



APPLiA ^{PL}

Producenci AGD

APPLIA POLSKA - HOME APPLIANCE ASSOCIATION IS:

- Effective and the only representation of the household appliance manufacturers industry since 2004 in Poland
- 34 member companies employing 33,000 people (most in the household appliance sector) with a total revenue of 51 billion PLN in 2023, including about 75% from sales and production of household appliances in Poland
- Active participant in dialogue with the government, parliament, media and NGOs
- Moderator of industry dialogue between all participants in the supply chain, from manufacturers to suppliers, service providers and recyclers, including many SMEs
- Organizer of the largest events in the industry (Home Appliance Congress, Home Appliance Service Congress)
- Expert on issues of closed-loop economy and energy efficiency, among others
- Initiator of Codes of Good Practice in the household appliances industry
- Author of information and education campaigns: EtykietaEnergetyczna.pl, ZostanTechnikiemAGD.pl
- Center for research and analysis of the household appliances industry in Poland
- Industry representation in standardization institutions - chair three committees in the Polish Committee for Standardization
- Founder and main shareholder of ElektroEko S.A., the largest electro-waste recovery organization in Poland

We are a member of APPLIA Home Appliance Europe, an organization that represents the entire home appliance industry in the European Union. The association was founded in 1958 and is based in Brussels. Currently, it associates 26 national organizations of the industry and 25 European household appliance corporations.

Konrad Pokutycki

Chairman of the APPLIA Polska Council,
CEO of BSH Sprzęt Gospodarstwa Domowego
Sp. z o.o.



In 2024, the home appliance industry again faced many challenges, such as the difficult geopolitical situation, problems in the real estate markets, high interest rates, high energy and transportation costs. All this resulted in continued low demand for durable goods worldwide. Only the last three months of last year brought increases in sales of household appliances. We can expect this positive trend to continue this year and the market to return to a path of moderate growth.

Given the difficult circumstances, however, we can be proud of the results we have achieved. We have maintained a high level of investment. In Poland, each year our industry allocates more than one billion zlotys. We invest in production development, Industry 4.0 solutions, but also research and development. Innovations are born in Poland, bringing home appliances to a new level of technological development.

Poland is still an attractive country for the development of the home appliance industry. However, we cannot afford to lose the competitive advantages that have determined our successes over the past three decades. For example, the Polish labor market is already short of workers, and demographic forecasts are alarming. Therefore, a wise migration policy is badly needed to allow more people who want to work here to come to Poland.

I recommend your attention to reading this report, as well as APPLIA's other publications, in which we point the way to maintaining the dynamic growth rate of the home appliance industry in Poland.

Wojciech Konecki

CEO of APPLIA Polska - Home Appliance
Association



We are the first sector in Poland to publish a comprehensive State of the Industry Report at the beginning of the year, including a description of the most important achievements, but also a list of challenges facing our industry. We wrapped the detailed statistics with a description of the phenomena, as usual, and asked our leaders to provide a brief commentary on each section.

The presented Report is the part of a broad information campaign aimed at Polish and European decision-makers. Taking advantage of the Polish presidency, we have issued a Manifesto in which we recall the most important and necessary conditions for the proper development of our sector. We are facing a shortage of manpower in factories, unstable demand and unfair imports. We have answers to everything and have prepared constructive proposals for change. Without waiting for the authorities to react, we are creating activities and structures to support industry teaching, we have prepared a program to promote the purchase of the most energy-efficient equipment, we are fighting against the gray market, which manifests itself in many fields, especially concerning environmental and consumer regulations.

I would like to take this opportunity to draw your attention to the comprehensive activities of APPLIA Polska in the fields of standardization, service and consumer relations, consultation of draft regulations or conducting market research. We talk about all this at the debates, conferences and congresses we organize, including the Home Appliance Congress, which, as every year, we organize in Lodz, May 22-23.

I cordially invite you to contact us directly and cooperate with us, and to read this Report.

HOME APPLIANCE INDUSTRY IN POLAND

The Polish home appliance industry is one of the key specializations of the Polish economy. It is also a significant branch of one of the largest manufacturing industries - the production of electrical machinery (about 25% of the value of the PKD 27 division). The sector is made up of a total of about 40 companies, with the 10 largest accounting for a significant portion of employment and sold production.

The production of household appliances in Poland in 2024 had a result similar to the previous year - more than 26 million units were produced. Production revenues reached 27 billion PLN (large and small household appliances, parts). The production of large household appliances in volume terms increased by 1%, and in value terms by about 2% to about 23.8 billion PLN. The production of large household appliances in the European Union was 55 million units in 2023, 10 million less than in the previous year. Poland's share of production is 36%. The decline in EU production is a result of, among other things, rising production costs, including energy, while non-EU producers have no such costs. There is an increase in imports of large household appliances throughout the EU.

According to public announcements, the number of Polish factories in Poland will fall to 32 by the end of 2025. Production at many factories in 2024, as in 2023, was below capacity. Over the past 8 years (2017-2024), the home appliance industry in Poland has invested in the development of modern production lines, digitization and automation of production processes, global and regional R&D centers, business, purchasing and IT centers more than 12 billion PLN.

We estimate that in 2024, home appliance companies invested more than 1.5 billion PLN, 30% less than the previous year.

36% SHARE OF POLISH HOME APPLIANCE PRODUCTION IN THE EU



• Wronki



35 factories

• Wrocław



• Zabrze



SHARE OF POLISH HOME APPLIANCE PRODUCTION IN THE EU



Washing machines and tumble dryers:
52%



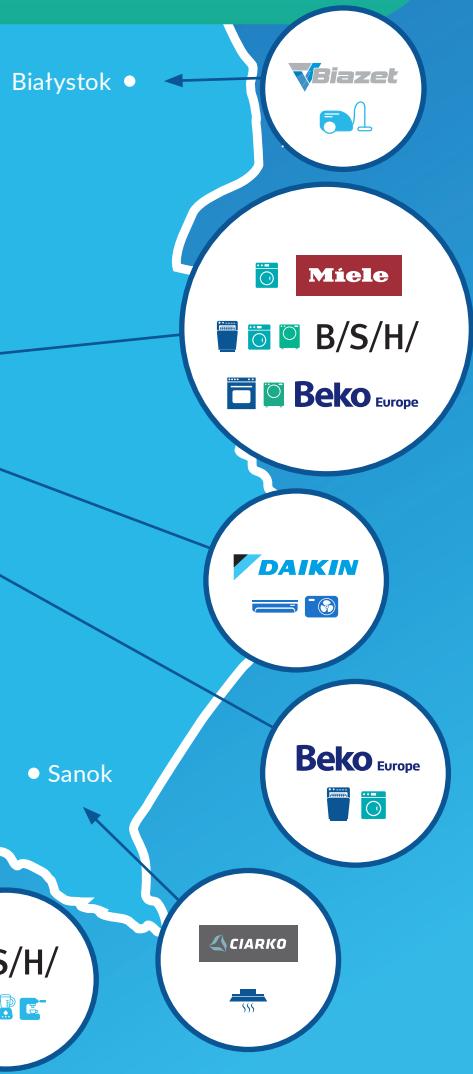
Dishwashers:
55%



Ovens:
33%



Refrigerators
30%



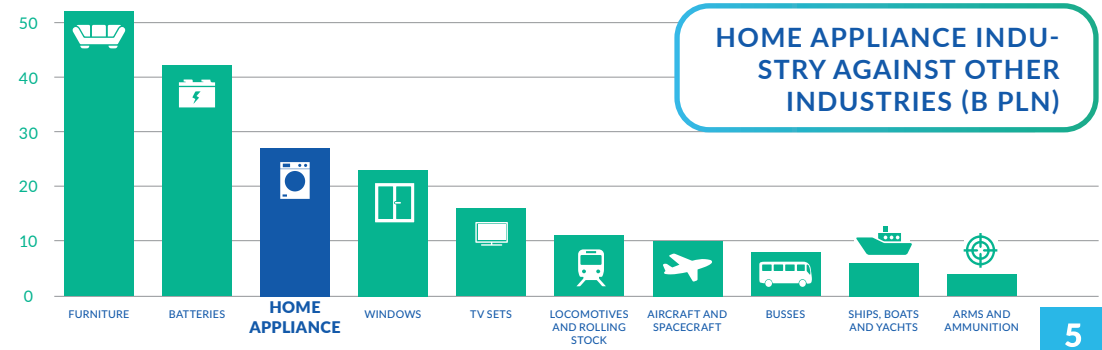
Tomasz Sadzyński

CEO of Lodz Special Economic Zone



The Lodz Special Economic Zone has been providing professional support and service to investment projects in central Poland for nearly 28 years. Every year we are at the top of Polish and European rankings. There would not be these achievements if we did not rely on the largest home appliance industry in our region. We are pleased that having as partners international giants who have chosen our location as a launching pad for their global expansion, we can also serve their sub-suppliers, i.e. small and medium-sized, often Polish companies. Importantly, and I myself pay special attention to this, hard manufacturing investments are followed by the development of research centers and shared service centers. We are currently operating in a time of constant change in every dimension. Our investors, especially in the home appliance industry, are affected by new challenges and unforeseen twists in economic reality. And it is openness and flexibility that allow us to find solutions in the most difficult moments, and the crises that occur along the way become only the next steps in the development process.

In a special way, I have to single out our recent “soft” activities, including the unique idea of setting up a Sectoral Competence Council with the home appliance industry, which will develop curriculum guidelines for industry education. This activity will create effective educational tools, prepare the home appliance sector for effective cooperation between education and industry. It is also important for manufacturing companies to cooperate with our Automation and Robotics Technical School and, already included in the calendar of the best industry events in Poland, our Home Appliance Congress co-organized with Applia Polska. It is good to have such partners!



