

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

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

*Grażyna Henclewska  
Undersecretary of State*

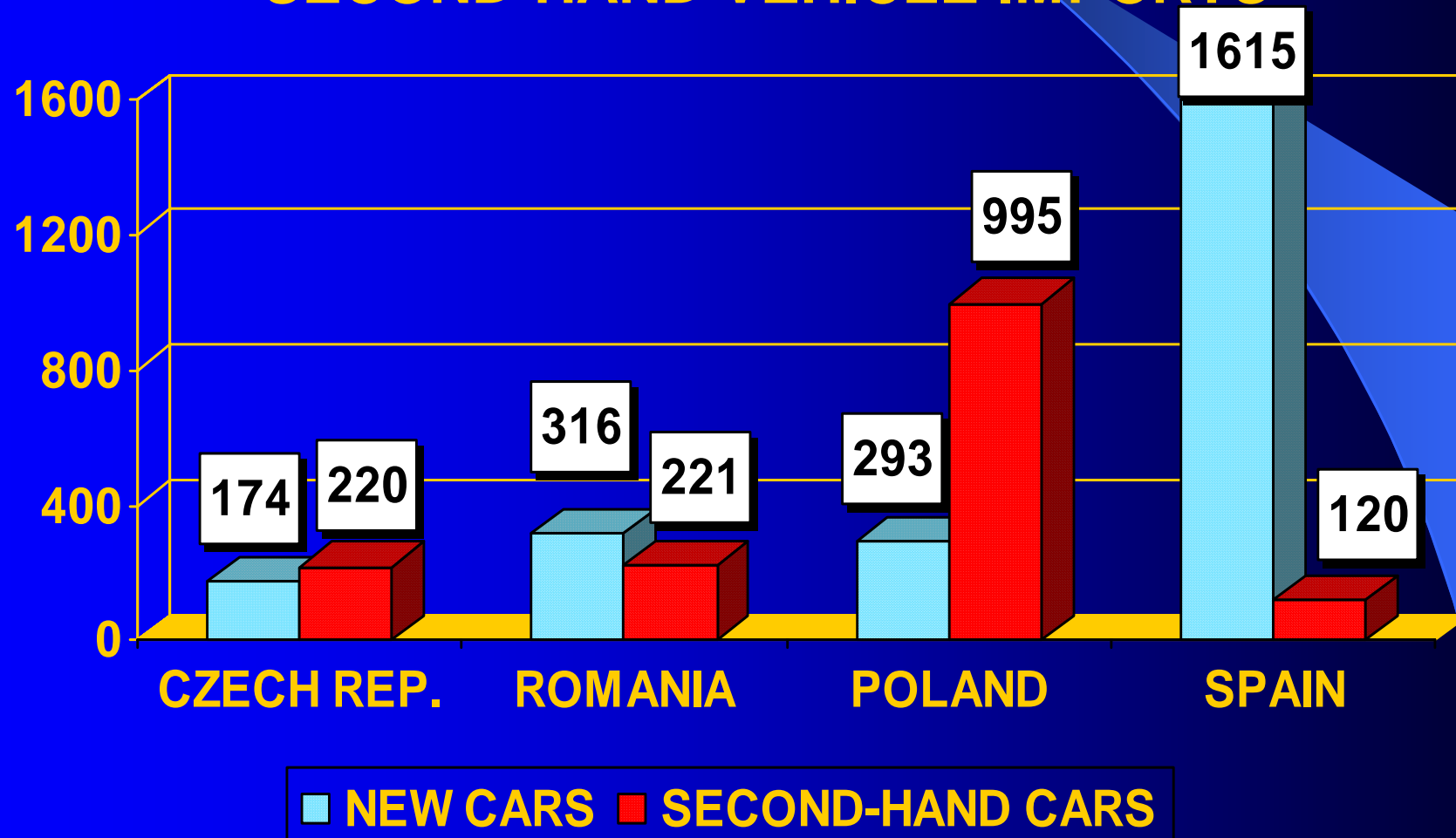
**Brussels - 4th November 2008**

# POLAND IN THE EU - COMPARISON

[IN THOUSAND VEHICLES]

