

***Republic of Poland
Ministry of Economy***

**FLEET RENEWAL,
AFFORDABILITY AND FISCAL ISSUES
- POLAND'S PERSPECTIVES**

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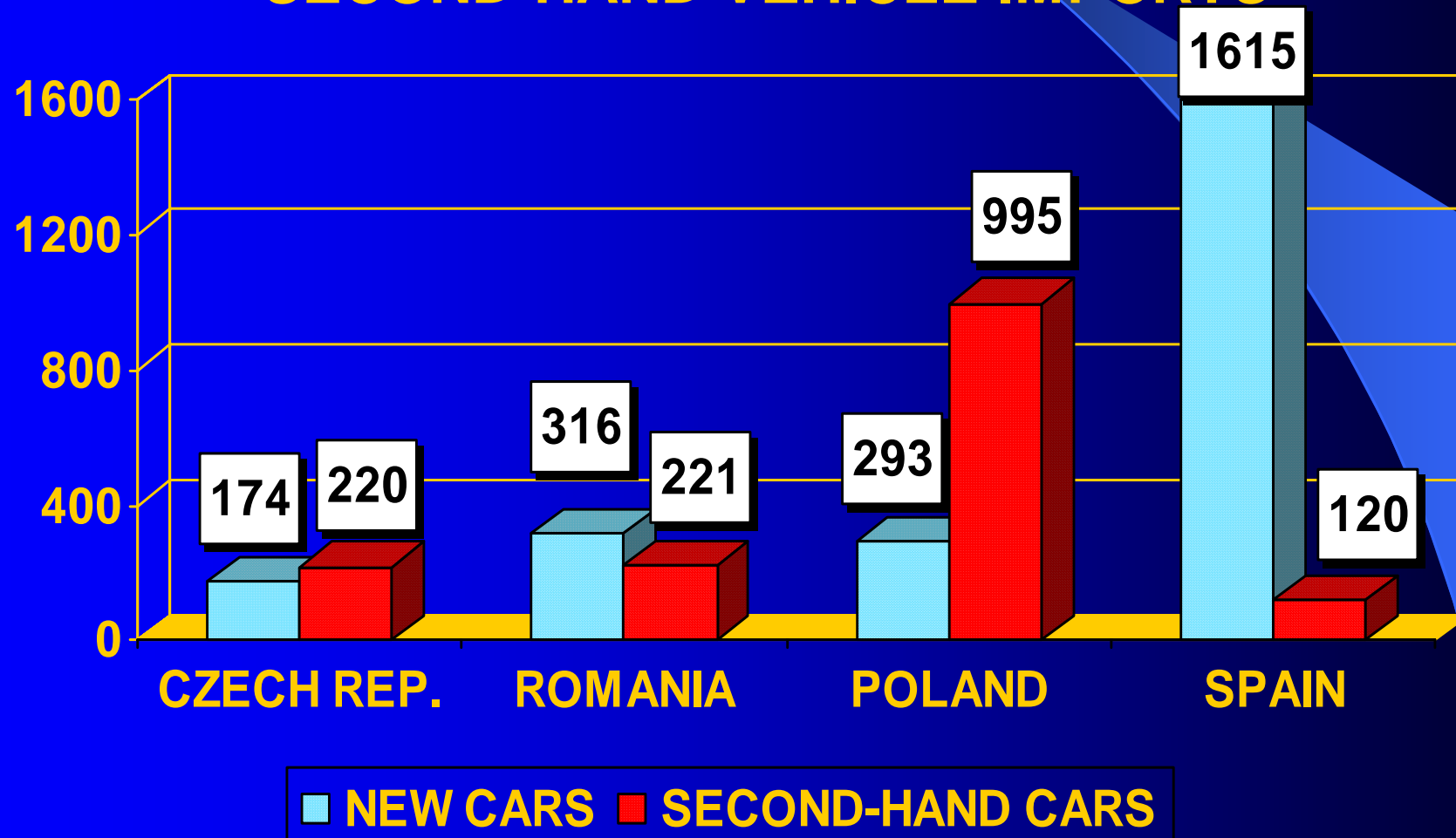
Brussels - 4th November 2008

POLAND IN THE EU - COMPARISON

[IN THOUSAND VEHICLES]