EMPLOYMENT

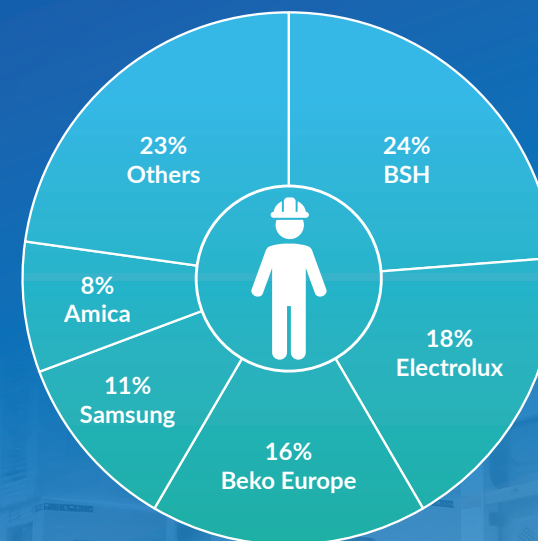
The domestic appliance industry directly employs about 32 thousand people in Poland, of which 26 thousand are directly employed in factories. According to estimates by the Home Appliance Association APPLIA, the entire domestic appliance sector generates employment of about 100 thousand people. This figure includes sub-suppliers of materials and services centered around the entire product life chain, including salespeople and employees of home appliance repair services. Employment at the 15 manufacturer companies stood at 28.9 thousand at the end of 2024, down 4% from the previous year.

The largest center of household appliance production in terms of employment is Lower Silesia - about 8.7 thousand people. The second is the Lodz region - about 7.1 thousand people.

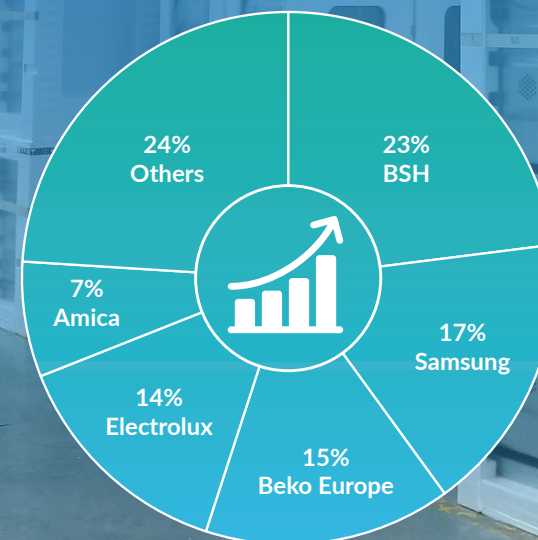
The largest employers in the home appliance industry are BSH Sprzęt Gospodarstwa Domowego, Electrolux Poland, Beko Europe, Samsung Electronics Poland Manufacturing oraz Amica. These companies employ 77% of people working in home appliances (industry and imports) and account for 76% of the revenue of all manufacturers and importers of home appliances. The combined revenue of the largest manufacturers, suppliers and importers from the production and sale of household appliances in Poland and abroad was about 41 billion PLN in 2023. About 15% of employees in the household appliance industry are temporary workers, who, due to the significant seasonality of household appliance production, provide work at selected times of the year. One-third of full-time employees work in so-called non-manual positions. Some of these positions fall directly into factories, but more than 6,000 people work in commercial departments as well as shared service centers and R&D centers. Employees of Polish R&D centers take an active part in the design of equipment, but also in the development of international quality and safety standards. Engineers from our country participate in the work of European and global organizations dealing with technical standards for equipment (CENELEC and IEC), where they represent the entire European industry.

The average industrial wage in 2023 was more than 8,000 PLN gross, 10% more than the previous year (quotient of wage costs and full-time employment in the 15 largest companies).

EMPLOYMENT (2024 r.)



REVENUES (2023 r., production and import)

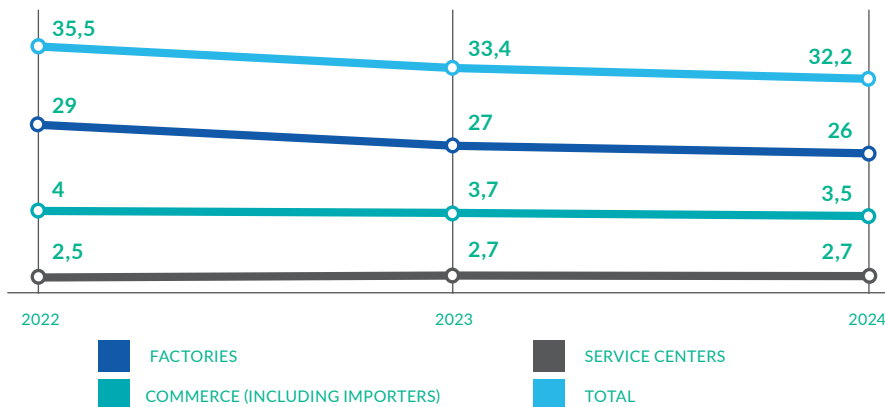


The domestic appliance industry in Poland is currently particularly vulnerable to a shortage of workers. Despite the location of most factories in or near large cities, companies are facing a shortage of workers, primarily production ones. But not only that, as shared service centers and research and development centers have been established in the locations of factories. There, specialists in many fields are in demand. At present, it is possible to observe a clear reduction in the availability of workers from Ukraine, who until now accounted for up to ninety percent of all foreigners. In our opinion, it is in Poland's economic interest to stop or delay the departure of Ukrainian citizens working for us.

Migration policy and a rapid and effective increase in the number of people in the labor market is crucial for all industries in Poland. It directly affects the level of investment, both by domestic and foreign manufacturers. Symptoms of weakness in the labor market in Poland are already being negatively perceived by the managements of producer companies. Failure to counteract these negative trends in the labor market may result in many negative decisions.

In 2024, APPLIA, together with the Employers of Poland and the Association of Polish Economists, created the report "Immigration. Rescue for the economy and social benefits" showing the urgent need for tools to mitigate the effects of the shrinking population in Poland. It is estimated that over the next decades more than 100,000 people will disappear from the labor market annually.

EMPLOYMENT IN THE HOME APPLIANCE INDUSTRY IN POLAND IN YEARS (THOUSANDS OF PEOPLE)



Kamil Sobolewski

Chief Economist at Employers of Poland



The labor market situation has risen to the ranks of major barriers to doing business. The decline in the number of people of working age will continue at an average rate of about 1% per year for the coming decades, leading to a decline in GDP growth and a slower increase in the well-being of Poles. Paradoxically, the number of people with higher education is increasing, and the demographic tsunami is hitting the shortage of production, warehouse, service workers with redoubled force. The shortage of workers is the coming unavailability of services, e.g.: care, construction, repair. It's a dependence on imported foreign goods. It's a risk that educated and aspiring Poles will be forced to do simple jobs instead of jobs adequate to their ambitions and expectations: managers, executives, researchers.



A higher retirement age and labor activation can help: the elderly, the ailing and their caregivers, for which we need well-organized public services. Investment and innovation can save us, increasing production despite the loss of labor or natural resources. The home appliance industry feels that the availability of workers is a necessary condition for investment. After all, without workers, investment may go abroad, which is also encouraged by high prices and the uncertainty of energy supplies. Immigration is the necessary salvation; newcomers already account for 7% of the workforce in

in Poland. Work fosters their integration, compatible coexistence in society and involvement in building local communities.

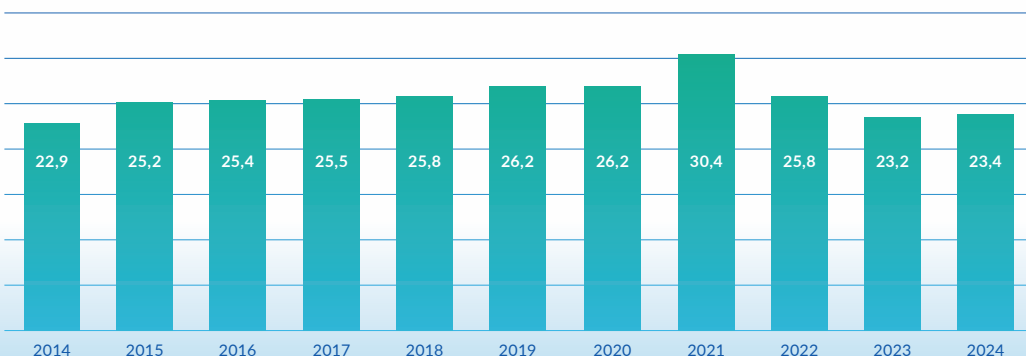
PRODUCTION

The value of the industry's sold production is about 27 billion PLN. 90% of this amount is accounted for by large household appliances.

Polish factories produced a total of more than 26 million units. Production increases were recorded in the so-called WET appliance categories, i.e. laundry, dishwashers and tumble dryers. Large household appliances accounted for the vast majority of the volume, with 23 million units. On a year-on-year basis, this is a 1% increase. Only three categories of equipment are produced in small household appliances in Poland: vacuum cleaners, coffee makers and blenders. The value of this production reached **1,2 billion PLN in 2024. Quantitatively, it is 3 million appliances**, two-thirds of which are coffee makers. Including the production of household appliance parts, the value of industrial output sold in 2024 is **about 26,9 billion PLN**.

By volume and value, washing machines continue to be the largest group in production, with 25% of the volume of large appliances **and 24% of the value** of all household appliance production in our country. Two other categories are dishwashers and refrigerators.