2007

## SALES OF PASSENGER CARS VS. SECOND-HAND VEHICLE IMPORTS



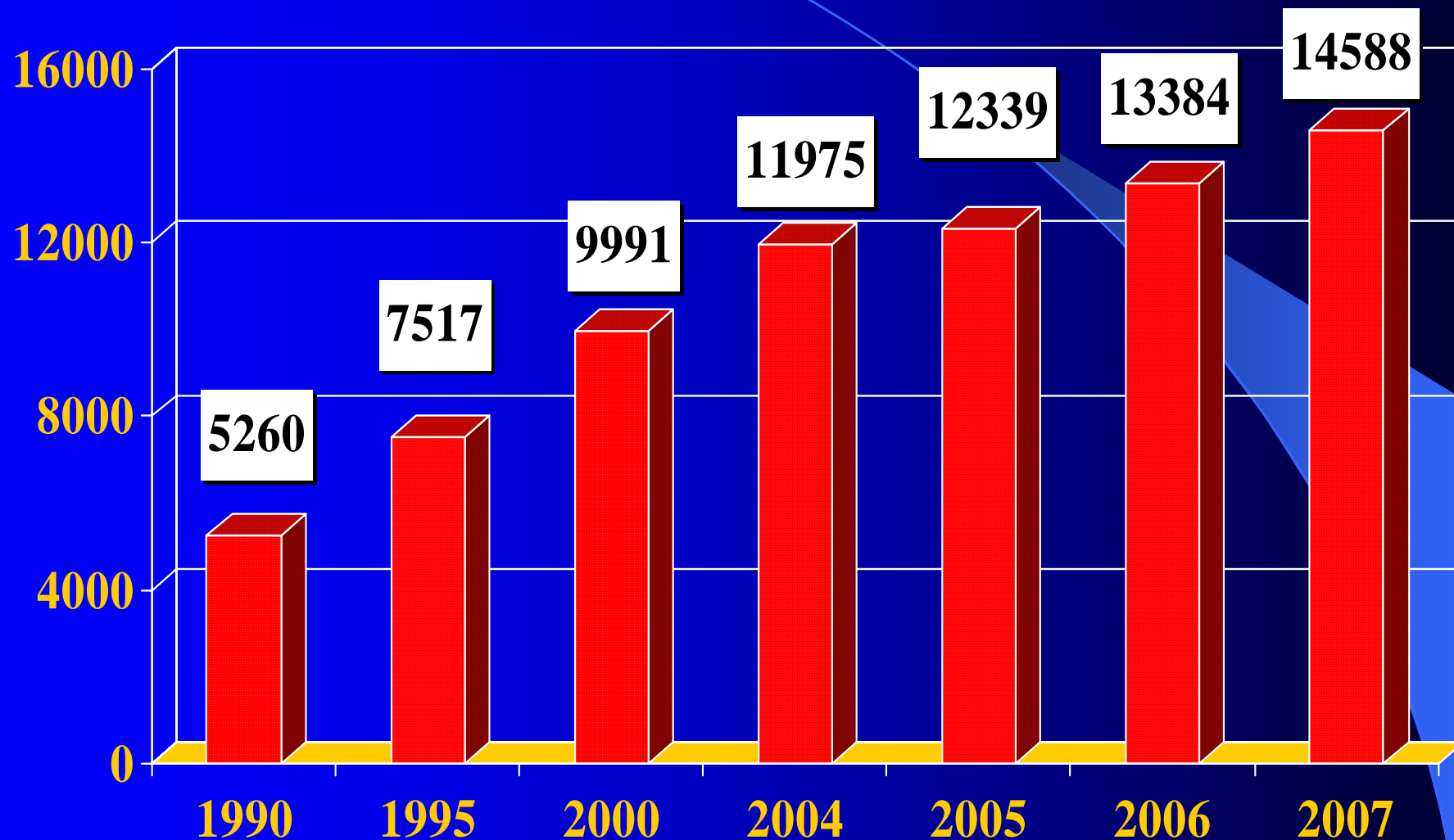
# POLAND IN THE EU – COMPARISON

2007

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

