

The market for

AUTOMOTIVE COMPONENTS

IN POLAND

ITC



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M.D FMD /01/0122

Abbreviations

CIF Cost Insurance Freight

EFTA European Free Trade Association

EU European Union

HS Harmonized System

LC Letter of Credit

Notes Note Issued where specified

OEM Original Equipment

OEM Original Equipment Manufacturer

VAT Value Added Tax

USA United States of America

VW Volkswagen

EXECUTIVE SUMMARY

A population of almost 40 million, rapid economic growth and a still relatively low level of car ownership, make Poland one of the most promising markets for the sale of new vehicles and their parts, components and accessories. With over 13 million vehicles using its roads, of which passenger cars account for some 10 million, the country is by far the largest single market for vehicle components in Central Europe.

All new vehicles together with the millions that are already in use require parts and components for their maintenance and repair. In addition, all 15 of the established vehicle manufacturers and assemblers in the country, also require "Just-in-Time" Original Equipment supplies, so as to be able to meet production commitments. Since the industry was privatised in 1991, it has attracted US\$ 6 billion of foreign investment, leading to the full restructuring of component production. Currently, there are over 100 Polish and foreign owned component producers in the country.

In 1999, vehicle production reached some 720,000 units of which some 30% were exported to the EU, the Czech Republic and Hungary. Domestic production of parts and components was valued at US\$ 1.35 billion in 2000, of which US\$ 420 million were exported, mainly to neighbouring countries. Imports reached a value of US\$ 1.5 billion of which 83% came from EU countries. The total Polish market for automotive components reached a value of US\$ 2.43 billion in 2000. Fiat, Dae woo, Opel, Ford and the other Polish-based vehicle assemblers absorb about US\$ 1 billion of this total. This leaves some US\$ 1.43 billion for the replacement market. Since some 40% of vehicles registered in Poland are over 10 years old, the market for genuine replacement parts is still relatively small and estimated to be valued at some US\$ 430 million, leaving components valued at US\$ 1 billion for non-genuine replacement parts and components.

Poland is a free market open to any supplier including those from developing countries. It is also a highly competitive market where new entrants must be able to match the high standards of existing suppliers in terms of product quality, reliable delivery and competitive prices. European based suppliers do have the advantage of a 0% rate of customs duty compared with 15% for components imported from outside the European region. (For details on countries paying 0% customs duty. Their main advantage derives however from their proximity to the market which facilitates deliveries and after-sales service.

The most technically advanced automotive component producers in developing countries, many of whom are already supplying vehicle assemblers in Europe and the USA, should be able to sell original equipment to Polish-based assembly plants. As this is the dominant sector of the total market and the volumes required are large, it is worth while to devote time and effort in getting components approved by Polish-based vehicle assemblers. Such approval will not only permit sales to the vehicle manufacturers but also to their official franchise holders in the country who stock and sell original replacement parts. Many among the hundreds of automotive component producers in developing countries, who supply non-original replacement parts, can also sell some of their products in this market. To do so successfully, initial correspondence in Czech, German or English must be followed up by a visit to the market and the subsequent appointment of an agent, dealer or distributor. Without a local presence business is unlikely to develop satisfactorily.

Component suppliers from developing countries will face strong competition from European based companies, particularly from Italy, Germany, and France. EU exporters, who supply 83% of components imported into Poland, benefit from common regulations and standards, a geographic advantage for transportation and support, as well as preferential customs duties. In spite of this, ample opportunities exist to sell products from developing countries in this rapidly expanding and changing market. Potential suppliers of original equipment to the vehicle assemblers and especially those who supply non-original parts for the replacement market have a realistic chance of success.

A. PRODUCT DESCRIPTION

This market brief covers automotive components, with special emphasis on those, which are Classified under the following H S codes.

H S Code

87.08	Parts components and accessories of motor vehicles of headings 87.01 to 87.05
8708 /29	Parts and accessories of motor vehicle bodies n.e.s. Brakes and servo-brakes and parts thereof
8708 /40	Gearboxes
8708 /50	Drive-axes with differential, whether or not provided with other transmission components
8708 /94	Steering wheels, steering columns and steering boxes
8708 /99	Motor vehicle parts n.e.s.

Apart from the products covered by the above listed H S codes, this report also covers many other essential parts and components which account for the bulk of fast moving replacement parts. All of these products are required for the repair and maintenance of existing vehicles in the country.

