

# Leasing market in Poland in IQ of 2009

**Warszawa, April 2009**



Polish Leasing Association

# Members of the Polish Leasing Association

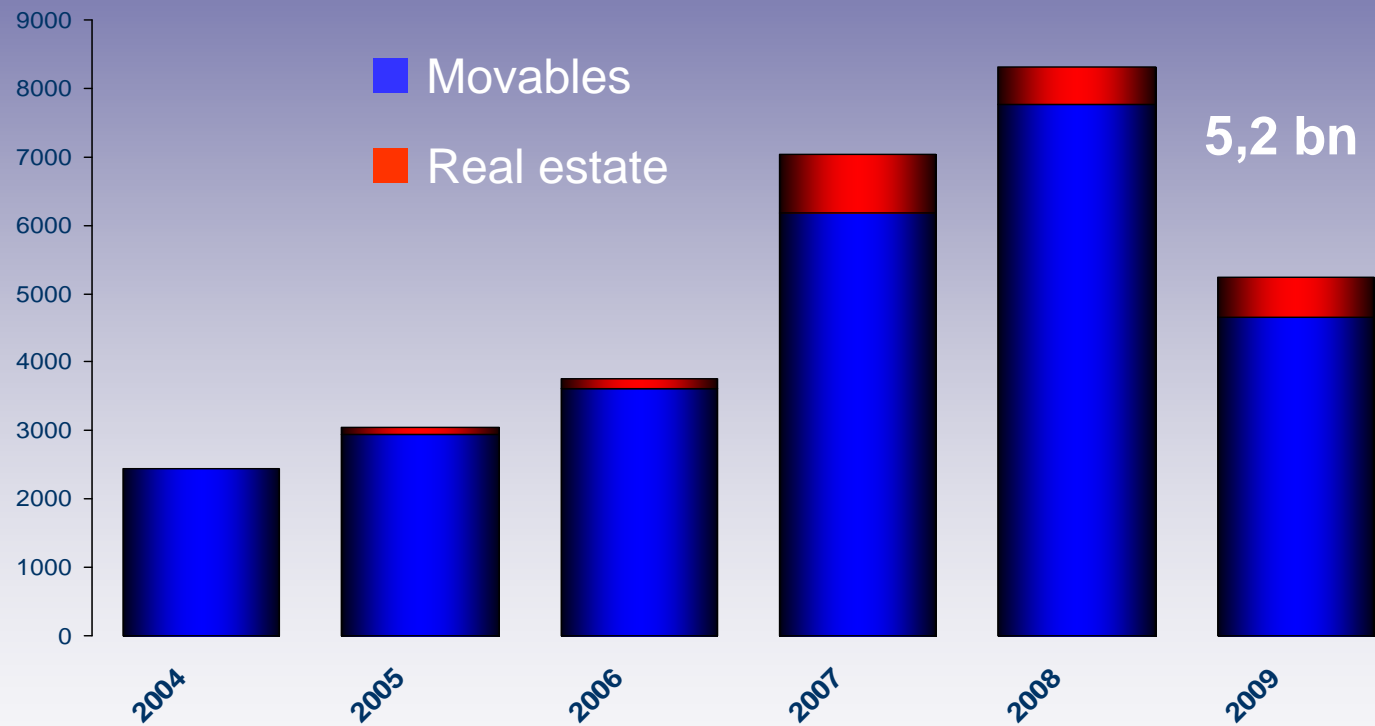
Bankowy Fundusz Leasingowy S.A.  
BGŻ Leasing Sp. z o.o.  
BNP Paribas Lease Group Sp. z o.o.  
BRE Leasing Sp. z o.o.  
BZ WBK Finanse & Leasing S.A.  
Caterpillar Financial Services Poland Sp. z o.o.  
De Lage Landen Leasing Polska S.A.  
Deutsche Leasing Polska S.A.  
DnB Nord Leasing Sp. z o.o.  
Europejski Fundusz Leasingowy S.A.  
Fortis Lease Polska Sp. z o.o.  
Handlowy-Leasing S.A.  
IKB Leasing Polska Sp. z o.o.  
Immoconsult Polska Sp. z o.o.  
Immorent Leasing Polska Sp. z o. o.  
ING Lease (Polska) Sp. z o.o.  
Kredyt Lease S.A.  
Masterlease Polska S.A.

Mercedes-Benz Leasing Polska Sp. z o.o.  
Millennium Leasing Sp. z o.o.  
NOMA 2 Sp. z o.o.  
Nordea Finance Polska S.A.  
ORIX Polska S.A.  
PEKAO Leasing Sp. z o.o.  
PEAKAO Leasing i Finanse S.A.  
Raiffeisen Leasing Polska S.A.  
Santander Consumer Multirent Sp. z o.o.  
Scania Finance Polska Sp. z o.o.  
SEB Leasing Polska Sp.z o.o.  
SG Equipment Leasing Polska Sp. z o.o.  
SGB-Trans-Leasing PTL Sp. z o.o.  
Siemens Finance Sp. z o.o.  
VB Leasing Polska Polska S.A.  
VFS Usługi Finansowe Polska Sp. z o.o.  
Volkswagen Leasing Polska Sp. z o.o.  
Watin Leasing & Finance S.A.  
Polski Związek Wynajmu i Leasingu Pojazdów



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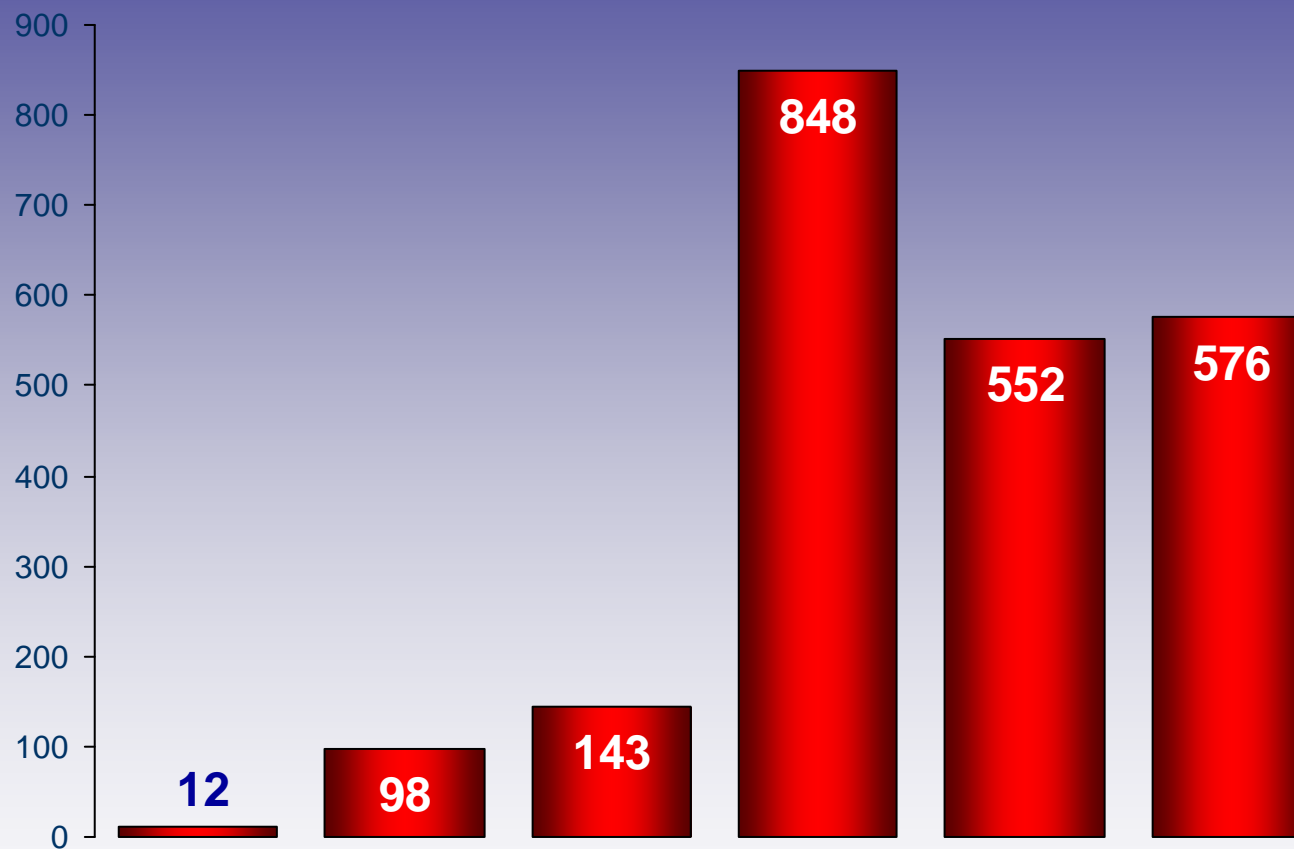
# Total net value of leasing after IQ of the years 2004-2009 (in PLN)