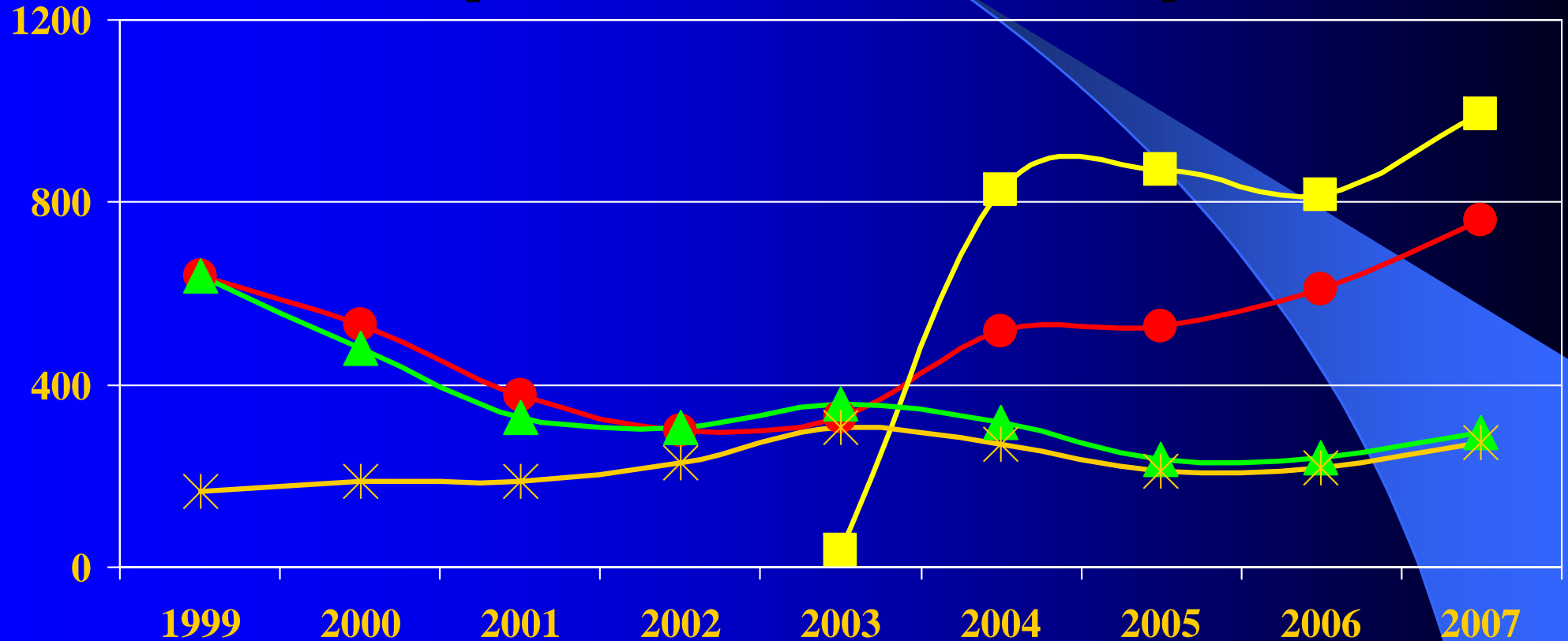
# PASSENGER CARS FLEET IN POLAND

[IN THOUSAND VEHICLES]



# PRODUCTION, NEW VEHICLES SALES AND SECOND-HAND CAR IMPORTS

[IN THOUSAND VEHICLES]



