

Poland

Capital: Warsaw
Population: 38,518,241 (2007)
GDP:* \$631.8 billion (2007 estimate)
Currency: Zloty
Language: Polish



Summary

Typically, Poles buy much smaller cars than Americans and tend to keep them longer. Diesel fuel engines are more popular in Poland and unlike in the U.S., cars are almost exclusively equipped with manual gearboxes.

Over the last ten years the number of cars sold in Poland has grown significantly, with over 13.2 million passenger cars currently registered. The number of passenger cars is likely to grow to 16 million by the year 2010. Experts estimate that the Polish car market is capable of absorbing approximately 500,000-600,000 passenger cars annually.

Polish Motor Vehicle Sales 2007

	2007	2006	% Δ
Passenger vehicles	293 319	238 683	9
Light commercial vehicles	54 477	39 724	37
Trucks	23 000	15 000	53
Motorcycles	21 217	12 782	66
Used cars import	994 564	816 839	22

Source: ww.samar.pl, www.scigacz.pl

Current Market Trends

Passenger Vehicles and Motorcycles

There is a growing interest in Poland in importing new and used passenger cars from the U.S. due to weakening rate of U.S. Dollar versus Polish currency. Some of the new vehicles imported from the U.S. are even 30-40% cheaper than the same or similar models sold in Poland. The price differences for used cars are even bigger. All Terrain Vehicles, SUVs, and vans enjoy the biggest demand. In 2007 Poles imported almost 24,000 vehicles from the U.S. The similar situation is observed on the motorcycle market.

Other sectors

The interest in car tuning and styling has grown over the last ten years. Many Poles consider the U.S. to be the trend setter when it comes to styling and tuning their vehicles. The most popular car brands for styling and tuning are European and Japanese models including: Renault (Megane, Clio), VW (Golf), Toyota (Corolla, Celica), Honda (Prelude, Civic), Suzuki (Swift), Subaru, BMW, Citroen, and Nissan.

Styling and tuning products are imported by either small, specialized importers of such products or by large car parts importers (styling and tuning products accounts to only 1% of their turnover). Most of the companies that specialize in the styling and tuning sector are small family firms with only a few employees. They usually have an online shop since a significant portion of sales in this sector is done through the internet. There is also a growing number of garages offering styling and tuning services. Some of the high-end well-known tuning service providers like Brabus and Carlsson, are already present on the Polish market.

Current Market Trends (continued)

There is also a significant interest in repair and diagnostic equipment for service stations. The demand for this equipment is driven by Polish regulations requiring all automobiles to pass a technical inspection three years after the initial date of sale. The next inspection is done after two more years and then on annual basis. Another important factor increasing the sales of automotive service equipment is the huge import of used cars, of average age 8 years or older, from EU countries since Poland joined the EU on May 1, 2004. These cars often need urgent repair, some of them having been in crashes and imported for repair in Poland.

Market Entry

Polish government wants to change regulations concerning individual import of vehicles from outside of the EU. Currently, to register a car imported individually from a non-EU country the car has to be modified in order to meet the EU specs (lights, exhaust etc.). The cost of the changes is about 2,000 USD. Then the car has to pass a technical approval, which costs 100 PLN (40 USD). The planned change the Polish government wants to introduce would require an importer of a single unit to test the imported car in order to register it in Poland. The new tests are in their scope very similar to homologation tests and can be done only by testing institution that is assigned to do homologation tests. The new law is going to significantly increase the complexity of procedures and the cost of import of cars from the U.S.

U.S. exporters must comply with EU and national legislation.

Main Competitors

The most common brands of new cars sold in 2006 are: Skoda (12,04% of the market), Toyota - 11,67%, Opel - 10,43%, Fiat - 10,16%, Ford - 7,41%. The best-selling brands are Skoda Fabia, Toyota Corolla, Toyota Yaris, Fiat Punto, Fiat Seicento, Opel Corsa, Peugeot 206, Ford Focus. Polish cars tend to be equipped with manual transmission (90%) and are gasoline-powered (80%).

U.S. suppliers of parts and equipment generally will face strong competition from European suppliers for high quality products and Asian suppliers for cheaper and lower quality products.

Current Demand

Aftermarket: Parts and Components

There is a significant potential market in Poland for U.S. made car parts. Especially for passenger cars with European specifications, accessories, engine parts, body parts, and air conditioning systems.

Aftermarket: Mobile Electronics & Technology

There are opportunities in Poland for U.S. made audio equipment, amplifiers, radar sensors, navigation systems, as well as high-tech alarms.

Trade Events

Automotive Technology Fair (Poznan)
<http://www.motorshow.pl/en>

Available Market Research

Polish Market for Motorbikes and Scooters (Jan 2007)
Automotive Styling and Tuning (Apr 2007)

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