

Polish workshop Report

POLISH NEWSLETTER
OF AUTOMOTIVE INDUSTRY

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Automotive center in Silesia!

From 7 to 9 of October 2011 Exhibition Centre FairExpo and International Katowice Fair invite you the 22nd edition of the International Fair of Automotive Technology and 22nd edition of the International Motor Show AUTOSALON.

Autumn Fair Autoservis and Autosalon have a very rich tradition, an attractive offer and crowds of car and motorcycle fans. All of this thanks to a good location in the

most automotive polish region - Katowice Fair allows at the same time and place for meetings with sellers and passionate about the automotive industry.

As every year during Autoservis organizers will prepare a comprehensive range of equipment body shops, paint, curing and SKP, car washes, parts and components, tools and accessories, automotive chemicals and cosmetics. Dealers of cars, trucks, SUVs, motorcycles and quads are invited to parti-

cipate in the fair.

Those who are interested in technical knowledge and innovations in the automotive industry will find their place in the conference rooms during numerous presentations. Prominent experts will have their lectures on modern techniques workshop.

Among the many other accompanied events will take place: Workshop, Off-Road - Silesia Park 4x4, XII Tuned Vehicles Rally, XVIII Strange Vehicle Rally and Caravanning Rally. As usual, the organizer will take care of unique sports, full of adrenaline-raising contests and lots of great prizes to be won.

We invite professionals from the automotive industry and car lovers to participate in Katowice Fair!

More on: www.autosalon.fairexpo.pl



TTM 2011

Over 10,000 professionals visited the exhibition of the Automotive Technology Trade Fair in Poznan. For four days (May 12-15), nearly 300 exhibitors from 11 countries presented innovations from garage equipment. There were gold medals, shows, conferences, lectures and competitions experts with attractive prizes. The event was also full of important events and announcements for professionals in the workshop industry.

Two years ago, during the TTM exhibited around 350 companies, and the area of the stands occupied 19 thousand m². This year was a bit less than that - exhibitors occupied one hall and outside areas, but everyone agreed that appeared most important



suppliers of equipment and garage equipment.

- For me it was above expectations, especially if you have in mind the workshop part of the Event - summed up the event Rafał Sosnowski, President of the Association of Automotive Technology.

- The most important decision that we - TTM coworkers concern is the cooperation agreement between the MTP and STM. The event will be held every two years, but in even years, so as not to compete with an international event in Bologna and Frankfurt. The next edition of TTM will take place from 12 to 15 April 2012.

We prefer to buy used



Only 8% of Poles who became owners of cars in 2010, bought a new car. The remaining 92% of people choose used cars. In most cases, buying second-hand cars were made from individuals, and the average price of a used car amounted to 12.4 thousand Polish zloty.

Last year 10% Poles bought cars and as the latest wave of OBOP research TNS "Intention to buy a car" confirm that this percentage remains unchanged 5 years, since 2006.

Continues to dominate among bought cars is the car from second-hand (in 2010 - 92%). In addition, the percentage of brand new vehicles among all bought cars in 2010

(8%) decreased slightly compared to the years 2009 and 2008, when it was 11% and 12%. At the same time, more than half bought cars in the past year (55%) are vehicles that are 10 years or more.

Last year, the Poles allocated for the purchase of a car slightly smaller amount than last year. Average price of cars bought in 2010 was about 15.5 thousand zł, while in 2009 it was approximately 16.7 thousand zł. However the statistical used car buyer allocated in 2010, an average of 12.4 thousand zł.

For three years the most popular form of buying a used car is a direct purchase from a private individual. In 2010, with this me-

thod benefited more than one third of respondents (35%). A relatively popular place to buy a car in Poland are Used Car Dealers. In 2010 around 17% Poles bought their cars in the nearest Used Car Dealer, approximately same amount as in 2009. Slightly less, because 13% of respondents bought a car over the Internet, using ads on portals and auction sites. We observe in this upward trend - it was about 3% more than last year.

Data are from studies conducted by Omnimas TNS between the 3 - February 20, 2011 on a nationwide, representative sample of Poles aged 18 and over ;the total number of interviews 1981.