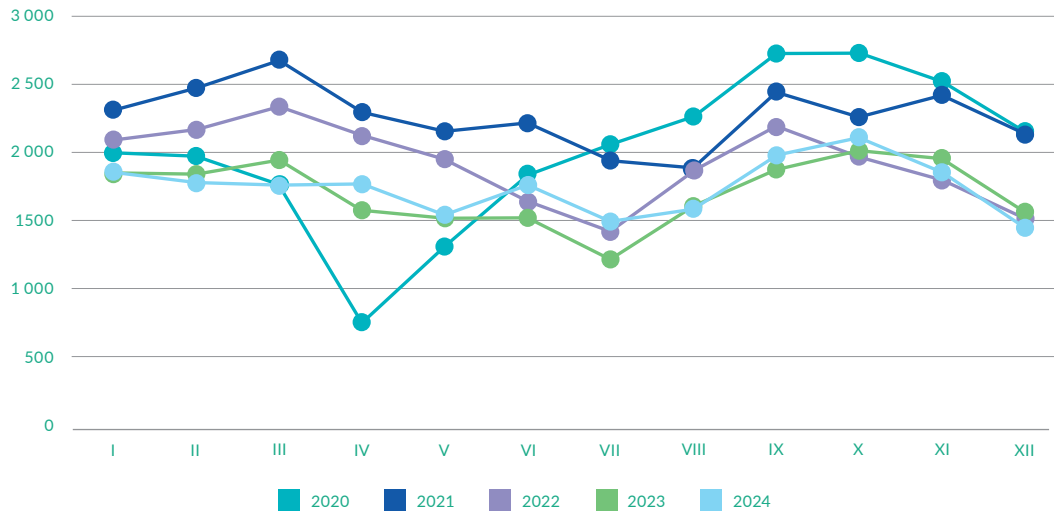
PRODUCTION OF LARGE HOME APPLIANCE IN POLAND (MLN PCS)



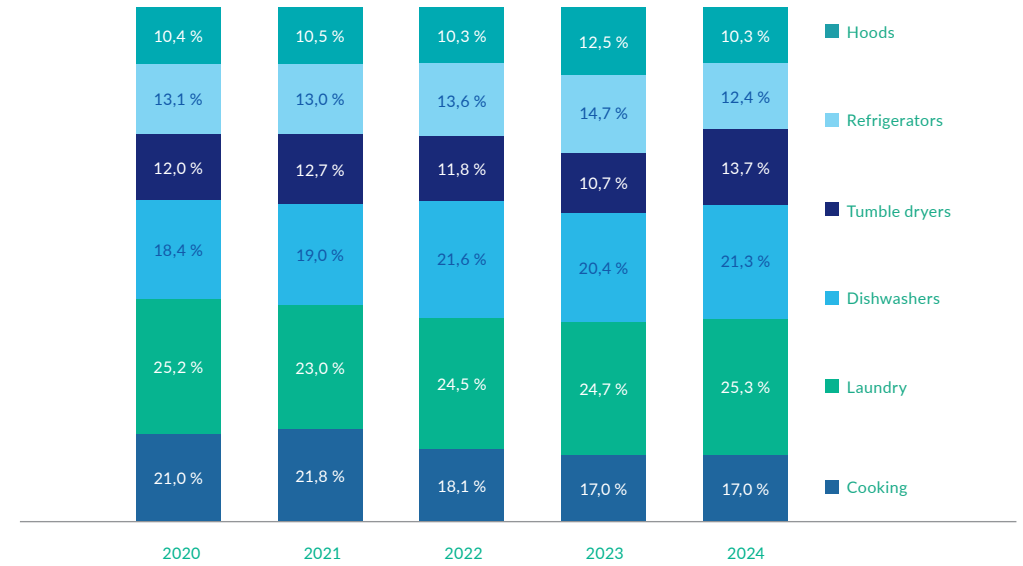
HOME APPLIANCE PRODUCTION IN 2024

	2024	Mln pcs	B PLN
WASHING MACHINES		5,9	6,4
COOKERS, OVENS, HOBS		4,0	2,8
DISHWASHERS		5,0	4,8
REFRIGERATORS		2,9	4,5
TUMBLE DRYERS		3,2	4,4
HOODS		2,4	1,0
SDA		3,0	1,2
PARTS		---	1,8
TOTAL		26,3	26,9

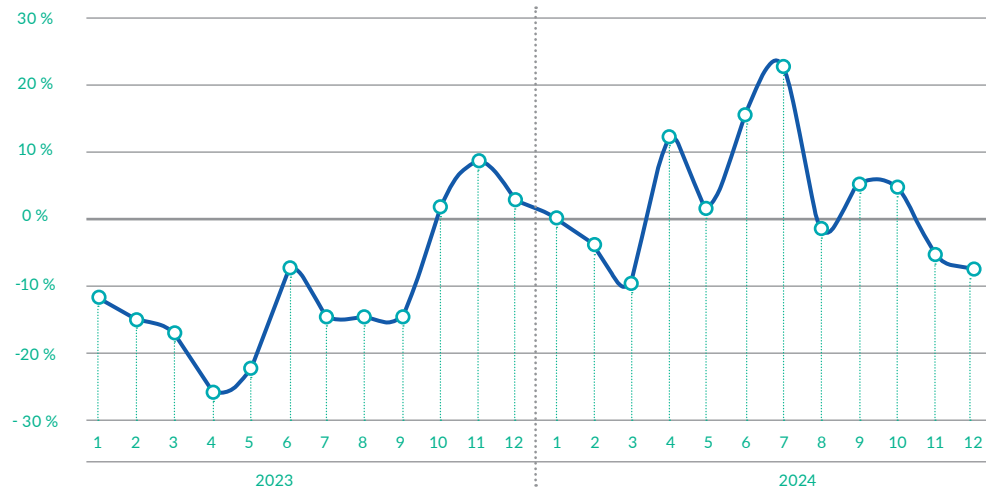
PRODUCTION OF LARGE HOME APPLIANCE IN POLAND, MLN PCS



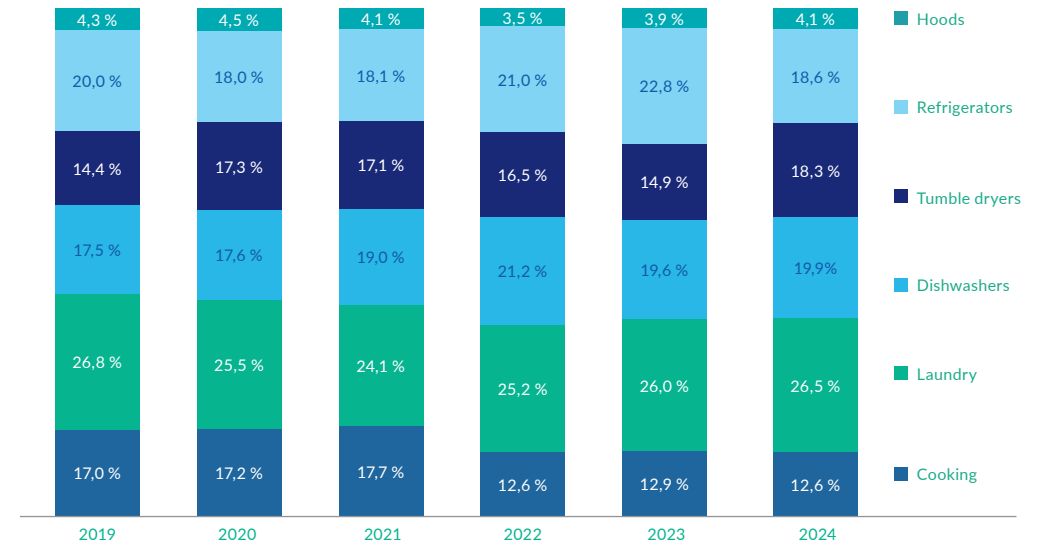
SHARES OF GROUPS OF LARGE HOUSEHOLD APPLIANCES IN PRODUCTION - PCS.



PRODUCTION DYNAMICS, PCS, Y/Y



SHARES OF GROUPS OF LARGE HOUSEHOLD APPLIANCES IN PRODUCTION - PLN



EXPORT

Large household appliances are Poland's specialty in exports as well. In terms of value, Poland ranks second in the world with a share of about 9%. Number one is China with a share of about 35%. In third place as of 2023 is Turkiye which has surpassed Germany. In terms of volume, Poland ranks third, behind Turkiye.

In 2024, Poland exported more than 24 million appliances, including almost 21.8 million units of large household appliances (93% of the production volume). The value of Poland's exports in home appliances (large and small) amounted to nearly 23 billion PLN. This value is 5% lower than the previous year. The value in euro currency remained at the same level as in 2023. It should be noted that the value of exports in some product categories exceeds the value of total production. This is due, among other things, to the fact that logistics-related costs are included in the price of goods.

More than half of Polish exports are shipped to the four largest EU markets (Germany, France, the UK, Italy).

Imports of household appliances to Poland increased by about 12% in value and by about 13% in volume terms in 2024. The largest increases took place in imports of washing machines with 6-10 kg load (+48% y/y), refrigerators over 340l (+47% y/y) and dishwashers (+24% y/y). For the first two categories, the changes in the statistical average price per import unit are -11% and -15%, respectively. In value terms, imports of large household appliances to Poland in 2024 amounted to 4.6 billion PLN, 12% higher than last year. According to official data, the value of small home appliance imports to Poland amounted to 12 billion PLN - according to the authors of APPLIA's analysis, these data confirm the growing importance of Poland as a logistics hub for the entire region. Also, Polish branches of household appliance importers are responsible for the sales of small appliances throughout Central and Eastern Europe.

WORLD EXPORTS OF LARGE HOME APPLIANCE

1 CHINA 35%

2 POLAND 9%

TURKIYE 8%

GERMANY 8%

Share in the exports value

POLISH EXPORTS IN THE WORLD



31%

Tumble dryers
- no. 1



19%

Dishwashers
- no. 1



16%

Washing machines -
no. 2

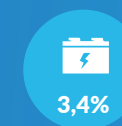
LEADERS OF POLISH EXPORTS (SHARE OF EXPORTS OF THE TOTAL ECONOMY):