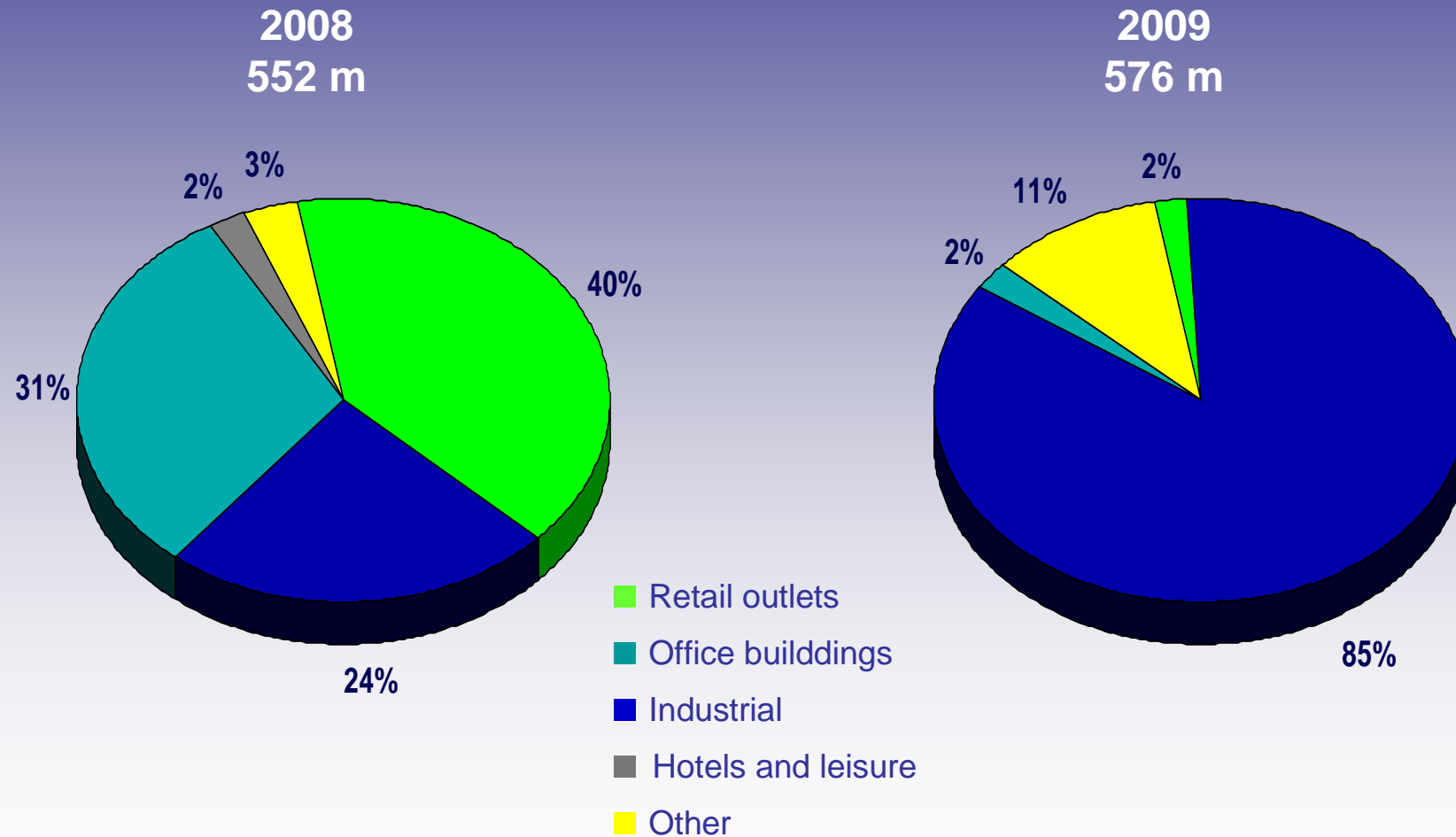
5,2 bn



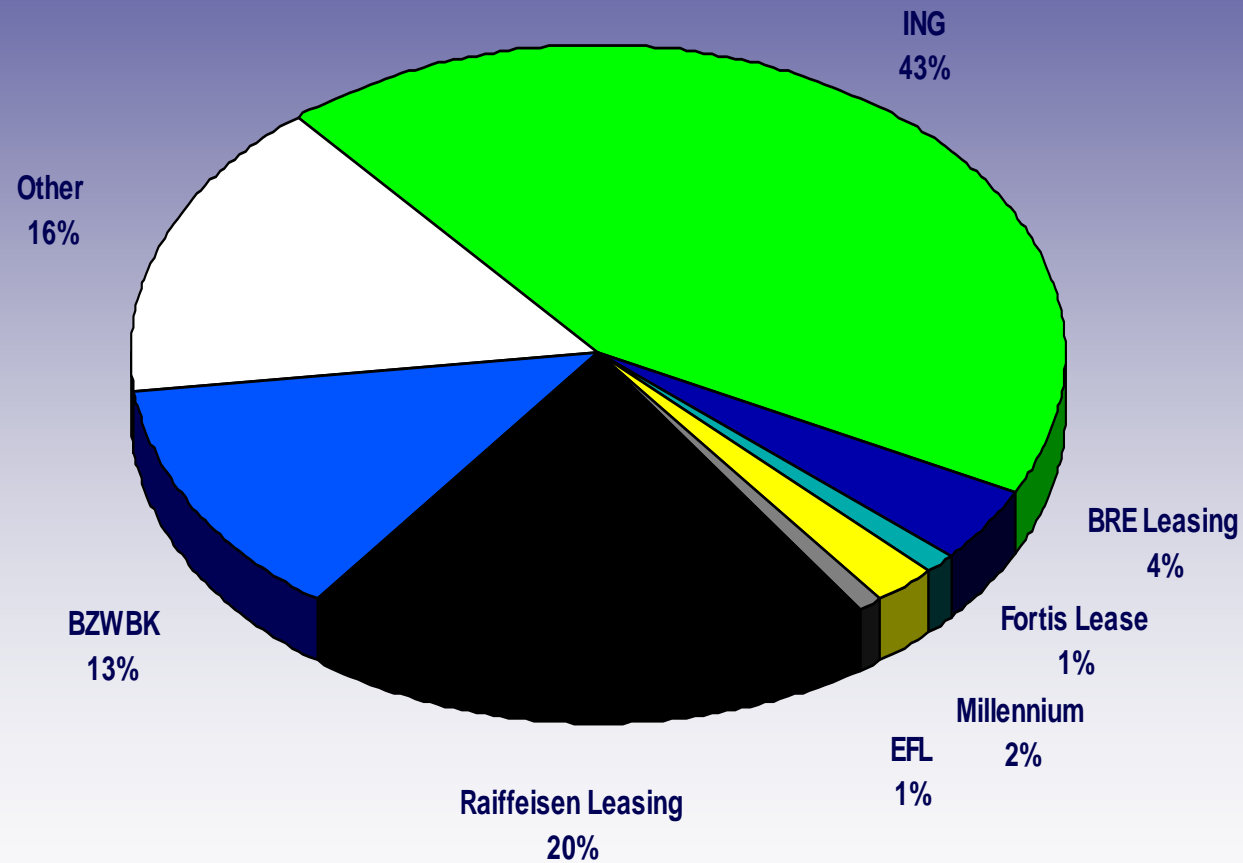
## Total net value of real estate leasing after IQ of the years 1997-2008 (PLN m)