2007

SALES OF PASSENGER CARS VS. SECOND-HAND VEHICLE IMPORTS



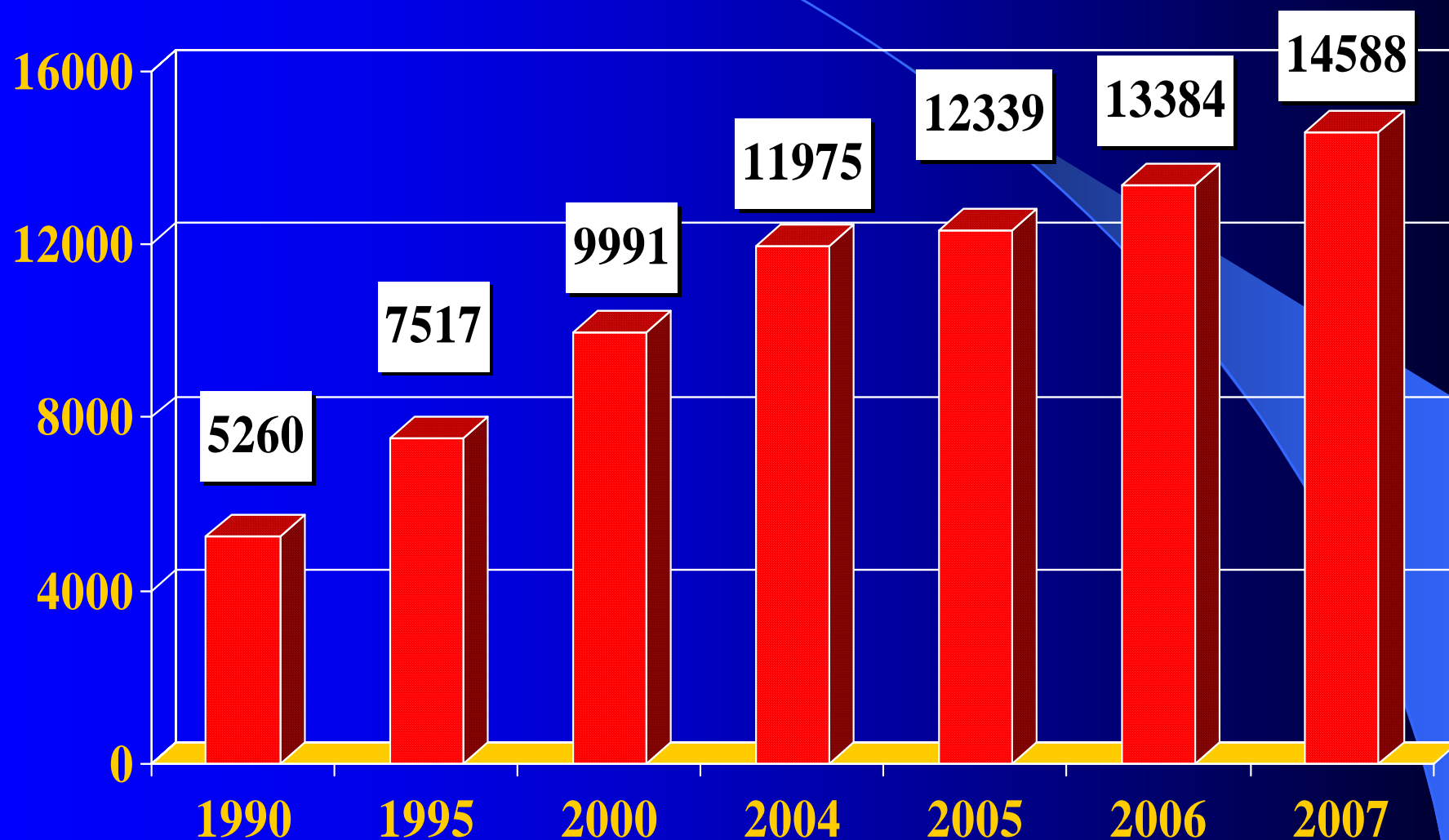
POLAND IN THE EU – COMPARISON

2007

	CZECH REP.	ROMANIA	POLAND	SPAIN
PASSENGER CARS FLEET [IN MLN]	4,2	3,5	14,5	20,6
POPULATION [IN MLN CITIZENS]	10,2	21,6	38,1	44,1
NUMBER OF PASSENGER CARS PER 1000 INHABITANTS	412	162	380	467
SALES OF NEW PASSENGER VEHICLES PER 1000 INHABITANTS	18,4	13,7	7,7	45,0
AVERAGE AGE OF CARS [IN YEAR]	13,9	13,5	14,3	8,7