CAR PARTS



FURNITURE



ACCUMULATORS



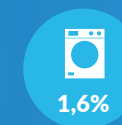
PASSENGER VEHICLES



TRANSPORT VEHICLES



DATA PROCESSING EQUIPMENT



HOME APPLIANCE



TV SETS AND LCD MONITORS

THE MOST IMPORTANT MARKETS OF POLISH EXPORTS AND DIRECTIONS OF IMPORTS

40%

China

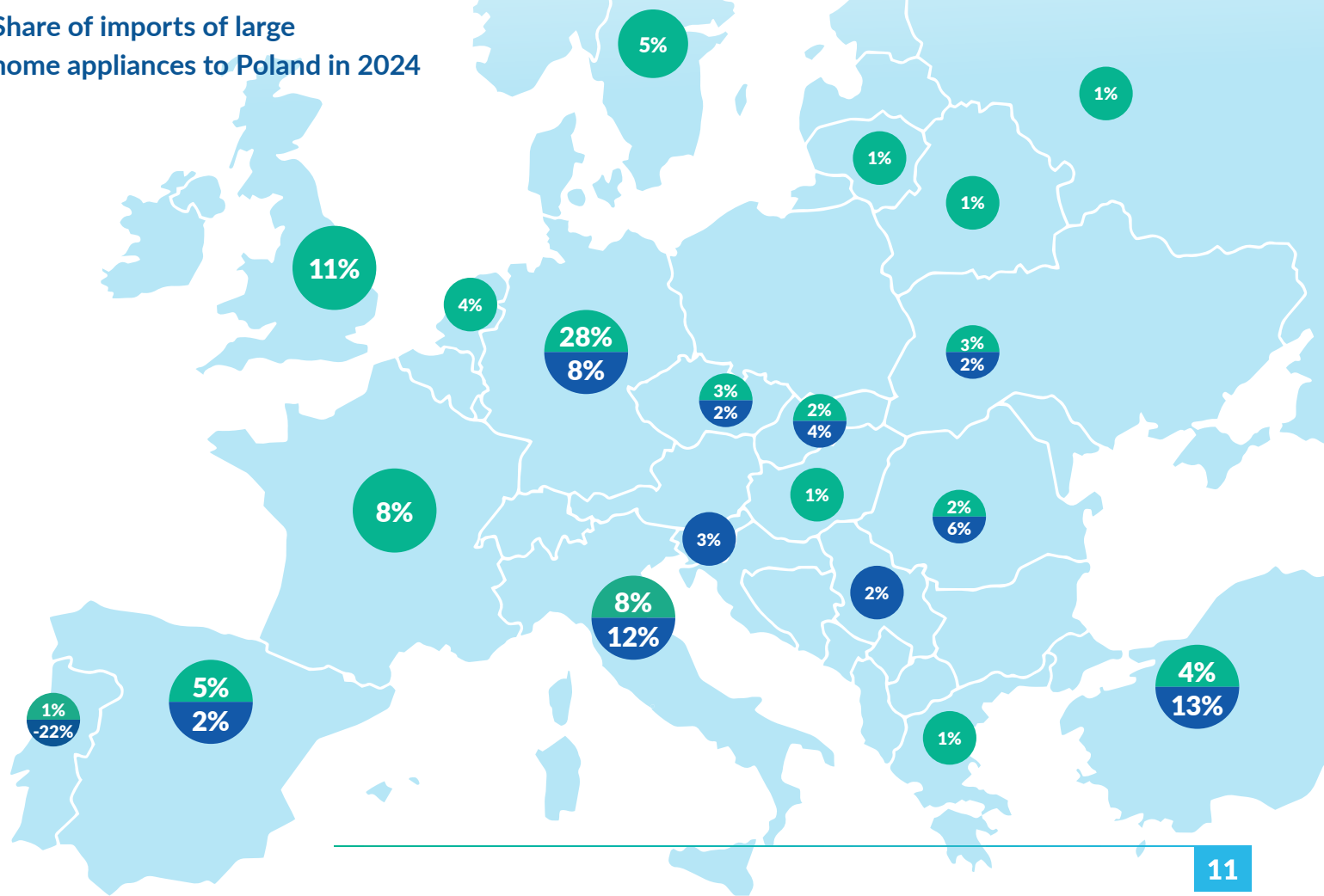
2%
Malaysia

2%
Korea

- Share of exports of large home appliances from Poland in 2024
- Share of imports of large home appliances to Poland in 2024

CHANGE COMPARED TO 2023

	EXPORT	IMPORT
CHINA	-	+54%
ROMANIA		+16%
GERMANY		
TURKIYE	-	+5%
UK	0%	-
ITALY	-5%	-12%
SWEDEN	-11%	-
SPAIN	-9%	-
FRANCE	-14%	-



HOME APPLIANCE MARKET

According to APPLIA estimates, consumers spent nearly 19 billion PLN on household appliances in 2024 (value including VAT). The net figure is 15.4 billion PLN, 9% more than in 2023. This is above the consumer price index, which was 3.6% in 2024. The positive result is largely attributable to strong double-digit growth in the small household appliance segment. 1/3 of consumer spending on household appliances is small appliances and this share has been growing over recent years. Sales value growth in large household appliances was at 5% over last year.

Monitored by the Central Statistical Office, retail sales in the home appliances, consumer electronics and lighting sectors in 2024 were negative except for October. By the end of the year, the share of online sales in these three segments exceeded 21%.

The wholesale sales dynamics for the home appliances and consumer electronics industry (an indicator common to both sectors) followed a similar pattern. For this category, the price growth rate index fell from 7% at the beginning of the year to minus 2% at the end of 2024.

Virtually throughout 2024, we have seen negative, albeit fairly stable, consumer sentiment. The index announced by the Central Statistical Office at the end of the year stopped at a value of minus 16, which means that out of 100 respondents, 58% rate their purchasing ability pessimistically. At the same time, the largest number of consumers (almost 60%) say they are saving systematically, postponing their investment decisions for the future.

The home appliance market is also shaped by the situation in the housing market. In 2024, 9% fewer housing units were completed than a year earlier, with a total of 200,000.

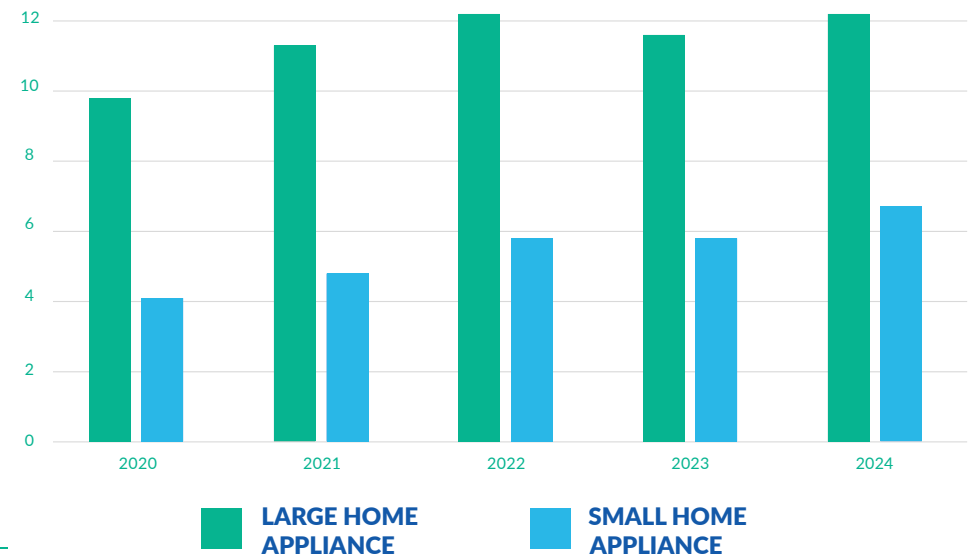
Michał Grzeźliński

Country Director – Poland & Baltics, Beko



According to forecasts, 2024 proved to be a challenging year for the entire home appliance industry in Poland. Although the market's rate of decline has clearly slowed down, it is still difficult to talk about a real recovery, which is also unlikely to occur in the first half of 2025. Rising energy costs and the effects of recent inflation are significantly influencing Poles' purchasing decisions, increasing interest in promotions, sales and installment programs. At the same time, there is growing awareness of the importance of energy efficiency and technologies that promote resource conservation - energy and water - in selected appliance categories. Despite economic difficulties, consumers remain demanding, prioritizing quality and more willing to choose products from reputable brands that combine functionality with durability.

CONSUMER SPENDING ON HOME APPLIANCES (B PLN GROSS)



HOME APPLIANCE DISTRIBUTION

The vast majority of household appliance sales to the customer (known as sell-outs) in Poland are made by the five largest distributors, which own more than 1,600 stores and employ nearly 22,000 people. According to official reports, these companies generated revenue of 36.4 billion PLN in 2023.

The product range of many companies goes beyond household appliances and consumer electronics, so it is difficult to estimate the sales value of household appliances alone in these companies.

In addition to selling products, the aforementioned chains also sell numerous services, the value of which already exceeds 10% of their revenues.

The share of online sales in the household appliances/consumer electronics and lighting sales segment exceeds 20% (Central Statistical Office data). The aforementioned chains have a strong presence in this group. An additional online channel is led by online platforms such as Allegro and Amazon.

In 2024, the share of people buying online was 67%, which ranks Poland 18th in the European Union (making a purchase in the last 12 months, the EU average is 71%). Broken down by province, the capital district is the best with 81%. The West Pomeranian Voivodeship is the least likely to make online purchases, at just under 58%. The survey shows that 68% of people use the Internet to search for information about goods or services. At the same time, 8% have never used the Internet (the EU average is 5%).

In 2024, APPLIA has worked to ensure fair competition in the face of increasing cases of household appliances being sold on international online platforms that do not meet basic product safety requirements or fail to contribute to the financing of the country's electro-recycling system.

LARGEST DISTRIBUTORS OF HOME APPLIANCES AND CONSUMER ELECTRONICS IN POLAND (DATA FOR 2023)

	REVENUES (B PLN)	EMPLOYMENT (PEOPLE)	NO. OF STORES (2024)
MEDIA EXPERT (TERG S.A.)	18,4 (for the period IV'23-III'24)	11 659	600
EURO-RTV-AGD (EURO-NET SP. Z O.O.)	10,6 (for the period I-XII'23)	6852	330
MEDIA MARKT (MEDIA-SATURN HOLDING SP. Z O.O.)	4,4* (for the period X'23-IX'24)	2 817	85
NEONET (NEONET S.A.)	1,5 (for the period IV'23-III'24)	417	200
MAX ELECTRO (GT GROUP TOMASZEK SP. Z O.O.)	1,5 (for the period I-XII'23)	135	441
TOTAL	36,4	21 880	1656

Source: National Court Register; * APPLIA estimates in the absence of reports in the NCR



SALES - LARGE HOME APPLIANCE

The year 2024 ended with a 6 percent increase in the volume of household appliances sold in wholesale sales of large household appliances. Monitoring of these sales (so-called sell-in sales) has been carried out by APPLIA Poland for more than 20 years.

Last year, 6.7 million large appliances were sold, and this is more than in 2019 preceding the pandemic that disrupted the market for several years. In value terms, the market grew by more than 5% reaching a net value of 9.7 billion PLN.