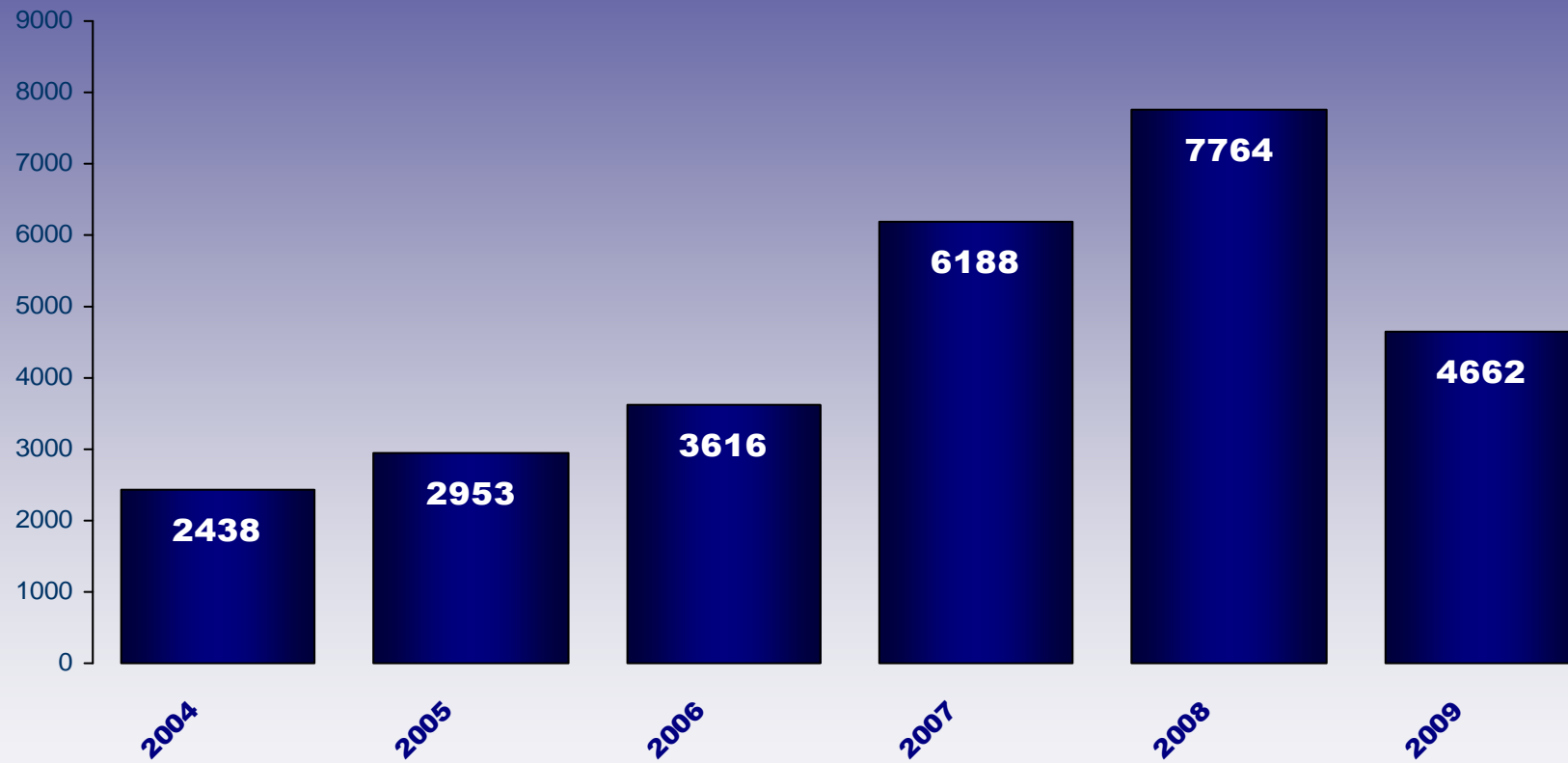
# Real estate leases per building type in IQ of 2008 and 2009



