

POLISH INFORMATION  
AND FOREIGN INVESTMENT AGENCY

**Automotive industry in Poland**



## Automotive industry in Poland in 2010

- 892 companies (of which 270 with foreign shareholding)
- motor vehicle production: 887 301 units in 2010
- production sold: 91 272 mln PLN (15,9% market share)



Fiat 500



Ford Ka

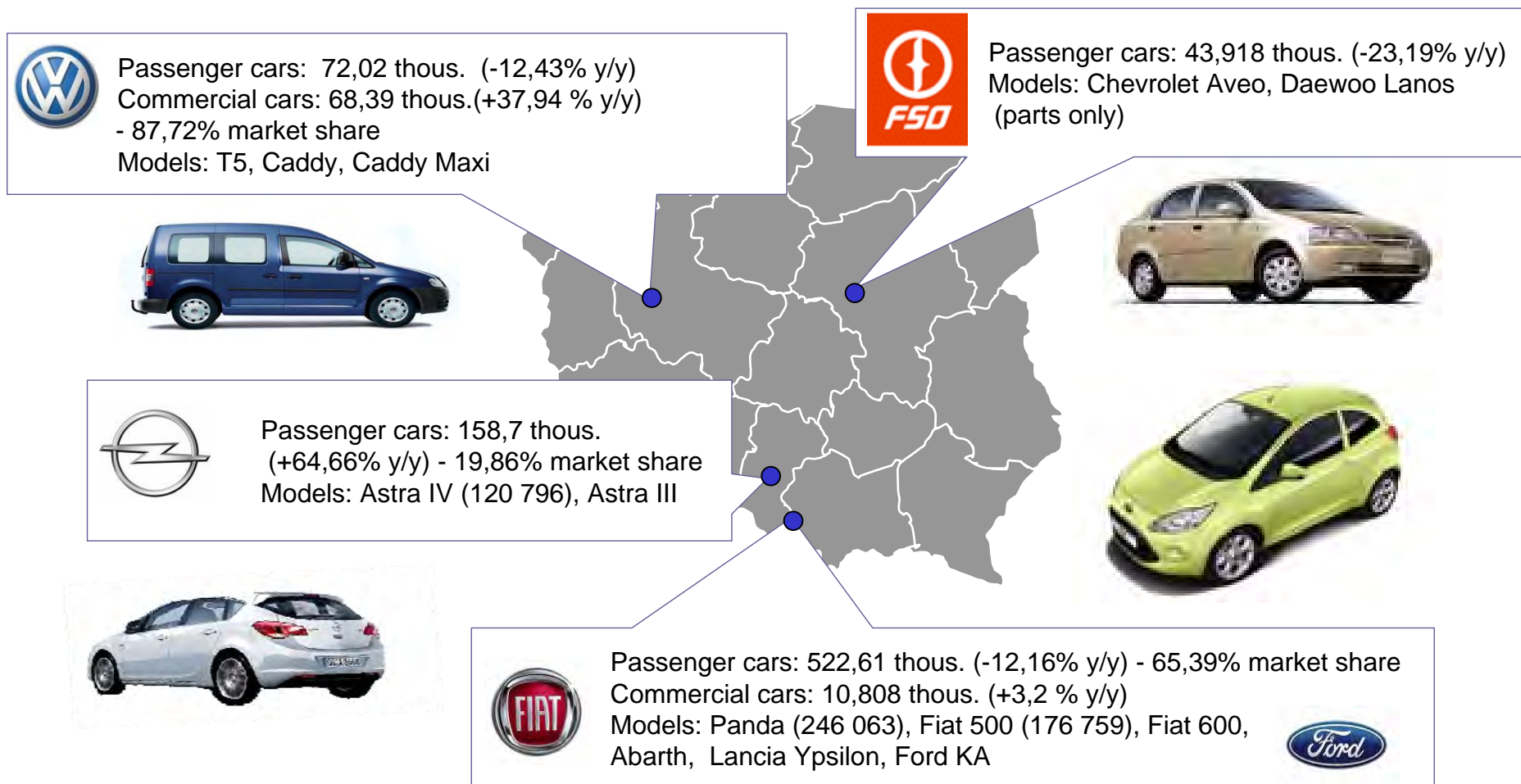
- 283 suppliers with ISO/TS 16949 certificates
- share of production sold in GDP: 6.2%
- approx. 170 thous. employees
- export 17.8 bn EUR (+7,8% - 86,9% of production goes to EU countries)

