

The Automotive Industry in Poland

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Polish Chamber of
Automotive Industry



POLISH CHAMBER OF AUTOMOTIVE INDUS
SINCE 1994

The Polish Chamber of the Automotive Industry

27 YEARS

- established in 1994
- bringing together representatives of the automotive industry
- has almost 200 members; however PIM cooperates with 400 companies from the automotive sector in Poland
- links between companies and associations active in Poland, large and small:
 - automotive suppliers & manufacturers
 - automotive experts & their organizations / associations
 - companies in the „broadly understood” automotive sector
 - media and business associations in the automotive sector
 - car dealers & independent workshops

The Chamber works closely with:

- government and ministries
- KIG Krajowa Izba Gospodarcza (The Polish Chamber of Commerce) as a member
- PAIH (Polish Investment and Trade Agency)
- PARP (Polish Agency for Enterprise Development)
- The National Centre for Research and Development (NCBR)
- European Commission (CARS21/CARS2020/GEAR2030/Skill4Industry)
- Warsaw School of Economics (SGH),
- Lean Institute,
- Special Economic Zones,
- Other automotive associations PZPM (ACEA),
ZZPMiAP, PGM



Ministerstwo Rozwoju,
Pracy i Technologii



POLISH CHAMBER OF COMMERCE



Invest
in Poland

POLSKA AGENCJA INFORMACyjNA
i PROMOCyjNA ZAGRAJNICZNYCH INWESTYCJI



The Polish Chamber of the Automotive Industry is also involved in such projects, programs and events as:

- Lobbying on behalf of Polish automotive players
- Commenting on draft laws and regulations,
- Organizing exhibitions to promote vehicles using alternative „fuel” systems
- The Best Automotive Investment of the Year, the Best Automotive Manager of the Year
- INNOMOTO (NCBR) – R&D automotive sectorial projects financed by EU „money”
- Sectoral Council for Competences in the Automotive Sector (PIM is the leader of project)
- AutoEvent - conference for the Polish automotive industry
- Etc.



Postgraduate Studies for Automotive Managers

The project is implemented continuously since 2003, in cooperation with the Warsaw School of Economics (SGH). Over the past years post-graduate studies for Managers Automotive completed more than 500 people. Among our graduates are also directors of factories, heads of departments of companies producing parts and components for the automotive industry.

Participation in the study is not only a large dose of knowledge from the best professors of the University SGH, but especially interesting opportunity to establish business contacts and a chance to exchange valuable experience. Constantly maintained high interest in studies is a proof that people in the industry want to improve their skills and broaden their knowledge.

AutoEvent facts and figures

- 2005: first edition of the conference
- 350: number of participants in 2019
- 400: estimated number of B2B meetings
- 40: number of exhibition booths



The AutoEvent conference:

- excellent experts and automotive practitioners
- lectures, discussions, debates
- an industry exhibition,
- technical and technological innovations
- inspiring networking,
- organised cooperation talks (B2B),
- The “Manager of the Year” competition
- The “Investment of the Year” competition



AutoEvent - the largest conference of the automotive sector in Poland and CEE.

For several years, business talks between participants have been an essential of the AutoEvent Conference

conference is a great opportunity to carry out B2B talks with many companies at the same time and place (purchasing departments are engaged in the talks).

In 2019 more than 300 companies from Poland and 10 companies from abroad participated in B2B meetings, and carried out over 400 business talks.