The largest categories of large household appliances are laundry with a share of 22% in units, and refrigeration with 19%. By value, they are 23% and 20%, respectively. Sales hits were undoubtedly clothes dryers, with sales close to the 2021 record of 330,000 units. (+30% y/y). Freestanding microwave ovens also recorded a 30% growth rate (460 thousand units). Categories with declines in sales were cookers (-3%), built-in refrigerators (-2%) and hobs (-1%).

The share of built-in appliances declined in 2024 and accounts for 38% of the volume of large household appliances.

Mariusz Chołyst

General Manager, Electrolux Poland



2024 has been another challenging year for our industry. The home appliance market in Poland is still waiting for a rebound, which is not helped by high inflation, interest rates and a correction in the housing market. However, the demanding environment also has positive aspects - it forces manufacturers to work on the quality of their offerings and customer service. Companies that, like ours, have used this time to improve operations and build a distinctive position in the market are poised for further growth when the trend reverses, with the first small increases expected as early as 2025. By focusing on reducing energy and water consumption of appliances and creating innovative solutions that make it easier for users to live a sustainable lifestyle, Electrolux is meeting the expectations of a growing group of consumers who pay attention to efficiency, functionality and the environmental impact of the appliance. Therefore, we think that the home appliance market in our country has promising prospects ahead and we look to the future with cautious optimism.

SALES OF LARGE HOME APPLIANCE IN POLAND

MLN PCS	1,37	1,48	0,98	0,90	0,73	0,62	0,34	0,33	6,75
% Y/Y	+ 1 %	+11 %	+ 1 %	+ 3 %	- 1 %	+ 17 %	+ 5 %	+ 30 %	+ 6 %
	REFRIGERATORS & FREEZERS	WASHING MACHINES	COOKERS & OVENS	DISHWASHERS	HOBS	MICROWAVE OVENS	HOODS	TUMBLE DRYERS	TOTAL

SALES - SMALL HOME APPLIANCE

The market for small household appliances grew by about 16% in value in 2024. According to APPLIA estimates, it represents a net worth of about 5.5 billion PLN. About 13 million different appliances in this segment were sold annually.

The largest categories in small appliances are coffee makers and vacuum cleaners. Together they account for about 50% of the market value. By volume, coffee makers recorded double-digit sales growth (+16%).

Undoubtedly, the sales hit in small household appliances has been fat-free frying equipment, the so-called air fryer. More than 400,000 units of this equipment were sold in Poland, i.e. 2 times more than a year ago.

Also worth noting are the volume increases in the largest categories. Battery vacuum cleaners recorded growth of 30%. The category of so-called food preparation, i.e. blenders and food processors, was similar. In 2024, the category that exceeded sales of 1 million units was ironing equipment (irons, steam generators, steamers). Clothes steamers already account for 1/3 of this category.

The only category that saw a decline in both volume and value is built-in coffee makers (-9%).

Marcin Głodek

District Leader North-East, Versuni

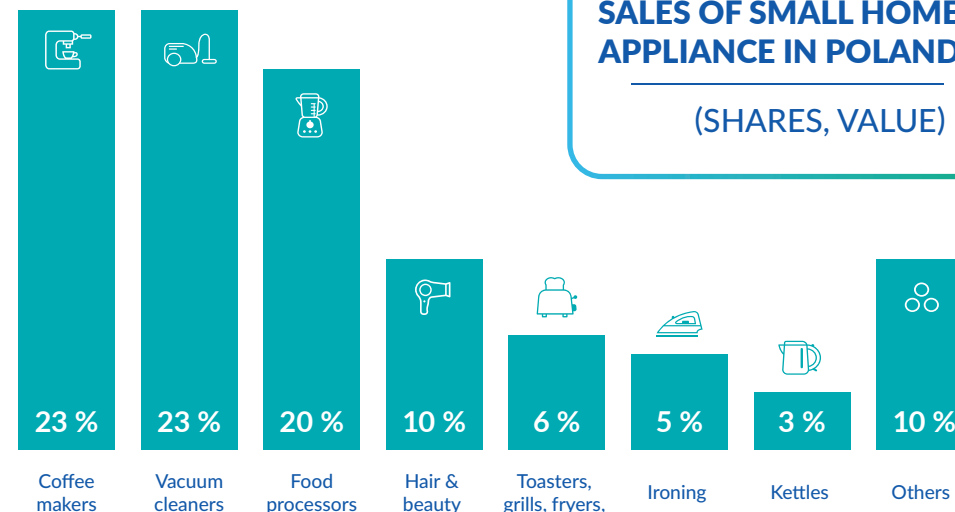


In 2024, the market for small household appliances in Poland recorded stable growth, despite persistently high inflation and uncertainty related to the geopolitical situation. Although consumer sentiment deteriorated somewhat, favorable labor market conditions and rising wages helped keep demand high. An increased tendency to save, however, could affect slower growth in 2025.

The past year unquestionably belonged to the airfryer category. Cordless vacuum cleaners and clothes steamers were also in high demand. All of these devices respond to the increasingly apparent needs of consumers: convenience, time saving and efficiency in everyday domestic life.

SALES OF SMALL HOME APPLIANCE IN POLAND

(SHARES, VALUE)



HVAC SALES MARKET

HVAC sector (heating, ventilation, air conditioning) are appliances that are heavily dependent on seasonal sales.

In addition, heat pumps are overwhelmingly shaped by a program to finance their purchase with public funds, that is „Czyste Powietrze” („Clean Air”). Estimates put sales under the program at up to 80% of the market. According to official data, the program covered more than 50,000 units, about 35% less than the previous year. The main factor behind the drastic decline was a change in the requirements for this category under the Program. The manufacturers' obligation to retest the devices and the requirement to make confidential test reports public led to the removal of about 90% of the models from the list of pumps eligible for subsidies. The Program's administrator, the National Environmental Protection and Water Management Fund, suspended the operation of „Czyste Powietrze” in November 2024, further aggravating the heat pump market. The program is scheduled to open in April 2025.

Poland, thanks to large investments in heat pump factories, can become a leader in the production of these devices in the EU. The value of Poland's exports of heat pumps to other countries amounted to 790 million PLN in 2024.

HVAC IMPORT TO POLAND (MLN PLN)

	2020	2021	2022	2023	2024
HEAT PUMPS	460	696	1533	1319	514
AIR CONDITIONERS	1392	1497	2773	2090	1316
WATER HEATERS	307	434	565	512	440

Paweł Bišta

Head of East Europe Northern Countries
in Ariston Polska



Recent years have been a very turbulent time for the HVAC industry in Poland and across Europe. Russia's aggression against Ukraine and the resulting suspension of gas supplies triggered an artificial, vastly overestimated demand for electric heating equipment, mostly heat pumps. Distributors and installers built up inventories to meet the surprisingly high demand. However, after only a dozen months or so, when the supply of blue fuel proved to be unthreatened and the electricity-gas price ratio not so preferential, the market verified the demand for heat pumps. The Polish HVAC market was also not helped by the misuse of subsidies from the „Czyste Powietrze” Program. Their intense communication by the industry led to the suspension of the program and the start of work on its new version. The whole situation led to huge pump stockpiles at both manufacturers, distributors and even installers.

We therefore face several challenges at the beginning of 2025:

1. Missing, at least for a few months, the subsidy program „Czyste Powietrze”
2. Still fairly high inventory levels at distribution
3. Price polarization in the heat pump market

Nevertheless, in the medium term, heat pumps, as devices that are part of the European trend of energy transition, will undoubtedly become the primary choice of investors.

SMART HOME AND CONSUMERS

Smart appliances are internet-connected devices that, using external resources (including artificial intelligence), provide new functionalities such as remote technical support and automatic analysis of the device's condition, assistance in selecting and cooking a dish, help in making a shopping list, or recognizing obstacles while vacuuming. Artificial intelligence also manages energy consumption, thereby improving the energy efficiency of the equipment.

According to estimates, household penetration of smart appliances (not just household appliances) will reach 10% in 2025. By 2029, it could reach 30%. The number of households with smart appliances is expected to reach about 4 million by the end of the decade.

Revenues in the smart device market are expected to reach \$284 million in 2025. The estimated annual growth rate will be 12%, resulting in a projected market size of \$445 million in 2029.

According to the latest data, artificial intelligence is becoming increasingly popular in businesses. In 2024 13.48% of companies in the EU were using AI technologies, and for large companies the rate was 41.17%. For Poland it is 6% (penultimate place in the EU) and 33%, respectively.

Piotr Stelmachów

VP Head of Consumer Electronics,
Samsung Electronics Polska



The year 2024 was definitely marked by the rapid development of artificial intelligence in household appliances across the industry. We have conducted a survey in this regard and we know that the majority of Polish (59%) have a positive attitude towards artificial intelligence in household appliances, and among 70% there is a belief that AI makes daily chores easier and less time-consuming, so they can have more time for pleasure. And that's what AI in household appliances is all about - first and foremost - making everyday life easier. Of course, when talking about AI, you can't leave out smart home technology. Refrigerators, washing machines, dryers, vacuum cleaners, ovens learn our habits and help increase functionality, optimize energy consumption at home or improve our safety. And it is these aspects using modern technology - that we will improve in 2025.

HOME APPLIANCE IN OUR HOMES

HOUSEHOLDS AND HOUSING IN NUMBERS

According to forecasts, we currently have about 14.7 million households in the country (projected number of households according to the Central Statistical Office).













There are 15.7 million apartments in Poland, of which about 1 million are unoccupied. The average area of an apartment is about 75 sqm. 60% of them are connected to the gas network. A similar percentage of apartments use the local heating network, and 94% of apartments have a bathroom.

Last year, 200,000 apartments were completed, 9% less than in 2023. A total of 1.1 million new apartments were built in the last five years.

HOME APPLIANCES IN POLISH HOMES

There are about 200 million units of home appliance in operation nationwide, of which more than 60 million are large household appliances. Every year, they provide convenience and save time, electricity and water.

According to APPLIA estimates, home appliances consume about 50% of electricity in Polish households, i.e. 14 TWh.