## 2010 production figures

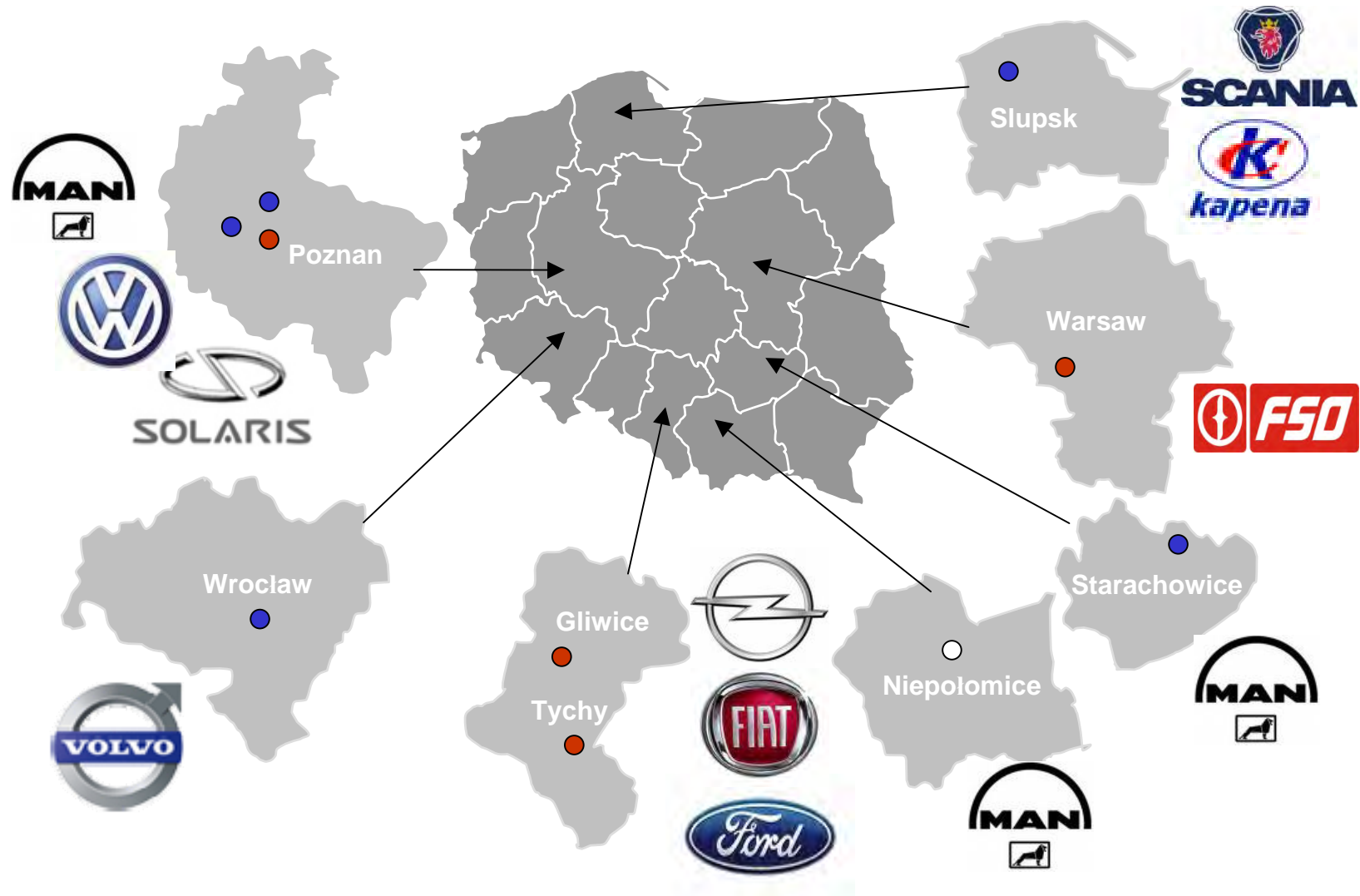
Passenger car production: 799,255 vehicles (- 4% y/y)

Commercial car production: 87,986 vehicles (+32% y/y)