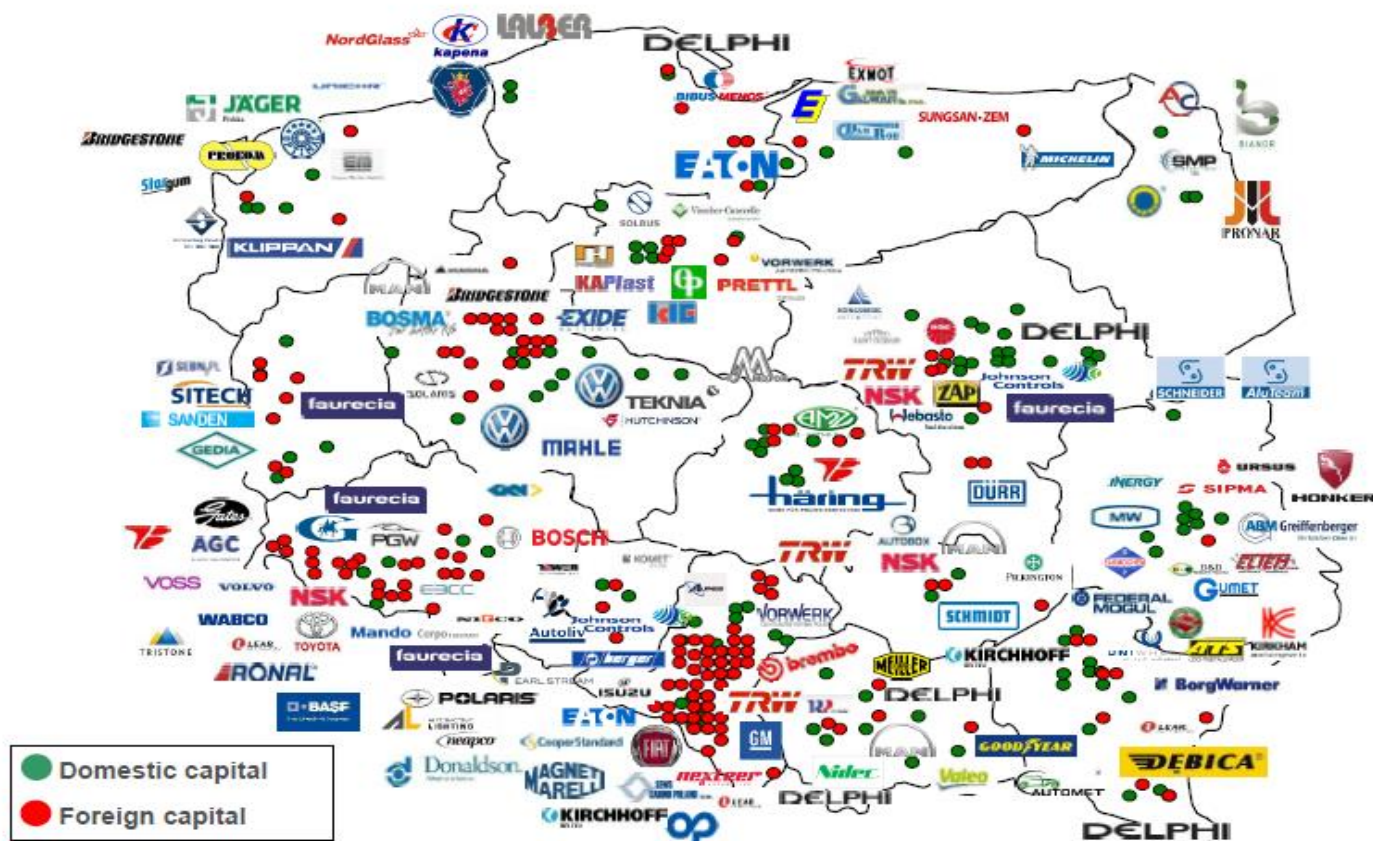
The results of the Polish Chamber of Automotive Industry's competition

The „MANAGER OF THE YEAR” & The „INVESTMENT OF THE YEAR”

are announced during the official Gala Dinner



Main Automotive suppliers in Poland



Source: PAliIZ, Automotive Suppliers, PIM

Motor vehicles production in CEE and Poland

PRODUKCJA SAMOCHODÓW W WYBRANYCH KRAJACH EUROPY ŚRODKOWO-WSCHODNIEJ [000 SZT.]
MOTOR VEHICLES PRODUCTION IN SELECTED CENTRAL AND EASTERN EUROPEAN COUNTRIES [000 UNITS]

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Zmiana Change 2018/2019
Polska Poland	818,8	785,0	740,5	540,0	475,0	473,0	534,7	554,6	514,7	451,6	434,7	-3,74%
Czechy Czech Republic	976,4	1 069,5	1 192,0	1 171,8	1 128,5	1 246,5	1 298,2	1 344,2	1 413,9	1 345,0	1 427,6	6,14%
Słowacja Slovakia	461,3	561,9	639,8	900,0	975,0	971,2	1 000,0	1 040,0	1 001,5	1 090	1 100	0,92%
Węgry Hungary	212,8	208,6	211,2	215,4	220,0	434,1	491,7	472,0	502	431,0	498,2	15,59%
Rumunia Romania	279,3	323,6	310,2	326,6	411,0	391,4	387,2	358,8	359,2	476,8	490,4	2,86%



