

Made in Poland

2024

**Fireplaces, stoves
biomass boilers
wood and pellets**



HYBRID HEATING SOLUTIONS

DEFRO

heat



ELECTRIC BOILERS



GAS BOILERS



MECHANICAL
VENTILATION



HEAT PUMPS



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ACCUMULATION TANKS



SOLID FUEL BOILERS



FIREPLACE INSERTS &
FREESTANDING STOVES



FIRE PITS



LPG TANKS

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LAVA Complete Burning System is a solution involving the process of optimum air supply, combustion, heat exchange and flue gas removal



The solutions used allow us to guarantee the highest quality and include a **5 year warranty** on every Lava Thermofireplaces.



Lava fireplaces offer excellent heating power and maximum efficiency while meeting **Ecodesign** standards.



LUMINA



BASE

Who we are and why we do it

Aldona Mazurkiewicz

deputy editor-in-chief of ŚWIAT KOMINKÓW



“Świat Kominków” – a magazine for a common consumer

Our publishing adventure with fireplaces began in 2002 and in 2003 resulted in the first issue of “Świat Kominków” – a periodical that is our lead title to this day. We provide them an overview of the wide gamut of fireplaces available on the Polish market as well as the variety of technical solutions used in this type of heating units. We write not only about fireplaces designed for wood, but also for pellet, gas, electricity or bioethanol. We also present the variety of garden heating units such as grills, smokehouses, bonfires, bread ovens or summer kitchens. The whole is complemented by articles dedicated to the use and operation, fuel issues, flue gas evacuation as well as all kinds of equipment and accessories for fireplaces. We try to cover the topic of the fireplace as widely as possible. We pay attention to how to combine the fireplace with other heating systems such as heat pumps, photovoltaics, recuperation systems or gas boilers. Since 2021 there has been a separate section of our journal dedicated exclusively to wood or pellet boilers.

The magazine has a wide distribution system of both the traditional paper version (available in showrooms and fireplace companies, newsagents, DIY stores) and the electronic version available on the issuu platform and promoted, among others, on our portal fireplaces.org and Facebook thematic groups. We participate in many trade fairs, not only those related to fireplaces, but also regional ones, dealing with construction, interior design and gardening.

We are considered a trustworthy and influential magazine. We are a co-founder and a supporting member of the Polish Association “Kominki Polskie”. Since 2006, we have established the Flame of the Year prize awarded, among others, to the best companies, products and events.

kominki.org – a portal bringing fire to the house and garden!

Since 2008, we have been creating a fireplace-related website www.kominki.org. Here, the end-customer can not only view a rich photo gallery and read about various technical and aesthetic fireplace solutions, but also find an executive company and manufacturer using the database of companies, or learn about legal issues regarding the construction of fireplaces.

“Kominiki PRO” – a magazine for fireplace industry professionals

We are constantly advancing, as best proven by the magazine addressed exclusively to professionals from the broadly understood fireplace industry – “KominikiPRO”, which expanded our portfolio in 2009. The periodical is distributed directly by mail (both by snail mail and in electronic form accessible via the issuu platform) to over 2,500 fireplace and fireplace-related companies in Poland. In “Kominiki PRO”, there are texts on legal, economic and marketing aspects of the functioning of companies, important current topics for the industry, materials dealing with technical problems important for contractors, as well as update information on industry events, trainings and fairs. It is a perfect place to look for trade representatives, establish business contacts or reach a wide group of fireplace contractors and stove fitters in Poland.

Our professional sales department is always willing to adjust the offer to the needs and expectations of each client. We are not a large media concern, but a small family publishing house that puts the emphasis on quality and genuineness. We are a reliable partner for companies and a valuable source of information for the Readers.



Read on
ISSUU.com



HAJDUK COMPANY
a leading European manufacturer of
premium fireplace inserts and stoves



The Hajduk company is a leading European manufacturer of fireplace inserts and stoves. Currently, there are almost 300 stores and fireplace wholesalers cooperating with us. A large part of production is exported to the markets of the European Union and to countries outside its borders. The Hajduk fireplace insert was the first Polish product to be included on the list of USEPA - the American Ministry of Environmental Protection (USA).

Hajduk fireplace inserts and free-standing stoves, due to their unique features such as durability, reliability, aesthetics and precision of workmanship visible in every detail, have also found many buyers in such distant places as the United States, Iceland and Turkey. Despite large exports, Poland is a very important area for our daily activities.

The production of inserts and furnaces has been taking place for over 33 years in halls and rooms with a total area of 15,000 m². The extensive production experience obtained is confirmed by, among others: Quality Management System PN EN ISO 9001:2009. In the production of fireplace inserts, the following are used, among others: 2D and 3D laser cutting machines, numerically controlled bending machines, technological painting line, numerically controlled welding robots.

Hajduk's sales offices are located in Gorzów Wielkopolski at ul. Kasprzaka 6F. The building houses the headquarters of the management board, a sales office, a fireplace exhibition, a logistics center and a fireplace insert testing laboratory.

On many levels of our activity, we make every effort to ensure that our fireplace inserts and fireplaces meet your needs, the increasing environmental protection requirements, and constitute a central place in the life of every family. Our well-trained and experienced staff helps us achieve these goals.

www.hajduk.eu

Fireplaces, stoves, boilers or pellets from Poland?

Why not!



Witold Hawajski
editor-in-chief
of ŚWIAT KOMINKÓW

Poland has been one of the 27 countries of the European Union since 2004, and the unification of legal regulations within the EU framework makes most of the products manufactured in Poland meet common European standards. This is also the case with fireplace inserts, stoves and biomass boilers, which are also covered by the provisions of the EU Regulation 1185/2015 in Poland, the popular “Ecodesign directive”. These regulations entered into force on January 1, 2022, but already much earlier, most devices manufactured in Poland had met them.

Polish manufacturers of fireplace inserts, stoves or biomass boilers are a very experienced group, and many of them have been present on the market for 25 years or even longer. It is thanks to them that from the position of the country-importer of practically everything related to fireplaces, fireplace inserts, connections, ventilation grilles, etc., we have reached the state where Polish producers cover most of the domestic needs. They are not small, because the country with a population of 37.7 million buys and installs around 100 thousand devices every year, and in addition to the basic requirements, Polish manufacturers also meet the higher technical and aesthetic expectations of their buyers. What is important, these are mostly own constructions, which are the result of many years of experience and the work of our own designers. These include fireplaces with multi-sided and large glazing, with a water jacket, gas fireplaces or bioethanol furnaces. In recent years, we can observe not only the adaptation of products

to the requirements of Ecodesign but also changes in the production structure – there are more and more free-standing stoves and fireplace inserts for more demanding buyers, classified as “premium” by producers. The number of garden equipment offered is also growing dynamically.

You can rely on Polish manufacturers, constructors and highly qualified employees. That is why the recognized European manufacturers, SPARTHERM, NORDPEJS and JOTUL located their production plants in Poland some years back.

The manufacturers of central heating boilers fired with wood and pellets are also able to meet the expectations of markets where there is a high demand for this type of device. Modern machinery, professional staff and long-standing experience mean that Poland is the seat of good boilers production and the renown European producers, like HARGASSNER, have found reliable partners in here. Polish manufacturers also provide a wide range of mechanical and electronic equipment, everything necessary to install and control modern biomass devices.

Poland does not only produce equipment. As a country with large, sustainably managed forest resources, we have also been a producer of excellent quality pellets for many years, which also goes beyond the borders of Poland.

If you do not know fireplaces or biomass boilers from Poland yet, it is worth reading our report, which – we hope – will help you navigate through the wide range of devices made in Poland.



THE MAGIC OF FIRE WHEREVER YOU WANT

**POLISH MANUFACTURER
OF HIGHEST QUALITY BIOFIREPLACES**



80

MODELS OF
BIOFIREPLACES

3

PRODUCT
LINES

1200

M² OF PRODUCTION
AND STORAGE AREA

22

COUNTRIES
WHERE WE SELL



The new in bio-fire SLIM Collection

Last year, INFIRE, a company specializing in the production of bio-fireplaces, expanded its collection with the SLIMfire product line. The name "Slim" indicates a collection with a slim, minimalist form, where the main idea is a uniform color - the whole thing is black, with a frame finished in a characteristic minimalist form - a narrow frame. This is how new, refreshed double-sided fireplaces were created.

2 SIDE bio-fireplaces in the SLIM version are impressive and expressive interior design elements, and their vertical shape and narrow black frames give them elegance and a modern character. The double-sided nature allows for functional use in two adjacent rooms, creating a cozy atmosphere and, at the same time, being a practical solution for dividing space, creating an impressive decorative element that gives character to the entire interior.



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Minimalist and modern solutions



DEFRO HOME PORTAL ME BP G

A fireplace insert with an exceptionally high glass and a deep, low-set firebox, allowing us to enjoy a beautiful vision of fire. It is an excellent choice for a minimalist yet refined style enthusiast.



DEFRO HOME HYDROFIRE

A modern stove with rounded shapes and an innovative design of the water jacket transfers up to 79% of energy to the water. Thanks to the use of up to triple glazing of the door and the MULTIFLOW system, the Hydrofire model is characterized by high efficiency (A+) and ensures warmth for the entire house.



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Artiss Garden Barbecue- Firepit G5 GRAPHITE

ARTISS is a brand of extraordinary appliances for BBQ and outdoor cooking of a special design, modern, beautiful look and aesthetics as well as functional solutions. ARTISS gives You the chance to barbecue all-round and all-year outside in the fresh air.

We created a special product which delivers amazing culinary experience and becomes an art of cooking and barbecue. It is not just barbecuing, it is a philosophy of barbecuing.

The barbecues are made in Poland from top-quality steel, with a particular care for details but, most importantly, with the thought about our customers. The barbecue can be personalized according to one's needs, all parts are exchangeable, have different forms and colours – depending on one's taste and needs a perfect barbecue can be created.



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www.artiss.design





Akos fireplaces

Have been designed as a minimalistic product line.

Have been patented as a high-efficiency gas fireplace.

The energy rating of the Akos Fireplaces is Type A, meaning that they can be used as a heating element with a nice and decorative flame effect, or as a decorative fireplaces by using one of two burner steps. Akos fireplaces can be supplied as sheet metal surrounding inside the burner chamber or with a black and reflective glass, in order to create a reflective background for the fire. Each Akos fireplace has a remote control unit with option to supply with wi-fi application.



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akos@akosfires.com
www.akosfires.com



Hajduk Fireplaces

Volcano 3ATh is a fireplace insert with three-sided frameless doors opening upwards with the CLING + mechanism. The CLING + mechanism ensures easy and precise opening and closing of the door and exceptional tightness when closed. The door with dimensions of 820 x 510 mm provides a wide three-dimensional effective vision of the fire. As in the wide range of Hajduk models, the fireplace lined with accumulating ceramics is optimally shallow, the inserts have extensive standard equipment and a solid, proven construction. They will meet ecodesign requirements and can be installed throughout the European Union.



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www.hajduk.eu



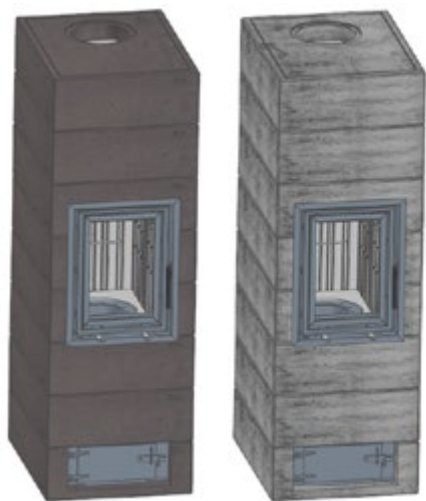
Innovative designed thermo- -fireplace

An appliance showcasing the modern styling of the LAVA water jacket inserts. Our devices are fully customizable, here you can see a version with an additional handle and frame for easier installation. Noteworthy is the exceptionally high output of the water exchanger of 12-19 kW with a nominal output of 13-22 kW. Thermofireplace in the innovative design guarantees maximum heat exchange surface from the flue gases to the heating circuit, which has a direct effect on reduced fuel consumption with the same heating result. Each of our fireplace inserts has a certified combustion system and a five-year warranty. We strongly encourage You to check out our products at



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www.lavakominki.pl





Brown

Gray

New in 2024! Accumulative Freestanding Fireplaces

for wood gas
generated from pellets
and for wood logs

Stove-fitting company Cebud, for over 20 years, has been producing prefabricated stove inserts, flue channels and heating plates made of Akubet – patented accumulative chamotte composite with 3 times increased heating parameters. Akubet made prefabricated stoves and fireplaces allow to replace three traditional tiled stoves made of chamotte bricks and clay. Allowing to grow the wood load three times, it improves the comfort of use, while maintaining an 8-24-hour, maintenance-free heating period. The appliances manufactured using the innovative pellet gasification and wood gas combustion technology allow to achieve emissions at the level of combustion of gaseous fossil fuels.



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Thermal insulation products

We offer a wide range of sealing materials for central heaters, fireplace inserts and fireplace doors:

- thermal insulation glass cords;
- self-adhesive glass tapes;
- repair kits (ready-made).

Production capabilities:

- glass tapes up to 35 mm, thickness up to 4 mm;
- thermal cords from 5 to 30 mm;
- thermal cords up to 20 mm without glass filling;
- thermal cords over 20 mm with glass filling;
- rectangular thermal cords sewn with non-flammable thread;
- square ceramic sealants from 6 to 30 mm (up to 1200°C);
- ready-made.

The thermal insulation products we offer are produced on our own, therefore we are able to customize technical parameters of the products to specific requirements our customers, within the technical capabilities of our machines.

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MANUFACTURER OF GLASS
AND BASALT SEALINGS



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www.dortech.eu

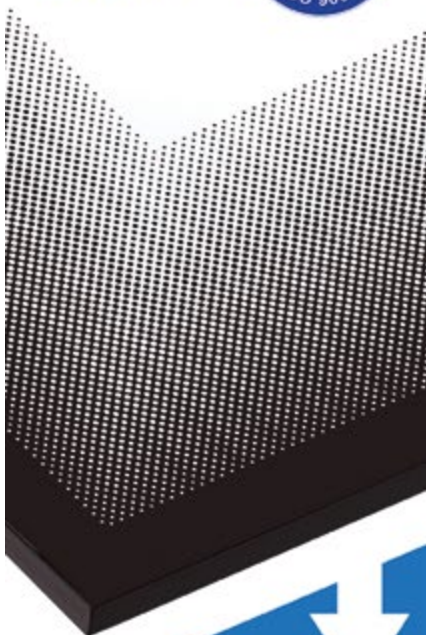


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ROBAX NEOCERAM

Glasspanel decorated to the border and 100% of surface.