Registrations and sales of motorcycles and mopeds in Poland

In May 2011 registered 20 758 new and used single-track vehicles in Poland. It was more about 3 843 (22.7%) than in May 2010. In 2011 registered about 12 000 single-track vehicles, about 1 590 (15.3%) more than in 2010. Since the beginning of the year registration number of all of the single-track vehicles in Poland amounted to 64 911 units and was higher by 15.2% (8 553) than at the same time last year. Among the new single-track vehicles there was an increase of 6.6% to 34 596 units, and the among used ones the growth was much greater - by 26.8% to 30 315th



Motorcycles

In May 2011, registered 7 022 new and used motorcycles, 19.5% (1 144) more than last year. The number of new motorcycles were 1 344, giving an increase of 10.4% (127 units). Compared to April, the number of registrations of new motorcycles decreased by 9.3% (137 units). In the last month, the most popular registered brands were Romet Motors (163), Yamaha (153) and Junak (148).

Since the beginning of the year registered 24 937 new and used motorcycles, which means an increase year on year by 10% (2 259).

At that time, registered about 4 328 new motorcycles, 116 units more than in the same period a year ago.

Most registered brands were Yamaha (647), Romet Motors (470) and Honda (433).

Motorbikes

In May 2011 recorded 13 736 new and used motorbikes, more about 2 699 (24.5%) than in May last year. In 2011 registered about 10 656 new motorbikes, which is an increase year on year 1 463 (15.9%). The growth in used ones amounted to 67% to 3 080 units.

The greatest importance had the largest brand as Romet Motors (1 592), Router (1 576) and the ZIPP (1 508).

From January recorded 39 974 new and used motorbikes. This represents an increase by 18.7% year on year.

New motorbikes accounted for 75% of all registrations. 30 268, 7.2% registered - more than in the same period of 2010. The number of used registered motorbikes significantly increased by 78.3%. From January to May 2011 the most popular registered brands of new motorbikes were: Router (4 602), Romet Motors (4 589) and Zipp (4 025).

Source: Polish Automotive Industry Association on the basis of the CEP (MIA) and member companies

15 Years of Auto-Gaz Centrum



This year Auto-Gaz Centrum Company celebrates its 15th anniversary.

Due to the cooperation with Italian companies, long experience in LPG sector as well as high standards of work based on the ISO9001:2008 system, our company

growing number of clients in Poland and all over the world. At the moment Auto-Gaz Centrum exports its products to over 30 countries on 5 continents. Our top products

systems

- many executions of completing
- easy to fit and calibrate

Innovative ECU – COMPACT

Compact is an innovative and technologically advanced LPG controller. It is equipped with the latest technology processor as well as many other functions that provide comfort in using car. Modern COMPACT has been caught on enthusiastically by the automotive market and the users of cars with LPG autogas systems.

Compact:

- designed for 4 cylinders cars
- technologically advanced
- minimal number of links, small enclosure
- modern processor
- AAS function (Automatic Adjustment System)



provides only high quality products to European and world markets. LPG products offered by the company have ECE R67-01 approval, whereas CNG products have ECE R11 approval and ISO 15500.

Auto-Gaz Centrum company received also ECE R115-00 homologation for selected groups of cars. The high quality of products is being confirmed by the constantly

include modern sequential gas injection systems – ZENIT and COMPACT.

Sequential gas injection system - ZENIT

Auto-Gaz Centrum is the manufacturer of well known and used all over the world sequential gas injection system – ZENIT:

- available in versions of 4,6 and 8 cylinders for all engines and fuel injection

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First vehicles registration over 3.5 tons in May 2011



According to the Central Register of Vehicles examined by the Polish Automotive Industry Association (PZPM), in May 2011, registered 4 254 new and used vehicles over 3.5 tonnes, including buses.

This was 30.6% more than last year, when registered 3 251 vehicles. In May, on the road there was an increase about 3 901 new registered (new and used) trucks and

344 buses. In group of 1, 629 new vehicles, which accounted for 38% (36% a month before) all registrations, an increase by 97.5%. Compared to April 2011 recorded more of them by 5.7%. Used vehicles accounted for 61.6%. There was a 2 616, 7.8% more than in May last year and less than a month ago of 4.6%.

Source: PZPM

Professional LPG & CNG Autogas Systems



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Extended by one day



As every year, Inter Cars SA invites all its customers and suppliers at the 11th Trade of spare parts, tools and workshop equipment. Exhibition will be held at the new location and will be extended by one day.