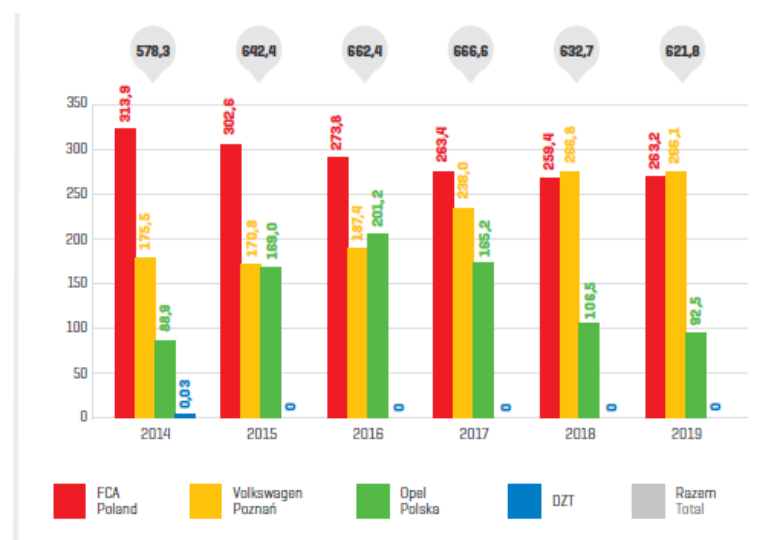
Samochody osobowe
Passenger cars



Samochody użytkowe
Commercial vehicles

Źródło: KPMG w Polsce na podstawie danych OICA / Source: KPMG in Poland based on OICA data

PRODUKCJA WEDŁUG PRODUCENTÓW* [000 SZT.]
PRODUCTION BY COMPANY [000 UNITS]



Źródło: producenci* ze względu na różnice metodologiczne prezentowane tutaj dane nie są bezpośrednio porównywalne z danymi według GUS prezentowanymi w innych częściach niniejszego Raportu PZPM
Source: manufacturers* due to differences in methodology, presented data are not directly comparable with CSO records featured in other sections of PZPM's Yearbook.

Poland – cars down ... vans up ...

Cars production in Poland (in 000)

Produkcja samochodów osobowych (GUS)*

		sty	lut	mar	kwi	maj	cze	lip	sie	wrz	paź	lis	gru	w tys. szt. RAZEM	przeciętna miesięczna
Produkcja	2016	46,5	52,4	55,7	52,5	47,3	57,1	38,0	28,5	50,7	41,5	40,8	43,6	554,6	46,2
	2017	47,7	50,9	59,5	49,7	48,2	46,6	32,9	24,7	38,0	45,5	43,6	27,4	514,7	42,9
	2018	39,2	43,8	47,4	43,3	43,4	44,2	32,1	17,0	35,1	45,0	33,4	27,7	451,6	37,6
	2019	32,1	38,5	41,9	43,4	43	39,2	37,8	19,1	40,7	36,1	33,4	29,5	434,7	36,2
	2020	37,8	41,9	20,1	0,4	3,5	18,9	26,4	19,9	31,1	28,3	30,1	20,5	278,9	23,2
	2021	18,0	24,3	30,7										73,0	24,3

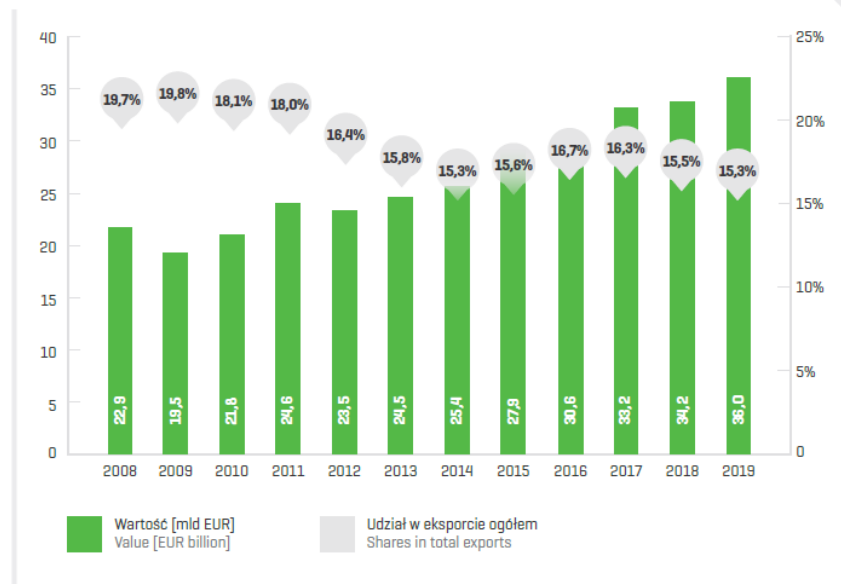
Bus production in Poland (+10 passengers)