Colorful logo, dark opaque black, white or shades of grey.



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Vermiculite ThermoVerm PRO

The ThermoVerm vermiculite boards are products created in cooperation with the Institute of Ceramics and Building Materials. The highest quality composition is the result of 18 months of research and testing. They have been especially selected to be used in heating boilers, fireplace inserts and fire-resistant doors. Thanks to making use of modern technology Vermeko produces high quality product - the boards which retain their structure, and do not crumble or crack. ThermoVerm boards have increased mechanical strength, higher insulating properties, reduced moisture absorption, and low thermal shrinkage. They can be cut and milled to non-standard shapes, and according to customers drawings. They protect against uncontrolled heat losses, raise the combustion temperature, and reduce the consumption of fuel materials.



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Feniks Pellets

The highest quality of Feniks Pellets has been confirmed, among others, by the EN PLUS A1 certification program (certificate no. 019). Our pellets are ecological, efficient, and environmentally friendly. We offers two product lines: Premium and Gold – both in 15 kg standard bag. Feniks Pellets Premium are characterized by high calorific value and lowest ash content. Feniks Pellets Gold are characterized by extra high calorific value and lowest possible ash content.

Feniks Pellets guarantees long-term safe use of the stove and reduces heating costs. This is confirmed by well known european producers of heating systems, including Windhager, Defro, Budmet among the others.

Characteristics:

- Calorific Value: 18.21 MJ/kg
- Ash Content: 0.39%
- Humidity: 5.1%



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www.fenikspellets.eu





EKOLLET brand wood pellets

EKOLLET is a premium class Polish pellet, meeting the strict standards confirmed by DINplus certificate No. 7A362.

The pellets are produced exclusively from pure sawdust derived from 100% spruce and pine wood without the addition of bark, needles or sand. Thanks to pure sawdust pressed under high pressure, EKOLLET pellets are characterized by their light color.

An additional advantage of the pure raw material is the high calorific value of the pellets – above 17 MJ, and low amounts of ashes, which means that no sinter is formed during combustion, and the use of the burner is unproblematic.

Proper production standards and constant inspections allow to maintain the high quality of the product.

- Pellet diameter: 6 mm.
- Packaging: bags of 15 kg.
- 1 pallet holds 70 bags = 1050 kg.
- Pallet protected by foil (hood).

Trans - Pal®

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www.transpal.pl



Premium and Excellent Selection

As a leading manufacturer and preferred supplier of environmentally friendly, efficient En Plus A1 PL 027 certified wood pellets, our company offers 2 types of pellets: Excellent Selection and Premium Selection pellets. The wood pellets we offer have a very good calorific value. In the case of the Premium and Excellent options, you can also count on a small amount of ash produced during combustion, which allows convenient use of the pellet cooker. Our wood pellets are fully ecological – they don't contain harmful substances, don't emit odours that are offensive and unpleasant for humans, and the ash produced after the pellets are burnt can be used as fertiliser for the lawn or garden.

**Biomasa Partner Group always in
harmony with nature!**

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HIGHEST QUALITY ECOLOGICAL FIREPLACE FUEL

ECOMAX® PREMIUM



NR 15740114.015.2022
valid until: 16.03.2025



- produced from pure wood sawdust, does not contain glues and artificial substances
- high, repeatable calorific value
- very low ash content (0,5 %)
- very low water content (< 9%)
- clean fireplace glass and chimney
- steady, high flame
- suitable for all types of solid fuel fireplaces
- harmless to health and the environment

High-quality, ecologically certified fuel intended for use in fireplaces and stoves, manufactured from premium hardwood sawdust (may contain trace amounts of softwood sawdust), without artificial additives or binders. Burns with a clean, tall flame, leaving the fireplace glass clean and producing minimal ash. Packaged in environmentally friendly cardboard.



ECO-PAL®
MOKRONOSY
Marka rekomendowana przez Zdrón



www.eco-pal.pl

Fireplace Controls

RT-08 OMG



Fireplace control for traditional and modern fireplaces, heating fireplaces and wood stoves.

The control stabilizes the burning process to maintain the desired temperature in the stove for as long as possible and extend the burning time.

The flue gas temperature sensor measures the temperature above the combustion chamber, and the air damper regulates the air supply for combustion.

RT-08 OMGX



Fireplace control for water-circulating fireplaces, including buffer storage and central heating.

The control stabilizes the burning process to maintain the desired temperature in the stove for as long as possible and extend the burning time.

In addition, the control can manage two pumps (buffer storage charging pump, circulation pump), as well as other devices (e.g. room ventilation, smoke exhaust fan).

RT-08 OSG



Fireplace control for tiled stoves, basic stoves, combination stoves, and other storage systems.

The control ensures optimal air supply to the combustion chamber for a quick heating process. Controlled air supply prevents premature cooling of the stove and stores the heat obtained for as long as possible.

The optimal air supply ensures low-emission combustion and protects the stove from overheating.

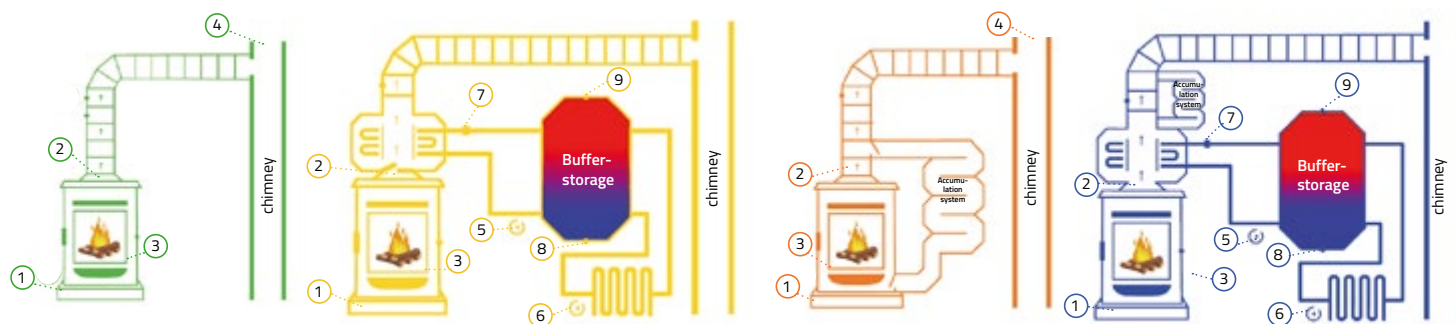
RT-08 OSGX



Fireplace control for water-circulating fireplaces with heat storage system, including buffer storage and central heating.

The control ensures optimal air supply to the combustion chamber for a quick heating process. Controlled air supply prevents premature cooling of the stove and stores the heat obtained for as long as possible.

In addition, the control can manage two pumps (buffer storage charging pump, circ-



- 1 - Air damper
- 2 - Exhaust gas temperature sensor
- 3 - Door contact switch (optional)

- 4 - Second exhaust gas temperature sensor (optional)
- 5 - Buffer storage charging pump or Laddomat
- 6 - Circulation pump

- 7 - Water temperature sensor (T1)
- 8 - Water temperature sensor (T2)
- 9 - Water temperature sensor (T3)

Benefits of TATAREK fireplace controls

- Universally applicable
- Individually adaptable
- Diverse safety features
- (even during power outages)

User-friendly, customizable, comfortable, and equipped with various safety functions

Saves up to 30% on firewood

- Attractive prices
- Fast delivery times
- Customer service
- Consultation

R E P O R T

Fireplaces and stoves in Poland in 2024

Witold Hawajski (70)
editor-in-chief of ŚWIAT KOMINKÓW



He was selling fireplace inserts and stoves between 1992 until 2018. At the same time, he was involved in social and journalistic activities, writing for Gazeta Wyborcza, Murator and local media dealing with construction issues. He initiated the foundation of the Polish association of fireplace industry. As a result of cooperation with the IHZ Publishing House in 2002, a project of a generally accessible magazine about fireplaces was born, of which he became the editor-in-chief. In 2003, the first issue of Świat Kominków was published, followed a few years later by the magazine for specialists in the industry, Kominki.Pro and the portal, kominki.org.

Since 2006, Świat Kominków has been awarding the FLAME OF THE YEAR award for the best companies, products and most important events in the industry.

For some time, the traditional area of interest of Świat Kominków with domesticated fire has expanded to include ecological home heating solutions, mainly those based on wood and pellets.



Hitze

Fireplaces in Polish homes. Today and tomorrow

Poland is the sixth-largest European Union country with an area of 312,679 square kilometers. The population of 37.7 million ranks it as the fifth among the 27 member states.

People have to live somewhere – there are over 6 million residential buildings in Poland, of which over 5 million are single-family houses. Unfortunately, we still have a shortage of apartments in Poland, even though both developers and individual investors are building a lot. Over the last 5 years, approximately 1 million apartments and single-family houses have been built in Poland. A record year in this respect was 2022, when as many as 238,500 apartments were built. Three voivodeships: Masovia, Greater Poland and Lower Silesia, which traditionally lead in terms of income, also record the largest numbers of apartments built.

I am providing the data on Polish construction industry for, after all, it is an apartment or a house that makes a potential place for

a fireplace. Although multi-family housing is leading the way to developers, it is still individual housing with single-family houses which provides optimal places for fireplaces. The number of single-family houses is still growing and, according to the numbers provided by the Central Statistical Office, at least 71,500 single-family houses were built every year in Poland in the decade from 2012 to 2022, and in the record period starting in 2019 almost 90,000 houses were built every year. It should be taken into account that the number of houses built in 2019-2022 was negatively affected by the COVID-19 pandemic and Russia's aggression against Ukraine. Both the events translated into drastic supply shortages, an increase in the cost of materials, and a significant growth in interest rates on loans. On the other hand, in 2023, the number of houses built and building permits granted decreased slightly, and this is, among others, the result of high inflation and ongoing problems with obtaining loans, (in quarters I-III of 2023, the decrease was as follows – 7.1% of buildings completed and – 15.7% of buildings started).

Estimated sales volume solid fuel LSK 2022*					
	Nordic	Central	Latin	East	Total 2022
Open fireplaces	0	10.000	0	300	10.300
Inset /insert	23.667	67.062	158.000	89.360	338.089
Freestanding stoves	111.678	378.992	283.500	122.817	896.987
	135.345	456.054	441.500	212.477	1.245.376

* Source 13 national European organisations/companies.

So according to the partners of CEFACD in 2022 1,245 million units have been sold in the EU 27 and the UK including 100.000– 120.000 estimated sales (production + distribution) in Poland.

The majority of Polish single-family houses is built with the use of traditional technologies, which even under normal conditions implies a construction cycle of 1-2 years. Under a high inflation rate (officially exceeding 15%), rising prices and lack of materials, limited access to cheap credits will certainly extend the construction time, as well as lowering the size of the houses built which can already be observed (a decrease from 130.9 m² to 128.8 m²). If viewed from this side, it seems that in the next 2 or 3 years houses, construction of which was started in the period 2020-2022, will only be at the finishing stage. And from the point of view of the demand for finishing materials, including fireplaces, it is optimistic for in the next few years, neither manufacturers of devices and installation materials nor construction contractors shall be afraid of stoppage in the sector.

It cannot be denied that years 2018-2022, for the customers wishing to domesticate fire in their own fireplace were by no means favorable. The unprecedented one-sided campaign against burning with wood and publicly stigmatizing a fireside as “middle-class luxury” caused the fireplaces, stoves and wooden fuel to be taken out of regional air protection programs. Moreover, the intensively promoted government’s Czyste Powietrze (ang. Clean Air) programme de facto prohibited the presence of a fireplace in a situation where subsidies were used, e.g. for the replacement of a coal boiler. The same programme explicitly discredited wood or pellet-fueled heating devices, not to mention fireplaces and rejecting any founding for exchanging older types of hearths for the models that fulfil Ecodesign. Despite such an unfriendly atmosphere, the number of supporters of fireplaces

and wood-burning in Poland remained high enough to keep the whole industry working, including its manufacturers, distributors as well as contractors. The COVID-19 pandemic and forced staying at home, be it a year-round one or a seasonal cottage, caused that interest in heating devices noticeably grew. That made many companies expand their offer with such heating solutions, even though their potential in this area has never been fully used.

According to the Central Emission Register of Buildings (pol. acronym CEEB), at the end of 2023 in Poland there were: 1,541,838 fireplaces and stoves, 1,049,481 tiled stoves, as well as 836,295 kitchen stoves and ranges.

The war in Ukraine, the increase in energy prices and the threat of electricity and gas supply shortages, led to the situation where not only the declared enthusiasts of their own hearthside, but the majority of Polish society started to understand the importance of locally available fuel and the devices that enable its use. Consequently, wood-fueled fireplaces and even more freestanding stoves, which are particularly quick to install, have become a sought-after commodity.

Despite various fluctuations caused mainly by factors outside the industry and the lack of co-funding programmes for the replacement of old heating devices or purchase of new ones, which are popular in many other countries (obviously, all the devices sold currently meet Ecodesign standards), the present-day potential of the Polish fireplace market can be estimated at around 100 thousand devices per year.

At the moment, the lead time for the most-sought-after models of fireplace inserts or stoves is several weeks. Teams of stove

fitters and fireplace constructors must wait for a similarly long time. Sadly, the fireplace-and wood supporting social movement is still not fully accepted by national and local authorities, and 'green' renewable fuels such as pellets and wood are included in the applicable regulations in the same group of "solid fuels" as 'black' fossil coal.

However, regardless of these glaring errors in official documents and statistics, many householders in cities and villages use wood in their home fireplaces, which makes wood the most popular renewable fuel in Poland, as it is in many other countries.