Regular part of the exhibition will remain a rich and interesting exposition of the range of spare parts for cars and trucks and impressive exhibition of machinery and equipment needed in a modern workshop. The offer will include proposals for the fans of the motorcycles, new models of motorcycles and scooters and related accessories. Tuning and off-road enthusiasts will find

an interesting solutions for replacement parts, as well as plenty of additional sports attractions. In addition, visitors will be able to see the latest models of tires, and technological novelties for the installation of gas, air conditioning and fuel injection systems. Each guest will be able to get to know the current batteries offer, car accessories, parts, body-paint products and lubricants and chemistry workshop. If you are interested in the portal Motointegrator.pl, we invite you to stand where experts will provide information on online collaboration.

As usual, the organizer will make sure about good impressions and emotions of sports. Adrenaline will provide Polish and

international stars of motorsport, and the scene will entertain the audience with well-known personalities and beautiful girls.

Show will be extended by one day. To meet the demands and suggestions of long-term customers, Inter Cars SA decided to add an extra day for professionals. Friday, 2.09 is designed for people from the industry, which will receive special VIP invitations. At the same time it will be also press day allowing VIPs and the press establish new contacts with manufacturers, as well as a conference exhibition.

Organizers chose the new location of exposure. 11th Fair will be held in Jozefow near Legionowo, on 2-4.09.2011 r.

Polish driver problems with tires

A large part of Polish drivers are not paying attention to the tires on their cars – it is conclusion which came from tests conducted in major cities by Bridgestone.

Great review of the tires was organized under the slogan "Bridgestone Road Show". Similar events also took place in Warszawa, Krakow, Zabrze, Wrocław, Poznan and Tricity. This is a part of the Japanese company politics, which in addition to manufacturing and sales activities is strongly involved in education of drivers. Primary goal – to improve safety. That is why during the event

each city had a special moto-town with driving simulators that imitate the changing weather conditions, where drivers can test their skills and workshops about first aid. There was also town for children with bike paths and roads. However the most important part were mobile diagnostic workshops in which the tires of the cars were checked by the Japanese company professionals. During the six editions of the event examined more than 5,300 tires. What was their condition?

- Unfortunately, more than two thousand tires had to low pressure, nearly 1000 had to

low tread and about 141 tires to qualify for immediate exchange – says Dorota Zdebska, Trade Marketing Specialist with the Bridgestone.

Experts agreed that these statistics are alarming because the tires have a huge impact on road safety.

Driving on tires with too low pressure and used tread means less stability and eventually extended braking distances. Also worth mentioning is the possible tragic consequences of the bursting of the tire while driving. This is very possible in case of poor tires condition. And even when results of the great test are alarming, the representatives of Bridgestone are not surprised.

- Studies conducted in Western Europe clearly show that seven out of ten drivers drive on tires with too low pressure. Our big test is to be only confirmation and motivation for further work on increasing awareness of Polish drivers. This project "Tyre Safety" is directed especially to them – says Aneta Białach, PR Officer at Bridgestone.

Project is designed by engineers from the Japanese company, which developed rules for the safe maintenance and exploitation of the tire. The test results indicate that is necessary to remind these rules despite of systematic tread or pressure level check.



AC SA hosted foreign contractors

AC SA – leading in Poland global manufacturer of automotive gas installations - on June 15 celebrated the 25th anniversary of the company. Among the guests at the anniversary gala was attended by: representatives of the city and the region as well as contractors and partners of the country and abroad.

The ceremony was held in the Philharmonic in Białystok. During the event in thanks for the valuable cooperation customers were given specially designed statuettes for this occasion.

The ceremony was attended by partners from the country and around the world - including China, Thailand, Australia, Korea, Russia, Lithuania, Ukraine, Belarus, Bulgaria,

Britain and Germany. The meeting was accompanied by the philharmonic orchestra concert under the baton of excellent conductor Zbigniew Gorny. Visitors could listen to the best of the worlds film music charts and entertainment music performed by Beata Rybotycka and Jacek Wojcicki.

The second step of the event celebration - June 16 - was the visit of foreign partners in the factory AC SA. They had the opportunity to learn the processes of manufacturing.