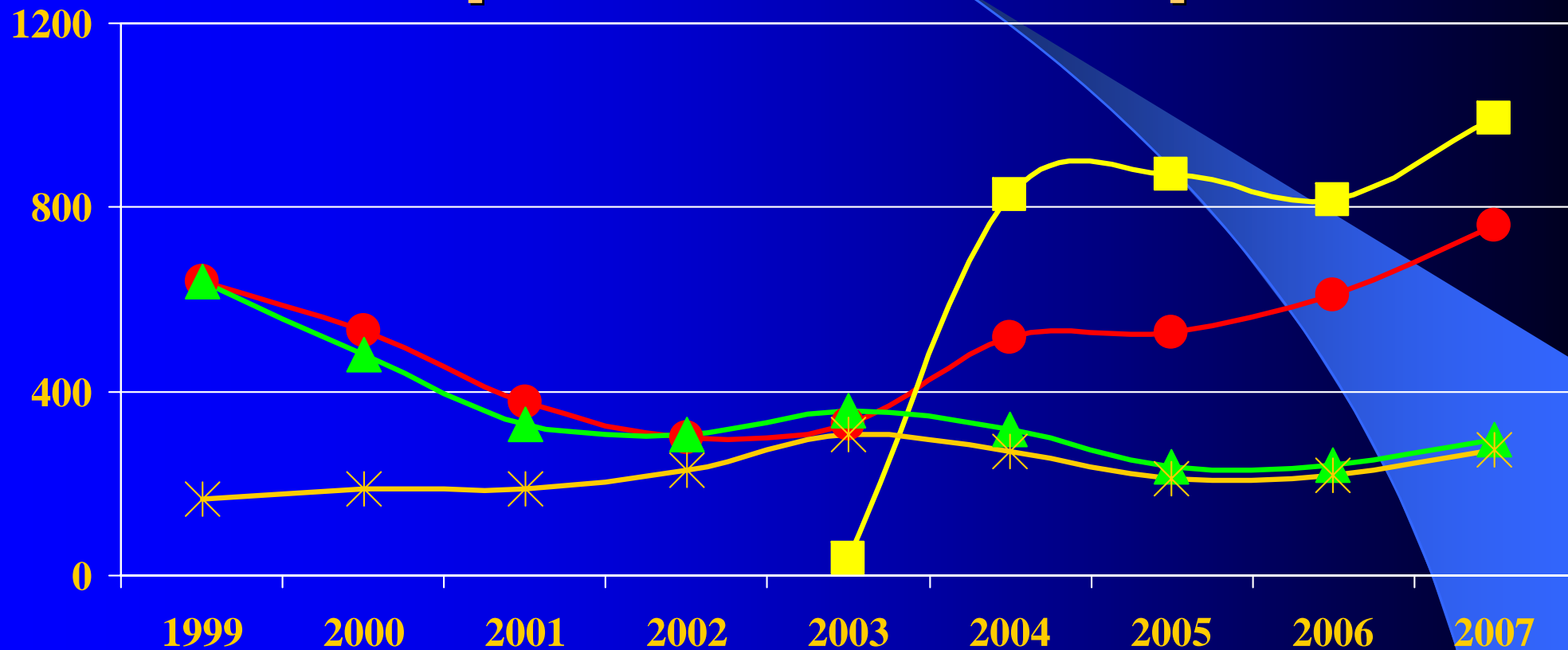
PASSENGER CARS FLEET IN POLAND

[IN THOUSAND VEHICLES]



PRODUCTION, NEW VEHICLES SALES AND SECOND-HAND CAR IMPORTS

[IN THOUSAND VEHICLES]