# Real estate leasing market per company, IQ 2009

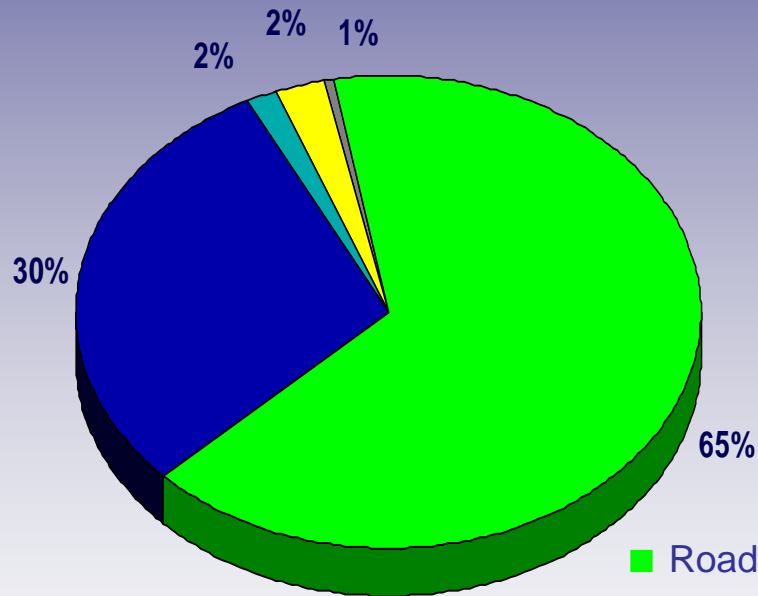


## Total net value of movables leased in IQ of the years 2004-2009 (PLN m)

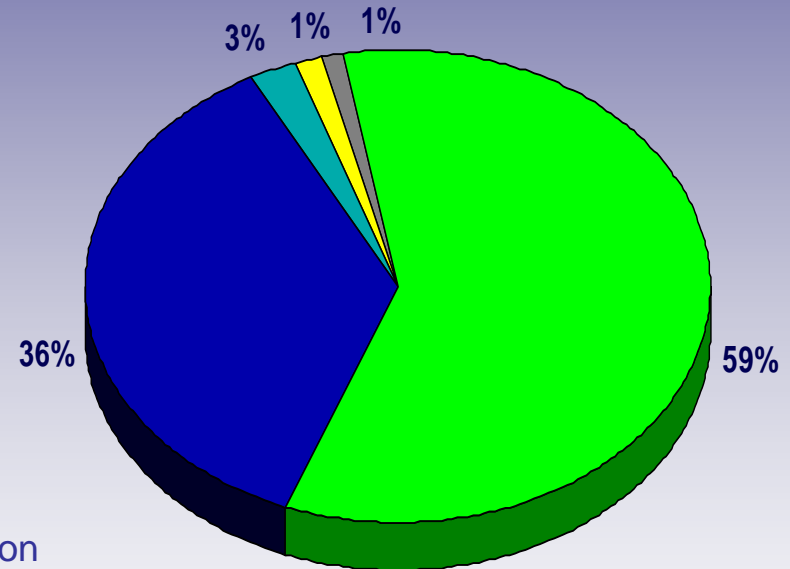


# Movable leases per asset type in IQ of 2008 and 2009

2008  
7764 m



2009  
4662 m

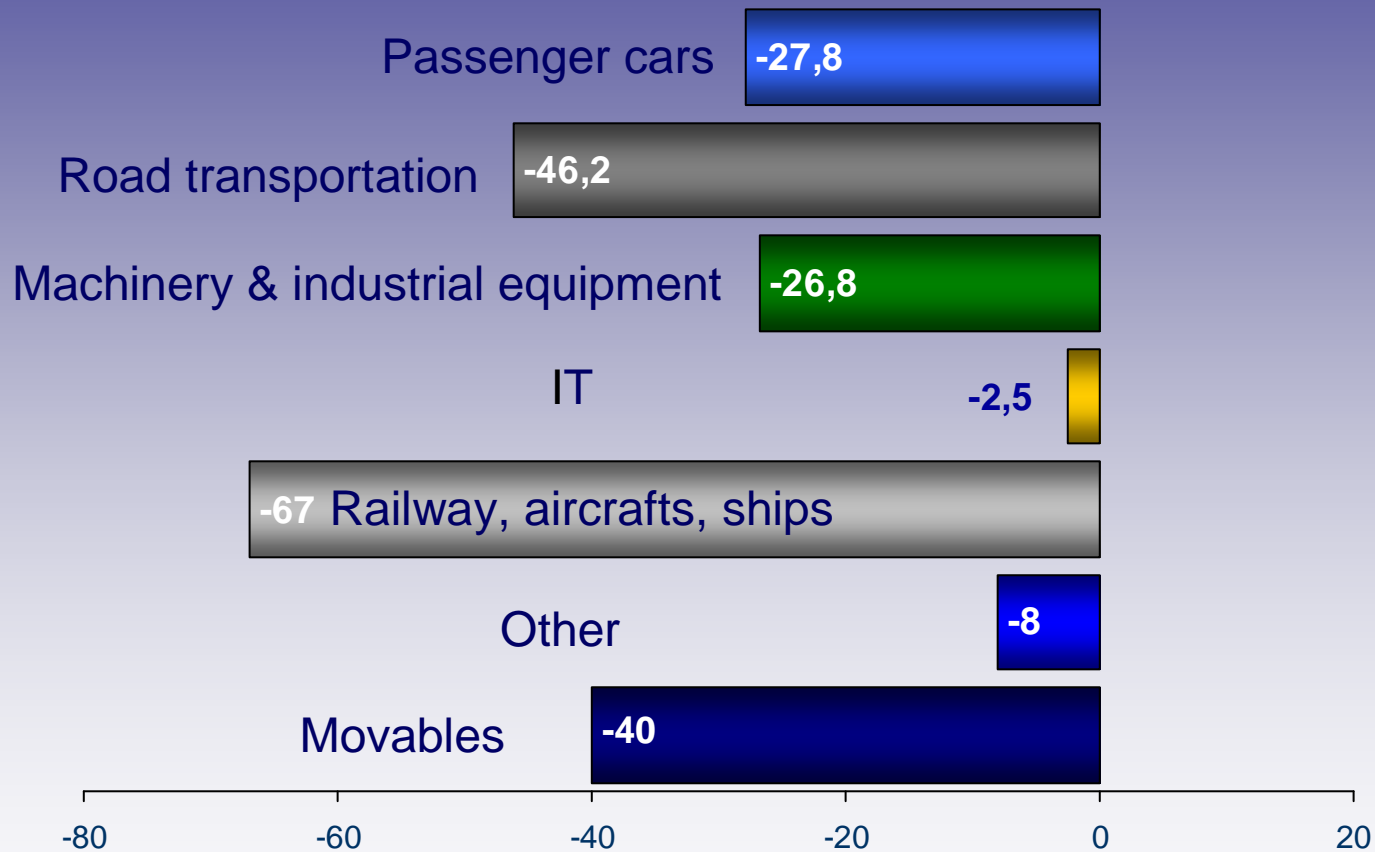


- Road transportation
- Machinery & industrial equipment
- Coputers and office equipment
- Railway, aircrafts, ships
- Other