AC SA plans a public offer of shares at the main market of the GPW. The prospectus of the company has already been made in the Commission of Financial Supervision. AC SA shares debut on the Warsaw Stock Exchange is possible even in the third quar-

ter of 2011. After the publicity AC SA will be the third in the world renowned manufacturer of automotive gas installations, noted on the stock exchange.

On the Polish automotive market AC SA operates more than 25 years and currently is the largest market for automotive gas installations in the country. As the company estimates, AC SA owns approximately 45% market share in Poland AC SA product guide reaches more than 30 countries worldwide. In 2010, sales to foreign customers accounted for 56% of total AC SA revenues. AC SA key market include: Germany, Russia, Ukraine, Turkey, and Thailand.

Fuel Market 2010 - report

Consolidation trend of independent stations around the major market players, increase diesel fuel consumption and a marked increase in prices at the stations - according to a report published regarding the fuel market in the monthly published FLEET (4 / 2011) - this phenomenon took place last year on the Polish fuel market.

Over the years was observed a steady growth trend in consumption of fuel by the Polish economy. Last year the national GDP grew by 4%, which resulted in an increase in sales of liquid fuels of about 1%. In particular, increased demand for diesel oil and premium fuel, while motor gasoline demand is stagnant. High fuel prices affect the slow revival of interest in LPG.

Over the decade, consumption of liquid fuels in Poland increased by 48% - from 13 545 thousand tons to 19 987 thousand tons last year.

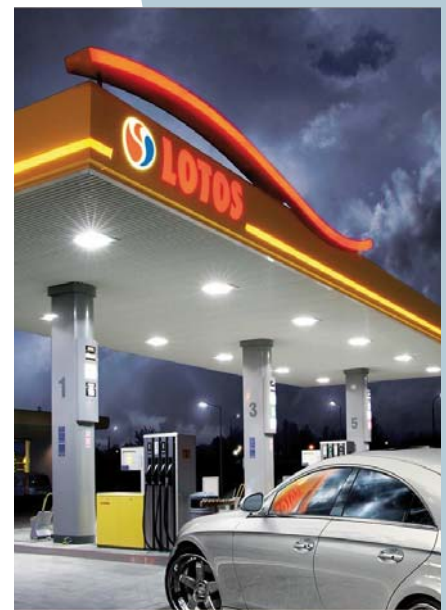
For many years we have seen a trend of rising demand for diesel, which is largely the driving force of the Polish economy. The demand for this fuel, unlike gasoline depends on the GDP and private consumption. Last year used up 14.6 million meters, so about 4% more than last year. Increased by the consumption of LPG by 1% compared

to 2009. However, the general trend of several years in the consumption of this fuel is downward. Even five years ago Polish farm consumed 4.4 million cubic meters of fuel, and last year 4 million meters.

Fuel prices for two years are in a permanent uptrend. Average retail prices of gasoline and diesel EU95 rose last year by an average of 10 (42 grosze / l) and 17% (61 grosze / l) compared to 2009.

It also meant reducing the gap between the prices of diesel and gasoline from 47 polish groszy to 28 polish groszy. Increased while the average retail price of LPG - 21%, to 2.22 zł / l of these expenses have increased by 732 polish zlotych and 456 polish zlotych.

Last year on the Polish market, operated 6,755 service stations for retail customers, up 40 centers more than a year earlier. Among them a dominant position had in independent stations - 2658 objects. From year to year the number of stations decline, which are increasingly eager to join in or start a small network to work with the leading market players in the franchise. Even in 2008, functioned in Poland about 2929 independent operators and about 421 of stations operating within small networks.



The largest fuel distributor in Poland - PKN Orlen - reduced the number of owned facilities by 33 per year to 1,714 objects. But still one in four petrol stations in Poland belongs to that company.

**Source: FLEET Magazine (4 / 2011) or www.fleet.com.pl
COMPLETE REPORT - „FUEL REPORT 2010” (available on the website): [www.fleet.com.pl / report](http://www.fleet.com.pl/report)**

9th edition of „Mechanic of the year”

„Mechanic of the Year” is a competition organized by Fota since 2002. This year had its semi-finals and finals between 16-18 June in Kolobrzeg.