Total: 887 301 vehicles



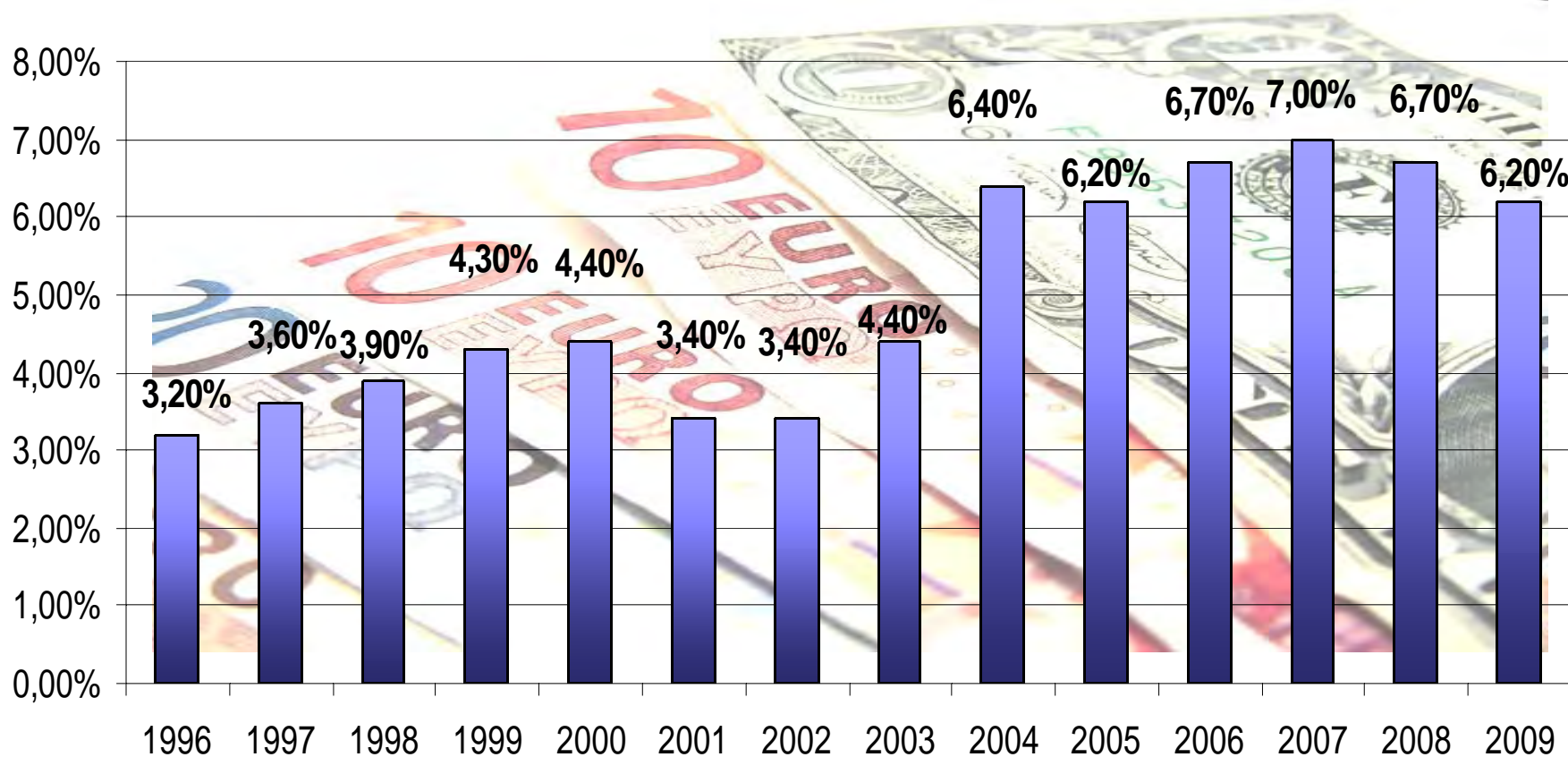
# Major OEMs in Poland



- Passenger and light commercial vehicle
- Busses
- Heavy trucks

## Automotive industry in Poland – general information

Automotive Sector's share in GDP (% production sold/GDP Value)



# Poland attracts multinational companies

Multiple Investments  
(number of production locations)

