# 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)

Source: Central Statistical Office, National Bank of Poland, PIM, PZPM 2011



# 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



Passenger cars: 72,02 thous. (-12,43% y/y) Commercial cars: 68,39 thous.(+37,94 % y/y)

- 87,72% market share

Models: T5, Caddy, Caddy Maxi



Passenger cars: 43,918 thous. (-23,19% y/y) Models: Chevrolet Aveo, Daewoo Lanos (parts only)





Passenger cars: 158,7 thous. (+64,66% y/y) - 19,86% market share Models: Astra IV (120 796), Astra III









Passenger cars: 522,61 thous. (-12,16% y/y) - 65,39% market share

Commercial cars: 10,808 thous. (+3,2 % y/y)

Models: Panda (246 063), Fiat 500 (176 759), Fiat 600,

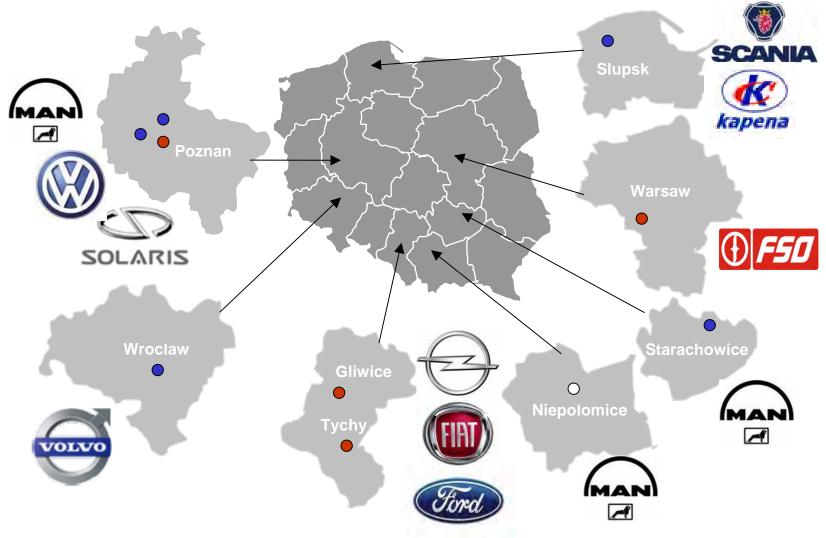
Abarth, Lancia Ypsilon, Ford KA



Source: Samar, 2011



# **Major OEMs in Poland**



Passenger and light commercial vehicle

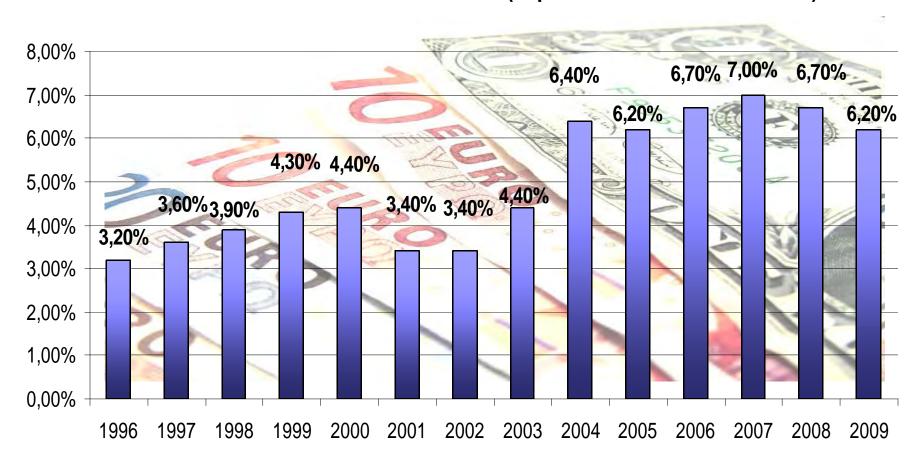
Busses

Heavy trucks



# **Automotive industry in Poland – general information**

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



Source: Central Statistical Office, Polish Automotive Chamber, National Bank of Poland, automotive suppliers.pl



## Poland attracts multinational companies

# Multiple Investments (number of production locations)

#### 5 (+R&D) Faurecia (+R&D) Delphi 4 Lear Valeo 4 **TRW** (+R&D) MAN 3 **JohnsonControls** 3 2 Tenneco 2 Volkswagen **Toyota** 2 **Bridgestone** 4 **Brembo** 2

# Density of automotive companies in Polish regions

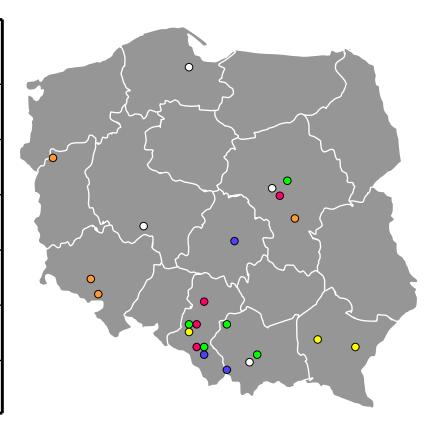


Source: Polish Automotive Chamber, automotive suppliers.pl



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

7 <b>7</b> 77	Company	No of workers	
DELPHI	TRW	7 274	
faurecia	Delphi	5 600	$\bigcirc$
O LEAR. CORPORATION	Faurecia	5 170	
	Lear	4 300	
	Valeo	3 300	
HUTCHINSON' &	Hutchinson	3 281	