ŚWIAT KOMINKÓW has been observing the Polish fireplace-and-stove market for 20 years and we hope that now the time has come for all the forms of 'green energy', and so for renewable wood too, and for ecological fireplaces to not only be socially but also legally acceptable. Both the present and future users as well as manufacturers and distributors of fireplaces and any other kinds of devices for wood and pellets are looking forward to it. After all, you cannot talk forever about ecology, prioritize coal and forget about locally-sourced wood.

Fireplace business in Poland

Since 1989, when Poland entered the path of democratic development and free market economy, we have been facing a dynamic growth of the economic activity of Poles. Poland's accession to the structures of the European Union on May 1, 2004 and to the Schengen area on December 21, 2007 increased the activity of Poles even more and encouraged the presence of foreign companies in Poland. Several European manufacturers of fireplaces, such as SPARTHERM, NORTHSTAR or JOTUL, took advantage of the possibility of doing business and locating their production plants in Poland. However, the Poles themselves also took matters into their own hands. Numerous small workshops that functioned in the shade of large state-owned behemoths, at most using materials the latter rejected, grew into enterprises employing several dozen or even several hundred people.

Among the companies that were created completely from scratch, there are mainly one-person or several-person service establishments. However, whenever the founding ideas were original and supported by the determination and perseverance in pursuing their goals, companies that were created are today appreciated not only on the domestic market but also on the demanding markets of other countries.

Polish fireplace industry, its diversity and current potential are a perfect example of this growth. While in the early 90's the Polish fireplace market was dominated mainly by products imported from France, Norway or Germany, currently these are Polish manufacturers that prevail on the domestic market in terms of the number of devices sold. Attractive products from other EU and non-EU manufacturers only complement the market. Polish fireplace companies have made excellent use of their assets and are more bold to enter foreign markets with their fireplace products.

Fireplace inserts and freestanding stoves

Products of DEFRO, HAJDUK, HITZE, KAWMET, KRATKI.PL and UNICO are today the most frequently installed fireplace inserts and stoves in Polish homes. The size and range of production places some of them among leading producers in Europe. Of course, wood-burning, air-fired and water-jacketed fireplaces are the most popular, but attractive gas and pellet models are also offered.

In every large DIY store in Poland one can find fireplace inserts and stoves from KAWMET or NORDFLAM. To the contrary, manufacturers such as CEBUD or IWONA PELLETS do not produce tens of thousands of hearths, but offer innovative devices which are attractive just for a specific groups of buyers. These are, among others, accumulation stove inserts with a pellet gasification hearth or dual-fuel inserts for wood and pellets. And this is just a part of the list of Polish manufacturers of fireplace inserts and stoves. The total production potential of

Polish companies exceeds 200,000 fireplace inserts and free-standing stoves. This can be estimated on the basis of data provided by major manufacturers: GRILLES (90,000 pcs), DEFRO (50,000 pcs), HAJDUK (20,000 pcs) NORDFLAM (10,000 pcs), HITZE (5,000 pcs), KAWMET (5,000 pcs), UNICO (5,000 pcs) as well as ARYSTO, CEBUD and IWONA PELLETS. Of course, this potential is not fully used every year because there are many market situations beyond the producers' control, but production capabilities allow not only to cover the domestic demand for modern hearths, but to deliver a noticeable number of high-quality devices to outer markets.

Bioethanol fireplaces

It is one of Polish specializations. The most famous manufacturer of bioethanol fireplaces in the world is, of course, PLANIKA, the creator of the innovative BEV combustion system. However, for several years now at almost every construction fair in Europe one can also meet the INFIRE company, which expands its offer year by year.

Garden fireplaces

Although various forms of outdoor fire installations have been present for centuries, in recent years they relive their youth. Currently available materials and technologies make it possible to expand the garden and terrace range with various forms of gas, bioethanol or pellet heaters and to create their attractive shapes not only from traditional ceramics but also of steel. This group of products attracted such a great interest that almost every manufacturer of the fireplace industry has garden heating devices in its offer which expands every year. Various interesting forms of fire devices for gardens and terraces are also produced by Polish manufacturers.

Fireplace accessories and control electronics

A fireplace is not a bare fireplace insert or stove. To build a fireplace or just install a ready-made one, which is a freestanding

wood or pellet stove, one needs additional materials. Ropes and insulating tapes as well as ceramics for lining the hearth are necessary already at the stage of production. This is only the beginning, for then one needs materials to connect the fireplace to a chimney, make insulation, accumulation, ventilation grilles, and to create and finish the body of the fireplace. If the fireplace is to perform a heating function, additional elements are required to create a system distributing hot air or accumulating and distributing heated water. The wide gamut of fireplace accessories and electronic drivers can be found in the offer of Polish manufacturers, which is addressed not only to the domestic market, but also to the one overseas.

Fireplace ceramics

It is difficult to compete with experienced leaders in ceramic production from Austria, Germany or the Czech Republic. Nevertheless, several Polish ceramic manufactories managed not only to create an assortment that almost completely meets the demands of the Polish consumer, but also demonstrates attractive modern design solutions and allows to complete ambitious renovations of antique fireplaces. Several Polish ceramic manufacturers also offer ceramic elements for interior decoration, which not only complement the fireplace and stove range but are also an independent proposition addressed to interior designers and decorators.

ŚWIAT KOMINKÓW visits many construction fair events all over the Europe. It must be stressed that for quite a few years also the presence of Polish fireplace products can be noticed. If the trade fair presentations are not made by companies themselves, then the products are exhibited at least by local distributors.

We do remember the timid beginnings of the fireplace market in Poland, so we are all the more pleased with the current production volume and assortment. The thriving activity of the Polish fireplace sector makes us look with optimism to the future.

Polish manufacturers of the fireplace industry

AGKOM

Materials for central heaters, fireplace

www.puhagkom.pl

BEOUTSIDE

Garden fire pits producer

www.beoutside.pl

CEBUD S.C.

Jacek Ręka, Maria Ręka

Fireplace inserts, accumulation materials

www.cebud.eu

DARCO sp. z o.o.

Heat distribution systems,
chimney systems, chimney cowls,
chimney venting systems

www.darco.pl

DEFRO HOME

Fireplace inserts, stoves, gas
fireplaces, outdoor heaters

www.defrohome.pl

DORAKO Piotr Koper

Fireplace inserts, stoves, gas
fireplaces, outdoor heaters

www.dorako.pl

FHU EKO-TERM Kućmierz

Accumulation materials

www.etksystem.pl

FIRE FLY PIT

Garden fire pits

www.fireflypit.com

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Wojciech Mikulski

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and precast concrete elements producer

www.gorbet.com.pl

HAJDUK Agnieszka i Dariusz

Nasińscy sp. z o.o. s.k.

Fireplace inserts, stoves

www.hajduk.eu

HITZE

Fireplace inserts, stoves, gas
fireplaces, outdoor heaters

www.hitze.pl

HUBOS Paweł Pułaski

Producer of cast irons accessories
for fireplaces, stoves, furnaces

www.hubos.pl

INFIRE Karol Lipka

Bio-ethanol fireplaces

www.infire.pl

IWONA PELLETS sp. z o.o.

Hybrid fireplaces heated with wood
and pellet, outdoor heaters

www.iwonapellets.pl

KAFLARNIA KAFEL-KAR

Rafał Karny

Tiles, ceramic wall panels

www.kafel-kar.pl

KOMIN-FLEX sp. z o.o.

Gas garden heaters

www.vulkan.com.pl

KRATKI. PL Marek Bał

Fireplace inserts, stoves, gas
fireplaces, garden equipment

www.kratki.com

KUBU

Saunas and garden tubs

www.kubu-wellness.com

LAVA Nikodem Szymkowiak, Julia Tomczak sp.j.

Fireplace inserts

www.lavakominki.pl

MAKROTERM

Agata i Krzysztof Wąchała sp.j.

Fireplace inserts

www.makroterm.pl

NORDFLAM HS sp. z o.o.

Fireplace inserts, stoves, outdoor heaters

www.nordflam.pl

Odlewnia KAW-MET Marek Kawiński

Fireplace inserts, stoves, outdoor heaters

www.kawmet.pl

PARKANEX sp. z o.o.

Flue connections, outdoor heaters,
fireplace inserts, bio-ethanol fireplaces

www.parkanex.pl

PEKABET Krzysztof Paluszak

Chimney systems

www.pekabet.pl

STABICA Paweł Węgrzyn

Warm fireplace cladding system

www.stabica.com

STYROBUD Górno

Garden fire pits, smokehouses
and vegetables crates producer

www.styrobud.eu

TATAREK sp. z o.o.

Electronics

www.tatarek.com.pl

TEXTHERMA.EU

Glass and basalt sealing rope

www.dortech.eu

UNICO

Fireplace inserts, stoves, outdoor heaters

www.unico-kominki.com

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Fireplace and stove fitting industry organizations



National Association "Fireplaces and Stoves"

The National Association of Fireplaces and Stoves (OSKP) brings together manufacturers, importers, agents and contractors of fireplaces and stoves throughout Poland. The association promotes the idea of clean wood. Members recognize the role of wood as the Polish national treasure and indicate that heating by means of wood does not only protect the interest of the poorest groups of society, but also ensures security and is a supplement to the energy balance. The association cooperates with Polish stove fitting guilds, chimney sweep guilds and chimney organizations. It also belongs to the European Associations of the stovefitters trade VEUKO and works closely with the Polish Pellet Council and the Polish Climate Forum.

www.kominkipolskie.com.pl



Guild of Polish fireplace fitters

The Guild of Polish fireplace fitters takes care of continuing the tradition connected with stove fitting and learning the profession of a stove fitter. The guild conducts social, social and organizational, cultural, educational and integration activities for the benefit of the community. The aim of the Guild is to strengthen the bond among the fireplace fitters and to reinforce the environment's image in line with the principles of professional ethics and dignity of the Polish craftsmen. The Guild also aims at executing tasks in the field of supervi-

sion over the craftsmanship courses of young workers, people employed in enterprises run by the Guild members and provides assistance in the field of further training and additional active qualification of the Guild. The guild cooperates with the Chamber of Crafts in Kalisz.

www.cechzdunowpolskich.zduny.pl



Guild of Fireplace Fitters and Related Professions of Lesser Poland

Guild of Fireplace Fitters and Related Professions of Lesser Poland is affiliated with the Lesser Poland Chamber of Crafts and Entrepreneurship in Krakow. The aim of the Guild is to introduce acceptable exhaust gas emission standards in the legal regulations, which will be at a level that do not cause the deterioration of air quality, and to ensure that the only stoves and fireplaces that are allowed to be used are the ones that technically meet specific emission requirements and will have the appropriate certificate. This means that these will only be installations for wood (biomass) – the largest, cheapest and most available Polish RES. Guild of Fireplace Fitters and Related Professions of Lesser Poland primarily aims to train professionals in order to be able to guarantee that its members will build installations that meet the required standards. The guild organizes training and vocational examinations in two levels – journeyman and master stove fitter. The Guild was established in 2016 to revive the Krakow Gild of Fireplace Fitters, Ceramics and Potters from 1403.

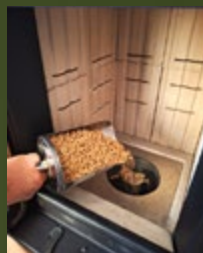
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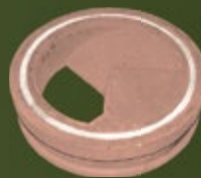
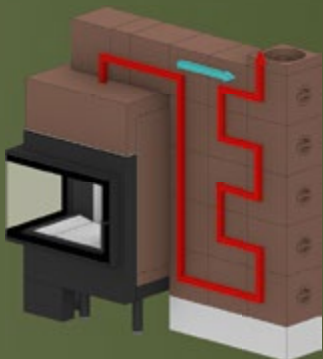
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Dorako company was founded in 2004. The main activities are production and trade. Contrary to prevailing trends DORAKO's strategy is not to offer customers the cheapest products in the world. The company focuses on quality, innovation and design in every field of activity. Over 20 years of experience, selection of the best materials and technologies meeting the highest quality criteria at optimal product costs and continuous research and development work make DORAKO products so popular both on the Polish market and on international markets.

DORAKO's product range in the heating industry: fireplaces (fireplace inserts), free-standing solid fuel stoves (so-called wood stoves) and fireplaces for gas. More information at www.dorako.pl

The company's headquarters is located in Warsaw and the place of business in Legionowo, where there are: offices, a model showroom, a laboratory, training facilities, production and a high-bay warehouse.



DORAKO

KOMINKI & SPA

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www.dorako.pl





AGKOM: experience and development

A family company operating on the Polish market since 2008, built on the knowledge and experience of the previous generation, as well as on the passion and desire to develop production for the current generation. Excellent craftsmanship and expanding technical resources allow us to strengthen our position in Poland among producers of high-temperature seals for fireplace inserts and central heating furnaces, and in small steps in other European markets.

Focused on a solid path of production development, thanks to the family atmosphere, each day strengthens and brings us closer to the intended goal. Openness and the ability to listen, help us encourage old and new business contacts.

Production capabilities:

- glass tapes up to 35 mm, thickness up to 4 mm;
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Vermeko LTD is the manufacturer of „Premium” expanded vermiculite and fireproof „ThermoVerm PRO” vermiculite boards with almost 15 years of experience.

The thermal insulation products are valued on the market for their high quality, increased mechanical strength, higher insulating properties, reduced moisture/ water absorption and low thermal shrinkage. Vermeko supplies fire-resistant and thermal insulation elements to the largest manufacturers of heating boilers, fireplaces and fireproof doors. The company has an extensive machinery park – CNC plotters and mould presses allow it to fulfil the orders even for non-standard elements, shapes or moulders. The products are ecological, do not contain harmful substances and meet the highest class requirements for heating devices. Thanks to several production lines and the biggest stock of vermiculite in central Europe Vermeko guarantees very short lead times – orders can be processed even within a few working days.

Vermeko expanded vermiculite is used by the largest horticultural farms, as well as in the cultivation of all types of plants, for sowing seeds and as the main component in soil mixtures. The company cooperates with several transport companies ensuring the lowest delivery costs in the whole European Union and the rest of the world.