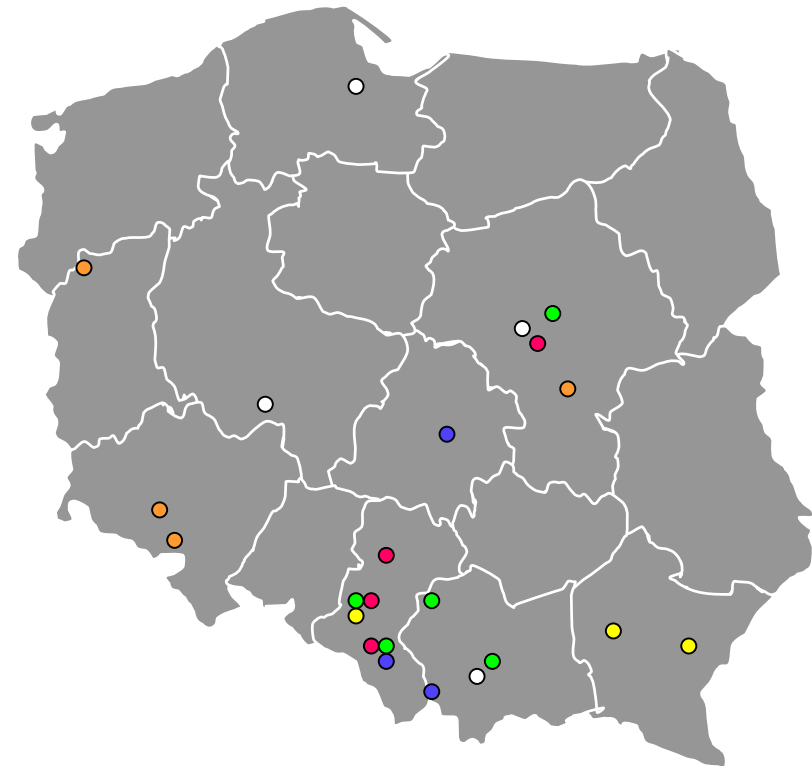
Faurecia	5 (+R&D)
Delphi	4 (+R&D)
Lear	4
Valeo	4
TRW	4 (+R&D)
MAN	3
JohnsonControls	3
Tenneco	2
Volkswagen	2
<b>Toyota</b>	<b>2</b>
<b>Bridgestone</b>	<b>4</b>
Brembo	2

Density of automotive companies in  
Polish regions



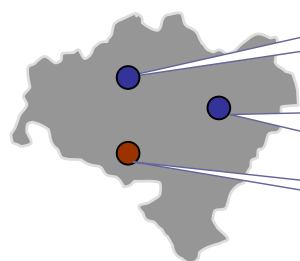
## Major tier 1 &2 employers in Polish automotive sector in 2010

	Company	No of workers	
	TRW	7 274	
	Delphi	5 600	
	Faurecia	5 170	
	Lear	4 300	
	Valeo	3 300	
	Hutchinson	3 281	



## Engine plants

### Lower Silesia region



#### Volkswagen Motor Polska

Location: Polkowice  
Products: 2,0 TDI and 1,6 TDI (452 thous. units)  
Employment: 1 171



#### Toyota Motor Industries Poland

Location: Jelcz-Laskowice  
Products: 2,0 and 2,2 D-4D (180 thous. units)  
Employment: 1 058

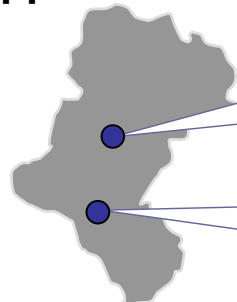


#### Toyota Motor Manufacturing Poland

Location: Wałbrzych  
Products: 1,0 VVTi (330 thous. units)  
Employment: 1 877\*



### Upper Silesia region



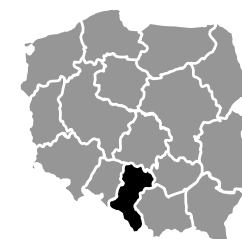
#### Isuzu Motor Polska

Location: Tychy  
Products: 1,7 CDTI (300 thous. units)  
Employment: 606



#### Fiat GM Powertrain

Location: Bielsko Biala  
Products: 1,3 CDTi (640 thous. units)  
Employment: 1 1382




- Diesel engines
- Petrol engines



## Major suppliers of engine parts

**Mahle Polska** 

Location: Krotoszyn  
 Products: cylinders and barrels, pistons, valves, castings  
 Sales: 832 M PLN (2008)  
 Employment: 3 000