Source: automotive suppliers.pl



## **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. untis)

Employment: 606



#### Fiat GM Powertrain

Location: Bielsko Biała

Products: 1,3 CDTi (640 thous. units)

Employment: 1 1382





- Diesel engines
- Petrol engines

Source: securities.com, producers' web pages



## **Major suppliers of engine parts**

#### Mahle Polska

Location: Krotoszyn

Products: cylinders and barrels,

MAHLE

**≞**Teksid

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)

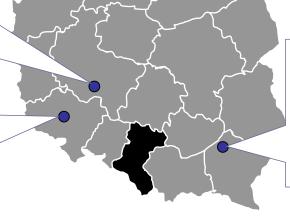
Employment: 599

#### **Eaton Automotive**

Location: Bielsko Biała Products: valves, tappets

Sales: 136 M PLN (2007)

Employment: 400



#### Federal-Mogul Gorzyce

Location: Gorzyce

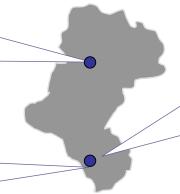
Products: pistons, dogs, castings

(FEDERAL

Sales: 543 M PLN (2008)

Employment: 1 438

## **Upper Silesia region**



## TI Poland **TI Automotive**

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

Employment: 957

Source: www.securities.com



# Major suppliers of powertrain and underbody parts

#### **TRW**

Locations: Czechowice-Dziedzice, Gliwice Products: steering gears, brake pumps

Sales: 2 334 M PLN (2008)

Employments: 4500

#### Magnetti Marelli **Suspension Systems**

Location: Bielsko-Biala

Products: brake srums, wheel discs, suspensions, dampers, stub axles

Sales: 3 489 M PLN (2008)

Employment: 944

777

**BOSCH** 

TOYOTA

#### **Tedrive Poland**

Location: Praszka

Products: axles, dampers Sales: 411 M PLN (2008)

Employment: 877

#### Tenneco Automotive **Eastern Europe**

Location: Gliwice

Products: shock absorbers Sales: 231 M PLN (2007)

Products: joints. shafts, axles

Sales: 896 M PLN (2008)

Employment: 552

#### Robert Bosch

Location: Mirków

Products: brake drums, wheel discs.

servo-mechanisms

Sales: 880 M PLN (2008)

Employment: 862

#### **TMMP**

Location: Wałbrzych Products: gearboxes

Sales: 1 986 M PLN\* (2008)

Employment: 2 023\*

# region

#### **AAM Poland**

Location: Oława

Employment: 707

Products: transmission. powertrain differentials

Sales: 5,39 M (2008) Employment: 130 (2009)

\* Including engine section







TENNECO

tedrive





Source: www.securities.com



# Major tyres manufacturers

#### Zachodniopomorskie and Wielkopolskie Regions



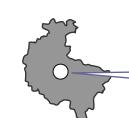
Location: Stargard Szczecinski

Employment: 550

Web: www.bridgestone.pl







Bridgestone

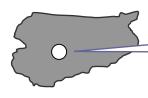
Location: Poznan Employment: 1 300

Web: www.bridgestone.pl









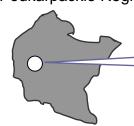
Michelin

Location: Olsztyn Employment: 4 000 Web: www.michelin.pl





#### Podkarpackie Region



Dębica

Location: Debica Employment: 2 600

Web: http://www.debica.com.pl





## Selected automotive R&D

#### **VW Poznan**

Location: Poznań R&D Activity: development of

special purpose vehicles (e.g. VW Caddy Tramper, fire brigade cars)

#### Dräxelmeier

Location: Jelenia Góra Dräxlmaier I R&D Activity: development of cables

and wire harness

#### Wabco

Location: Wrocław

R&D Activity: development of pneumatic braking systems and suspension parts

#### **Remy Automotive**

Location: Wrocław

R&D Activity: development of

starters and alternators



WABCO

## **Faurecia**

Location: Grójec

R&D Activity: development of seat

faurecia

frames systems

#### TRW

Location: Częstochowa R&D Activity: development of safety systems (seat belts, airbags, steering systems, electronics)

### Delphi

## **DELPHI**

Location: Kraków

R&D Activity: software development, electronic and electric solutions for vehicle control systems, suspension sollutions

#### Valeo

Location: Skawina

R&D Activity: development of engine

cooling systems

#### **Tenneco**

Location: Gliwice, Rybni **TENNECO** R&D Activity: development of exhaust

systems and suspension parts

Source: PAlilZ, automotivesuppliers.pl



## **Selected PAlilZ investments**

#### Bosch

Location: Mirków and Łódź Products: brake systems, household appliances

Investment expenditures: approx.80 mln

GEDIA

PGW

Autoliv

**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

(\*KIRCHHOFF

Yushin

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

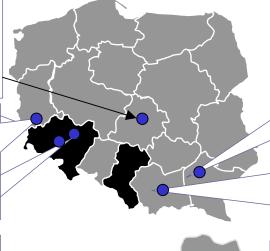
#### Ford Werke GmbH

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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