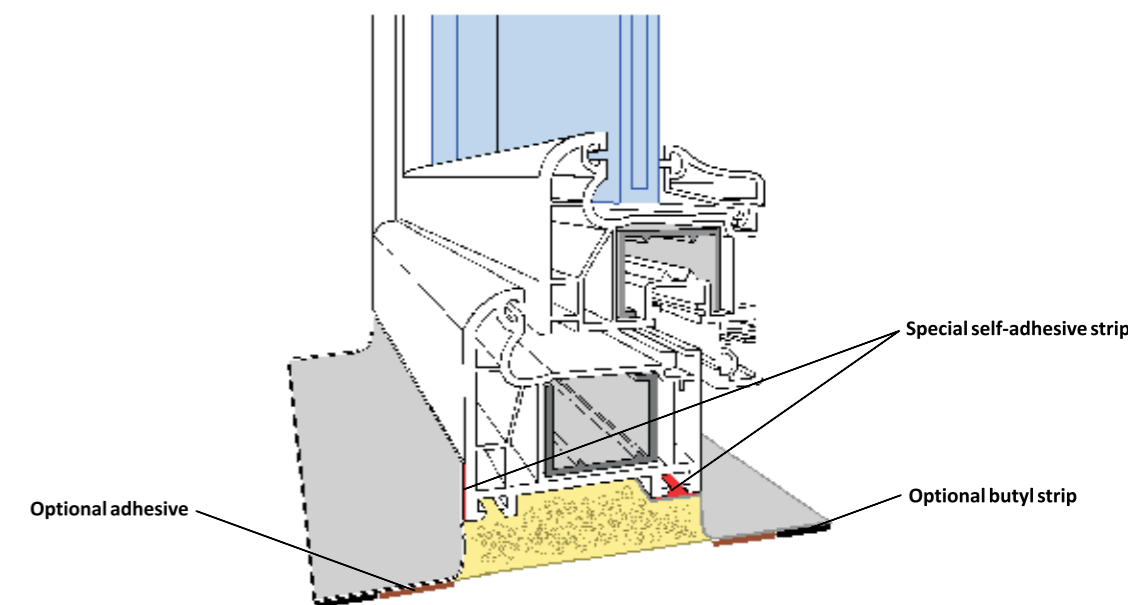


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Fig. 1 Typical installment:



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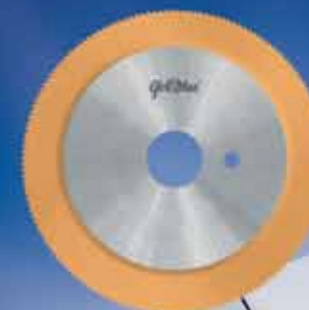
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