**Gates Polska** 

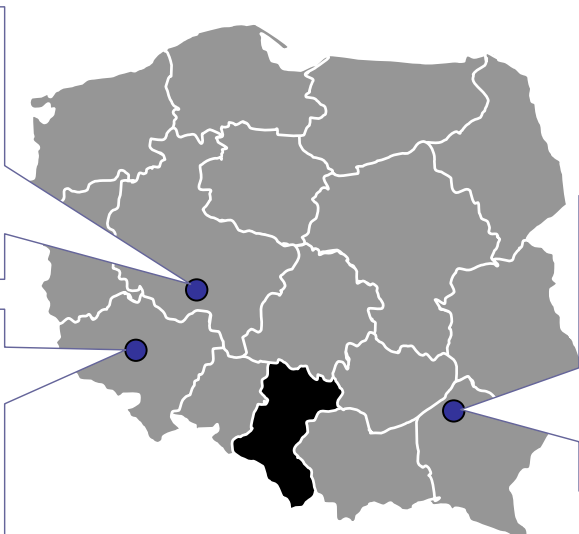
Location: Legnica  
 Products: synchronous belts, sprockets  
 Sales: 253 M PLN (2007)  
 Employment: 380


**Teksid Iron Poland** 

Location: Skoczów  
 Products: camschafts, flywheels, differential cases, rear brake drums, rear suspension arms, steering knuckles  
 Sales: 323 M PLN (2008)  
 Employment: 599

**Eaton Automotive** 

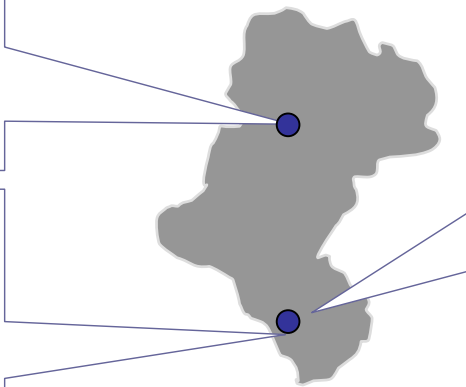
Location: Bielsko Biala  
 Products: valves, tappets  
 Sales: 136 M PLN (2007)  
 Employment: 400



**Federal-Mogul Gorzyce** 

Location: Gorzyce  
 Products: pistons, dogs, castings  
 Sales: 543 M PLN (2008)  
 Employment: 1 438