APPLIANCE GROUP	Saturation of households with equipment	Household equipment with home appliances [mln pcs]	Annual energy consumption [TWh]
 REFRIGERATORS	101 %	14,9	4,7
 HOODS	51 %	7,5	0,6
 WASHING MACHINES	97 %	14,2	1,2
 OVENS/ COOKERS	84 %	12,3	1,2
 ELECTRIC HOBS	22 %	3,2	1,7
 FREEZERS	12 %	1,7	0,7
 DISHWASHERS	57 %	8,3	0,8
 TUMBLE DRYERS	10 %	1,5	0,3
 VACUUM CLEANERS	98 %	14,0	0,3
 COFFEE MACHINES	30 %	4,4	0,3
 MICROWAVES	70 %	10,2	0,9
 FOOD PROCESSORS	70 %	10,3	0,1
 OTHER SMALL HOME APPLIANCE	-	98	1,0
TOTAL	-	200	13,7

USAGE AND REPAIR

USAGE

Millions of household appliances do a huge amount of work every day, e.g. 8 million dishwashers perform more than 2 billion wash cycles washing about 25 billion dishes. Washing machines wash about 17 million tons of clothes every year. Refrigerators store about 16 million tons of food each year, extending freshness and reducing food waste. Vacuum cleaners clean an area equal to 50,000 square kilometers, or about 17% of the country's area, every year.

Usage is also the most important stage in terms of environmental impact - 80% of the carbon footprint of large household appliances is generated at this stage. It is extremely important to install equipment correctly, use it in accordance with manufacturers' instructions, including maintenance, as well as repairing defects.

Manufacturers equip appliances with detailed instruction manuals - nearly 1,500 tons of paper are used to create more than 15 million booklets each year. Unfortunately, the vast majority of them are not read by users, which in many cases even leads to equipment failure.

REPAIR

An integral part of the Polish home appliance industry is the appliance repair network. After-sales customer service is divided into that within the warranty period, usually 2 years, and the post-warranty period. With the statistical assumption that 1% of large household appliances in our homes require repair every year, it is easy to calculate that at least 2,000 appliances are repaired every day. Professional household appliance repair technicians are needed for this trade. We estimate that about 2 thousand people in Poland are engaged in household appliance repair. They work extremely effectively - according to a pan-European survey, more than 90% of repair calls end with the final repair of the appliance.

APPLIA has been running a project to promote the occupation of Home Appliance Repair Technician since 2020, which includes the preparation of teaching materials for this specialization in schools - www.zostanTechnikiemAGD.pl. We also cooperate with the Polish Association of Home Appliance Service Providers.

In recent years, the European Union has worked to create a so-called "right to repair. The effects of the legislative changes are the index of reparability of appliances, which will begin to appear on energy labels for household appliances from 2027. Also at that time, the obligation to repair equipment after the end of the warranty period will come into force.

Joanna Gałuszka-Szarzyńska

Pani AGD



Working in the online space, I often find that we don't take advantage of the capabilities of the equipment we buy, such as steam in a washing machine or pyrolysis in an oven. This may be due to a poorly chosen appliance or the fact that we don't read the instruction manual.

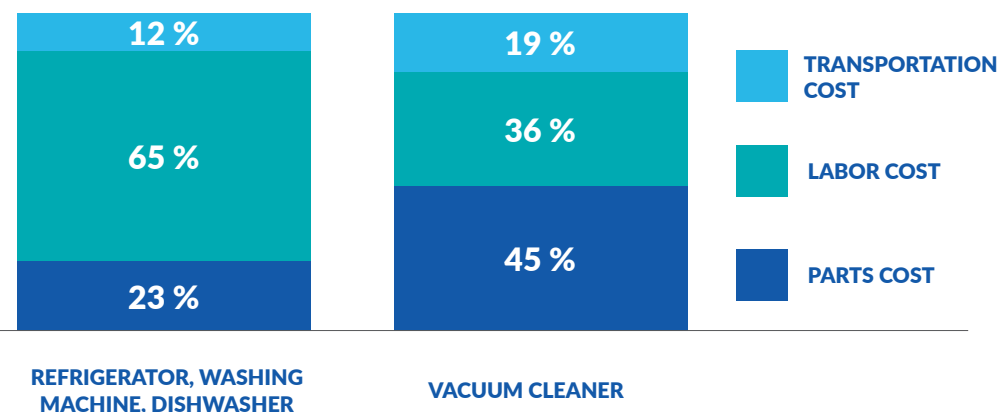
We don't take care of home appliances. We are not aware that this affects the life of the equipment. We think that a dishwasher or washing machine cleans itself while doing what it was designed to do.

We treat habits as sacred. Technological innovations in a smartphone? Great! In a washing machine for what? It will probably break faster! The prevailing view is that home appliances should be simple and reliable. Talk of changing habits and ecology remains a hot potato. It's like an attack on our freedom!

I'm concerned about the online trend - lifehacks that can destroy equipment.

We need a strong counterbalance - clear instructions and a greater online presence of experts.

REPAIR COSTS OF LARGE HOME APPLIANCES IN 2023



ESG IN HOME APPLIANCES

ESG (short for Environmental, Social and Corporate Governance) refers to a way of managing a company that takes into account three non-financial aspects - environment, social responsibility and corporate governance.

The home appliance industry has been at the forefront of this concept for years, especially in the environmental field. It plays a considerable role in implementing the EU's pro-environmental goals of reducing raw material consumption at every stage of a product's life, starting with design and logistics through sales and service, and ending with recycling. Much more important from the perspective of caring for the environment, however, are the home appliances themselves. More than 80% of their climate impact is due to their very use. By providing more efficient appliances and supporting their users with professional repair services, home appliance companies are supporting the realization of sustainable consumption.

One of the cornerstones of the ESG is the UN's 17 Sustainable Development Goals 2030. The entire home appliance industry and each company in the sector individually support the implementation of about 10 of them.

For the home appliance industry, ESG is several topics that we have been pursuing for years. These include the closed-loop economy, extended producer responsibility, including financing for the collection and treatment of electro-waste, eco-design requirements, energy labels, the right to repair, CSR, reporting on environmental and social parameters for both companies and products. We discuss each of these in detail in this report.

Robert Stobiński

Vice President of Amica S.A.



The year 2024 was a key year for companies in terms of ESG, as from that year many of them (including those in the home appliance industry) are required to report on sustainability.

In order to meet the requirements of the CSRD and the increasing expectations of customers in this area, companies have been grappling with complex issues such as carbon efficiency, climate change adaptation, energy efficiency of equipment or value chains.

The next few years will bring challenges in the circular economy or eco-design. It will also be a time when companies will have to integrate sustainability into their business strategies.



PRODUCTION AND ECODESIGN

Home appliance manufacturing like many industries in the EU is systematically developing a Closed Loop Economy model. By design, this model involves minimizing resources and reusing equipment and raw materials.

The first stage of Closed Loop Economy is the process of component design and supply. The home appliance industry has been subject to a number of requirements related to sustainable production requirements for many years. These consist of rules specifying what substances cannot be used in equipment for reasons of human health and environmental safety. For the past 20 years, there has been no Freon or even f-gases, responsible respectively for depleting the ozone layer and causing the greenhouse effect, in manufactured refrigerators.

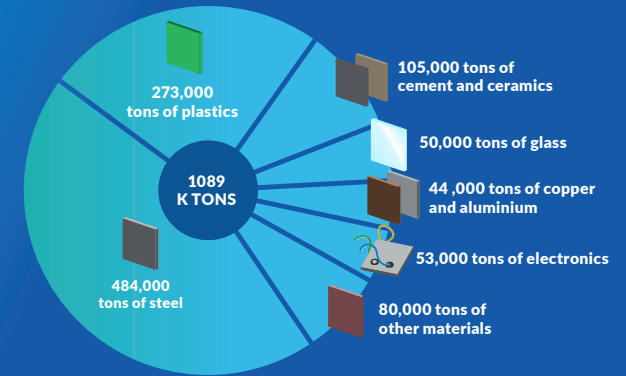
Within the supply chain, household appliance manufacturers purchased about 1.1 million tons of raw materials and components in 2024. Steel accounted for the largest share of tonnage - about 44%. ¼ was plastic components. All companies that are sub-suppliers to household appliances already participate in the ESG reporting.

The home appliance industry also implements the EU's so-called eco-design requirements, which are updated and tightened every few years. Over the past two decades, ecodesign requirements have led to the phasing out of inefficient appliances and given impetus to the introduction of innovative solutions that ultimately save electricity and water. The latest generation of ecodesigns introduces so-called Closed Loop Economy requirements, which go further than energy savings. They concern the obligation to make technical documentation available to service technicians or to provide spare parts for up to 10 years after the end of production.

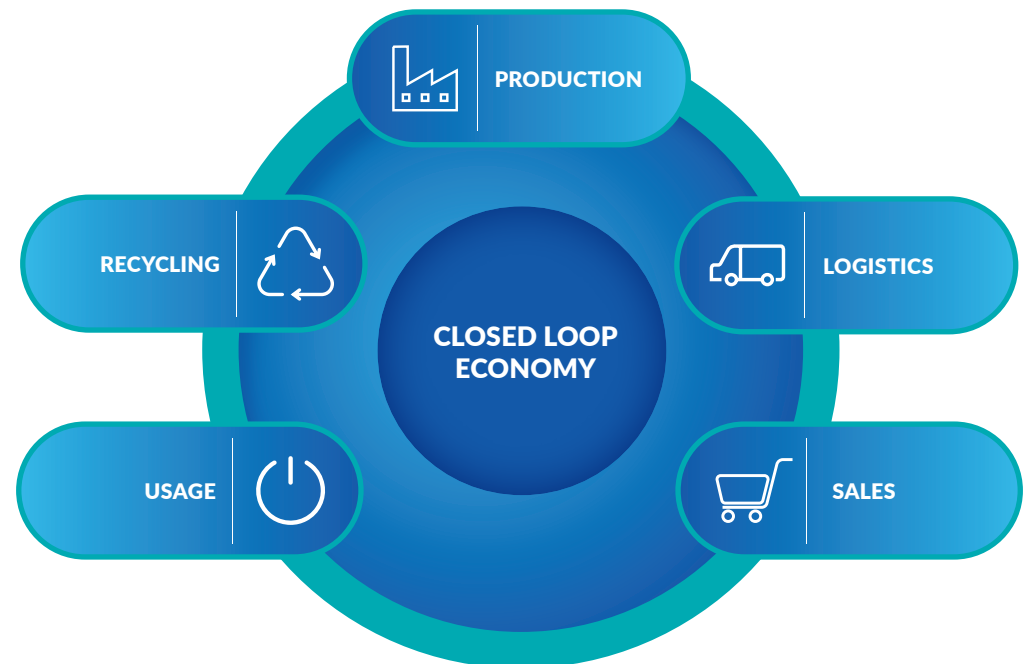
As of July 1, 2025, new ecodesign requirements will apply to tumble dryers.