As automotive parts and components are one of the most diverse product groups, consisting of many thousands of different items made of metal, plastic, glass, wood, rubber, etc, these products lend themselves to misinterpretation by customs authorities and are therefore often misclassified. Official trade statistics of this product group are therefore, particularly prone to significant distortion and if used, must be used with extreme care. Unfortunately, in common with many other countries, Polish customs authorities are prone to misclassify items belonging to this product group.

B. STATISTICAL DATA

The size and structure of the replacement market for automotive components, parts and accessories is determined by the number of vehicles in use as well as the average age of these vehicles and the distribution of their age structure. In a country such as Poland, with an established vehicle manufacturing and assembly industry, there exists additional demand for parts and components for use in the vehicle assembly process. The size and structure of the sector is directly linked to, and governed by, the numbers and types of vehicles that are being produced. The Polish vehicle production for the period 1996 to 1999 is shown below:

Table 1 - Vehicle Production (Units)

	1996	1997	1998	1999
Passenger cars	445,231	540,220	593,781	666,362
Light Vans	-	63,329	57,377	50,038
Trucks	3,750	4,540	2,407	1,316
TOTAL OUTPUT	448,981	608,090	653,565	717,716

Source: Mercedes Motor Verlag, Stuttgart, Germany

The Polish market for automobile parts, components and accessories is valued as follows:

Table 2 - The Market for Automotive Components – US\$ million

US\$ Million	1996	1997	1998	1999	2000
Domestic production	567	725	900	1,100	1,350
Imports	715	1,188	1,235	1,350	1,500
Exports	187	282	325	370	320
TOTAL MARKET	1,095	1,631	1,810	2,080	2,430

Source: Chief Statistical Office (GUS)

- Production

From 1990 to 1991, many of the independent automotive parts manufacturers faced severe cash flow problems due to a 30% drop in domestic vehicle sales. As a result, production destined for the replacement market declined by over 20%. At that time there existed a relatively small independent component sector that, with a few significant exceptions, was principally involved in supplying a limited range of components to designs specified by the vehicle manufacturers. As a result, only 30% to 35% of components came from independent parts manufacturers, compared with 60% in Western Europe and 70% in Japan. When foreigners started to invest in the Polish automotive sector, this situation began to change: the role of independent manufacturers increased, making the market in Poland more in line with EU countries than a few years ago.

The car parts industry in Poland has been undergoing a radical restructuring since 1992, when the sector was privatized. Foreign companies bought out some Polish manufacturers while other investors decided to invest in greenfield production sites. At the same time, vehicle production was restructured with the entrance of a number of major Western vehicle assemblers in the market. Their presence in

Poland is a stimulating investment for the components industry. Foreign investment in the automotive industry, including car production and spare parts and vehicle distribution, is estimated to amount to US\$6 billion. This represents 20% of total direct foreign investments in the country. As a result, there are now an increasing number of foreign-owned component manufacturers in Poland. These include Delphi, Lear, Magneti Marelli, Michelin, Pilkington, Isuzu, Gestind, Allie's Signal, Bosch, Packard Electric, IMO, Roltra Morse, Mitra, VW Elektrosystems, Exide, Lucas and Goodyear.

The automotive components sector in Poland consists today of over one hundred local and foreign-owned suppliers. Production has grown rapidly from US\$67 Million in 1996 and was valued last year at an estimated US\$1.35 Billion in 2000. This is a growth rate of 22% per annum during the 1996-2000 period. The bulk of last year's production, valued at US\$930 million was sold in the domestic market. In spite of this massive increase in output, domestic automotive parts producers are not able to meet the country's total requirements.

Moreover, major vehicle assemblers who have invested in Poland have declared their willingness to source as many parts as possible in the country. Some have even trained selected independent Polish producers to supply OEM approved components. Many foreign vehicle manufacturers have committed substantial investments and high production volumes to Poland. Of these, the leading investors have also gained a dominant position in market share: FIAT (28%), DAEWOO (27%), VW-SKODA (11.1%), RENAULT (5.2%) and FORD (5.0%) of vehicles sold in Poland.

- Imports

Polish producers of automotive parts have not been able to keep up with local demand in spite of a rapid growth in output. As a result, the country is a net importer of these products. Between 1996 and 2000, imports have increased from US\$715 million to US\$1.5 billion. This substantial growth is largely driven by the rise in the number of vehicles in use and the rapid expansion in domestic vehicle production.