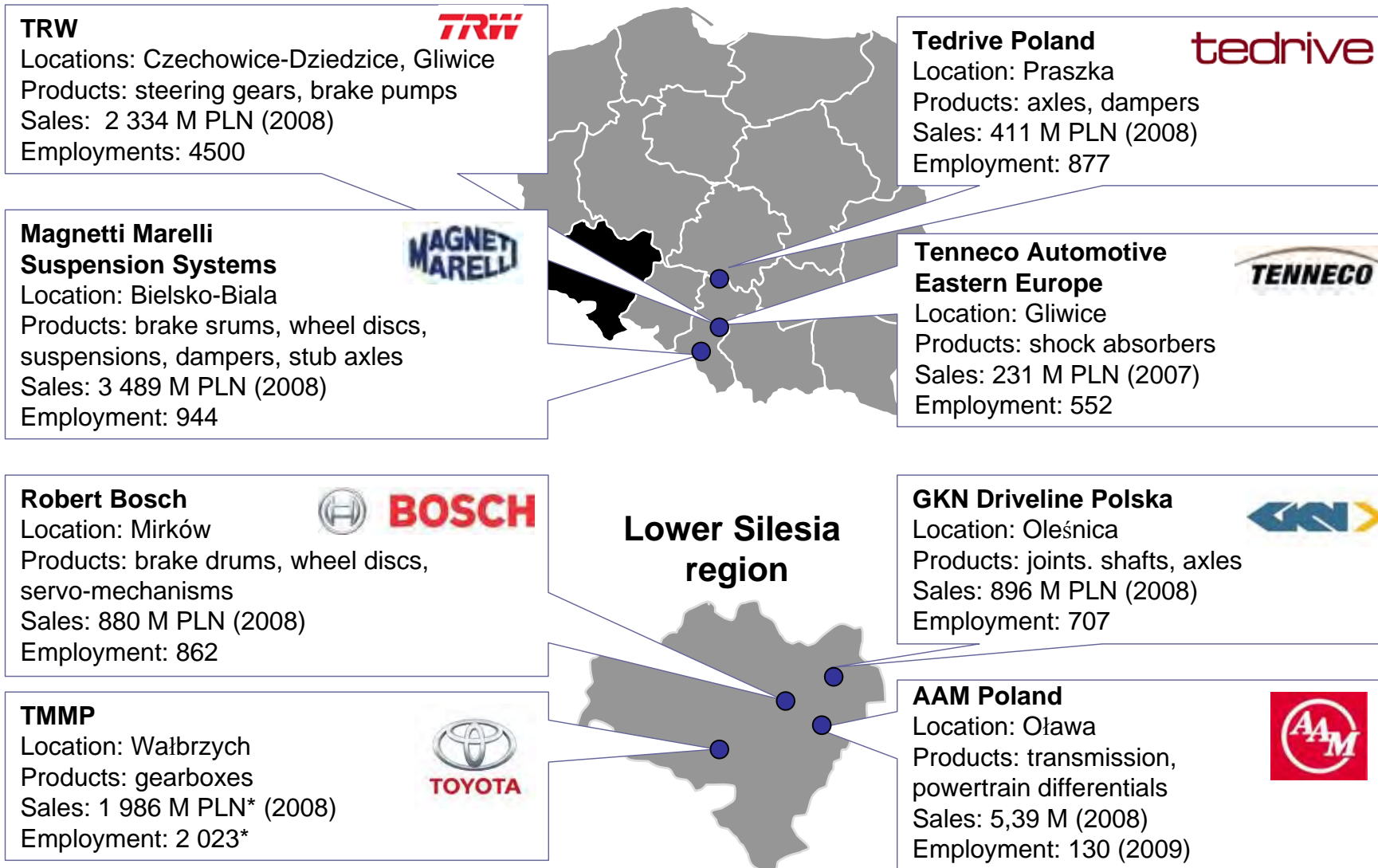
### Upper Silesia region



**TI Poland** 

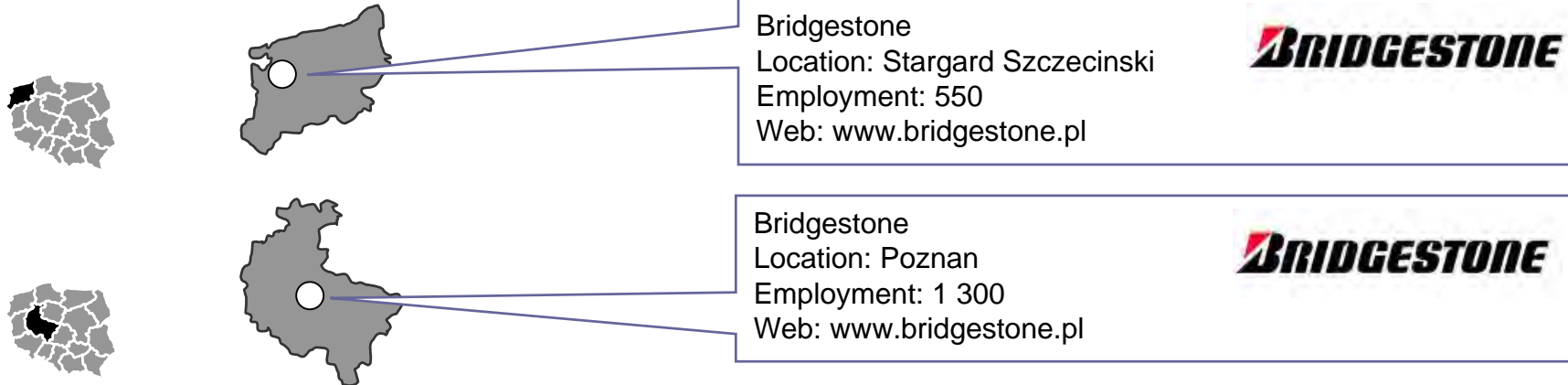
Location: Bielsko Biala  
 Products: fuel pumps  
 Sales: 404 M PLN (2008)  
 Employment: 957