Produkcja pojazdów do transportu publicznego (do przewozu 10 osób i więcej) (GUS)*

		sty	lut	mar	kwi	maj	cze	lip	sie	wrz	paź	lis	gru	w szt. RAZEM	przeciętna miesięczna
Produkcja	2016	323	318	350	382	478	467	484	313	439	504	592	584	5234	436
	2017	348	464	537	336	387	537	343	328	459	454	478	580	5251	438
	2018	370	468	478	553	507	577	477	444	440	522	577	492	5905	492
	2019	490	558	664	676	650	547	610	412	691	640	684	740	7362	614
	2020	377	474	519	379	508	524	502	480	503	586	703	482	6037	503
	2021	295	388	581										1264	421

Poland - Automotive export (36 EURb)

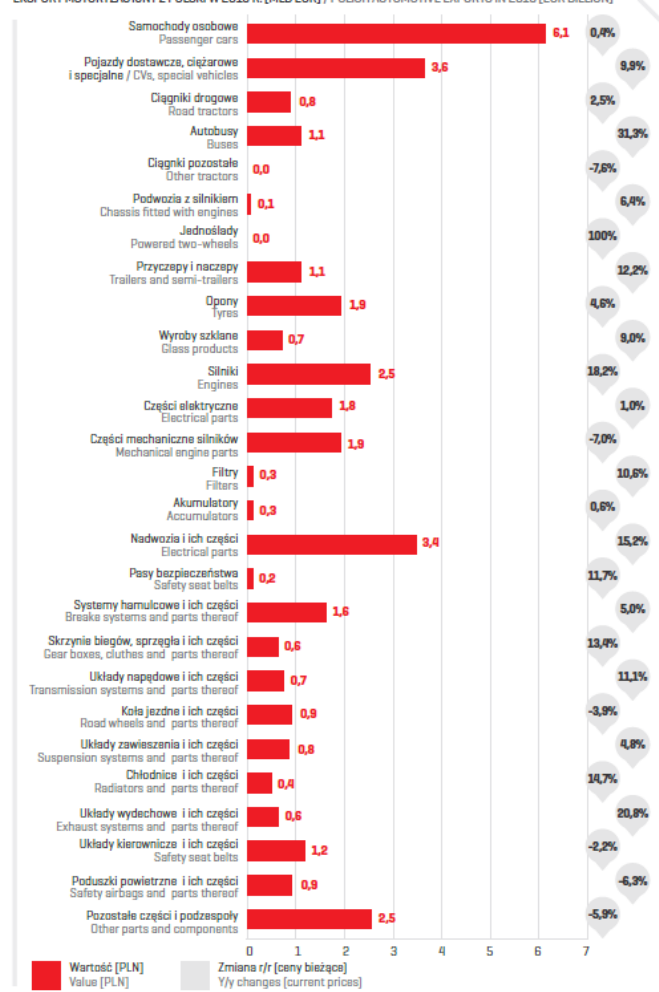
EKSPORT MOTORYZACYJNY Z POLSKI
POLISH AUTOMOTIVE EXPORTS



Źródło: KPMG w Polsce na podstawie danych Eurostat
Source: KPMG in Poland based on Eurostat data