Imports of original equipment components could be much larger but for the fact that the dominant vehicle assemblers in Poland; Fiat, Daewoo and Opel still produce a higher proportion of components in-house than the European norm. European producers supply the bulk of current imports of both original and non-original parts. As a result, the products of most well-known European parts producers are currently available in Poland.

- Exports

With booming local demand on the one hand, and a restricted product range on the other, exports of automotive components are still low. In spite of this, they increased at an annual average rate of 12% from US\$187 million in 1996 to US\$420 million in 2000. Polish auto parts and component producers are most competitive in the production of castings and electrical cables. These are supplied to such auto producers as Mercedes and VW in Germany, Volvo and Scania in Sweden, Fiat in Italy, Seat in Spain. Generally, generic products such as forgings, castings, standard bearings, simple plastic and rubber components are easier to produce in Poland as their sourcing criteria (maintaining quality standards and the competitive cost of production and shipment) are relatively simple to meet.

- Apparent Consumption

The total market for automotive components has more than doubled from US\$1.1 billion in 1996 to nearly US\$2.5 billion in 2000. In the year 2000, vehicle manufacturers based in Poland, bought in original equipment parts and components valued at some US\$1 billion leaving a total of US\$1.43 for the replacement market. Of this total, around US\$430 million represents the supply of genuine replacement parts and components. The remaining US\$1 billion represents the market share of non-genuine replacement parts and components.

The market for non-genuine replacement parts would in fact be considerably larger than the above

components for the repair and maintenance of older vehicles. Thousands of damaged vehicles have been imported in recent years with the sole purpose of stripping out serviceable parts and components for resale in the replacement market. Through legislation and administrative orders the Polish government has tried to discourage this practice but has so far not been able to eradicate it completely. Domestic producers and importers claim that this practice has a significant negative impact on their sales, with a shortfall of at least US\$600 million per annum.

- Main Origin of Imports

Almost 85% of parts and components were imported from EU countries. Currently, Germany and Italy remain Poland's largest suppliers with 28% and 19% respectively. Imports from Italy generally consist of parts and components that are used in the assembly and production of Fiat cars in Poland. Other important European suppliers are France, the Netherlands, The Czech Republic, UK, Sweden and Spain. From outside Europe, Korean and Japanese components and parts predominate. These, together with US components are mainly supplied from Europe-based subsidiaries.

C. MARKET CHARACTERISTICS

According to the 1998 Statistical Yearbook and to recent press releases there are 9.5 million registered passenger cars and light vans in Poland, and 13.2 million vehicles altogether. This includes trucks, buses and tractors. Every second family in Poland now owns a car; but 40% are more than ten years old. New passenger car sales reached 515 000 units in 1998 and 640 000 in 1999. Households owe nearly US\$1.5 million to banks at the end of 1998 for new car purchases. In the 1998-1999 period, a number of 'car banks' opened offices in Poland. Fiat, Opel, Ford, VW and Daimler Chrysler established their own 'car banks' which specialise in granting car credits and make it easier for customers to obtain competitive loans.

While domestic producers dominate the market, they are now all foreign owned by FIAT, Daewoo, and General Motors. Additionally, Ford and VW assemble in Poland. About 73% of the cars presently registered in Poland are locally produced. The most popular vehicles in Poland are Italian FIAT and Korean Daewoo, which account for 55% of the market. Volkswagen, Opel and Ford, the latter two known in Poland as German rather than American; French Renault, Peugeot, and Citroen; Japanese Toyota, Mazda, and Honda are their main competitors.

Poland also provides attractive tax and other concessions for new investment in designated economic zones. The GM Opel greenfield plant is in such a zone - Gliwice - which is in the heart of Poland's steel and coal region of Katowice - an area undergoing massive structural change, which requires major new investments. Foreign investment in the automotive industry, including car production and spare parts and vehicle distribution is estimated to reach approximately US\$6 billion in 1999, representing 20% of total direct foreign investments in Poland. Cars, parts and other components are produced mainly for the domestic market. Nevertheless, exports are on the increase. Companies such as Daewoo hope to move into the European market thanks to their plants in Poland.