Besides the honorable title – the winner also got Mitsubishi ASX, workshop equipment, a ticket for EURO 2012 and trip to Cuba. The value of prizes for the mechanic, who took the highest place on the podium totaled over 110 thousand Polish zł.

The title „Mechanic of the year” 2011 got Krzysztof Sobiecki from the workshop Auto

Center Ziomek in Trzebinia.

The competition was organized by Fota S.A. with the cooperation of Castrol, Bosch, ATE, Febi, MANN-FILTER, Kager, Philips, Ruville. The company like Wimad, Techman and Magneti Marelli were also sponsors for prizes in the competition. Polish TV – TVN Turbo took over the media patronage of the event.

This year semi – final test consisted of 30 multiple choice questions. Participants had 30 minutes for their solution. For many of

them the test was too difficult and they left the hall before the expiry of the time.

The top five participants took part in the semi-final showdown. Under the supervision of experts, five finalists were solving practical tasks. They relate to changing a wheel at the time, locate the fault or reason of the air conditioning, proper assembly of the timing belt, make measurements and determine acceptable parameters in the brake assembly and test and measurement VP44 injection pump on the test station.

The automotive sector in foreign trade

The automotive sector is one of the most important areas of Poland's economy especially in terms of the role in foreign trade. The sector is particularly important for the structure of Polish exports due to the fact that the vast majority of the output of Polish automotive factories is directed to foreign markets. On the other hand, the automotive sector plays an important role in imports, since most of the vehicles, parts and accessories sold at the Polish market come from outside the country. In 2010 the value of automotive exports amounted to EUR 17.8 billion. This figure was 9.7% higher than in 2009, when automotive companies exported goods worth EUR 16.2 billion. However, 2010 exports were still lower than in the record-breaking year 2008, when total automotive exports reached 19 billion Euro. In 2010 exports of automotive goods accounted for 15.1% of Poland's total exports of goods. The share of automotive sector in total exports was at the same time lower than in previous years, when it amounted to 16.0-16.6%. In the recent years Poland was the largest exporter of automotive goods among all Central and Eastern European countries. However, during the last two years took advantage over the second lar-

gest exporter, the Czech Republic. In 2009 the Czech Republic experienced the slightest decline in automotive exports among four main manufacturers in the region (by 10.2%) and increased the exports (by 23.8%) in 2010. As a result, the total value of vehicles, parts, accessories and other automotive goods exported by the Czech Republic was slightly lower than in case of Poland and amounted to 17.3 billion Euro.

Passenger cars represent the largest share (38.9%) in Poland's total automotive exports – their sales on foreign markets reached more than 6.9 billion Euro in 2010. This value was nearly equal to the one reported last year (as much as 7.0 billion Euro) and higher than in the years before the crisis. A comparable figure of export of passenger cars was reported by Slovakia. However, Czech exports were substantially higher (9.5 billion Euro).

Exports of minibuses and buses reached 709.6 million Euro, which accounted for 4% of total exports of Polish automotive sector. In case of commercial vehicles, trucks and road tractors value exceeded 1.4 billion Euro (8% of exports). It is worth mentioning that Poland holds strong leadership in Central and Eastern Europe in exports of

both categories and is the second most important exporter of automotive parts and accessories in the CEE region. The largest exporter, the Czech Republic, reported foreign sales of these goods at the level of 6.5 billion Euro.

A very important part in Polish automotive exports is played by engines, whose sales reached 2.4 billion Euro in 2010. Exports of other automotive goods, i.e. special purpose vehicles, chassis fitted with engines, trailers, semitrailers and others, reached 536.1 million Euro in 2010. The majority of Polish automotive exports in 2010 was directed to European Union member states (86.7%, 15.4 billion Euro). After a period of very dynamic growth (by 98.6% in 2004-2008), Polish automotive exports reached a record-breaking value of 14.4 billion Euro in 2008. In 2009 imports fell by 37.2%, to the level of 9.1 billion Euro. The rebound in 2010 was relatively weak – imports rose by 18.5% to 10.8 billion Euro. In 2010 automotive goods accounted for 8.2% of total imports of goods in Poland (10.2% in 2008). Due to the large size of its internal market as well as a large number of manufacturing and assembly plants, Poland remains the largest importer of automotive goods in Central and Eastern Europe.



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