MATERIALS IN THE PRODUCTION OF HOME APPLIANCES IN POLAND - 2024

**TOTAL:
1089 K TONS**



From this point on, among other things, the new "F" class will be withdrawn from production, and there will be an obligation to deliver spare parts within a maximum of 15 working days, access to repair and maintenance information, and a requirement to update computer software and firmware for at least 10 years.



ENERGY EFFICIENCY OF THE EQUIPMENT

Home appliances with the largest share of household electricity consumption fall under the energy labeling system. These include refrigerators and freezers, washing machines and washer-dryers, dishwashers, tumble dryers, ovens and cookers, and hoods.

Energy labels are based on a system of standardization that allows comparing products from different manufacturers in terms of energy efficiency, noise and other elements on the label. Each higher energy efficiency class represents a reduction in electricity consumption of 10 to 20%. An example refrigerator in the highest A class now uses four times less electricity than the most popular A class refrigerator 20 years ago (110 kWh vs. 440 kWh).

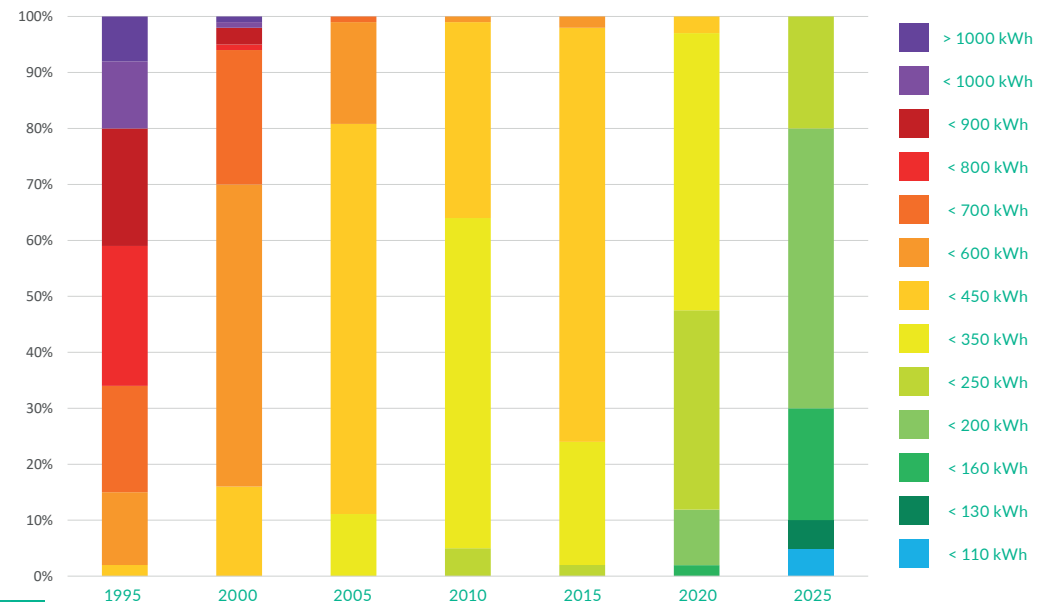
According to a 2025 analysis by APPLIA and the National Energy Conservation Agency, more than 80% of the environmental impact (carbon footprint) of household appliances is generated during their years of use by consumers. This is important when deciding whether to replace or repair an outdated appliance.

Large home appliances still represent a significant potential for electricity savings in Poland. Thanks to significant technological advances, today sales are dominated by energy classes that consume only about 10-20% of electricity compared to appliances available 25 years ago. According to APPLIA estimates, up to ¼ of refrigerators in homes are more than 10 years old. Looking globally, the 14 million refrigerators in Polish homes currently consume about 4.5 TWh. Replacing them with more innovative equipment would save as much as 3 TWh. Other categories of large home appliances consume smaller amounts of electricity, but considering the number of appliances in homes, these figures should not be underestimated.

In 2021, a rescaling process began to remove the pluses on energy labels. As a result, models in the highest class A+++ went to class C or other, and those from class A+ even to class G. Classes A and B were reserved for completely new, even more economical models. The change covered the following groups of household appliances - washing machines, washer-dryers, refrigerators and freezers, wine coolers and dishwashers. In 2025, tumble dryers will join the list.



REFRIGERATOR SALES BY ELECTRICITY CONSUMPTION



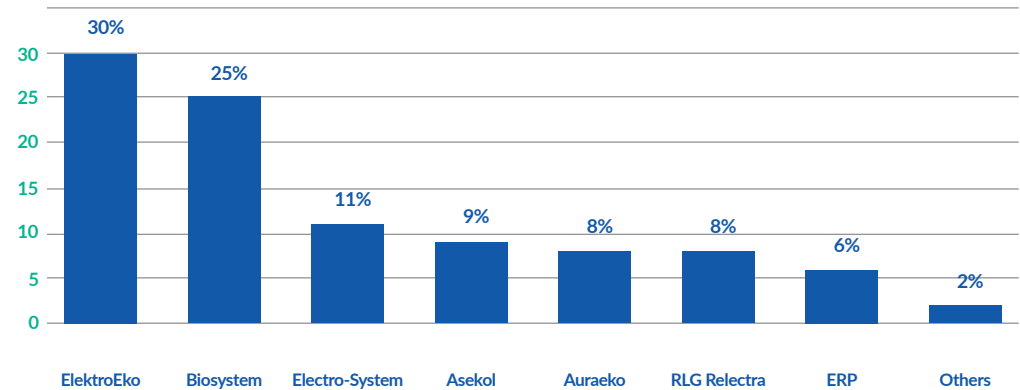
HOME APPLIANCE RECYCLING

The recycling stage closes the Closed Loop Economy in home appliances. The sector has been implementing the so-called Extended Producer Responsibility with dedicated regulations on waste electrical and electronic equipment (WEEE) for 20 years. Among other things, EPR consists of manufacturers financing the collection, processing and recovery of their used products. It's also about information obligations and reducing the resources used in production.

Home appliances account for more than half the weight of new appliance sales and collection of used ones under the WEEE Act (excluding photovoltaic panels). According to APPLIA's estimates, about 345,000 tons of new household appliances (small and large) appeared on the market in Poland in 2024, up 10% from the previous year. The EPR in its current form imposes an obligation on companies to finance recycling at 65% of the weight of equipment sold. For home appliance, introducers in 2024 were required to collect and recycle about 225,000 tons of waste appliances (based on average sales in 2021-23). The obligation for 2025 will be 219 thousand tons, 2% less than for the previous year. For large homeappliances, the decrease will be about 4%, for small homeappliances the obligation has increased by about 6%.

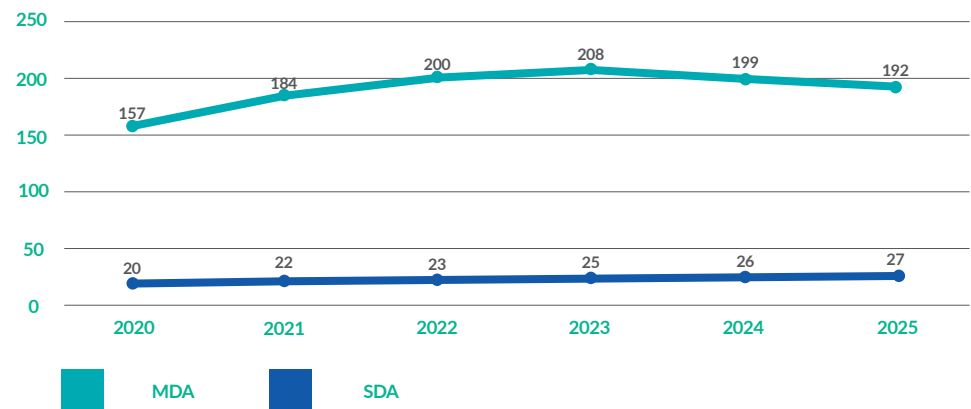
According to data from Polish Waste Database, in 2023, recovery organizations fulfilled a collection obligation on behalf of introducers of 556,000 tons. (99% of the total collection funded by introducers). APPLIA Polska on the occasion of the 20th anniversary of the WEEE system, has prepared a comprehensive market report summarizing the development of the electro-waste market. The document also shows the collection results and finances of recovery organizations and processing plants.

PARTICIPATION OF RECOVERY ORGANIZATIONS IN WEEE COLLECTION IN 2023



Source: Report of APPLIA Polska – 20 years of the WEEE market

WEEE COLLECTION OBLIGATION FOR HOME APPLIANCES (THOUSANDS OF TONS)*



*APPLIA's estimate

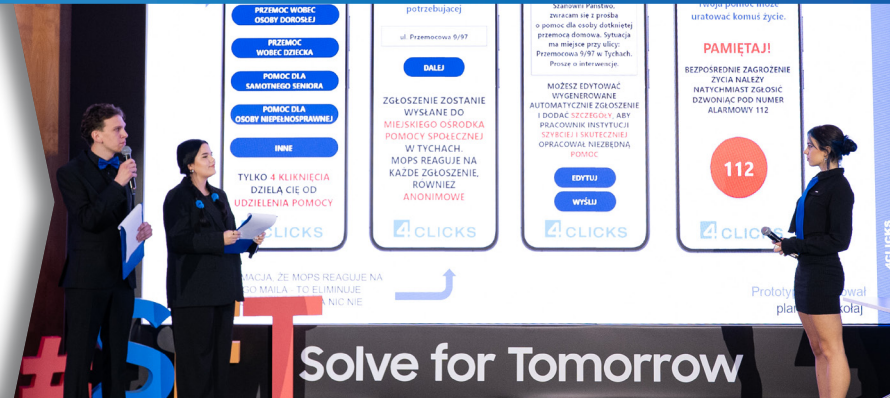
CSR IN THE HOME APPLIANCE INDUSTRY

Corporate social responsibility is strongly supported by home appliance companies. We present selected activities of some of our 34 member companies.