D. MARKET ACCESS

- *Import Climate*

Over the period 1996 to 2000, the market for automotive parts and components has grown at some 12% per annum. It has become increasingly competitive but is open to all suppliers. There are no legal or administrative restrictions on the import of these products from anywhere in the world, as long as exporters comply with existing safety and environmental standards and pay the appropriate duties and taxes.

- *Customs Duty*

Automotive parts and components imported from the EU and EFTA countries enjoy a preferential 0% rate of customs duty. Imports from the Czech Republic, Slovak Republic, Hungary, Slovenia, Romania, Bulgaria, Latvia, Lithuania, Estonia, Israel, and Faeroe Islands also enjoy a 0% rate. Parts imported into Poland for assembly purposes (in automotive plants owned partly by foreign investors such as FIAT, Dæw oo, GM- Opel, Ford, Peugeot, Volkswagen, and others) are also subject to a 0% rate irrespective of origin. Imports of these products from all other countries including developing countries, are subject to a customs duty of 15% of the CIF price.

- *Excise Tax*

Vehicle parts and components are not subject to excise tax.

- *Value Added Tax (VAT)*

A 22% VAT is calculated on the CIF price, increased by customs duty and border tax.

- *Import Restrictions*

Quotas do not apply for automotive parts and components. Some imported goods require a turnover certificate. Parts and components require this certificate if they are imported into Poland in commercial quantities. The certification agency tests the product and determines whether the product is consistent with Polish standards and can be sold in Poland. The certifying agency for the majority of automotive parts and components is *Pzemyslowy Instytut Motoryzacji – Industrial Institute of Motorization*. For further details see list of 'Other Useful Contacts'.

E. PRICES

Price levels for automotive components are generally in line with those prevailing in Western Europe and are highly competitive. This reflects the high degree of integration that has been achieved between vehicle producers / assemblers based in Poland, their local component suppliers and the "Global Industry". As in all markets, due to the high volumes involved, parts and components sold to vehicle producers / assemblers (OEMs) obtain the lowest prices. Original replacement parts approved by the OEMs obtain the best unit price. Because the mark-up to the final customer on these products is often very substantial, official franchise holders and distributors can afford to pay a higher price to the supplier.

"Non-Original" replacement parts, i.e. parts and components not approved by the OEMs, are priced substantially cheaper to the final customer and are extremely popular. Although this market sector is highly competitive, many suppliers of such parts make very adequate returns on their business.

It should be noted that owners of relatively new cars tend to buy original parts and components only, while owners of older vehicles tend not to use original parts due to their higher prices. As the number of Western-made cars grows in Poland and with the technical advancement of locally produced new models, the share of authorised service stations will grow. These will supply their customers with

F. DISTRIBUTION CHANNELS

- Original Equipment

Manufacturers of Original Equipment supply direct to motor vehicle assemblers who incorporate these parts into their vehicles. Foreign principals and local franchise holders have a considerable influence over products specifications and supply sources. Assemblers do not normally keep stocks of OE components but place planned orders based on their actual needs with approved suppliers on a "just in time" basis. Polish vehicle manufacturers also source OE parts direct from local and foreign manufacturers.

- Genuine Replacement Parts

Local franchise holders are major stockists of a full range of 'genuine' parts for the make of vehicle they represent. A number of products manufactured by foreign OE producers have found their way into the replacement market in Poland through independent importers. Local agents and dealers are key participants in the distribution network, acting for local OE manufacturers, franchise holders and independent importers.

- Non-Genuine Replacement Parts

This part of the distribution network is not yet efficiently organised but is slowly improving and still growing. There are many producers, wholesalers and companies involved in the distribution of non-genuine replacement parts. Taking into account that some 40% of vehicles in Poland are over 10 years old the market for this type of replacement parts will remain large in the foreseeable future. Their owners have turned to this sector as non-genuine replacement parts are less expensive compared to the OEM-approved genuine ones.

- Workshops

Since the changes introduced in the handling of insurance, workshops have now become more important in the distribution process. They not only repair vehicles, but have also become the main outlets for non-genuine replacement parts.

- Accessories

Vehicle accessories are largely imported. Manufacturers of the more popular items normally appoint a local agent. These are distributed by the agent to local garages, repair shops, dealers and do-it-yourself outlets.

G. COMMERCIAL PRACTICES

Import financing procedures adhere to Western business practices. All payments go through one of the following qualified foreign exchange banks, whose guarantees are reliable:

Bank Handlowy w Warszawie S.A. (the central bank and its nine regional branches)

Bank Polska Kasa Opieki S.A. (Pko, S.A.)