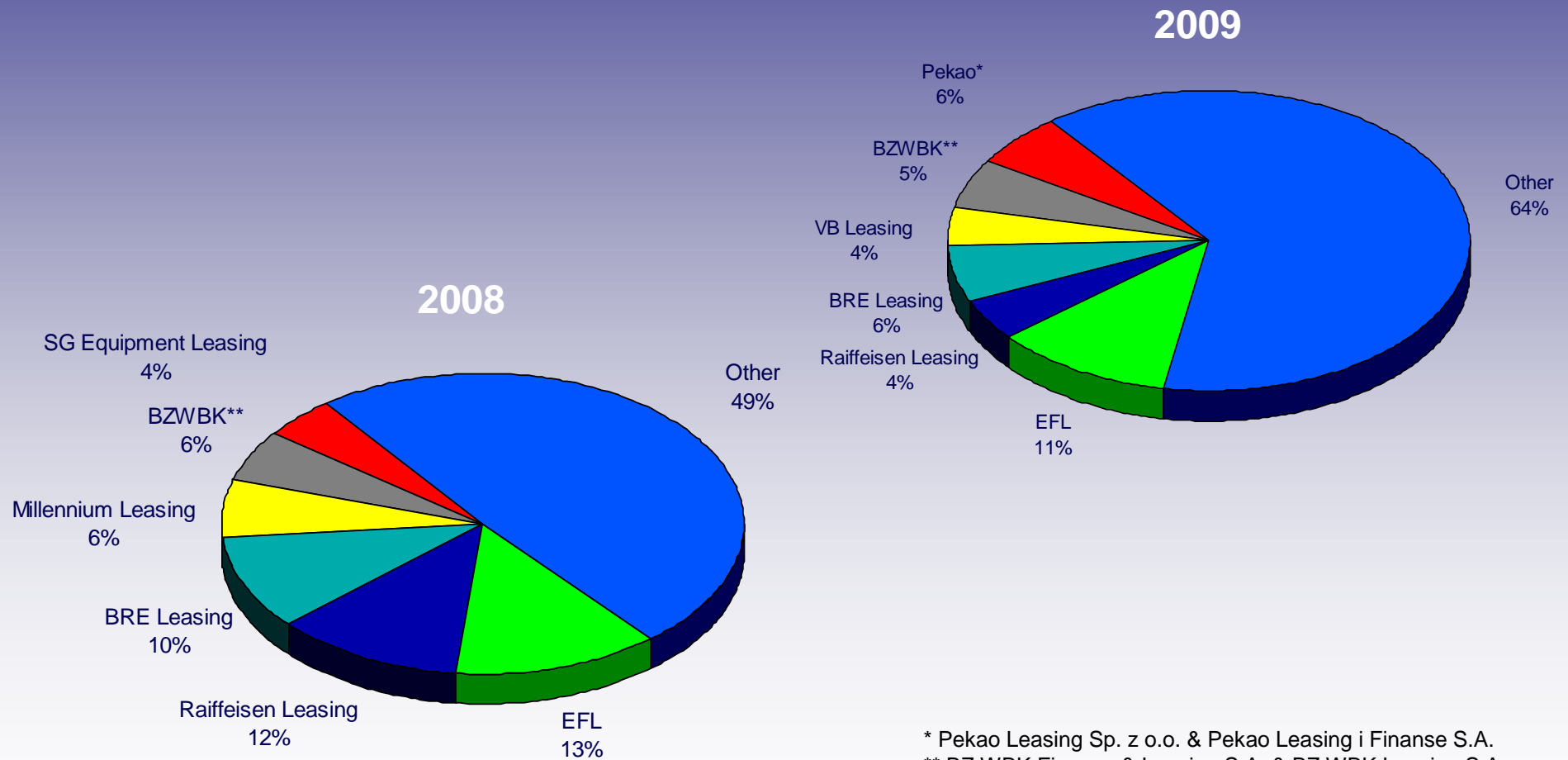




# Movable leasing dynamics (IQ 2009 vs IQ 2008)

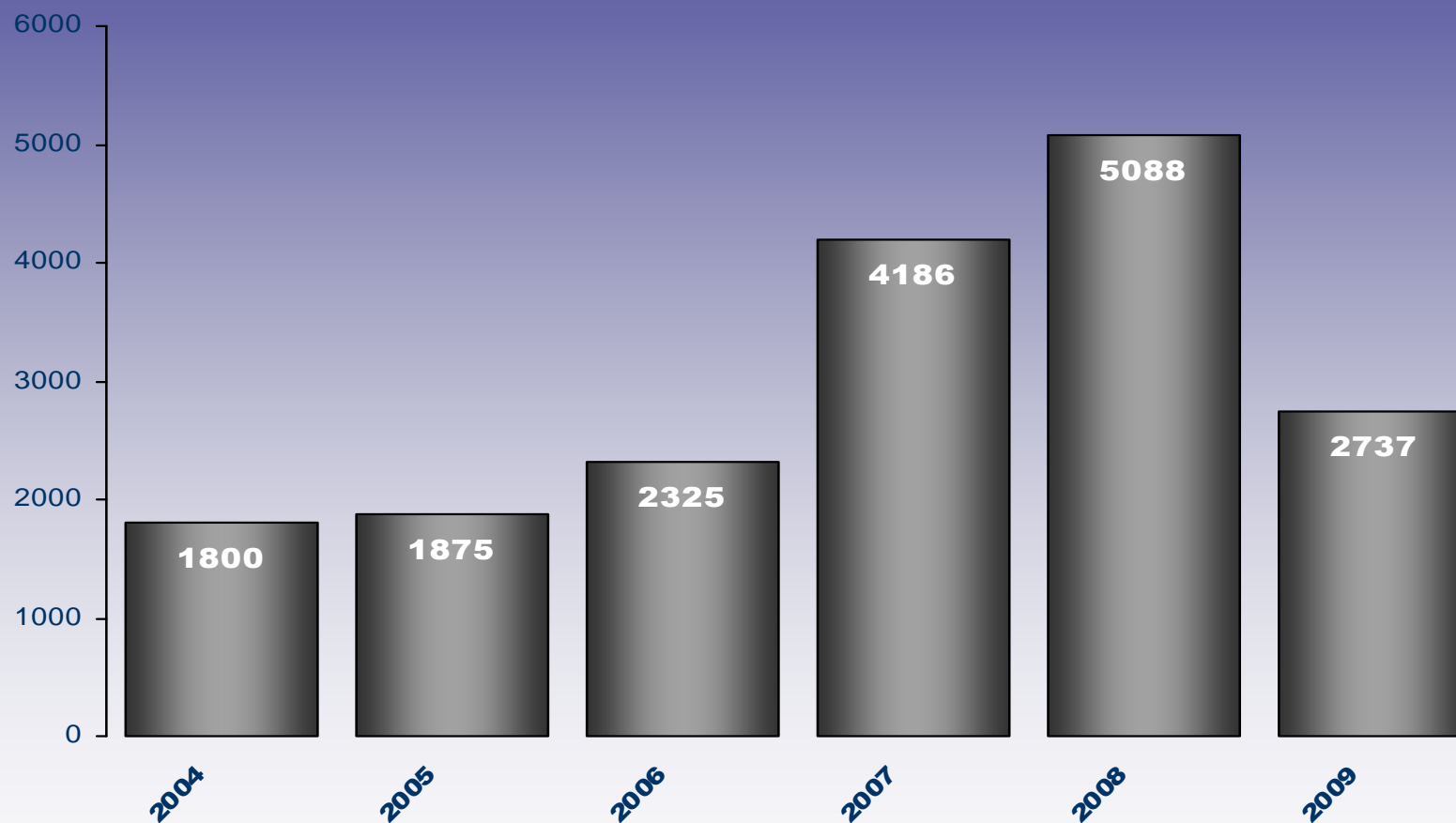


# Ten 6 companies share in the movable leasing market in IQ 2009 vs IQ 2008



\* Pekao Leasing Sp. z o.o. & Pekao Leasing i Finanse S.A.  
 \*\* BZ WBK Finance & Leasing S.A. & BZ WBK Leasing S.A.

## Vehicles leases in IQ of the years 2004-2009 (PLN m)

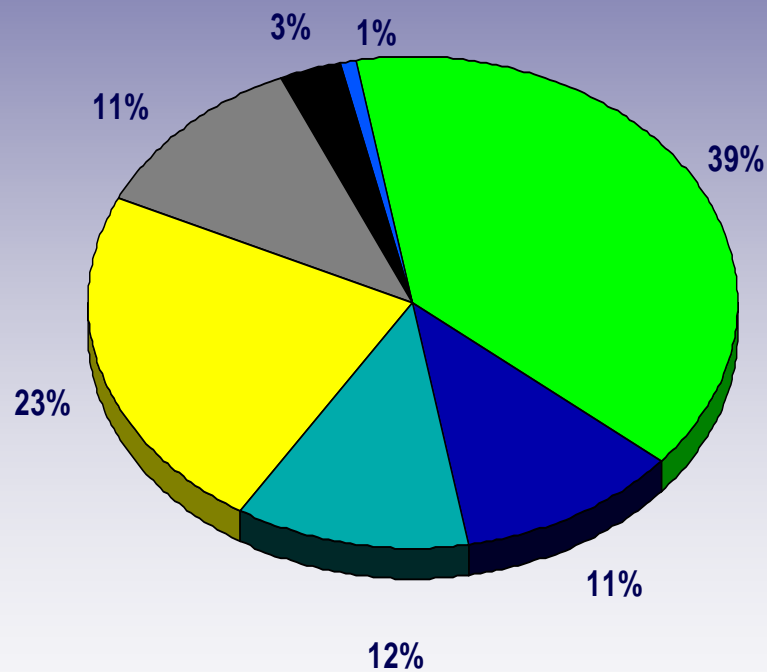


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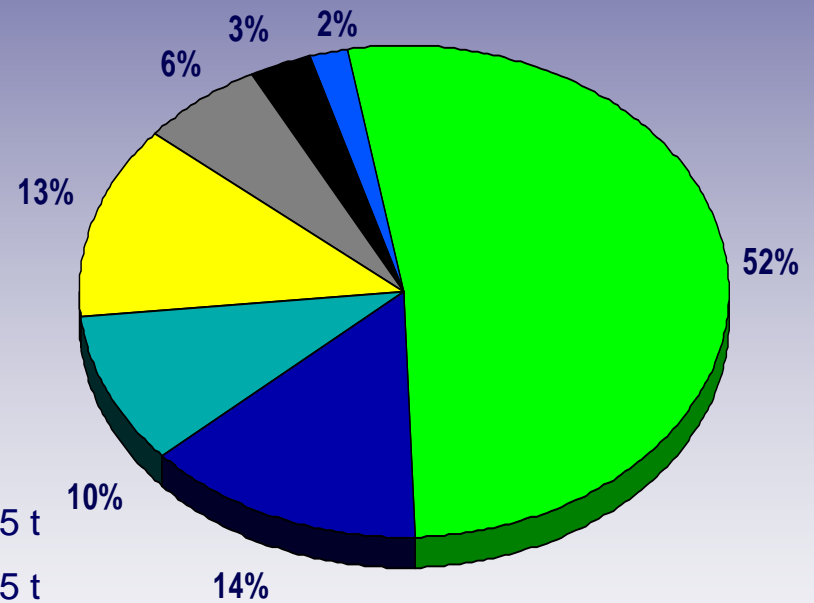
Source: PLA