For years, **MPM** has been involved in various initiatives, supporting local companies and organizations, especially the KS Bogoria Grodzisk Mazowiecki sports club specializing in world-class table tennis. The cooperation takes place, among others, at the level of sponsorship and strategic partnership of the club. MPM proudly accompanies children, adults and seniors in the development of their sports talents.

Solve for Tomorrow is a **SAMSUNG** educational initiative in which young people face the challenges of the modern world by creating ideas based on new technologies and developing 4C competencies: creativity, communication, critical thinking and cooperation. In the program, high school students learn about design thinking and STEAM methods. A record number of 413 projects were submitted for the 4th edition of SFT.



In 2024, **KÄRCHER** became an official sponsor of the “Operacja Czysta Rzeka” („Clean River Operation”). As part of it, the company’s employees in June joined the action to clean up trash around the Vistula River in two locations - Warsaw and Krakow.



In September 2024, **AMICA** conducted the second edition of the Amica Group Sports Challenge. For a month, employees recorded their physical activity in the app in one of four selected disciplines - cycling, rollerblading, running and walking. The kilometers covered by participants made it possible to donate 87,000 PLN to charity - to medical, rehabilitation and support facilities for people in need.

BSH supported those affected by the floods in southern Poland, donating dozens of household appliances. The appliances went to organizations such as Caritas, the Polish Red Cross and the Lower Silesia Federation of Non-Governmental Organizations. From there, the aid reached the most affected people, supporting them in rebuilding and returning to their daily lives.



In 2024, **BEKO** has consistently continued its project to develop a network of community refrigerators in selected Polish cities. There are already more than a dozen such fridges under the program, including the two newest ones on housing estates in Łódź and Wrocław. Through such actions, Beko not only prevents food waste, but also actively supports those in need.



CHALLENGES, THREATS, OPPORTUNITIES



Not all the black swans have yet flown away, and new threats have already emerged. We are working as an industry and an appliance supplier in an increasingly unpredictable environment. However, it is necessary to cope somehow. The most important thing is to accurately define needs and try to give constructive proposals for solutions to problems.

Here's an abbreviated list of challenges facing not only the home appliance industry. It is also, paradoxically, a list of opportunities....

In an era of changing priorities, on the threshold of a possible trade war and rippling supply chains, **nearshoring** - that is, locating investments close to the right, largest markets - may be the answer. Those large investments as well as smaller ones made by component suppliers. This is an opportunity for Poland, which has defended itself from being stigmatized as a frontline country. However, the question remains how to ensure the availability of strategic raw materials.

The big ones of this world are betting on security, digitization, biotechnology and renewable energy sources. How about seemingly simple and common home appliances? Are we lost as something that has been and will be regardless of the world's development? We need to present the **production of home appliances as a strategic** sector, guaranteeing the security of basic food and the minimum necessary comfort of life. Politicians are increasingly considering worst-case scenarios, and we need to remind them to take care of the primary industry alongside medical and energy.

Legislation is strangling us. One factory has to respect more than 1,350 (!) different kinds of legislation, from HR to safety, transportation and environment. All this is needed, but not on this scale. Unification is required, or at least slowing down the inflation of new laws. Fortunately, this process is being noticed not only thanks to Draghi's report. We support and endorse these measures!

When thinking about the **competitiveness** of industry located in Poland, we glance with concern at Far Eastern countries. However, if we want to maintain the level of production and the primacy in the European Union, we must keep an eye on Romania, Turkiye or even Egypt. Working with the government and special economic zones, we should take care of favorable conditions for investment financing, logistics and availability of personnel.

Demographic trends are unfavorable. Poland will lose 100,000 workers every year, and this gap must be closed. Without opening up to educated immigrants, we won't make it. This is a political matter, but we will soon issue, among other things, an "appeal for a pact for Poland" on this issue, in order to treat certain threats as cross-party topics not subject to electoral battles. We have also prepared a "Migration Policy" Report on this issue (jointly with Association of Polish Economists) and have requested Polish Agency for Enterprise Development to establish a sectoral competence council.

Consumption is one of the pillars and drivers of GDP. Therefore, we have prepared a program (another Report created jointly with The National Energy Conservation Agency), promoting energy-efficient products, which gives an answer to the basic challenges: increasing consumption, reducing CO2 emissions, increasing household savings and reducing energy consumption, i.e. increasing Poland's energy security. We're talking about enormous terawatts of savings!

DIALOGUE IN THE HOME APPLIANCE INDUSTRY

The home appliance industry is a kind of chain with thousands of players, companies, institutions and organizations clustered around the entire product life cycle. It begins with sub-suppliers providing raw materials, components and services. The next market participants are manufacturers who design and produce equipment. Further down the chain are logistics companies and distributors responsible for delivering equipment to the consumer and advising on the choice of a device that meets expectations. No less important are also companies providing after-sales service and directly related to the end of life of the product, such as recovery organizations and treatment facilities. An important glue of the chain in question is conversation and cooperation at the level of business environment institutions. APPLIA Polska, as the only representation of manufacturers and importers of home appliances actively participates in these processes. Among other things, events organized by the Association, such as the Home Appliance Congress and the Congress of Home Appliance Service Providers, are part of them. Equally important is APPLIA Polska's cooperation with both APPLIA Europe and Poland's representatives in international institutions, mainly the EU. With a view to the start in January 2025, the six-month Polish presidency of the European Union, we have prepared the Manifesto of the Polish Home Appliance Industry 2025, the content of which is included on the following pages.



THE MANIFESTO OF THE POLISH HOME APPLIANCE INDUSTRY

Recommendations for the Polish Presidency of the European Union (I-VI 2025)

In view of the challenges facing the home appliance industry in Poland, Home Appliance Association APPLIA Polska has prepared a list of demands addressed to politicians and officials during the Polish Presidency of the European Union.

- The home appliance industry is a Polish specialty contributing to the economy. The industry provides employment for more than 100,000 people throughout the supply chain and contributes to the development of hundreds of SMEs. Poland is the largest home appliance manufacturing hub in the European Union and a leading global exporter (No. 1 in tumble dryers and dishwashers). Poland also has the opportunity to become a leader in the production of heat pumps. Unfortunately, the production of home appliances across the EU has been declining for several years - last year it was as much as 12 million units less than in 2021 (an 18% drop). At the same time, the share of domestic production in EU production fell from 38 to 36%. The decline is accompanied by an increase in imports of large home appliances from outside the European Union.

APPLIA Polska represents 34 companies in large and small home appliances, as well as air conditioning and heat pumps.

HOME APPLIANCE INDUSTRY RECOMMENDATIONS



1 / PROJECTS TO REPLACE OBSOLETE EQUIPMENT AS A TECHNOLOGICAL BOOST TO INNOVATION AND A RESPONSE TO LOW DEMAND

In Poland, home appliances consume about 14 TWh of energy annually. According to APPLIA Polska's calculations, almost 25% of this value can be saved by replacing equipment with the latest, highest energy class equipment. Many households use outdated home appliances. We call for the introduction of an action plan at the EU level or in Poland alone to encourage consumers to replace them with modern equipment. Such measures are already in place in countries such as Italy, Hungary and Greece. The solution will create an additional impetus for the development of innovative production of home appliances, bring savings to households and increase declining consumption, which is a basic component of GDP.

2 / MIGRATION POLICY TO INCREASE THE SHARE OF FOREIGNERS IN THE DOMESTIC LABOR MARKET

In the medium term, the development of industry, but also of the national economy as a whole, is seriously threatened by the demographic crisis. Poland will need an average of up to 150,000 new people to work each year. We need a bold migration policy to partially reduce the scale of the problem. Home appliance is one of the sectors with the highest demand for labor in recent years - in 2023, their insufficient number resulted in serious business consequences, including production cuts.



3

EXPANDING THE SCOPE OF THE CBAM MECHANISM IN RESPONSE TO THE CHALLENGES OF THE EU SINGLE MARKET

In the coming years, EU home appliance manufacturers will incur additional costs of about €400 million a year as a result of taxing the carbon footprint of the production and import of key raw materials for home appliances. However, the system contains a significant loophole, as the additional costs do not include imports of finished products containing raw materials. The CBAM loophole forces the home appliance industry to compete with non-EU manufacturers who buy their materials from suppliers with no carbon price. Thus, they are able to offer their products at lower prices with all other cost factors on par. Adopting CBAM unchanged could lead to a flight of home appliance production from Poland and an increase in CO2 emissions. It is necessary to expand the scope of the EU CBAM regulation to include appliances produced in Poland, primarily washing machines, dishwashers, tumble dryers, refrigerators, cookers and ovens, hoods, air conditioners and heat pumps. It is also necessary to provide a simple methodology for calculating CO2 emissions in the import of such goods.



5

IMPROVING THE REGULATORY ENVIRONMENT

The increasing number and complexity of regulations at both the EU and member state levels is a major challenge. The lack of harmonization of EU policies and between EU and national legislation creates compliance difficulties and diverts resources from innovation and investment. We urge policymakers to streamline and simplify the regulatory framework to avoid undermining the competitiveness of European manufacturers.



4

ELIMINATION OF FRAUDULENT IMPORTS THROUGH ONLINE PLATFORMS

There is a steady increase in the number of non-compliant products on the EU market that are made available through online trading platforms. This non-compliance concerns various aspects, such as product safety, intellectual property, eco-design requirements or lack of participation in extended producer responsibility (EPR) financing. In addition, companies supplying non-compliant products are not inspected by the European Union due to the lack of implementation of such tools. Therefore, we appeal to require online platforms to verify the registration in the Waste Database of stores placing electrical and electronic equipment on the domestic market, and to recognize online platforms as product marketers if no other business entity has been designated in the EU that could be recognized as a product marketer in the EU.



6

STRENGTHENING THE SINGLE MARKET

Despite the progress made in European integration, the single market for household appliances remains fragmented, with significant differences in standards, regulations and market access across member states. We call for further harmonization and integration of the single market to create a level playing field and facilitate cross-border trade.

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Chairman of the Council
CEO of BSH Sprzęt

Gospodarstwa Domowego Sp. z o.o.



Mariusz Chołyst

General Manager,
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Marcin Głodek

District Leader North-East
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Zygmunt Łopalewski

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Piotr Stelmachów

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Communication and Analyst Specialist



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