Bank Rozwoju Eksportu S.A. (Export Development Bank)

Powszechna Kasa Oszczednosci-Bank Panstwowy (PKO-BP)

Bank Gospodarki Żywnościowej (Bank for Food Economy)

Polski Bank Rozwoju (Polish Development Bank)

The safest method of receiving payment for exports is through a confirmed, irrevocable letter of credit (LC). Banks in Poland require the importer to deposit funds prior to issuance of a LC. Most difficulties in obtaining a bank guarantee on a Polish LC seem to stem from considerations of Poland's overall debt performance. This does not reflect the actual performance of Polish banks on LCs, however, and there have been no known cases of default on payment during the last several years. Typically, LCs are opened for a period to cover production and shipping, and they are normally paid within seven working days after receipt of the goods. Cash payment or down payments provide an extra measure of security for exports sales.

H. PACKAGING AND LABELING

- Packaging

Beyond compliance with EU and Polish health and safety regulations, there are no special legal requirements on packaging for the import of automotive components. Each package should however, indicate the name of the manufacturer, the country of origin and its contents. Individual customers will however, specify the materials and manner in which they require the components to be packed.

In general terms, packing should be sufficiently robust to adequately protect the components from damage during transport in packages which are compatible with mechanical handling, storage and retrieval. Small parts and components are normally packed in plastic bags, put into cardboard boxes and placed in a master carton. Master cartons and all heavy components are transported in containers on pallets, to facilitate handling.

- Labeling

It is advisable to print all labels and especially specifications and fitting instructions in Polish. If this proves difficult or impossible, first German and/or English should be used. As a result of the introduction of computerized stock control, most customers now require labels to be bar-coded.

I. SALES PROMOTION

Although dominated by European suppliers at the present time, this rapidly expanding market offers ample opportunities for many potential suppliers from developing countries. To take full advantage of these, potential suppliers must make serious efforts to promote their products in this market and to support the work of their importers, distributors or agents effectively. One of the most effective ways is to participate in a local Trade Fair or Exhibition.

This is not a cheap option even in Poland where costs are still not as high as in Western Europe. It should therefore be only undertaken after thorough preparation. If well prepared, trade fairs can enhance a supplier's product image and increase his market share. For those exporters from developing countries willing undertake the effort of preparation, details of the best venue is shown below.

J TRADE FAIRS

The International Fair of the Automotive Industry (This is an annual event)

Organized by: *Miedzynarodowe Targi Poznanskie (Poznan International Fair)*

ul. Glogowska 14

60734 Poznan

tel: 0048-61-869-2355, 869-2286

fax: 0048-61-866-5827, 866-0940

The International Fair of the Automotive Industry is the biggest automotive fair in Poland. The trade show is broad and focuses on passenger cars and components.

- Advertising

To succeed in the Polish market, potential exporters will have to advertise their product using the local media. To have any positive effect all advertisements have to be in Polish. For initial advertisements, details of specialist publications dealing with the vehicle industry are shown below.

Motor

ul. Tytoniowa 20

04228 Warszawa

P.O. Box 21

tel./fax: 0048-22-615-3046;

0048-22-613-2536,

0048-22-613-2584

Auto Moto Sport

ul. Kredytowa 1a

00950 Warszawa

P.O. Box. 91

Warszawa 2

tel: 0048-22-626-8428

fax: 0048-22-626-8427

Auto-moto

Przeгляд Motoryzacyjny

ul. Sandomierska 19

02567 Warszawa

tel/fax: 0048-22-496-678

Auto

Technika Motoryzacyjna

ul. Zurawia 22

00515 Warszawa

tel/fax: 0048-22-629-4530

tel: 0048-22-628-1071 ext 159, 284

Auto International

Phoenix Informedia

ul. Powstancow Slaskich 95

53382 Wroclaw

tel: 0048-71-605-650

fax: 0048-71-610-470

Auto

Al. Stanow Zjednoczonych 51

04028 Warszawa

tel: 0048-22-810-3554

fax: 0048-22-133-346

Some of Warsaw's daily newspapers have large advertising sections and can be used to advertise.

