

Poland Construction - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Poland Construction Market Analysis

The Poland Construction Market was valued at USD 93.99 billion in 2025 and estimated to grow from USD 99.28 billion in 2026 to reach USD 130.62 billion by 2031, at a CAGR of 5.63% during the forecast period (2026-2031). Robust EU Recovery and Resilience Facility inflows, a strategic pivot toward renewable energy assets, and private-sector appetite for housing underpin this sustained expansion in the Poland construction market. Opportunities are strongest where energy transition targets intersect with transport modernization, enabling contractors that master grid-scale renewables, offshore wind logistics, and high-speed rail works to secure premium margins. Prefabricated volumetric housing is scaling quickly as the State Development Fund accelerates factory-built supply, while ESG-linked retrofits bolster renovation volumes in commercial real estate. Competitive intensity remains high because no single firm exceeds a 5% revenue foothold, yet specialist know-how in carbon-capture cement plants and marine foundations allows smaller players to win high-value contracts.

Poland Construction Market Trends and Insights

EU Recovery & Resilience Facility Funds Inflow

Poland secured USD 64.58 billion under the EU Recovery and Resilience Facility, making it the bloc's third-largest beneficiary. Nearly 47% targets green projects, front-loading demand for contractors versed in energy and transport mega-projects. Local governments already received USD 16.75 billion in 2024, disbursing USD 6.75 billion to thermal-modernization programs that

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

cover 380,000 homes, thereby compressing tender timelines. Funding velocity exceeds historic EU averages, rewarding firms with proven procurement networks. A discrete USD 925 million Clean Air allocation keeps renovation backlogs buoyant through 2027.

Rapid Urban Rail & Road Modernization Pipeline

The Centralny Port Komunikacyjny scheme underpins a 2,000-kilometer high-speed rail build-out that stretches into 2035, while the Łódź tunnel contract, worth USD 440 million, illustrates technical complexity that favors specialist consortia. Parallel road plans earmark USD 75 billion for 2,500 kilometers of expressways, and regulatory extensions to 2026 provide planning certainty for long-horizon assets. Multimodal hubs will fuse air, rail, and road nodes, spawning feeder works in logistics parks and intermodal yards.

Acute Skilled-Labor Shortages & Wage Inflation

Construction wages climbed 15% in 2024 as the labor pool thinned, eroding margins for small firms reliant on low-skill workers. German pay premiums lure tradespeople abroad and leave domestic contractors scrambling for electricians, welders, and crane operators. Management and engineering positions also face scarcity, adding supervisory bottlenecks to complex rail and energy works. Immigration-friendly policies offer some relief, yet productivity lags when language training is absent.

Other drivers and restraints analyzed in the detailed report include:

ESG-Linked Green Building Demand from Occupiers
REPowerEU-Driven Grid-Scale Renewables Capex
Volatile Cement & Steel Spot Prices Tied to ETS Costs

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Infrastructure controlled 40.12% of Poland construction market share in 2025, while residential projects are charted for a 6.76% CAGR up to 2031. The government channels EU grants toward rail tunnels and expressways that require specialized design-build expertise, supporting higher profit margins than commoditized office blocks. Meanwhile, housing shortages elevate apartment starts in Warsaw, Poznań, and secondary cities, a trend amplified by the "Mieszkanie na start" subsidy for first-time buyers. Industrial and logistics build also thrive on near-shoring demand, filling warehouse backlogs along S8 and A2 corridors.

A divergence in risk profiles is evident: infrastructure consortia face lengthy designs and public tender scrutiny, but revenue visibility is firm once notice-to-proceed is issued. Residential players move faster yet shoulder greater sales-cycle exposure. Contractors diversifying across both segments hedge against cyclical swings, leveraging state road income to weather private-sector slowdowns.

New builds held 68.12% of the Poland construction market in 2025, yet renovation is compounding at 5.73% annually, reflecting EU zero-emission mandates. More than 70% of existing office stock misses 2030 energy thresholds, and owners rush to install heat pumps, solar rooftops, and BMS retrofits. Incentives totaling USD 925 million under the Clean Air program sweeten payback periods on home insulation, while landlords chase higher rents by upgrading Class B assets to green status.

Despite its smaller base, renovation offers faster permitting and fewer land-bank capital locks than greenfield sites. New projects now include ESG engineering from day one-smart metering, PV integration, or low-carbon materials-raising design complexity and cost baselines. Firms with both demolition-retrofit teams and new-build divisions capture end-to-end workflows, growing wallet share per client.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The Poland Construction Market Report is Segmented by Sector (Residential, Commercial, Infrastructure), by Construction Type (New Construction, Renovation), by Construction Method (Conventional On-Site, Modern Methods of Construction), by Investment Source (Public, Private), and by Geography (Warsaw, Krakow, Rest of Poland). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