● PRODUCTION

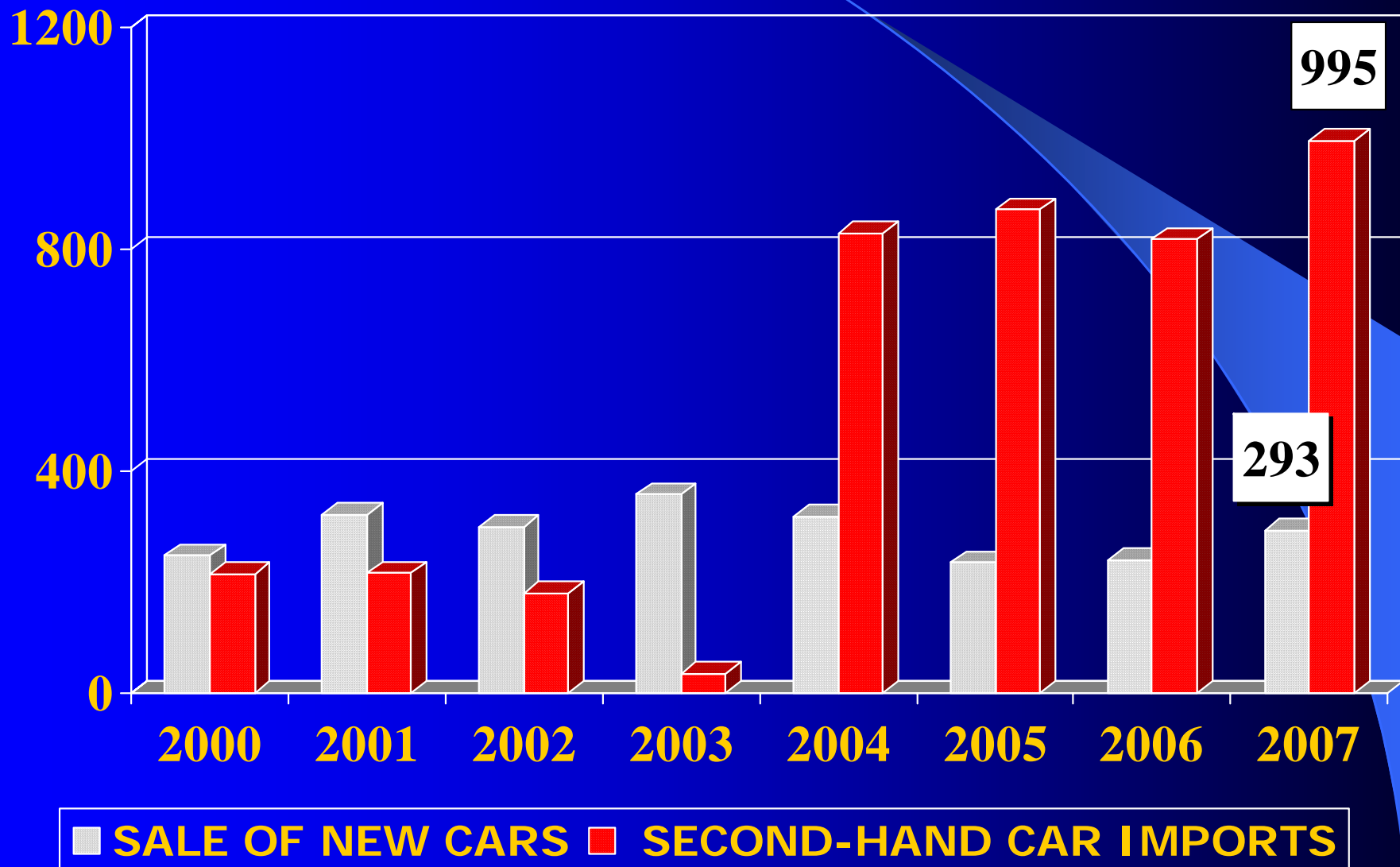
■ SECOND-HAND CAR IMPORTS

▲ SALES OF NEW PASSENGERS CARS

\* NEW CAR IMPORTS

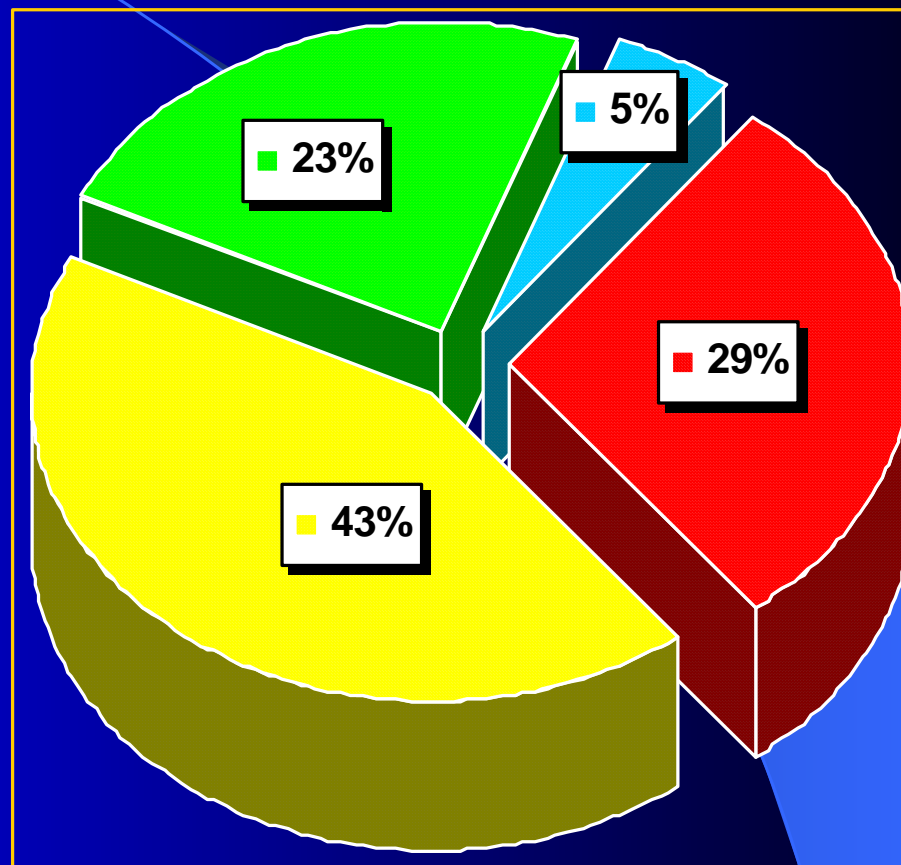
# NEWLY REGISTERED CARS

[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 CO<sub>2</sub> 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**

**[www.mg.gov.pl](http://www.mg.gov.pl)**