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Detailed information at: www.texttherma.eu
www.dortech.eu



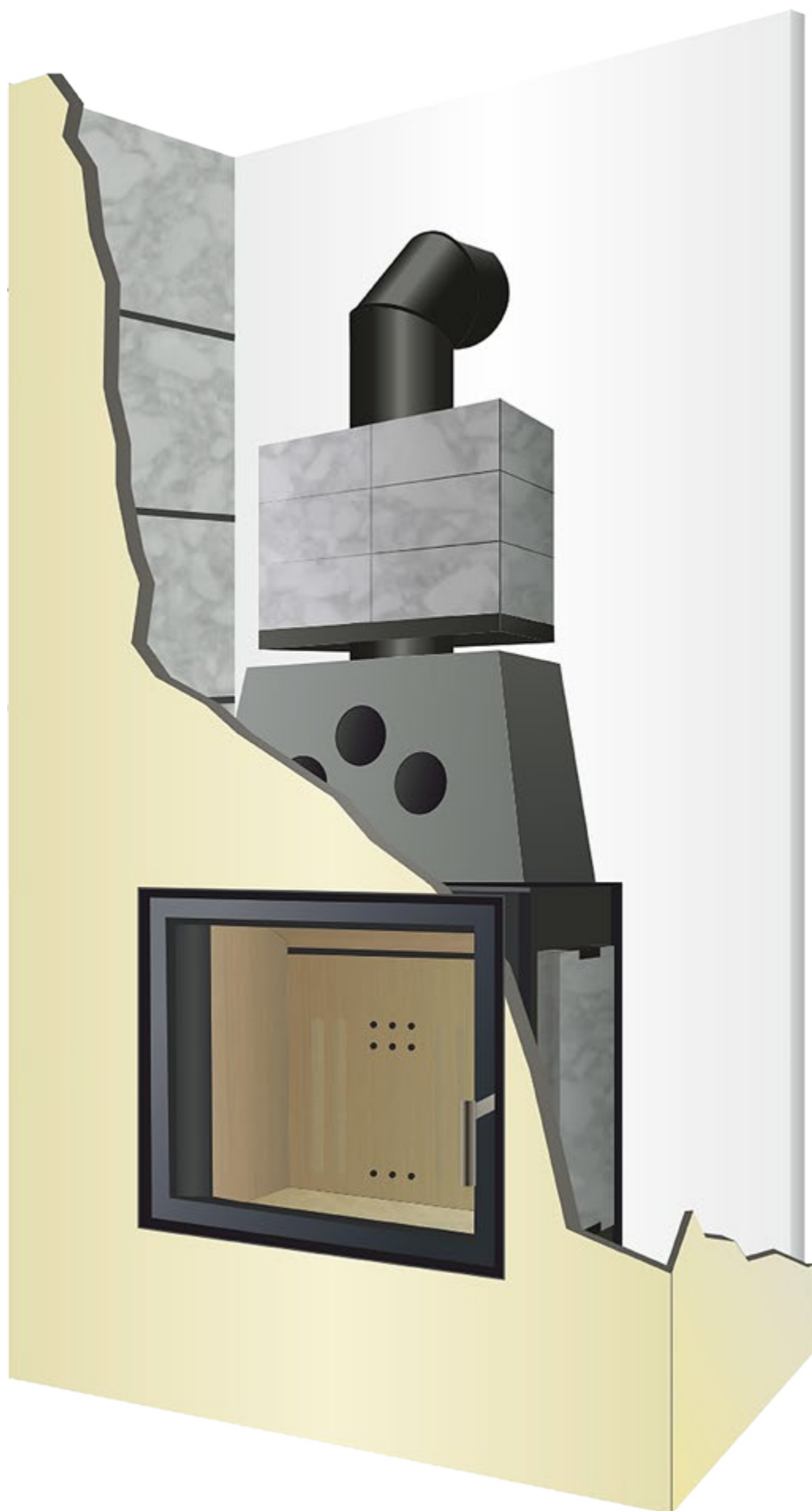
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For over a decade, the company **GÓRBET REFRACTORIES WOJCIECH MIKULSKI** (hereinafter: **GÓRBET**) has been continuing production started in this place in 1912 by Zakład Surowców Ogniotrwałych Górka sp. z o.o. (Eng.: Refractory Raw Materials Plant Górka Ltd.) and then conducted in the years 1998–2013 by Zakłady Materialów Ogniotrwałych Górbet Sp. z o.o. (Refractory Raw Materials Plant Górbet Ltd.).

Since its establishment, **GÓRBET** has been operating parallelly in two areas: production for all markets demanding monolithic materials, and research and development (R&D) in cooperation with The National Centre for Research and Development, AGH University of Krakow and a number of accredited research laboratories.

The wide applicability of our monolithic materials allows us to gain the experience based on their use in the most demanding industrial equipment for pyroprocessing (operating, among others, in the energy industry, cement industry, and waste incineration sector) as well as in the nonindustrial areas, such as the fireplace- and stove-building sectors.

Since the first exhibition of our materials at the ISH Frankfurt and KOK Wels trade fairs in 2015 and 2017, we have systematically expanded the gamut of offered materials, developing both aesthetic and functional features of our products.

Thanks to the persistent work of the R&D Department and the Department of Prefabrication of Aesthetic Ceramics, we are pleased to present our two recently developed technologies.

BG-KOM LIGHT is a monolithic material of high aesthetic values and high precision of finishing, meeting market expectations of sustainable development, energy optimization and lowering household energy expenditure.

BG-KOM LIGHT is intended for use in fireplace combustion chambers, where the energy produced is to be effectively and quickly transferred and then stored. For this purpose, we reduced the apparent density of the material from the standard one of 2.0 g/cm used in fireclay-based materials and concrete, to 1.3 g/cm while maintaining the remaining functional and aesthetic parameters.

The material is offered in two technological variants: in the form of a loose concrete mixture and ready-to-install prefabricated elements.

BG-KOM LIGHT complements our offer, which also includes high-density materials used for the construction of heat-accumulating chimney systems (energy storages) and materials used for modular construction. Both the solutions allow to obtain an alternative energy source, which, in the light of last years' experience, seems to be an attractive option for households.

Implementation of the project: "Development of innovative refractory concrete and technology for the production of prefabricated elements based on this concrete"

BG-KOM BLACK 2.0 is the result of 10 years of our search for a technology of the production of black aesthetic ceramics, where maintaining the blackness in the course of the firing process seemed to be unattainable. The greater is our satisfaction to present a product whose black is deep and lasts without brown discolorations. We can use this coating for any shape we produce. For details, feel free to contact our technical advisors.

Implementation of the project: "Development of technology for cement-free refractory concrete with high parameters for industry"



Cast Iron SMOKELESS Firepit



**There is no smoke without fire,
but there is fire without smoke!**

The FireFly garden fire pit is an environmentally friendly alternative to a traditional one. FireFly has been designed to minimize the emission of visible smoke and harmful substances. The cast iron body of the wood-fuelled fireplace maintains a high internal temperature, whereas its design makes our garden visually more attractive.

Fire without smoke - how is it possible?

The designers of the FireFly fire pit place great importance on ecology and cleanliness of combustion, which is why they created a garden heater that consumes little fuel and does not emit exhaust gases hazardous to health. All this was possible thanks to the optimization of air flow and the double-walled structure allowing both primary and secondary air to be supplied to the furnace. This causes a more complete and cleaner burning of the wood. An additional advantage of FireFly is that its user can burn both wood and high-quality pellets.

Fire without danger

The FireFly garden fire pit is safe for children and pets because it retains some of the sparks and produces much less smoke than a traditional fire pit. Smoke stops coming out of the fire when the Fire Fly reaches a certain temperature.

FireFly design

FireFly is available in two design versions – Black Diamond and Patina Queen. In the Black Diamond model, the cast iron fireplace is covered with a high-temperature-resistant black coating. Patina Queen is a version of a garden fire pit made of raw cast iron with a patina coating.

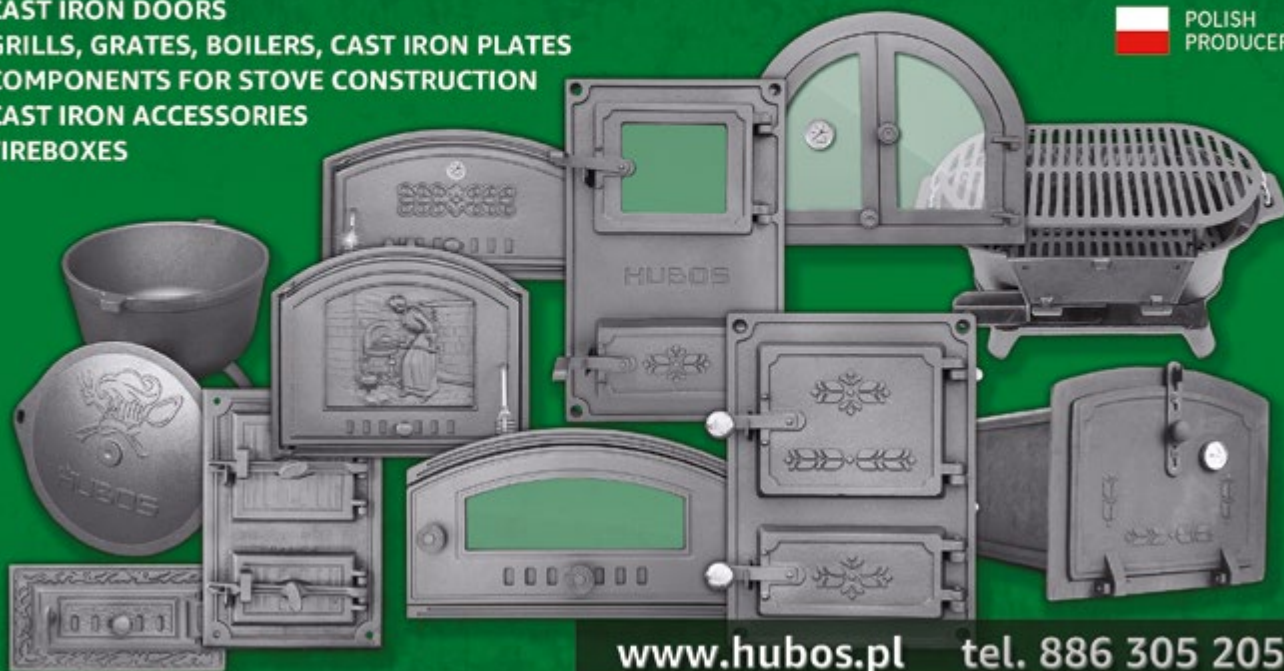
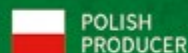
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“We give you heat” is our motto. We want you to feel comfortable while spending time with your loved ones – during family meetings, parties with friends or by yourself, relaxing after a long and exhausting day. We will be very pleased, if there is a place for Vulkan products on your terrace, patio, in the garden – wherever you like to spend time.

We are a Polish family company, relying on many years of experience, a good and dynamic team of employees and proven technological solutions. We know every single one of our products inside out and have tested them in many different ways. We vouch for its quality, functionality and, above all, safety. We manufacture only such terrace heaters we would like to use ourselves. We are not afraid of competition, because... there's practically none of it.

30 years of continuous development and improvement have allowed us to clearly define our goals, proven solutions and the values we hold dear. We trust that by sharing them with us, you will choose Vulkan products.

PRODUCTION STANDARDS

Unlike many of our competitors on the market, we do not import finished products from China. We are a manufacturer in the full sense of the word. All our products are manufactured in a production plant in Pszczyna, by qualified staff, using the best certified materials and specialized machinery.

CERTIFICATES

The quality of Vulkan products has been recognised not only by our customers, but also by independent experts and auditors. The entire production process is carried out in accordance with the adopted and supervised Company Quality Control System, as part of the ISO 9801–2015 Quality Management System. Each of our heaters is fully compliant with the PN-EN standard and has obtained a certificate authorising the marking of products with the European CE mark. However, we realise that the ultimate reviewer of our products are... you, our customers.

SAFETY

To ensure safety, all manufactured heaters are equipped with a number of protections, such as protection against uncontrolled outflow of gas from the burner or an installed tilt switch, and are subject to a meticulous final inspection, including a tightness test and a flame safety test. This makes our products synonymous with safety for the whole family – and they can even withstand small hands!

EASY INSTALLATION

We know how important, apart from high quality and attractive price, is the functionality of the product. Therefore, we make every effort to ensure that the assembly of our terrace heaters is simple and does not require higher technical knowledge, all its necessary elements are perfectly fitted, and the instructions for the operation of the equipment are clear and logical. Above all, we want to provide you with a high temperature after the entire installation, not during it...



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R E P O R T

Wood and pellet-fuelled boilers sector in Poland

PhD Marta Jach-Nocoń

member of Renewable Sources of Energy Systems
Chamber of Commerce (pol. acronym: IGU OZE)



Dr. Marta Jach-Nocoń has been working for 20 years on renewable energy sources, combustion processes in low-power boilers and the quality of solid biofuels. It was in this field that she earned her doctorate in sciences. During her career, she has supervised and controlled the work of the Laboratory for Actual Combustion of Solid Fuels. As part of numerous projects, she conducted analyses and tests aimed at optimizing combustion processes and improving the energy efficiency of heating equipment using renewable energy sources.

Her hands-on approach to science has allowed her to successfully combine theory and practice. Through scientific publications in the heating industry, she has contributed to the introduction of innovative RES products to the European market.



Defro

Pellet, which is a form of fuel derived from sawdust left from sawmills, has become a commonly used renewable energy source for heating systems. The Polish pellet boiler industry is at the forefront in Europe. We are renowned for the production of wood pellets and development of the sector using this fuel for heating purposes. Pellet boilers are popular heating devices with many advantages not only in the household sector, but also in the commercial one. Thanks to automation as well as the use of control and power systems, they do not absorb a lot of user's time. It is an ecological and effective heat source that contributes to the reduction of greenhouse gas emissions and the sustainable use of natural resources.

The purpose of heating systems is to produce usable heat, viz heating living spaces, preparing hot water and meals. Due to the method of transferring the heat that results from the combustion process, heating devices using solid biofuel can be divided into local space heaters, i.e. devices with direct heat transfer to the room in which they are installed (fireplaces, stoves, storage stoves and kitchen stoves) and central heating water boilers with indirect heat transfer.