# Vehicles leasing market in IQ 2009 vs IQ2008

2008  
5088 mln

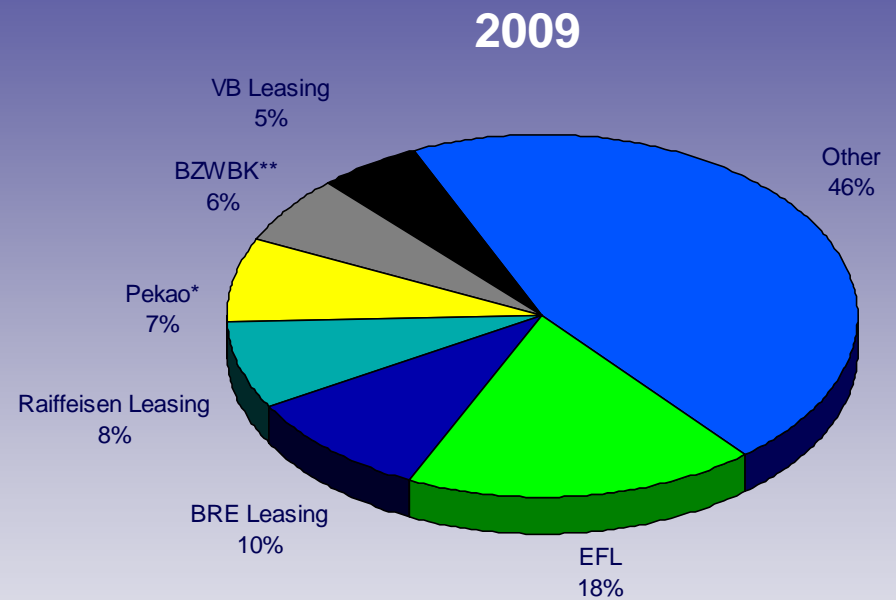
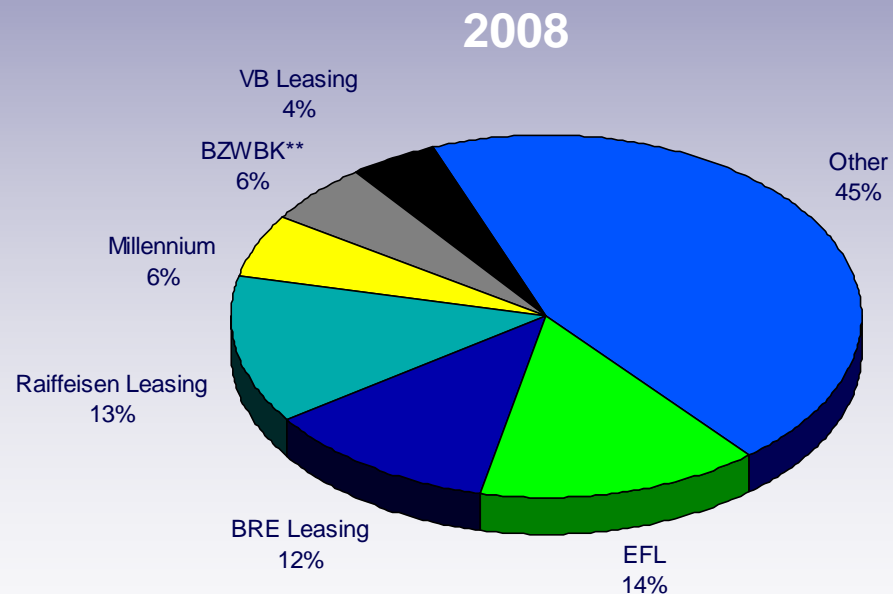


2009  
2737 mln



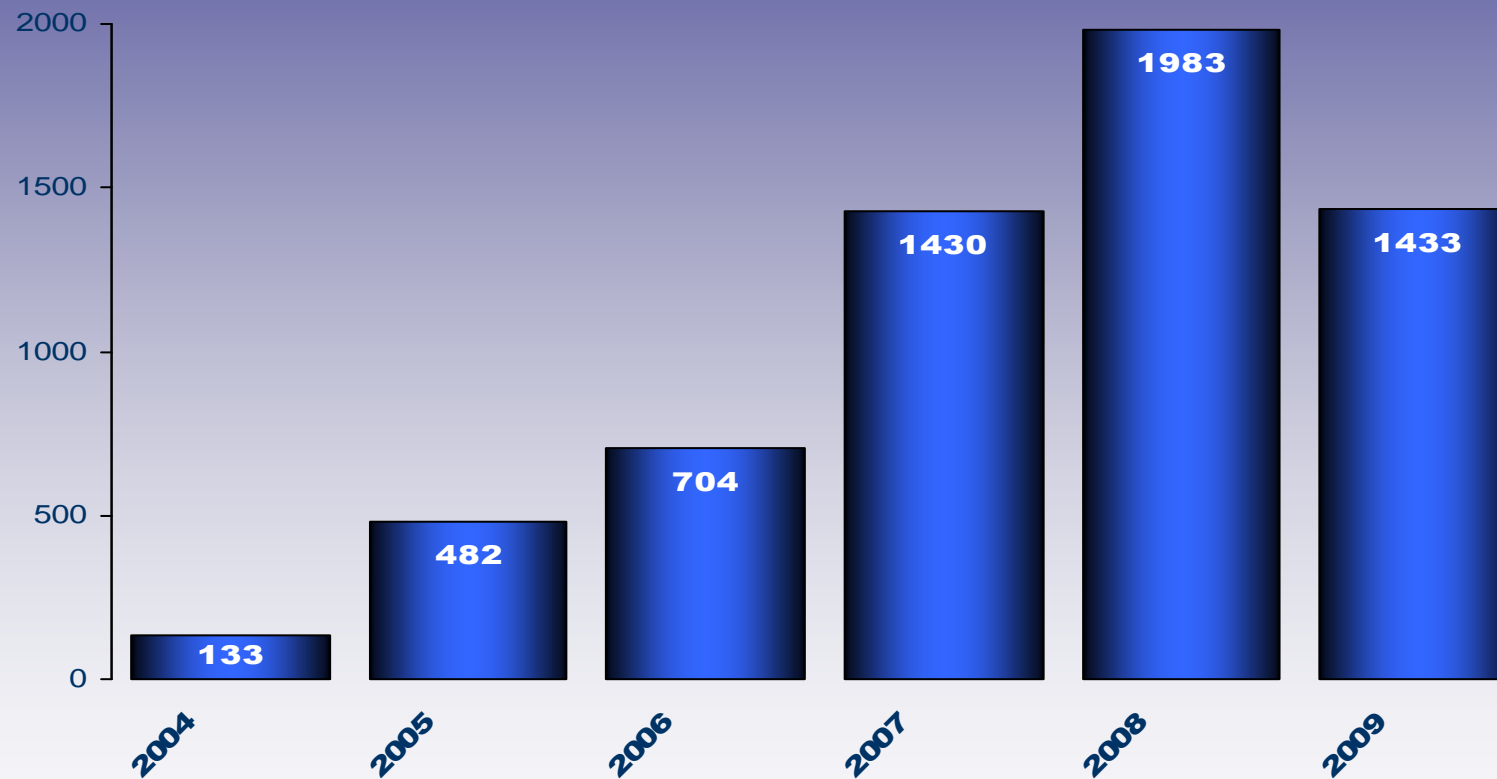
- Passenger cars
- Commercial < 3,5 t
- Commercial > 3,5 t
- Truck tractors
- Trailers/semitrailers
- Buses
- Other

