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Global Agriculture Information Network

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A faint, light gray outline of a world map serves as a background for the central text. It shows the continents and major country borders.

Market Brief - Product

Poland : Wood for Furniture Manufacture

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Warsaw [PL1], PL

Summary. As one of the largest three producers of furniture in Europe, Poland is a strong market for hardwood lumber, veneer and materials used in furniture construction. Around 85 percent of local furniture production is exported. The biggest market for Polish furniture is Germany. Imports of furniture are small and consists mainly of luxury products. Large foreign capital investments have occurred in the Polish furniture sector, primarily from German companies like “Schieder”, “Klose” and “Steinhoff”.

Production. From 1990 to 1997, production in the furniture industry increased from PLN 454 million to PLN 5.53 billion. Exports increased 10 times in the same period, reaching \$ 1.77 billion in 1997, \$ 1.85 billion in 1998 and \$ 950 million in the first 6 months of 1999. For the fifth consecutive year, furniture was the leading Polish export commodity, overtaking such traditional leaders, as ships, coal and cars. Between 1989 and 1997, exports, as a share of total furniture production, increased from 17 percent to almost 80 percent.

Production of furniture	1995	1996	1997	1998	Jan-June 99
sales value (million PLN) (million US\$)	3,090 (1,275)	4,219 (1,565)	5,530 (1,686)	6,569 (1,880)	3,207 (. 930)
thousand of furniture sets	1468	1955	2329	2448	946

The privatization process in the Polish furniture sector has been proceed more rapidly and was more advanced than in other industry in Poland. The private sector currently accounts for 87 percent of furniture production. Beginning in 1989, out of 73 state-owned furniture enterprises, 29 were transformed into single share-holder companies of the State Treasury, 25 were liquidated and 19 privatized, including 12 which were sold to foreign investors, mainly from Germany, Sweden, Switzerland and the United States.

Privatization, together with foreign capital, resulted in a quick technological restructuring and opened the main distribution channels and sales networks for Polish furniture in Western Europe and North America. The net profitability of the industry increased from 1.6 percent in 1996 to 3.1 percent in 1997.

Modern wood materials (such as medium and high density fiberboard MDF and HDF, HPL laminates, laminated chipboards, thermoplastic foils, high quality water and acrylic varnishes) are currently used very extensively. The Polish furniture industry produces a wide range of home furniture (dining room, living room, bedroom and kitchen furniture), office, hotel, shop and garden furniture. Pine, oak, beech and alder are the dominant materials used to produce solid-wood furniture. Artistic reproduction furniture represents a new production trend.

Production of	1995	1996	1997	1998	Jan-Jun 1999
Fibreboard (1000 square meter)	104 000	103 641	106 750	103 428	55 827
Plywood (1000 cubic meter)	114	112	132	128.6	65.0
Particle board (1000 cubic meter)	1 538	1 747	2 072	2 417.2	1 209
Laminates (1000 square meters)	16 700	19 100	21 300	20 389.2	11 714

Foreign trade

Polish exports of furniture US\$ '000

	1995	1996	1997	1998
Total	1,330,734	1,611,279	1,774,815	1,909,904
U.S.	13,262	17,856	20,662	28,865
Germany	862,869	972,490	978,015	1,083,649
Russia	97,249	139,282	206,544	130,555
Ukraine	42,494	77,236	96,383	96,485

Polish imports of furniture US\$ '000

	1995	1996	1997	1998
Total	150,879	191,717	263,160	336,410
U.S.	3,015	3,304	3,267	4,274
Italy	47,992	64,813	73,940	85,819
Germany	47,772	48,275	63,145	80,077
France	6,152	9,606	17,799	26,949

Polish imports/exports of semi-products for furniture production (MT)

	1996		1997		1998	
	imports	exports	imports	exports	imports	exports
Veneer sheets and sheets for plywood	8,643	5,532	9,510	5,209	10,096	5,762
Fibreboard	63,276	186,061	209,707	112,314	130,185	298,155
Plywood, veneered panels and similar laminated wood	22,644	45,551	42,602	60,779	41,450	60,556
Particle board	211,453	31,375	306,004	87,643	296,436	213,969

Importing Products to Poland. Although the majority of wooden panels and boards are produced locally, a large quantity of these products are also imported. In 1998 imports were slightly lower than in previous years, due to lower exports as a result of the Russian crisis. The trade figures for the first half of 1999 indicate that the trade situation has improved. There is also a new trend emerging: Russian and Ukrainian companies have started to buy Polish panels and boards for their local production, instead of Polish furniture.

Imports are primarily conducted directly with local manufacturers, although in the case of small manufacturers (of which there are a lot in Poland), imports are conducted through traders. Only large furniture manufacturers can afford to buy containerized quantities from destinations like the United States or Africa. Small manufacturers do not have the proper storage conditions and prefer to buy small quantities of panels and wooden boards directly from Germany or a wholesaler in Poland.

Import Tariff

CN Code	Product Name	U.S. import tariff	EU import tariff
9401	Seating furniture, incl. convertible sofas	12 %	0 %
9403.10-80	Other furniture	12 %	0 %
9403.90	Parts thereof	9 %	0 %
9404	Mattress supports	12 %	0 %
4408	Veneer sheets and sheets for plywood	9 %	0 %
4410	Particle board	9 %	0 %
4411	Fibreboard	9 %	0 %

4412	Plywood, veneered panels	9 %	0 %
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EXHIBITIONS AND FAIRS:

MEBLE - the biggest international furniture fair in Poland held May 9 and 13, 2000 in Poznan

organizer:

Poznan International Fair Ltd.

Glogowska 14

60-734 Poznan

ph. (48-61) 866 1925, 869 2375; fax (48-61) 866 0675

<http://www.mtp.com.pl>

E-mail: meble@mtp.com.pl

IMPORTANT ADDRESSES:**Chamber of Commerce of Polish Furniture Producers**

ul. Grunwaldzka 104, 60-307 Poznan

ph. (48-61) 867 5661, fax 867 1256

Polish Chamber of Wood Industry

ul. Taczaka 24, 61-819 Poznan

ph. (48-61) 853 7588, 853 7033, fax 853 7342

IMPORTERS OF HARDWOOD AND WOODEN PANELS:**PAGED MATERIALY DRZEWNE S.A.,**

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Contact: Mr. Henryk Stachowski (de), Mr. Krzysztof Kaczmarek (en)

Mikomax S.c., Przedsiębiorstwo Handlowo-Uslugowe
ul.Elektronowa 4, 94-103 Łódź
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Contact: Mr. Zbigniew Haczkowski (de), Mr. Dariusz Piotrowski (de)

Eko-Bud Sp. z o.o., Przed.Produkcyjno-Handlowo-Uslugowe
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phone: (48- 85) 6755673, fax: (85) 6755673
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Pinus Standard
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Contact: Mr. Czesław Waszczeniuk (de)

Euros-Szkarlat S.c., Handel Drewnem Egzotycznym
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Contact: Mr. Leszek Osnicki (de)

OPDREW SA

Nysa-Hanuszow 9, 48-310 Nysa
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Contact: Mr. Jacek Paralusz

FURNITURE MANUFACTURERS:

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