## Major suppliers of powertrain and underbody parts

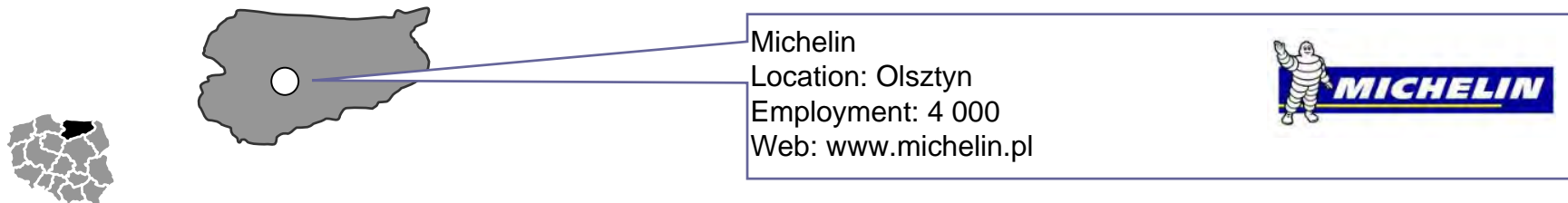


## Major tyres manufacturers

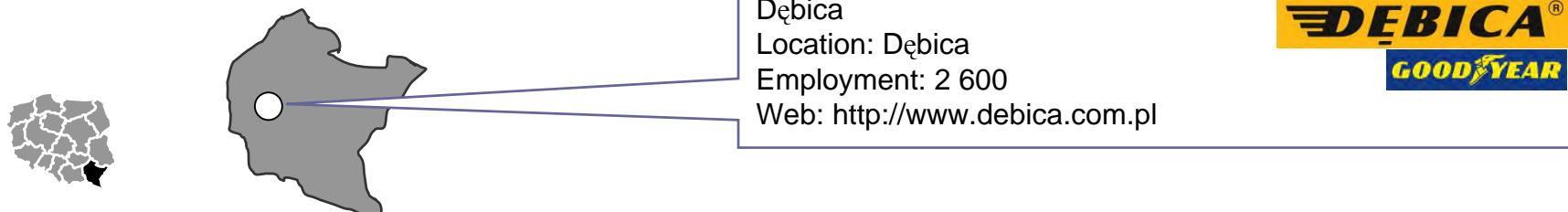
### Zachodniopomorskie and Wielkopolskie Regions