# Top 6 firms share in the vehicles leasing market in IQ2009 vs IQ 2008

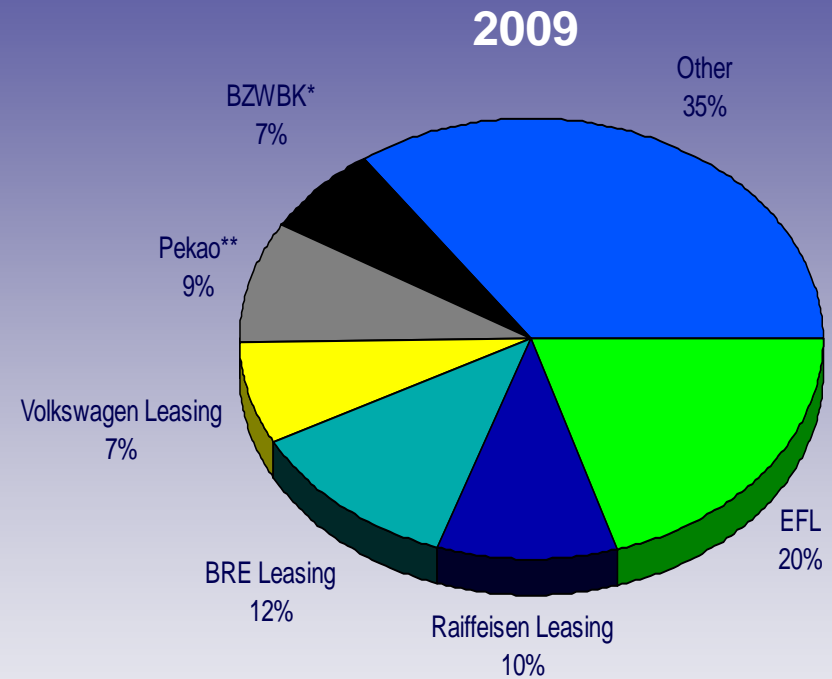
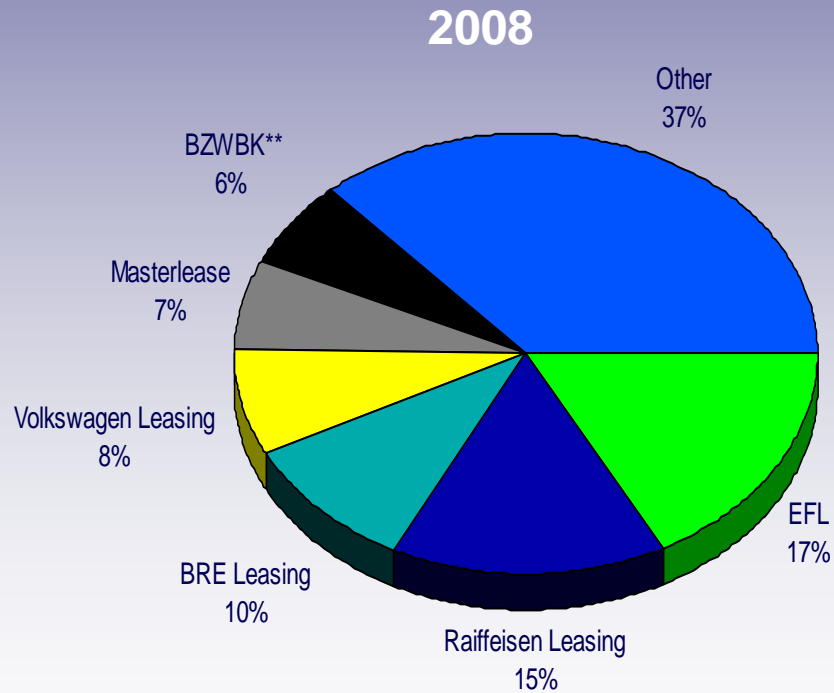


\* Pekao Leasing Sp. z o.o. & Pekao Leasing i Finanse S.A.  
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## Total net value of the passenger cars leases in IQ of the years 2004-2009 (PLN m)