The Polish boiler sector is one of the largest in Europe. Biomass heating devices have so far been exported, among others, to

Italy, Belgium, Austria, Germany, France and Scandinavian countries. In recent years, this branch of production has developed dynamically throughout Europe. In Poland, the boiler industry was also undergoing a real revolution. These changes are reflected by the wide gamut of wood pellet boilers offered by Polish producers of green heating systems, which are recognizable in Europe. The high quality of Polish heating devices is ensured by specialized staff, a wide base of available component suppliers, as well as research units. It is estimated that at the beginning of 2023, some 20,000 people were directly and indirectly employed in the boiler manufacturing sector. The majority of them are high-class specialists – people with extensive experience and knowledge acquired at renowned universities. The development of new academic specializations meets the expectations of future employers. In response to the current demand of the energy market and producers of heating systems, a modern Biomass Conversion Laboratory was established at the Department of Fundamentals of Engineering and Power Engineering of the Institute of Mechanical Engineering of the Warsaw University of Life Sciences, enabling R&D work on broadly understood innovative technologies. The laboratory facilitates design of modern and ecological heating

devices fuelled with herbaceous and woody biomass. An innovation on a national scale is the possibility of carrying out operational tests of a heating device for a specific building with its heat load changing over time. Another centre promoting knowledge on renewable energy sources is the Center for Sustainable Development and Energy Conservation of the Faculty of Geology, Geophysics and Environment Protection at AGH University of Science and Technology in Miękinia. Teaching and practical classes related to renewable energy sources are conducted there as a part of the relevant study programmes at the AGH University of Science and Technology in Kraków.

The rise of ecological awareness has led to an increase of interest in renewable energy sources such as boilers using solid biofuels (pellet or lump wood). There has also been an investments growth in renewable energy systems. Over recent years, enormous technological progress has been made, especially in the area of heating boilers. It resulted in the introduction of new, more effective and ecological solutions on the domestic and foreign markets. It can be said that the latest central heating boilers fuelled with wood pellets are characterized by an average dust (solid particle) emission that is more than twice lower than in devices manufactured in 2016–2019. The average emission of carbon monoxide and organic gas compounds is also lower. Heating boilers with the highest emission standards are selected annually as part of the TOPTEN-HACKS competition. This year's winners can be found at <https://www.pie.pl/wyniki-topten-hacks-2022/>. Thanks to the high efficiency and low dust emission Polish heating boilers have already been renown on the European market, and Polish entrepreneurs constantly adapt their product portfolio to the changing customer demands. The boiler sector associated in the Renewable Sources of Energy Systems Chamber of Commerce (<https://iguoze.pl>) includes not only boiler manufacturers, but also producers of additional equipment (controllers, electrostatic precipitators, burners) and component suppliers (actuators, gear motors). What is noteworthy, the Polish boilers exported to various European countries

owe their high efficiency to the high quality of components manufactured and hence easily available in the country.

The indicator of the clear tendency of weakening the dynamics of development or even drop in sales of heating devices on the Polish market mirror the housing construction. Due to large price increases, difficulties in obtaining a loan, and the shrinking budgets of investors, there was a decline in the number of apartments handed over for completion by developers as well as investments started.

As provided by the Central Statistical Office, in 2023 developers built over 97,000 housing units, which is a decrease of over 2% when compared with the previous year. However, according to the same body, individual investors built just a little over 60,000 apartments, i.e. over 6% less compared to 2022. In 2023 the sector experienced a big drop in the demand for heating devices. Globally, there is a clear and very drastic decline in sales of heating devices. This is the result of a general housing market crisis, lowering warehouse inventory levels in all product groups, fewer investments and stagnation in the construction market, anxiety and lack of information on the possibly profitable ventures.

Poland's path to achieving climate neutrality is longer than that of many other countries. In our reality, due to the need to reduce coal consumption, there is no alternative to providing low-emission fuel in the form of pellets and increase the availability of biomass boilers, which are the only renewable energy devices qualified in the overall CO₂ balance as non-emitting.

In 2020, for the first time in history, the share of coal in Poland's energy mix was less than 70%. It dropped to 65%. However, Poland still lags behind EU countries. The transformation of the heating sector must widely include and promote biomass in the form of pellets, which is classified as a renewable energy source in accordance with applicable Polish and EU law. Currently, the crucial legal issue on which European Union is working is the "FIT for 55" package, i.e. a set of proposals intended to change and made EU regulations consistent with the climate objectives agreed by the Council and the European Parliament. The main

premise is to adapt EU law to the new goal of reducing greenhouse gas emissions in the European Union by at least 55% by 2030. The “FIT for 55” package also assumes increasing the share of renewable energy sources in the overall energy mix from 32% to 40% in 2030. On the 25th of April 2023, the Council of the European Union adopted key legal acts constituting the package. The directives and regulations accepted and signed by the Council and the European Parliament were published on the 16th of May 2023 in the Official Journal of the European Union and will enter into force.

Poland is still reliant on fossil raw materials (coal and gas) as its main energy source. Fortunately, in recent years there has been increasing emphasis on renewable and diversified energy sources to reduce the dependence and increase energy supply security. When deciding to change a heating device, it is worth taking into account, on the one hand, an extremely important economic factor and, on the other hand, care for the environment and the possibility of using renewable energy sources.

We must remember that solid biofuel boilers are a very good solution for users whose accommodation do not allow the installation of a heat pump. In the case of buildings that are less insulated and have radiator heating and require high supply temperatures, a pellet boiler is often an optimal solution, both in terms of device efficiency and economics. Promoting pellets as a renewable and clean fuel can bring significant ecological benefits – increasing the share of renewable energy resources in the production of electricity and heat. When choosing a boiler, just as it is with choosing a heat pump, several key factors are worth considering. The power of such a device must be fitted to the heat demand in the building, insulation, volume and number of rooms, as well as the thermal preferences of the residents. One should also pay attention to the boiler control functions. Advanced control systems allow to easily manage settings, monitor work and ensure optimal performance. Comfort and convenience are a priority for modernization of a boiler room.

Attempting to reduce CO₂ emission, which is largely affected by boilers

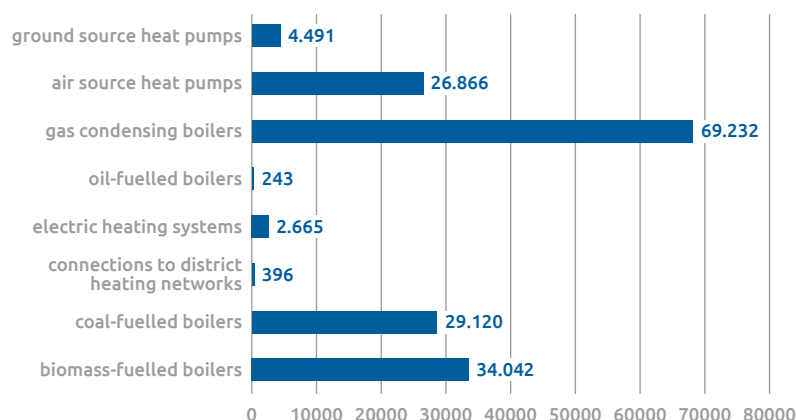


Fig. 1. Number of heat sources applied for under the Clean Air program in 2021. According to: Starościk, 2023

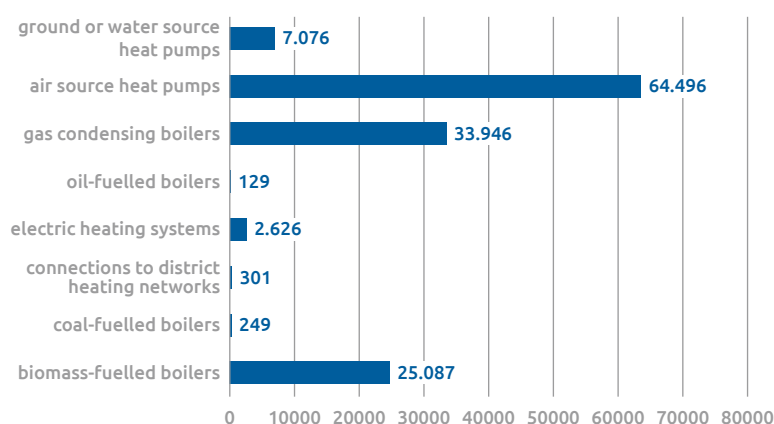


Fig. 2. Number of heat sources applied for under the Clean Air program in 2022. According to: Starościk, 2023

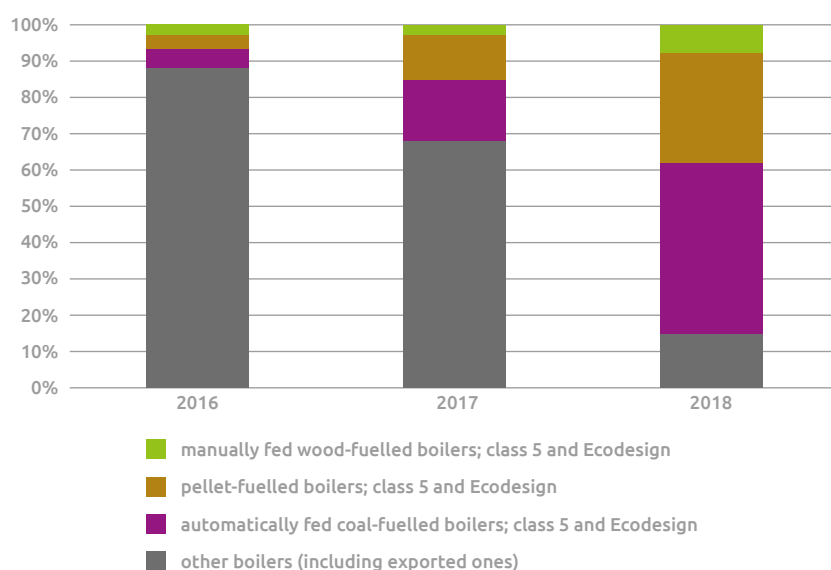


Fig. 3. Sales of boilers in 2016–2018 in Poland. According to: Kubica K., 2018

installed in single-family houses, Poland has launched the “Clean Air” program. It started on the 19th September 2018 and aimed at limiting the emission of harmful substances into the atmosphere by co-financing the replacement of old boilers that often did not maintain standards, with new ecological heating devices. Current data on applications submitted under the program can be found at <https://www.czystepowietrze.gov.pl/>.

In total, the thermal modernization of over 3 million buildings and the replacement of 3 million energy-inefficient and high-emission utility heat sources are planned. Regrettably, the implementation of this plan is not effective. Somehow increased modernization could be observed only in 2021 (Fig. 1). The largest share of installed devices were condensing gas boilers. The second most often installed heating device in the boiler room was a biomass boiler.

According to representatives of the heating sector, there was an increase in sales of heat pumps at the expense of solid biofuel boilers. The huge disproportion in the level of funding for various heating devices using renewable energy sources has destabilized the heating systems market. This resulted in growing demand for heat pumps, which can be seen in the number of applications submitted under the Clean Air program in 2022 (Fig. 2).

Since 2017, the number of boilers powered with wood biomass (especially pellet) introduced to the domestic market has been growing (16–20%). In 2018, the share of pellet-fuelled heating devices in the total volume of solid fuel boilers was approximately 40% (Fig. 3). Since the beginning of 2020, there has been a further increase in sales of boilers powered by wood biomass – to the level of 65–70%. There is much greater interest in pellet boilers, which at the end of 2020 accounted for over 60% (approximately 120,000 pcs) of all solid fuel boilers produced.

A pellet boiler, commonly called a pellet stove, is a heating device. It burns and converts the solid biofuel in the form of wood pellets into thermal energy which is then distributed by the central heating system throughout the building or facility. Along with the tightening regulations and local anti-smog resolutions adopted in Poland after 2017, the designs of



boilers, burners and control modules have evolved significantly. In 2023, most manufacturers of heating devices offer pellet boilers of energy class A+ with dust emissions below 20 mg/m³ and efficiency above 90%. To achieve such high parameters, one must appropriately design exchanger with the combustion chamber and pellet burner, and assure advanced control of all boiler components (such as exhaust fan, exchanger and burner cleaning mechanisms, all kinds of sensors, fuel feeding system, power adjustment system) during its operation and standstill. We distinguish boilers with a vertical, horizontal and mixed (horizontal-vertical) exchanger. Automatic pellet boilers are usually single-function devices, i.e. they are designed to heat buildings and rooms. Using the boiler controller software, which regulates its power in the range of 30%–100%, we can connect and heat, for instance, a hot water boiler. The self-ignition and quenching function makes it maintenance-free for several up to several dozen days, depending on the capacity of the wood pellet tank. It is noteworthy, that the high efficiency boilers can be connected to smoke flues attested for exhaust gas temperatures below 100°C.

All solid biofuel heating devices are certified by accredited laboratories. Tests of compliance with the requirements of the current PN-EN 303–5 standard include: determination of pollutant emission (by measuring of the concentrations of oxygen, carbon dioxide, carbon monoxide, nitrogen oxides, volatile organic compounds, dust and emissions from seasonal heating) and thermal tests (by measuring nominal power, minimum power, energy efficiency, operational efficiency, seasonal energy efficiency and energy efficiency coefficient). Laboratories accredited by the Polish Center for Accreditation also perform safety tests on the operation of quick-shutdown systems (voltage loss, heat collection failure), safety temperature limiters and temperature regulators, as well as analyses of handles and surface temperatures. Each boiler provided to the market has a laboratory certificate and report on tests carried out. In our country, attestation of solid fuel heating boilers with a nominal power of up to 500 kW, be them with manual or automatic fuel feeder, can be performed in:

- Environmental Research Centre SORBCHEM Ltd./Centrum Badań Środowiska SORBCHEM Sp. z o.o., ul. Kokotek 6, 41-700 Ruda Śląska;
- Institute of Energy and Fuel Processing Technology/Instytut Technologii Paliw i Energii, ul. Zamkowa 1, 41–803 Zabrze;
- Office of Technical Inspection/Urząd Dozoru Technicznego, ul. Szczęśliwicka 34, 02-353 Warszawa;
- Prof. F. Staub's ZETOM Research and Attestation Plant in Katowice Ltd/Zakład Badań i Atestacji „Zetom” im. Prof. F. Stauba w Katowicach Sp. z o.o., ul. Ks. Bpa H. Bednorza 17, 40-384 Katowice;
- Oil and Gas Institute – National Research Institute/Instytut Nafty i Gazu – Państwowy Instytut Badawczy, ul. Lubicz 25a, 31-503 Kraków;
- Institute for Research, Attestation and Certification OBAC Ltd/Ośrodek Badań Atestacji i Certyfikacji OBAC Sp. z o.o., ul. Łąbedzka 21, 44-121 Gliwice;
- Institute of Power Engineering – Research Institute/Instytut Energetyki – Państwowy Instytut Badawczy, ul. Mory 8, 01-330 Warszawa

Pellet as a renewable energy source in the form of compressed residues from sawmill production has gained a permanent place among the fuels powering biomass heating systems. Due to the possible convenient automatic fuel feeding, ease of fuel storage and relatively low price, pellet boilers have gone from being a niche product to a market-winning merchandise. All manufacturers of solid biofuel boilers associated in the the Renewable Sources of Energy Systems Chamber of Commerce (<https://iguoze.pl>) offer pellet heating systems. It is expected that, in order to achieve a 40% share of renewable energy sources in heating energy mix in 2030, over 860,000 new household heating boilers, mostly pellet-fuelled ones, will be commissioned over the next decade in Poland. The Polish boiler sector is one of the largest in Europe.