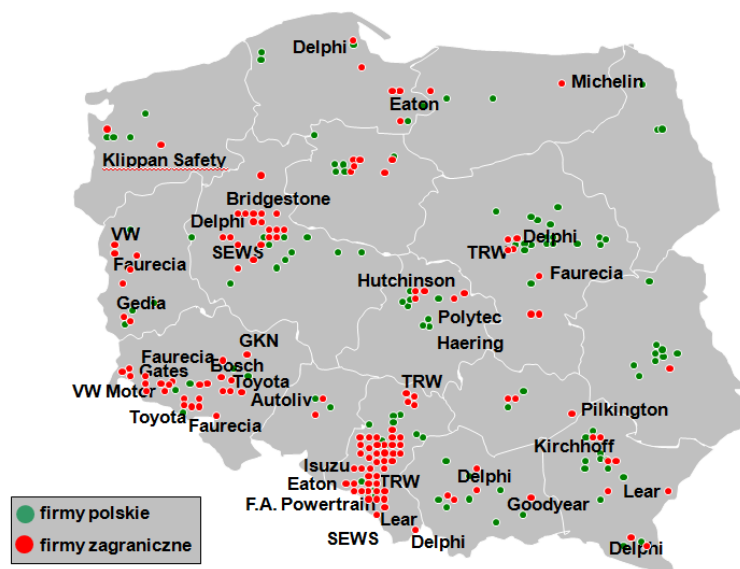
Growth driven by automotive suppliers ...

EKSPORT MOTORYZACYJNY Z POLSKI W 2019 R. [MLD EUR] / POLISH AUTOMOTIVE EXPORTS IN 2019 [EUR BILLION]



Źródło: KPMG w Polsce na podstawie danych Eurostat / Source: KPMG in Poland based on Eurostat data

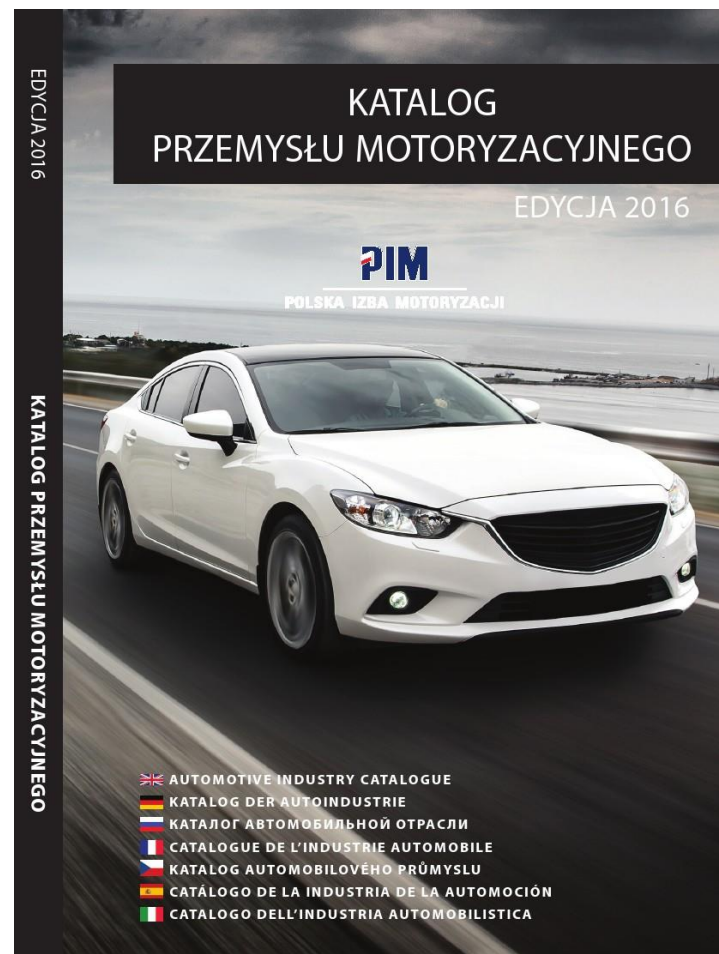
- **222 companies doing business in automotive sector in Poland have annual sales of more than 50 million EUR**
(total sales 329 142 PLNm = 76 bln EUR based on 2019 data, +23% like for like growth vs 2016)
- **In Poland, there are +900 manufacturers of automotive parts and accessories (Tier 1 – Tier 3)**
About 400 are entities with foreign capital.
approx. 500 „automotive companies” have ISO TS 16949



Catalogue - manufacturers of parts and components for the automotive industry in Poland

This catalogue is unique in presenting a wide range of companies from the automotive industry and at the same time forming a knowledge base for anyone looking for information about selected manufacturers and products.

Catalogue is with information in seven languages: Polish, English, German, Russian, French, Spanish and Czech.



Thank you for your attention
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