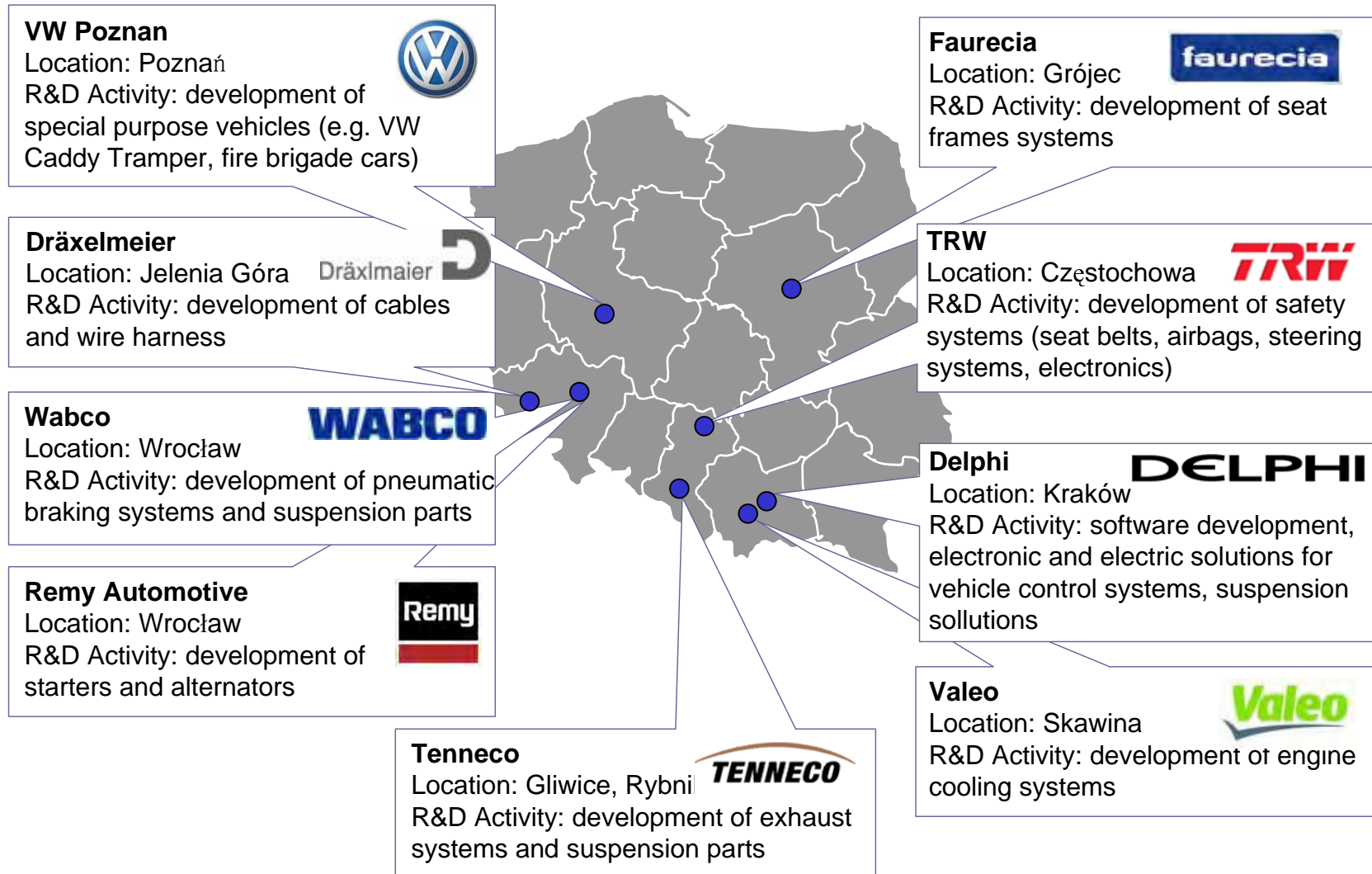
### Warminsko-Mazurskie Region



### Podkarpackie Region



## Selected automotive R&D



## Selected PAIIZ investments

**Bosch**  
 Location: Mirków and Łódź  
 Products: brake systems, household appliances  
 Investment expenditures: approx. 80 mln EUR  
 Number of employees: 2060

**Gedia**  
 Location: Nowa Sól  
 Products: metal body parts  
 Investment expenditures: 20 mln EUR  
 Number of employees: 350

**PGW**  
 Location: Środa Śląska  
 Products: car glass  
 Investment expenditures: 50 mln EUR  
 Number of employees: 151

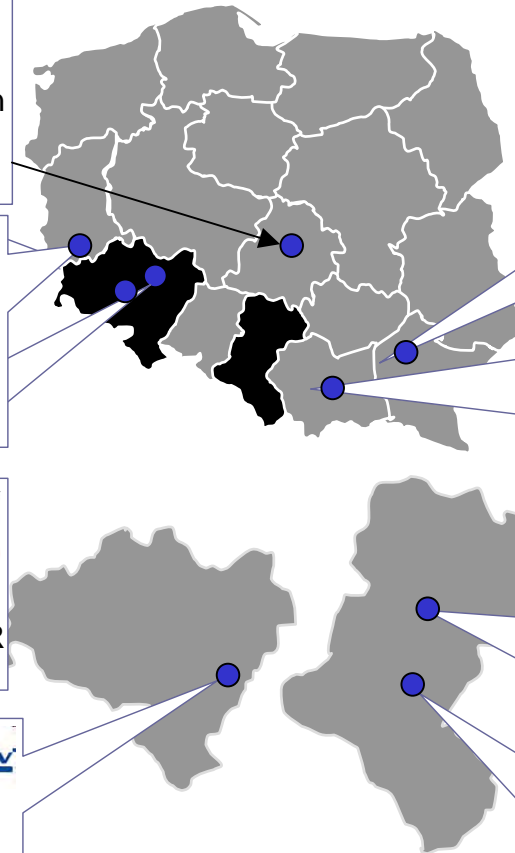
**Autoliv**  
 Location: Jelcz Laskowice  
 Products: safety equipment  
 Investment expenditures: 4 mln EUR  
 Number of employees: 250

**Kirchoff Automotive**  
 Location: Mielec, Gliwice  
 Products: stamped parts  
 Investment expenditures: 69 mln EUR  
 Number of employees: 73

**Nidec Motors&Actuators**  
 Location: Niepołomice  
 Products: precision electric engines and actuators  
 Investment expenditures: 14,7 mln EUR  
 Number of employees: 500

**Yushin Precision Automotive**  
 Location: Gliwice  
 Products: gear box parts  
 Investment expenditures: 6 mln EUR  
 Number of employees: 150

**Ford Werke GmbH**  
 Location: Tychy  
 Products: Ford Ka  
 Investment expenditures: 94 mln EUR  
 Number of employees: approx. 800 employed by Fiat





**Thank you for your attention**

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