Solid biofuels (lump wood, pellets and wood briquettes) are products of the processing of wood biomass, a renewable energy source (RES) and a natural store of solar energy. Non-fossil solid biofuel (unlike coal, oil or gas) is recommended for widespread use in the EU, in accordance with Directive 2018/2001 of the European Parliament and of the Council from the 11th of December 2018 on the promotion of the use of energy from renewable sources. Renewable energy sources are also the key energy carrier enabling the achievement of carbon neutrality indicated by the Energy Performance of Buildings Directive.

Currently available tests of devices compliant with the Ecodesign indicate a negligibly low emission level of local space heaters. Examinations carried out in real operating conditions have shown that the emission of total suspended matter (TSM) meets the requirements of Regulation EC EU 2025/1185, while the emission of benzo(a)pyrene/BaP is 100 to 1000 times lower than assumed in European Monitoring and Evaluation Programme/European Environmental Agency air pollutant emission inventory guidebook (EMEP/EEA EIG).

The indigenous renewable energy industry covers various sectors and technologies. Its potential is huge. The estimated annual domestic production of renewable energy devices is as follows: ▲

- pellet boilers – 150,000 pcs.,
- heat pumps – 50,000 pcs.,
- tanks (buffers, boilers) – 500,000 pcs.,
- local space heaters, fireplaces – 100,000 pcs.

The RES sector is dynamic and developing in response to the growing interest in sustainable and ecological energy sources. As technology develops and environmental

awareness increases, further progress and innovation in this field can be expected. The year 2023 witnessed dynamic changes in the sector of heating systems in Poland. The increase in ecological awareness, government support and the development of modern technologies result in increasing availability of effective and ecological heating options. ■

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Renewable Sources of Energy Systems Chamber of Commerce (pol. acronym: IGU OZE)

We have been operating since 2022, however, it was 2023 that was the breakthrough year. We managed to make people aware of how important the renewable energy sources are for our lives. How

important it is to choose the right heating devices for our residential buildings. How important it is to consciously and wisely use what technological solutions the domestic manufacturer offer. Polish heating devices are among the best in the world. They have all the certificates, tests and approvals. Our members are the best in Europe manufacturers of boilers for pellets, woodchip, lump wood, fireplaces, local space heaters, and heat pumps. But not only that, members of the Chamber also include manufacturers of controllers, fans and vents, pellet burners or suppliers of mechanical components, so that each ready device that enters the European market is perfect in every way.

Polish manufacturers affiliated with the RES Chamber of Commerce

BRAGER sp. z o.o.

producer of regulators and controllers for heating equipment

www.brager.pl/pl

BTI GUMKOWSKI sp. z o.o. sp.k.

producer of pellet burners, heating coils, pellet and wood boilers

www.kipi.pl

DEFRO R. Dziubeta sp.k.

producer of pellet and wood boilers, heat pumps, gas boilers, heat recovery systems and fireplaces

www.defro.pl

DWOREK BIS FPUH

Paweł Szymborski

producer of pellet and wood boilers

www.dworekbis.pl

DREW-MET

producer of pellet and wood boilers, producer of buffers

www.kotlydrewmet.pl

ECO-PALNIK sp. z o.o.

producer of pellet burners for central heating systems

www.eco-palnik.pl

ENERGO ECO

producer of pellet and wood boilers

www.energoeco.pl

ENERGO-SYSTEM Gielniak

producer of pellet and wood boilers

www.gielniak-energositystem.pl

EWMAR-NESS sp. z o.o.

vent production, sales of mechanics and controls

www.ewmar.com.pl

FHU "K&B" Grzegorz Kocot

consulting on heating solutions

www.gkocot.oferteo.pl

FHU MINI-MAX s.c.

consulting on heating solutions

www.amura.pl

GALMET sp.z o.o. sp.k.

producer of heat pumps, pellet boilers, buffers and heat recovery systems

www.galmet.com.pl/pl

HAJDUK Agnieszka i Dariusz

Nasińscy sp. z o. o. sp. k.

producer of fireplace inserts and fireplaces

www.hajduk.eu

HF INVERTER POLSKA s.c.

supplier of mechanics and automation for the producers of heating equipment and devices

www.hfinverter.com/index.php/pl

HKS LAZAR sp. z o.o.

producer of heat pumps and pellet boilers

www.hkslazar.pl

HT HEIZTECHNIK sp. z o.o.

producer of heat pumps, producer of pellet and wood boilers, producer of buffers

www.heiztechnik.pl

IMEX – PIECHOTA sp.k.

Polish supplier of heating fuel in the form of pellets and coal

www.imexpiechota.pl

KAMEN sp. z o.o.

producer of pellet and wood boilers, producer of buffers

www.kamen.com.pl

KOŁTON sp.k.

producer of heat pumps, pellet and wood boilers, producer of buffers

www.kolton.pl

KOTŁO-POL BANASIAK sp.j.

producer of pellet and wood boilers

www.kotlopol.pl

M PLUS M Frąszczak M. Kruk E. sp.j.

vents producer and supplier

www.mplusm.com.pl

MAC-TECH s.c.

producer of auger feeders for pellet and wood boilers

www.mac-tech.pl

MACZKA GROUP sp.k.

producer of pellet burners for central heating systems, producer of buffers

www.venma.pl

MCE Małopolskie Centrum

Ekologiczne sp. z o.o.

producer of pellet and wood boilers

www.mce.net.pl

METALERG sp. z o.o.

producer of heaters for straw and other biomass

www.metalerg.pl

METAL-FACH

Technika Grzewcza sp. z o.o.

producer of pellet and wood boilers\

www.metalfachtg.com.pl

PLUM sp. z o.o.

producer of controllers and of integrated building automation systems

www.plum.pl

POLENERGIA FOTOWOLTAIKA S.A.

supplier of solutions for air conditioning, ventilation and heating

www.lp.polenergia-pv.pl

POLI TRADE POLSKA sp. z o.o.

producer of pellet brand FENIKS

www.fenikspellets.eu

PPH KOSTRZEWA sp.k.

producer of biomass boilers, heat pumps and heat recovery systems
www.kostrzewa.com.pl

PPHU "GREGOR" Grzegorz Królak

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ROTENSO sp. z o.o.

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www.rotenso.com/pl

SCHIEDEL sp. z o.o.

producer chimney and ventilation systems
www.schiedel.com/pl

STALMARK sp. z o.o. sp.k.

producer of pellet and wood boilers and burners, producer of buffers
www.stalmark.pl

TECH STEROWNIKI II sp. z o.o.

producer of controllers and of integrated building automation systems
www.techsterowniki.pl

Technika Grzewcza RACZYŃSKI

consulting on heating solutions
www.raczynski-kominki.pl

TECHNIX

producer of auger feeders for pellet and eco-pea boilers, producer of controllers
www.technix.net.pl

TERMOTECHNIKA Michał Kotelba

producer burners and feeders for pellet boilers
www.ecomat.waw.pl/pl

TIS sp. z o.o.

producer of boilers and burners for pellet and wood
www.tisgroup.pl

WALENDOWSCY. Ślusarstwo sp.j.

producer of pellet and wood boilers
www.walasc.pl

Wytwórnia Kottów c.o. TILGNER

producer of pellet and wood boilers
www.tilgner.pl

Zakład Budowy Kottów BUD-KOT

producer of pellet and wood boilers
www.budkot.pl

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-INSTALACYJNY Rafał Grobelny

producer of pellet and wood boilers
www.grobelny-pleszew.com.pl

ZAKŁAD ŚLUSARSKO--KOTLARSKI

Krzysztof Adamkiewicz

producer of pellet and wood boilers
www.kotly-adamkiewicz.pl

ZD-MOTOR sp. z o.o.

supplier of mechanics and automation for the producers of heating equipment and devices
www.zdmotor.eu/index.php/pl

ZGM ZĘBIEC S.A.

producer of pellet and wood boilers
www.zebiec.pl/category/kotly

ZMK SAS sp. z o.o.

producer of pellet and wood boilers, producer of heat pump, gas heaters and buffers
www.sas.busko.pl/pl

ZPHU PLESZEWSKIE KOTŁY s.c.

producer of pellet and wood boilers
www.pleszewskiekotly.pl

Pellets producerers and suppliers

BIOMASA PARTNER GROUP S.A.

producer and supplier of ecological wood pellets and straw pellets
www.biomasapartner.pl

ECO-PAL Maciej Piotrowski i Wspólnicy sp. z o.o.

manufacturer of pellets for fireplaces, gastronomy and grilling
www.eco-pal.pl

PELLET4FUTURE GmbH

innovative platform for sales and purchase of wood pellet
www.pellet4future.at

POLI TRADE Polska sp. z o.o.

producer of quality biofuel pellets branded Feniks Pellets
www.fenikspellets.eu

Tartak OLCZYK sp. z o.o.

mamufacturer and supplier of quality wood pellets
www.pelletolczyk.pl

TRANS-PAL S. Gzik sp.k.

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- pneumatic pellet feeders,
- electric boilers up to 24kW.

Offering a wide range of products, we meet the diverse expectations of customers looking for efficient and environmentally friendly heat sources.

We invest considerable resources in research and development, which allows us to introduce safe, innovative solutions that meet the highest standards. Our heating systems are characterized by advanced technology, which is confirmed by proprietary solutions in the patent office and certification of accredited research units.

Invariably for years, Kostrzewa has also been taking care of after-sales support, offering professional customer service and an extensive network of authorized service centers. This approach translates into long-term relationships with customers and trust in the brand.

We are open to cooperation with foreign partners, offering competitive business terms and technical support. Cooperation with us is a guarantee of reliability and commitment to long-term business relations for companies that are looking for efficient, modern and environmentally friendly heating solutions.

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P.W. BUDMET

NOCON BUDMET

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About the company

P.W. BUDMET (BUDMET a multisector company) is a renowned manufacturer of central heating boilers with over 40 years of experience in the industry. The company is known for its passion for modern and ecological solutions in the production of heating boilers, especially pellet and electrode boilers.

Products, philosophy and innovation

P.W. BUDMET combines its philosophy based on ecology with an innovative approach to the production of heating boilers. Their passion for modern solutions has led to the creation of pellet boilers of the highest quality and aesthetics, while ensuring high efficiency and minimal maintenance. Through advanced production technologies and close cooperation with scientists, Budmet's heating devices meet strict European Union emission standards, but also have won prestigious awards which confirm the quality and innovation of the products.

Flagship product

- **Forest** is a wood pellet boiler whose three-pass vertical heat exchanger guarantees high heat recovery efficiency. Thanks to an innovative control allowing automatic power modulation, this product achieves maximum energy efficiency and smooth operation, thus reducing RES fuel consumption. Forest pellet boilers with feeder are produced in the power rating range from 15 kW to 200 kW. Forest is an exclusive solution, which will meet the needs of the most demanding customer.

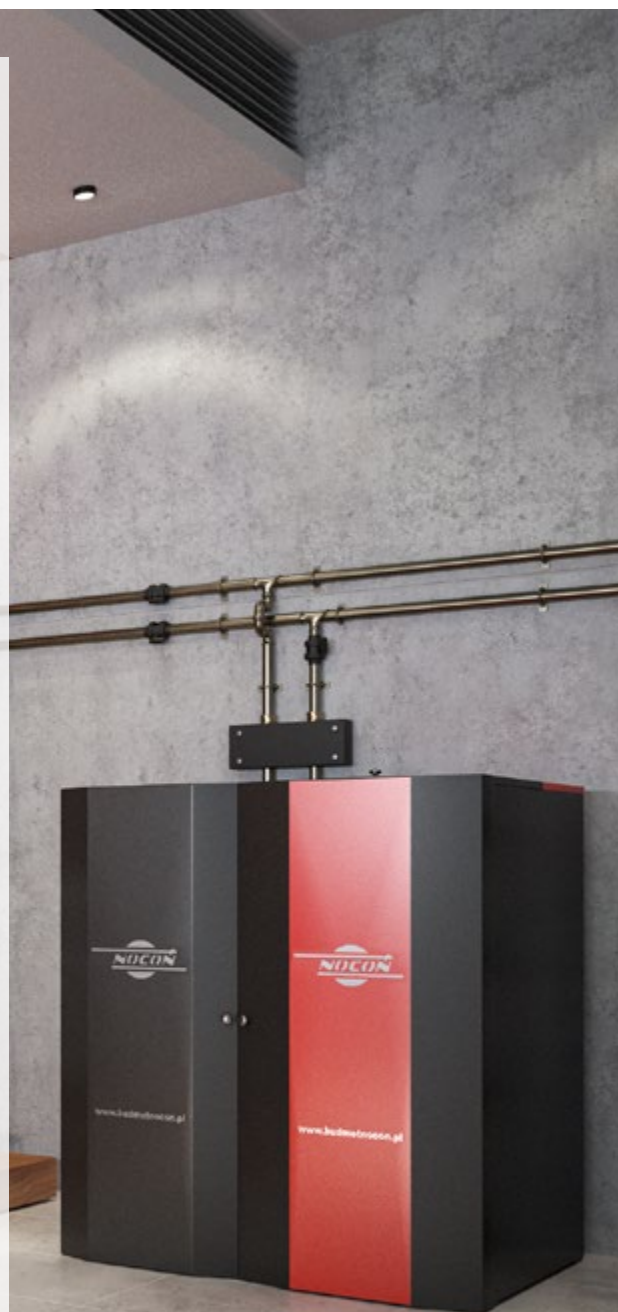
- **EKO Balance** - A technologically advanced product by implementing an electrostatic particle separator, (electrostatic precipitator) in the boiler exchanger. As a result of such a solution, particle emissions are reduced to a minimum thanks to which the device has been classified as a Green Heating Appliance. EKO Balance can be fueled with A1 and A2 class wood pellets, or miscanthus biomass. This allows for energy independence, the use of locally available raw materials and it also fits in with distributed energy trends. This boiler has separate approvals for all three fuels in accordance with the latest standard for the certification of solid fuel boilers.

