

Home and Garden in Poland

June 2024

Table of Contents

Home and Garden in Poland

EXECUTIVE SUMMARY

Home and garden in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for home and garden?

MARKET DATA

- Table 1 Sales of Home and Garden by Category: Value 2018-2023
- Table 2 Sales of Home and Garden by Category: % Value Growth 2018-2023
- Table 3 NBO Company Shares of Home and Garden: % Value 2019-2023
- Table 4 LBN Brand Shares of Home and Garden: % Value 2020-2023
- Table 5 Penetration of Private Label in Home and Garden by Category: % Value 2018-2023
- Table 6 Distribution of Home and Garden by Format: % Value 2018-2023
- Table 7 Distribution of Home and Garden by Format and Category: % Value 2023
- Table 8 Forecast Sales of Home and Garden by Category: Value 2023-2028
- Table 9 Forecast Sales of Home and Garden by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Home Improvement in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Challenging macroeconomic conditions constrain sales within home improvement

Home paint shows some reliance, given as it is an inexpensive way to beautify one's home

Shortage of wood drives consumers to opt for alternative flooring options

PROSPECTS AND OPPORTUNITIES

Improved macroeconomic conditions and government support for first-time property owners should benefit home improvement sales Online sales will grow in importance

Sustainable materials become increasingly important to consumers

CATEGORY DATA

- Table 10 Sales of Home Improvement by Category: Value 2018-2023
- Table 11 Sales of Home Improvement by Category: % Value Growth 2018-2023
- Table 12 NBO Company Shares of Home Improvement: % Value 2019-2023
- Table 13 LBN Brand Shares of Home Improvement: % Value 2020-2023
- Table 14 Distribution of Home Improvement by Format: % Value 2018-2023
- Table 15 Forecast Sales of Home Improvement by Category: Value 2023-2028
- Table 16 Forecast Sales of Home Improvement by Category: % Value Growth 2023-2028

Gardening in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Gardening equipment sees buoyant demand, despite inflationary pressures, as consumers remain keen to maintain outdoor spaces Automatic watering systems registered growing demand as consumers sought sustainable convenience Gardening specialists remain key distribution channel while e-commerce sees static performance

PROSPECTS AND OPPORTUNITIES

Consumers will continue to appreciate the health and wellness benefits of gardening

Robotic lawn mowers will continue to gain share over manual alternatives

Online channels will continue to expand

CATEGORY DATA

Table 17 - Sales of Gardening by Category: Value 2018-2023

Table 18 - Sales of Gardening by Category: % Value Growth 2018-2023

Table 19 - NBO Company Shares of Gardening: % Value 2019-2023

Table 20 - LBN Brand Shares of Gardening: % Value 2020-2023

Table 21 - Distribution of Gardening by Format: % Value 2018-2023

Table 22 - Forecast Sales of Gardening by Category: Value 2023-2028

Table 23 - Forecast Sales of Gardening by Category: % Value Growth 2023-2028

Homewares in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for homewares continued to contract after post-pandemic normalisation

Large players consolidate market share amidst economic uncertainty

Growing demand for durable and multifunctional homeware as consumers look for greater value-for-money

PROSPECTS AND OPPORTUNITIES

Flat performance ahead, but homewares is poised to perform better than other categories

Online sales will continue to expand

Sustainability concerns will drive changes in non-stick cookware products

CATEGORY DATA

Table 24 - Sales of Homewares by Category: Value 2018-2023

Table 25 - Sales of Homewares by Category: % Value Growth 2018-2023

Table 26 - Sales of Homewares by Material: % Value 2018-2023

Table 27 - NBO Company Shares of Homewares: % Value 2019-2023

Table 28 - LBN Brand Shares of Homewares: % Value 2020-2023

Table 29 - Distribution of Homewares by Format: % Value 2018-2023

Table 30 - Forecast Sales of Homewares by Category: Value 2023-2028

Table 31 - Forecast Sales of Homewares by Category: % Value Growth 2023-2028

Home Furnishings in Poland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressures drive decline in demand for home furnishings

Mattresses show greater resilience, due to growing consumer awareness surrounding hygiene and sleep quality Brands offer price promotions to sustain sales of textiles

PROSPECTS AND OPPORTUNITIES

Government affordable housing initiatives could drive demand for home furnishings

Retail e-commerce is expected to gain popularity as consumers value the channel's convenience

Retailers align their innovation efforts with sustainability

CATEGORY DATA

- Table 32 Sales of Home Furnishings by Category: Value 2018-2023
- Table 33 Sales of Home Furnishings by Category: % Value Growth 2018-2023
- Table 34 NBO Company Shares of Home Furnishings: % Value 2019-2023
- Table 35 LBN Brand Shares of Home Furnishings: % Value 2020-2023
- Table 36 LBN Brand Shares of Light Sources: % Value 2020-2023
- Table 37 Distribution of Home Furnishings by Format: % Value 2018-2023
- Table 38 Forecast Sales of Home Furnishings by Category: Value 2023-2028
- Table 39 Forecast Sales of Home Furnishings by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
 trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
 country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/home-and-garden-in-poland/report.