Of these, the best two are:

"Rzeczpospolita"

Pl. Starynkiewicza 7A

02015 Warszawa

tel: (48 22) 6280493

fax: (48 22) 6280588

"Gazeta Wyborcza" - Biuro Reklamy i

Ogloszen

Nowy Swiat 27

00950 Warszawa

tel: (48 22) 6269081

fax: (48 22) 6261434

K. MARKET PROSPECTS

As the largest single rapidly expanding market for automotive parts, components and accessories in Central Europe, Poland offers attractive opportunities for all suppliers. This market is likely to continue to grow at an average annual rate of at least 8% over the next five years. Although currently dominated by domestic and European suppliers any competitive supplier irrespective of the country of origin has a chance to sell his products. This includes potential suppliers from developing countries.

The technologically most advanced companies manufacturing automotive components in countries such as Argentina, Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Morocco, South Africa and Turkey already export their products to customers in Western Europe and the USA. Some of these companies even sell original equipment components to vehicle manufacturers and assemblers in developed countries. It is therefore, very likely that their products would have no difficulty to succeed in Poland. To sell directly to the OEMs such as Fiat, Daewoo, Opel or Ford can be a daunting task and takes time and effort. It is worthwhile however, since the volumes required are large and this often leads to the sale of genuine replacement parts to official franchise holders in the country.

The opportunities to sell automotive components in Poland are not confined to the 50 or 60 most advanced companies in developing countries. Based on passed experience with this industry in developing countries, it is estimated that there are at least 300 to 400 automotive parts and component producers could supply some of their products as non-genuine replacement parts. These are companies who regularly export their products to neighbouring developing countries, but have so far not been successful in entering developed markets. As non-genuine replacement parts currently represents 70% of the total replacement parts market in Poland and are valued at US\$1 billion, it is a worthwhile target for all potential automotive component exporters from developing countries.

LOCAL USEFUL ADDRESSES

Ministry of Economy

Plac Trzech Krzyży 5
009 50 W arszawa
t l: 0048-22-69 3-5508
fax: 0048-22-621-9 714

Ministry of Transportation and Maritime Economy

Road Transport Department
ul. Ch alubinsk ie go 4/6
009 28 W arszawa
t l: 0048-22-524-4065
fax: 0048-22-628-8556

Industrial Institute of Motorization

ul. J agie llonsk a 55
03301 W arszawa
t l: 0048-22-811-3389, 0048-22- 811-1421
fax: 0048-22- 811-09 75

This institute tests the majority of imported automotive parts and components, that require certification.

Transport Motor Institute

ul. J agie llonsk a 80
03301 W arszawa
t l: 0048-22-811-3231
fax: 0048-22-811-09 06

Tests: headlights, spark plugs, ignition systems, generators and other electrical products

Zakład Badania i Testacji - Zetom

ul. Ksie dza Bisk upa Be dnorza 17
40684 Katow ice
t l: 0048-32-256-99 35
fax: 0048-32-256-9 305

Tests bearings; V-belts, tires, and upholstery.

Polish Center for Research and Certification

ul. Klobucka 23a
02699 W arszawa
t l: 0048-22-857-99 16
fax: 0048-22-471-222

Issues the Safety "B" Certificate; Which, is required to protect the domestic market against products dangerous to human life, health, property or the environment

Polish Motorcycle and Automobile Federation

ul. Kazim ierzow ska 66
02518 W arszawa
t l: 0048-22-849-9 361
fax: 0048-22-48-19 51

Association of Official Importers of Automobiles and Trucks

ul. Krucza 28, room 103
00522 W arszawa
t l: 0048-22-629-056, room 103
fax: 0048-22-621-2724

Polish Chamber of the Automotive Industry

ul. Grazy ny 13
02 548 W arszawa
t l /fax: 0048-22-646-0818

M. LIST OF SOURCES

All figures quoted in this report are based on published Government or Industry sources in Poland and EU member countries. These have been supplemented through correspondence and telephone interviews with selected informants working in the vehicle components and assembly sectors. The main sources of published information used, are the following:

Główny Urząd Statystyczny (GUS)—Warsaw, The Polish Statistical Office

Polish Chamber of the Automotive Industry—Warsaw

Polish Motorcycle and Automobile Federation—Warsaw

Association of Official Importers of Automobiles and Trucks—Warsaw

Gazeta Wyborcza—Warsaw

Society of Motor Manufacturers and Traders (SMMT)—London

Verenigte Motor Verlage—Stuttgart