Value, trust, ecology

The company's core values, which have been passed down from generation to generation, are competence, responsibility and honesty in relations with partners. High quality and environmentally friendly solutions, make P.W. BUDMET a trustworthy partner. The use of local raw materials in the form of wood and herbaceous pellets as biofuel, as well as technological development to reduce particle emissions, testify to the company's commitment to ecology and sustainability.

Conclusion

P.W. BUDMET is a well-established company that is constantly evolving to provide innovative, environmentally friendly and high-end heating solutions. Its commitment to environmental protection and the high quality of its heating equipment make it recognizable and competitive in both domestic and international markets.



P.W. "BUDMET"

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R E P O R T

Current situation and prospects for pellets in Poland

Agnieszka Kędziora-Urbanowicz

Vice-president of the Polish Pellet Council

Auditor of ENplus®/DINplus/SURE UE®/DDS



Graduate of the Faculty of Commodity Science, specialty Commodity and Quality Management at the Gdynia Maritime Academy and of postgraduate studies in Energy and Renewable Energy Sources at the University of Warmia and Mazury in Olsztyn. She has been involved in certification of product quality and management systems for 10 years.

Long-time third-party auditor for factory production control, due diligence systems for biomass for energy purposes, quality for wood pellets and sustainability criteria for solid biofuels in certification bodies, i.e. the Polish Center for Testing and Certification, SGS Polska Sp. z o.o., Control Union Poland Sp. z o.o., DQS Polska Sp. z o.o., DINcertco GmbH and Bureau Veritas Polska Sp. z o.o.. Co-author of due diligence system standards for solid biomass, including standard SWP-SNS:2015 System of verification of origin of solid biomass for energy purposes. Member of the Technical Committees at Bioenergy Europe, participated in the work of technical committees at the Polish Committee for Standardization (PKN) and in the work of the Forest and Wood Commission at the General Directorate of State Forests. Currently, she is also Vice President of the industry association POLISH PELLET COUNCIL. She has experience in implementation projects carried out in preparing plants to meet the requirements of ENplus®/ DINplus certification schemes - more than 50 full implementation projects in this area.

European Wood Pellet Production

(in 2022, tonnes, %) Source: EPC Survey 2023

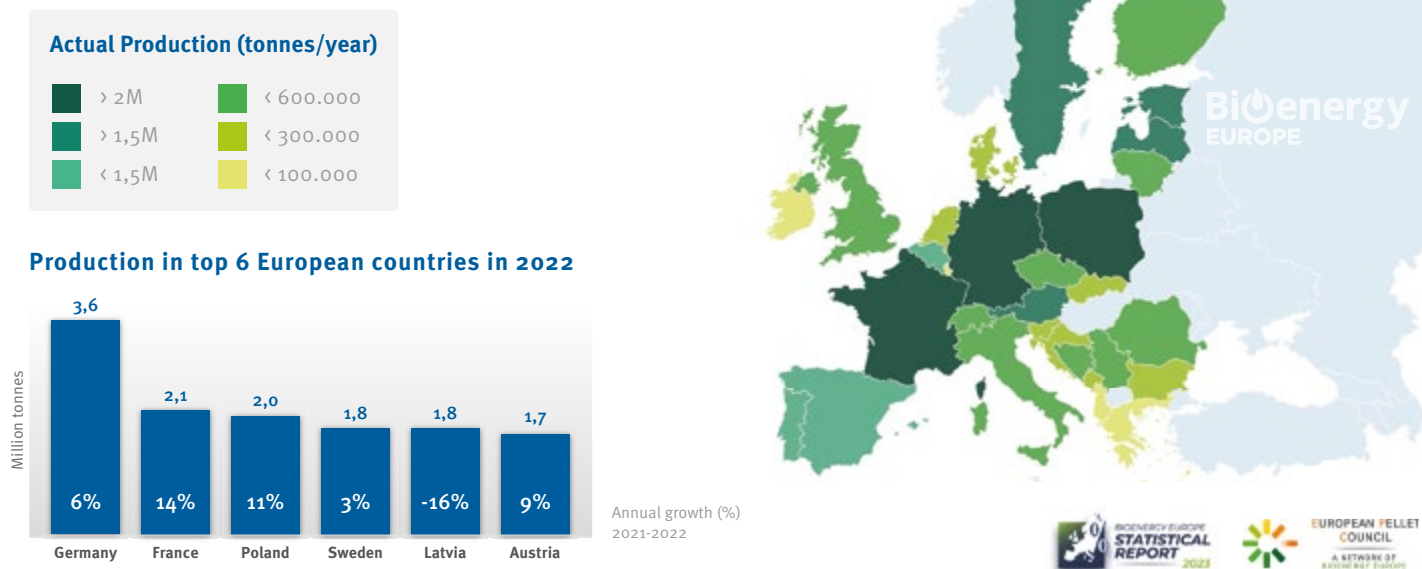


Figure 1. European wood pellet production

The pellet market in Europe and the world

Global pellet production experienced significant growth between 2021 and 2022, from 44.7 million tons to nearly 46 million tons. The year 2022 was marked by a unique landscape for the pellet market, characterized by unprecedented growth rate. The first few months of the year saw an extraordinary surge in demand, partly still driven by the upward characteristics seen in 2021. The successes of 2021 echoed, across sectors, driving sales of heating equipment in many new regions of the world, and consequently increasing the market for pellets. As a result, there was also a significant increase in pellet production in some regions to meet the increased demand. However, 2022 was also marked by unforeseen challenges that significantly affected the market landscape. The escalating conflicts between Russia and Ukraine resulted in visible impact on the pellet market. Import bans on Russian wood, resulting from geopolitical tensions, caused significant disruptions in the industry's supply chain. This unexpected turn of events demonstrated the vulnerability of global markets to geopolitical changes, shedding light on potential weaknesses in the supply chain.

In the so-called EU-27, pellet production showed a steady upward trend, rising from 19.83 million tons to more than 20.5 million tons. It is worth noting that Germany maintained its leading position as the largest producer by supplying more than 3.5 million tons of pellets. The EU-27's total production underscores its significant role in the global pellet market. These strong results are noteworthy, especially noting the broader global production growth I mentioned earlier. The joint efforts of key EU pellet producing countries, including Latvia, Poland, France, Sweden and Austria, further contribute to establishing the region as a key player in the global biomass energy sector.

Some comments on the EU policy landscape. In 2023, the lengthy discussions on REDIII and biomass sustainability criteria reached their political finale, the outcome of which was not unfavorable for our sector. The thorny issue of virgin woody biomass – a major concern for industrial pellet producers and end users – was removed, and woody biomass was explicitly recognized as a renewable energy source contributing to the EU's 2050 zero-carbon targets. However, as the experience with the REDII Directive has shown – the proof of the directive's

European Wood Pellet Consumption

(in 2022, tonnes, %) Source: EPC Survey 2023, Hawkins Wright

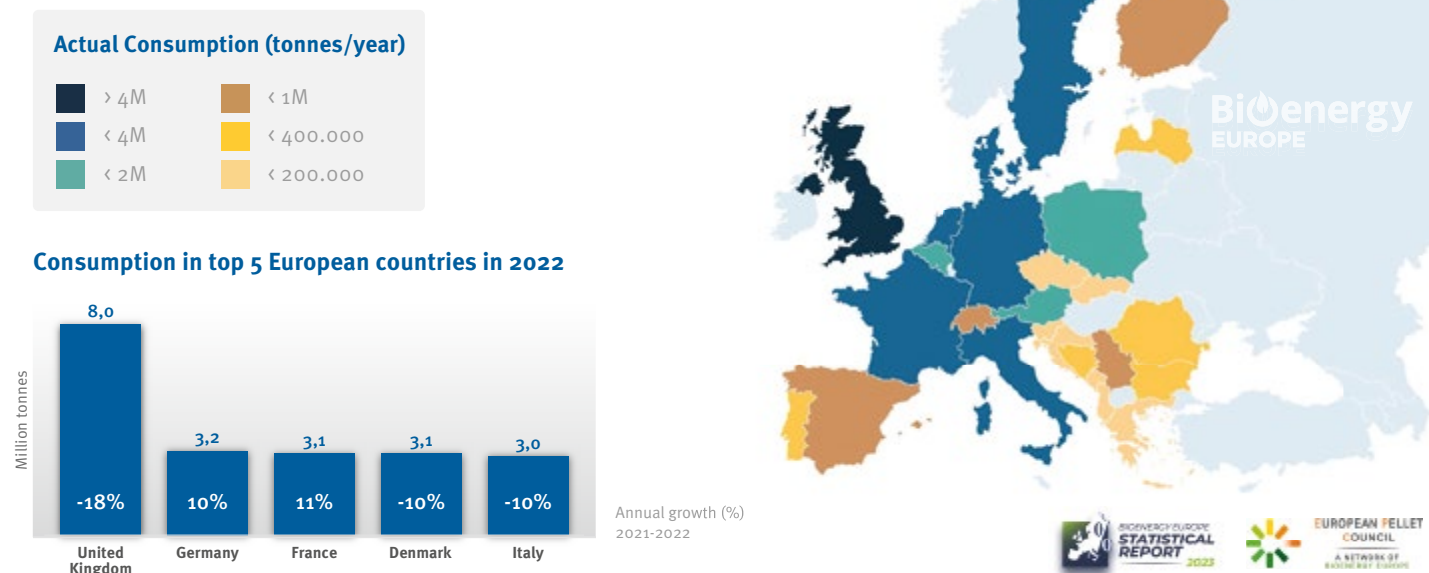


Figure 2. European wood pellet consumption

effectiveness is in its implementation, and several issues remain open. Another topic that has emerged is the implementation of the EUDR (EU Deforestation Regulation). The EUDR replaces the previous EUTR (EU Timber Regulation) by expanding the scope and product requirements.

However, there has been significant disruption in other regions outside the so-called EU27 due to the ongoing conflict between Ukraine and Russia. The war has caused serious consequences, especially for Russia – a key pellet producer with a history of steady growth. Following Russia's invasion of Ukraine and subsequent ban on pellet imports, production in the country is estimated to have dropped noticeably by 28% from nearly 2.5 million tons to 1.8 million tons of pellets. After EU sanctions on Russia went into effect in July 2022, pellets that had previously flowed to Europe were diverted to other markets. South Korea became the main destination for pellets from Russia. Belarus, another market player linked to Russia and affected by EU sanctions, also saw a decline in annual exports. Ukraine, despite a slight decline in pellet production, has handled the challenges with relative resilience. In contrast, other countries in the region, particularly the

Balkan countries, have seen steady increases in production levels (Fig. 1.).

This complex interplay of geopolitical factors and production fluctuations underscores the complex web that shapes pellet markets in regions outside the EU27.

In recent years, global pellet consumption has shown a steady upward trend. This can mainly be attributed to the significant environmental initiatives taken by many countries, including Poland. It is worth noting that the previous year was a remarkable milestone. It was characterized by an unprecedented increase in consumption exceeding 6 million tons of pellets, reflecting a significant increase of 16%. This remarkable growth in 2020–2021 can be attributed to the exceptionally high volume of pellet equipment sold and the relative affordability of pellets. Unfortunately, the transition from 2021 to 2022 was associated with greater challenges, characterized by various crises affecting stakeholders in the sector. Nevertheless, the overall trend remains positive, with moderate growth of just over half a million tons (+1%). The global pellet market, while fluctuating, continues to evolve under the influence of a dynamic interplay of factors.

In the global context, countries in the so-called EU-27 group maintain their

dominant position as the largest consumer of pellets, accounting for more than 24 million tons of the 46 million tons consumed worldwide in 2022. This impressive figure, while significant, shows a slight decline – of about 2% – compared to the record level of consumption in the previous year (2021). However, the downward trend has its roots in the geopolitical turmoil that swept Europe in 2022, significantly affecting the pellet market. The drastic declines triggered by the Russian invasion echoed across the continent, causing disruption in the pellet sector as well. The gas crisis that followed immediately after these events caused unprecedented fluctuations in pellet prices, which reached spectacularly high, unprecedented price levels. This sudden price volatility cascaded, reducing consumer purchases and creating a sense of uncertainty in the industry. As a result, sales of pellet appliances fell sharply in the last four months of 2022 across Europe, resulting in a decline in pellet consumption (Fig. 2.).

As for European countries outside the European Union, there was also a significant drop in pellet consumption, marking a return to levels reminiscent of 2018. This noteworthy trend can be attributed to a significant reduction in the industrial use of pellets, caused mainly by the UK's largest Drax power plants to date. Between 2021 and 2022, pellet consumption for electricity generation in the UK saw a sharp decline of nearly 2 million tons, a drop of as much as 20%.

Pellets from Poland

Recent years have brought many surprises, positive, but also negative ones for the pellet industry in Poland. The year 2021 proved to be a difficult time for the industry, largely marked by the prevailing COVID-19 pandemic and huge uncertainty about market development. It's hard not to see how strange 2022 was for the pellet market. What began as a perfect storm of supply-demand imbalance turned – in many ways thanks to unusually warm weather during the heating season – into a disappointing market environment. The year 2022 did not spare us from the sensations: high inflation, resulting in increased

production costs, raw material purchases, film purchases and increased labor costs, as well as the war in Ukraine and the resulting sanctions against the Russian Federation and Belarus, disrupted supply chains, raw material shortages... All of these generated additional risks and uncertainties in relation to ongoing operations (Fig. 3.).