BUDIMEX SA Skanska SA Strabag Sp. z o.o. PORR SA Warbud SA Erbud SA Torpol SA Unibep SA Intercor Sp. z o.o. Eurovia Polska SA Panattoni Development Europe Sp. z o.o. Mobile Services Team Sp. z o.o. Mirbud SA Mostostal Warszawa SA Hochtief Polska SA Polimex-Mostostal SA Kajima Poland Sp. z o.o. Ghelamco Poland Sp. z o.o. CFE Polska Sp. z o.o. Karmar SA

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

Table of Contents:

1 Introduction

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 EU Recovery & Resilience Facility funds inflow

4.2.2 Rapid urban rail & road modernisation pipeline

4.2.3 ESG-linked green building demand from occupiers

4.2.4 "REPowerEU"-driven grid-scale renewables capex

4.2.5 Prefab volumetric housing promoted by State Development Fund

4.3 Market Restraints

4.3.1 Acute skilled-labour shortages & wage inflation

4.3.2 Volatile cement & steel spot prices tied to ETS costs

4.3.3 Lengthy environmental-permit appeals slowing projects

4.4 Value / Supply-Chain Analysis

4.4.1 Overview

4.4.2 Real Estate Developers and Contractors - Key Quantitative and Qualitative Insights

4.4.3 Architectural and Engineering Companies - Key Quantitative and Qualitative Insights

4.4.4 Building Material and Equipment Companies - Key Quantitative and Qualitative Insights

4.5 Government Initiatives & Vision

4.6 Regulatory Landscape

4.7 Technological Outlook

4.8 Industry Attractiveness - Porter's Five Force Analysis

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.8.1 Bargaining Power of Suppliers
- 4.8.2 Bargaining Power of Consumers
- 4.8.3 Threat of New Entrants
- 4.8.4 Threat of Substitutes
- 4.8.5 Intensity of Competitive Rivalry
- 4.9 Pricing (Construction Materials) and Construction Cost (Materials, Labour, Equipment) Analysis
- 4.10 Comparison of Key Industry Metrics of Poland with Other Countries
- 4.11 Key Upcoming/Ongoing Projects (with a focus on Mega Projects)

- 5 Market Size & Growth Forecasts (Value, In USD Billion)
- 5.1 By Sector
 - 5.1.1 Residential
 - 5.1.1.1 Apartments/Condominiums
 - 5.1.1.2 Villas/Landed Houses
 - 5.1.2 Commercial
 - 5.1.2.1 Office
 - 5.1.2.2 Retail
 - 5.1.2.3 Industrial and Logistics
 - 5.1.2.4 Others
 - 5.1.3 Infrastructure
 - 5.1.3.1 Transportation Infrastructure (Roadways, Railways, Airways, others)
 - 5.1.3.2 Energy & Utilities
 - 5.1.3.3 Others
- 5.2 By Construction Type
 - 5.2.1 New Construction
 - 5.2.2 Renovation
 - 5.3 By Construction Method
 - 5.3.1 Conventional On-Site
 - 5.3.2 Modern Methods of Construction (Prefabricated, Modular, etc)
- 5.4 By Investment Source
 - 5.4.1 Public
 - 5.4.2 Private
- 5.5 By Geography
 - 5.5.1 Warsaw
 - 5.5.2 Krakow
 - 5.5.3 Rest of Poland (Pomorskie (Gdansk), Wielkopolskie (Poznan), Dolnoslaskie (Wroclaw))

- 6 Competitive Landscape
 - 6.1 Market Concentration
 - 6.2 Strategic Moves
 - 6.3 Market Share Analysis
 - 6.4 Company Profiles {includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Products & Services, Recent Developments}
 - 6.4.1 BUDIMEX SA
 - 6.4.2 Skanska SA
 - 6.4.3 Strabag Sp. z o.o.
 - 6.4.4 PORR SA

- 6.4.5 Warbud SA
- 6.4.6 Erbud SA
- 6.4.7 Torpol SA
- 6.4.8 Unibep SA
- 6.4.9 Intercor Sp. z o.o.
- 6.4.10 Eurovia Polska SA
- 6.4.11 Panattoni Development Europe Sp. z o.o.
- 6.4.12 Mobile Services Team Sp. z o.o.
- 6.4.13 Mirbud SA
- 6.4.14 Mostostal Warszawa SA
- 6.4.15 Hochtief Polska SA
- 6.4.16 Polimex-Mostostal SA
- 6.4.17 Kajima Poland Sp. z o.o.
- 6.4.18 Ghelamco Poland Sp. z o.o.
- 6.4.19 CFE Polska Sp. z o.o.
- 6.4.20 Karmar SA

7 Market Opportunities & Future Outlook

8 Appendix

- 8.1 GDP & Construction Value-Add Indicators
- 8.2 Key Trade Statistics of Construction Materials

Poland Construction - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Company Name*	<input type="text"/>	City*	<input type="text"/>
Address*	<input type="text"/>	Country*	<input type="text"/>
Zip Code*	<input type="text"/>	Date	<input type="text" value="2026-02-08"/>

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com