● PRODUCTION

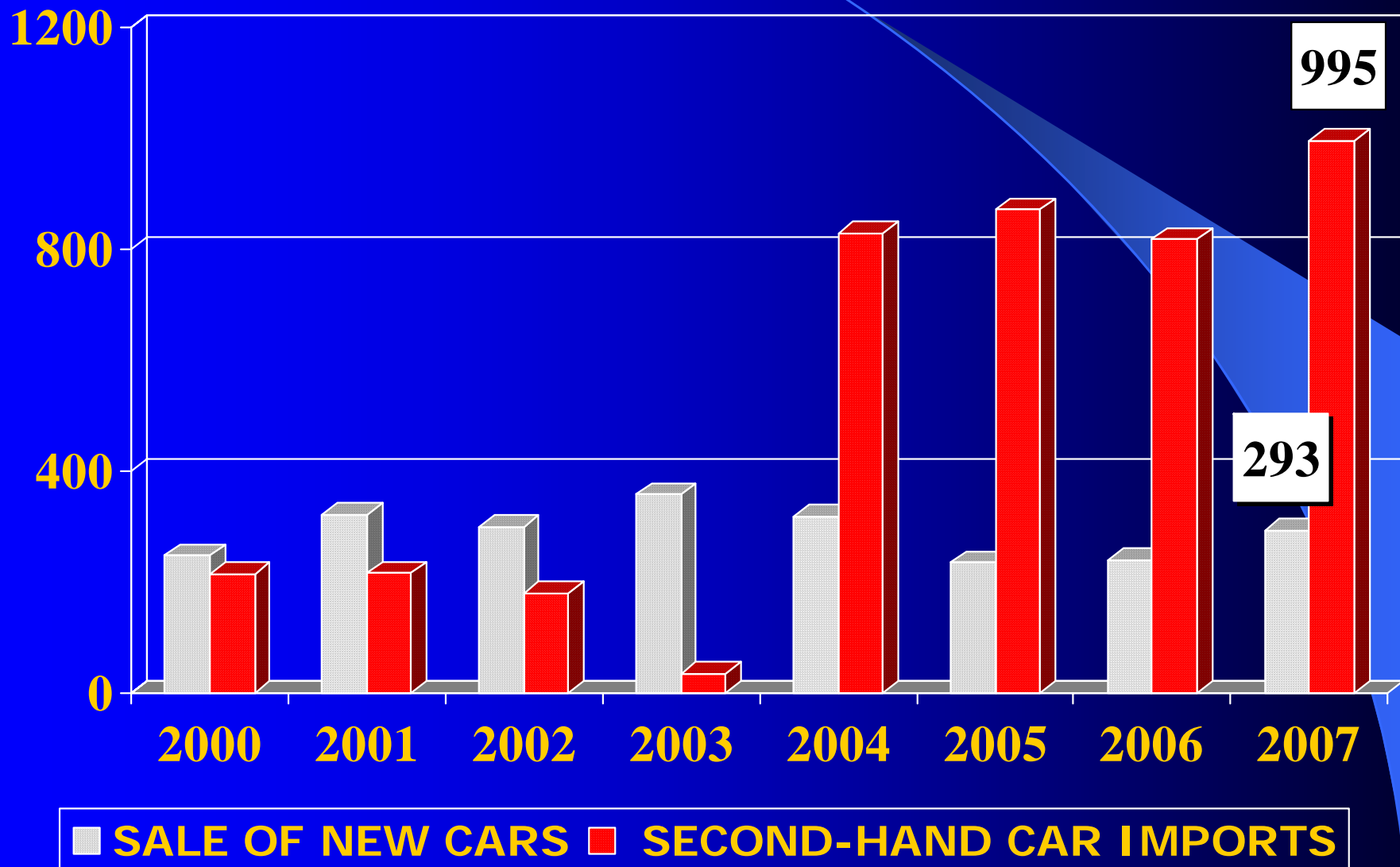
■ SECOND-HAND CAR IMPORTS

▲ SALES OF NEW PASSENGERS CARS

* NEW CAR IMPORTS

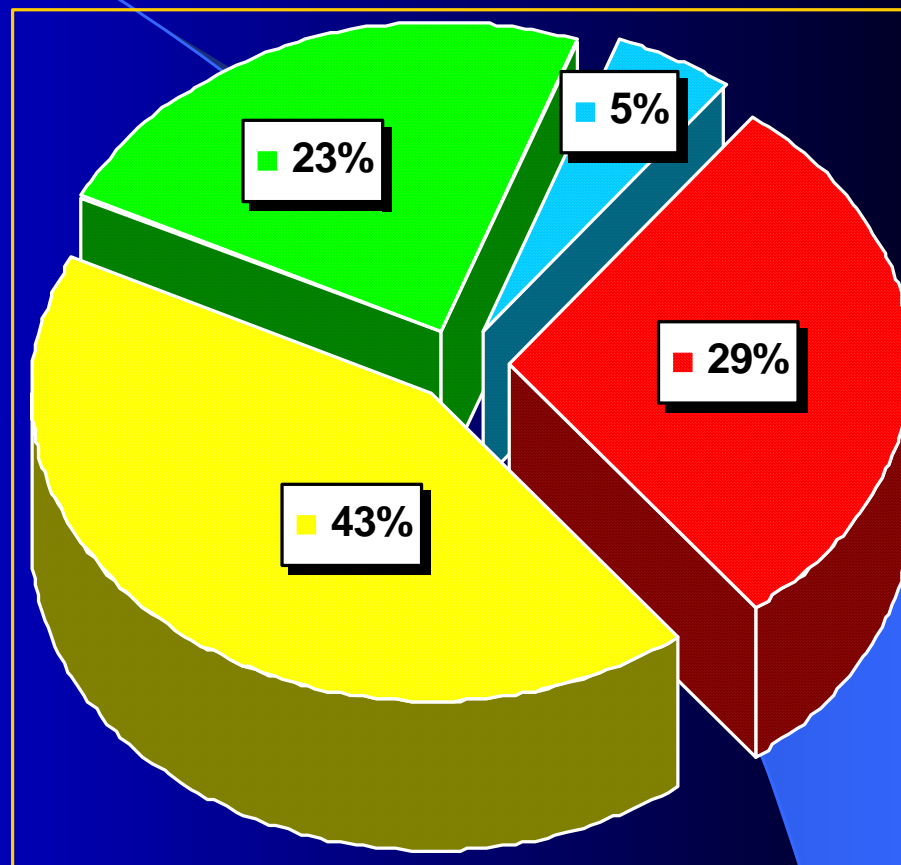
NEWLY REGISTERED CARS

[IN THOUSAND VEHICLES]



VEHICLE FLEET – AGE STRUCTURE

- **AVERAGE AGE:
14.3 YEARS (2007)**
- **CARS OLDER THAN
10 YEARS –
66% OF THE TOTAL
FLEET**



- UP TO 2 YEARS
- 3-10 YEARS
- 11-20 YEARS
- OVER 20 YEARS

CARS AFFORDABILITY IN POLAND

2007

- ❑ AVERAGE NEW CAR PRICE – 20 100 EUR
- ❑ AVERAGE VALUE OF IMPORTED SECOND-HAND CARS – 1 700 EUR
- ❑ AVERAGE SALARY – 9 250 EUR (YEARLY)
- ❑ COMPANY REGISTRATION (PASSENGER CARS) – 49 %

including:

- ❑ Direct registrations – 12 %
- ❑ Leasing and CFM registrations – 32 %

LEGAL REGULATIONS - CONTRADICTIONS

- REDUCTIONS IN CO₂ EMISSIONS**
- ECOLOGICAL TAX AND SYSTEM OF INCENTIVES**
- ROAD SAFETY**
- DESIGN PROTECTION**

CARS 21: THE NATURE OF MEASURES

- INTEGRATED APPROACH**
- BETTER REGULATION**
- SIMPLIFICATION OF EXISTING REGULATIONS**
- UNIFICATION OF THE TAX SYSTEM AND FISCAL INCENTIVES**

RISE IN PRICES OF NEW VEHICLES – RISKS

- SALE DROP OF NEW CARS**
- INCREASE IN AN AVERAGE AGE OF VEHICLES
BEING REGISTERED;**
- EXTENDED PERIOD FOR REPLACING THE
VEHICLE FLEET (20-25 YEARS);**

WHICH MEANS:

**A QUESTIONABLE
ENVIRONMENTAL EFFECT**

THANK YOU FOR ATTENTION

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