The unprecedented peaks in pellet prices that we saw in the broader period from late summer to early December 2022 have now dropped significantly, although they remain above historical averages. Rising raw material and production costs, as well as the broader issue of inflation, may justify this increase, but the question is what will happen when (or if) demand begins to rise again this heating season. The lack of consumer confidence and the negative publicity that the pellet industry received during the price crisis (pellet prices were in the media spotlight for several months due to rapid and not well understood price increases) will require focused efforts from key market players. While the first half of 2022 was extraordinary, with record sales increases as consumers rushed to replace their fossil-fuel-powered appliances after Russia's invasion of Ukraine, the significant drop in pellet appliance sales from the second half of 2022 has put manufacturers on edge and could have long-term consequences for the evolution of the pellet market for households.

Galloping prices have caused a shift in the perception of wood pellets from "the cheapest alternative to coal" to "one of the most expensive heating methods." The result is a huge drop in sales of wood pellet heating equipment estimated at nearly 80% compared to the same period of 2022, with a significant drop in sales of wood pellets and an exceptionally large increase in sales in the heat pump market (estimated at nearly 60% according to data from the Polish Heat Pump Development Organization).

The year 2024 poses many challenges which are: recovery of the wood pellet market, changes in the distribution system and communication with customers, and often restructuring of many production companies. The year also presents many opportunities thanks to the increasing attention the

EUROP TOP 10 largest wood pellet producers

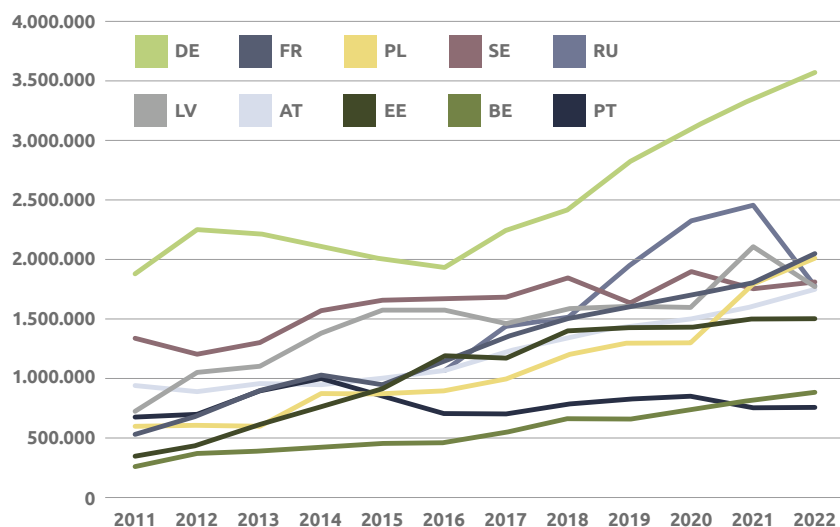


Figure 3. Europ top 10 largest wood pellet producers

Source: EPC survey 2023, Argus Media Research

industry is receiving from government administrations – we are perceived as an important part of the home heating system.

The activities of the Polish Pellet Council have not been insignificant in this process. The wood pellet industry is not lagging behind European leaders – we continue to see increases in pellet production, which are primarily due to new, medium-sized (up to 10,000 tons/year) production units. Most of them strives to obtain a certificate confirming the repeatability of pellet parameters in quality class A1 or A2, namely ENplus® certification. Since the beginning of 2023, more than a dozen new entities have joined the list of those applying for ENplus® certification, which shows that the industry continues to grow strongly.

Data collected by the Polish Pellet Council shows that in Poland, five companies account for 30% of the annual production of wood pellets, with a total annual production volume of about 0.5 million tons. The remaining smaller pellet plants comprise about 100 companies, operating mainly in the local market. Half of them produce up to a maximum of 10,000 tons of pellets per year and the rest have a production capacity of 15–20,000 tons of pellets per year. It should be noted that about 50% of wood pellets produced in Poland are sold to western countries as pellets certified under ENplus/ DINplus systems.

Poland, like other pellet-producing countries, is struggling with the problem of availability of the raw material, which is also used to produce panels, among other things,

or burned by the commercial power industry. It should also be added that the phenomenon of smog, which is a problem for most Polish cities, contributes to a change in thinking about the use of solid fuels by an increasing number of Poles, and the mandatory replacement of boilers with those of the 5th class affects the increase in demand for pellets on the local market. Despite the introduction of so-called anti-smog resolutions by individual provinces, we are still a country with one of the highest degrees of air pollution. As much as 87% of the coal used in the European Union for home heating is consumed in our country. On the other hand, we are one of the leaders in the production of this ecological biofuel.

Although the wood pellet industry in Poland is developing very well, it suffers from a shortage of raw material, so that the production potential of many Polish plants is very small, and they supply mainly to the local market (solid fuel for households). Larger production plants, due to the investments made to improve the quality level of the finished product, are mainly interested in producing pellets for export. Therefore, they work directly with mainly foreign customers or with distributors specializing in exporting pellets to the Scandinavian, Italian, Austrian, German and French markets. According to the EPC Survey, in 2022 Poland produced nearly 1.2 million tons of wood pellets, of which about 500,000 tons were sold on the domestic market, and about 700,000 tons were exported.

In reports published by EPC, Poland is listed among the top producers of wood pellets – alongside Belgium, Finland or Hungary. For example, between 2017 and 2018, Poland saw an 18% increase in pellet production. What is more, Europe saw more than 10% growth in the same period, reaching 20.3 million tons of production of this biofuel. Importantly, we are also not lagging behind in terms of the number of new production facilities and trading companies certified in quality systems according to ENplus®/ DINplus schemes, of which as many as 60 have developed in Poland between December 2017 and January 2021, boosting overall domestic production. At the beginning of March 2021, we recorded the 100th certificate issued

under the ENplus® scheme in Poland, which is a tremendous success for the industry!

The Polish pellet industry, despite the difficult geopolitical situation in 2020–2023, has recorded tremendous progress – today we are the third (excluding Russia) producer of wood pellets in the old continent. We can boast an impressive number of ENplus®-certified companies, and additionally it should be mentioned that more modern production lines are being built.

Polish pellet market

The consumption of pellets in Poland has been growing steadily since 2014. The increase in popularity of biofuels in the form of wood pellets is due not only to the greater concern for the environment, but also to end-user savings. Today, most of the production is still exported to countries that began producing green energy on an industrial scale as early as the 1980s, such as Sweden and Denmark, and began reducing carbon dioxide (CO₂) emissions and fossil fuel consumption earlier than Poland. However, this situation is changing, and more and more pellets are being distributed locally. The growth of local retail pellet sales is also influenced by boiler manufacturers, whose equipment is increasingly modern, self-service and, above all, easily accessible.

All these factors are of significant importance for the development of the entire

industry, and this should become even more apparent in the coming years. Thus, the choice of a renewable energy source (RES) can contribute to the economic growth of the country as a whole in a broader perspective. According to reports published by EPC, Poland is among the top producers of wood pellets.

Even though last year was very interesting, largely marked by huge changes in the market for biofuels and other solid fuels used for home heating and great uncertainty about the development of the market, pellet consumption in Poland has been growing steadily for several years. Government and local government subsidies for the replacement of old heating systems have resulted in an increase in the number of new, environmentally friendly pellet appliances, which has translated into an increase in pellet consumption. The effects of these subsidies (including under the Czyste Powietrze (Eng. Clean Air) program are expected to be felt for many years. As for retail sales in Poland, the market is becoming more absorbent, but this is a long-term process. This is due to the high VAT rate (23%) on pellets. Nevertheless, the price of pellets remains competitive with, for example, eco-pea coal. It is also important that manufacturers pay more and more attention to the quality of their products and certify them, which is noticed by increasingly aware end users. ■



**P O L I S H
P E L L E T
C O U N C I L**

Polish Pellet Council (www.polskaradapelletu.org)

The Polish Pellet Council (pol. acronym: PRP), as a National Industry Association aimed at promoting pellets, was established in 2017 as a result of a grassroots initiative of representatives and needs of this rapidly growing industry. We focus on activities that contribute to improving air quality and reducing carbon dioxide (CO₂) emissions through ongoing cooperation with legislators on national regulations, promoting pellets as an environmentally friendly biofuel, as well as conducting research and development and educational activities. We actively support producers, trading companies, service companies and

end users. PRP also serves as a national point of contact for the pellet industry in Poland and abroad in matters of regulations, pellet quality, certification systems, testing, but also in matters connected with counterfeit and abuse by entities imitating certified pellets or introducing non-compliant pellets. We also represent the pellet industry in dealing with public administration and local government authorities.



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32 cubes



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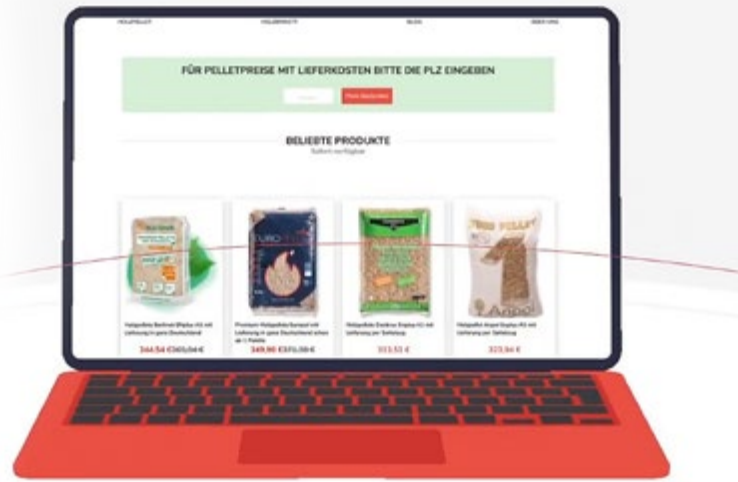
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Innovative Platform for the Sale and Purchase of Wood Pellets



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Pellet4Future is an innovative online platform based in Vienna that is revolutionizing the market for fuel sales and purchases. Currently, the platform operates in the Austrian market at www.pellet4future.at, in the Polish market at www.pellet4future.com, and in the German market at www.pellet4future.de. Pellet4Future specializes in the distribution of pellets and wood briquettes, catering to both customers and fuel distributors and manufacturers who can showcase their offerings on the platform.

Innovative System Exclusive to Pellet4Future

What sets this platform apart is its innovative system, enabling customers to make quick and secure purchases. Using a simple mechanism, customers, after entering their postal code, can check the current prices of pellets or briquettes along with the delivery cost to their homes. In just 3 minutes, they can compare various offers, choose the most favorable one, and place an order. This not only saves time but ensures pricing transparency.

Transaction Security for Customers

Customer safety is a top priority for Pellet4Future. The platform exclusively collaborates with renowned companies, ensuring transaction security for customers. Clients have the flexibility to purchase individual pallets or opt for entire vehicle deliveries of pellets, tailoring the platform to meet their individual needs.

Convenient Sales for Producers and Distributors

Pellet4Future streamlines the sales process for producers and distributors who can showcase their offerings on the platform. It enables them to reach customers nationwide and even beyond borders. By listing their

offers on the platform, entrepreneurs can enhance their visibility and trade efficiency. Focusing solely on pellet production, producers and distributors can rely on the platform to handle customer service, marketing, and logistics. Pellet4Future is continually evolving, offering producers and distributors additional tools, such as an application for managing offers, already operational in the Polish market. The app allows producers and distributors to manage their offers, update prices, and add quantities. The company plans to expand this application to other markets soon.

Dynamic Development, Just the Beginning

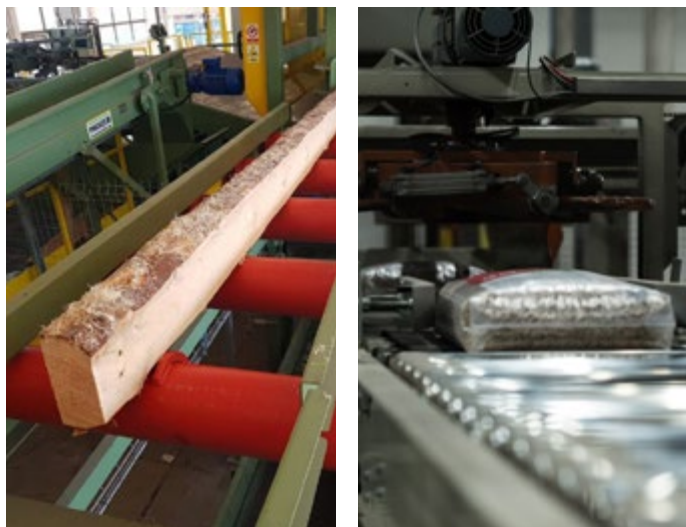
The dynamic growth of Pellet4Future is only the beginning. The platform has introduced eco-pea coal to its offerings in the Polish market. In 2024, expansion into the Italian market is planned, marking another milestone in shaping industry standards. Pellet4Future not only simplifies the process of fuel purchase and sale but also emerges as an innovation leader in the market, providing comprehensive solutions for both individual customers and industry enterprises.



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Poli Trade Polska

We are a producer of quality pellet brand Feniks Pellets and the owner of a production plant with a production potential of 30,000 tons per year. We have been delivering the best quality pellets since 2003. In 2015 our company established the "FENIKS PELLETS PREMIUM" wooden pellet factory in Poland – one of the most modern facilities in Poland. We adhere to the highest standards, ensuring quality at every stage of production, from raw materials (pure coniferous sawdust from selected, contracted suppliers) to the final product. The highest quality of Feniks Pellets has been confirmed, among others, by the EN PLUS A1 certification program. Our pellets are ecological, efficient, and environmentally friendly. We offers two product lines: Premium and Gold – both in 15 kg standard bag. The entire production process takes place in four halls covering over 2000 square meters, including a warehouse for the finished product. We comply with European product and ecological standards, as well as the goals outlined in sustainable development and corporate social responsibility programs. High quality of our pellets is confirmed by well-known European producers of heating systems, including among the others Windhager, Defro, Budmet.



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