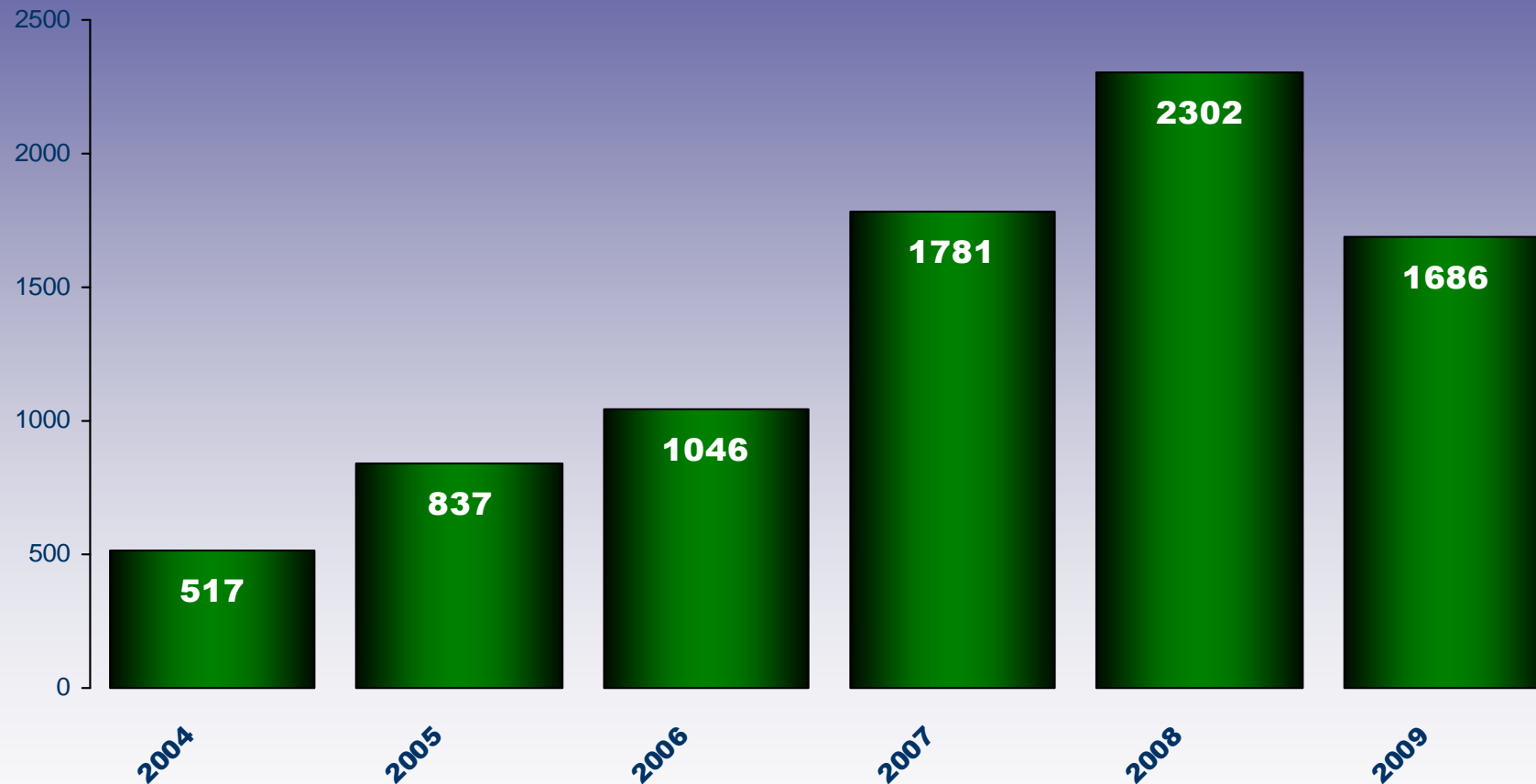


# Top 6 firms share in the passenger cars leasing market in IQ 2009 vs IQ 2008



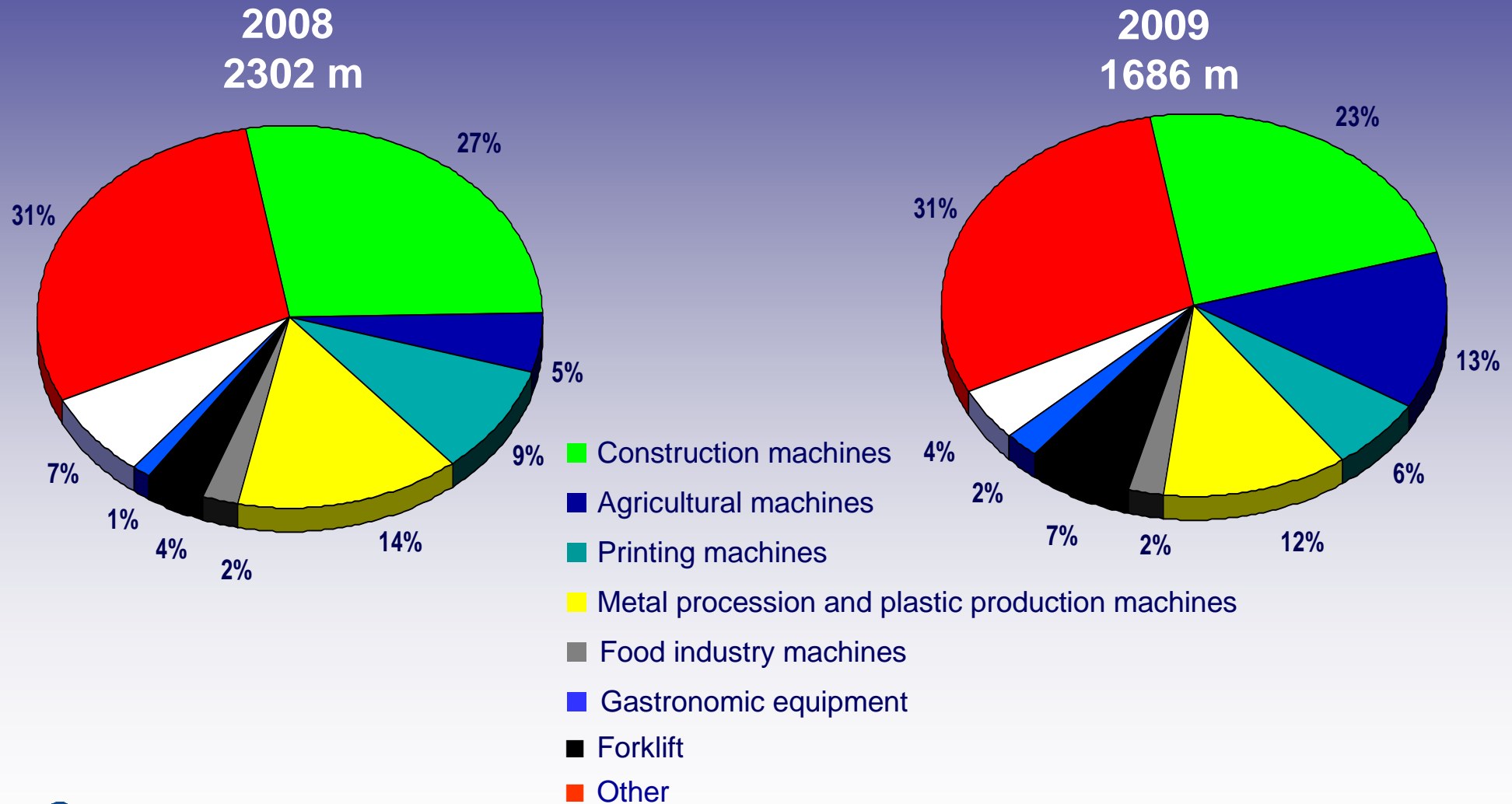
\* BZ WBK Finance & Leasing S.A & BZ WBK Leasing S.A.  
 \*\* Pekao Leasing Sp. z o.o. & Pekao Leasing i Finanse S.A.

## Total net value of machinery and industrial equipment leased in IQ of the years 2004-2009 (PLN m)

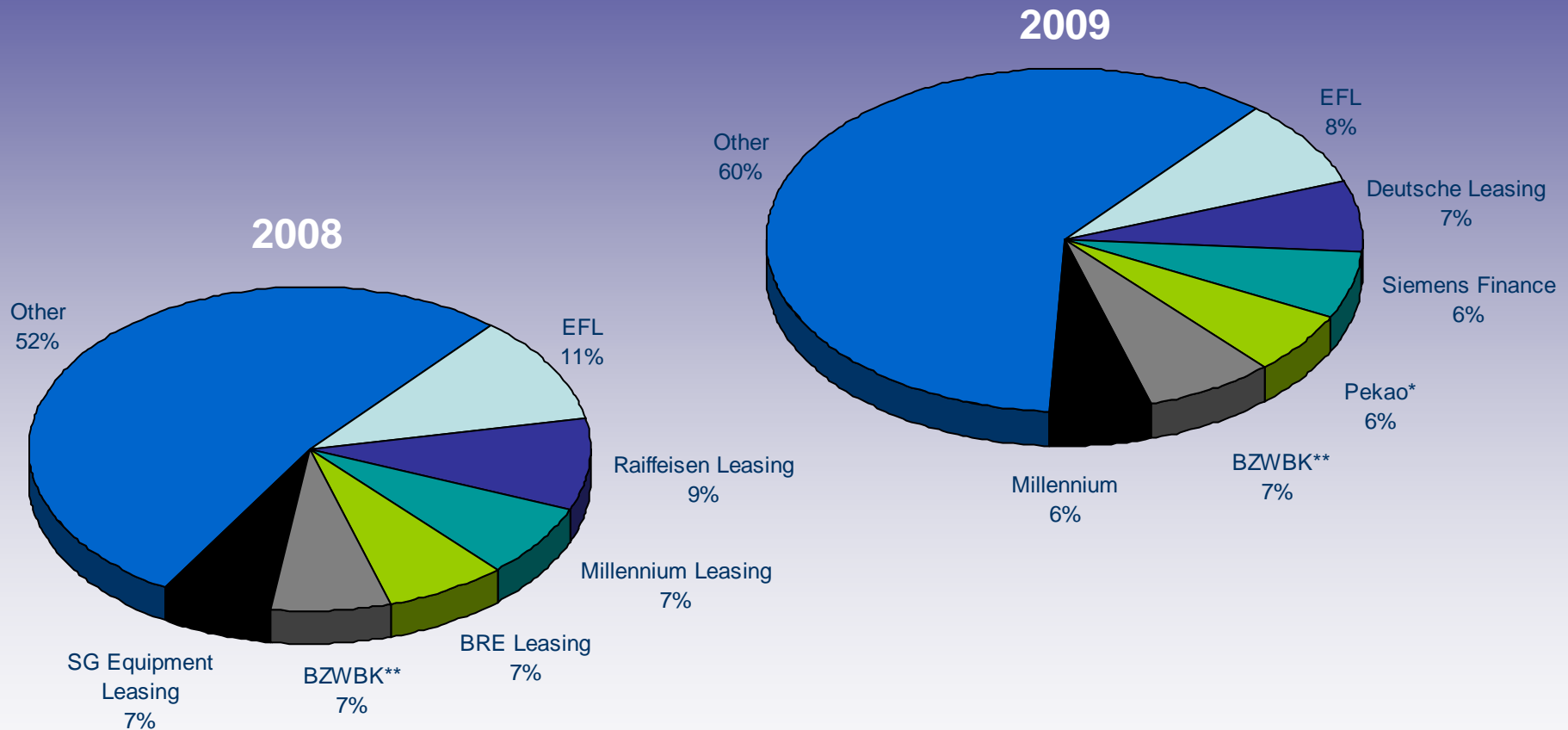




# Machinery and industrial equipment leasing market per asset type, IQ2009 vs IQ 2008



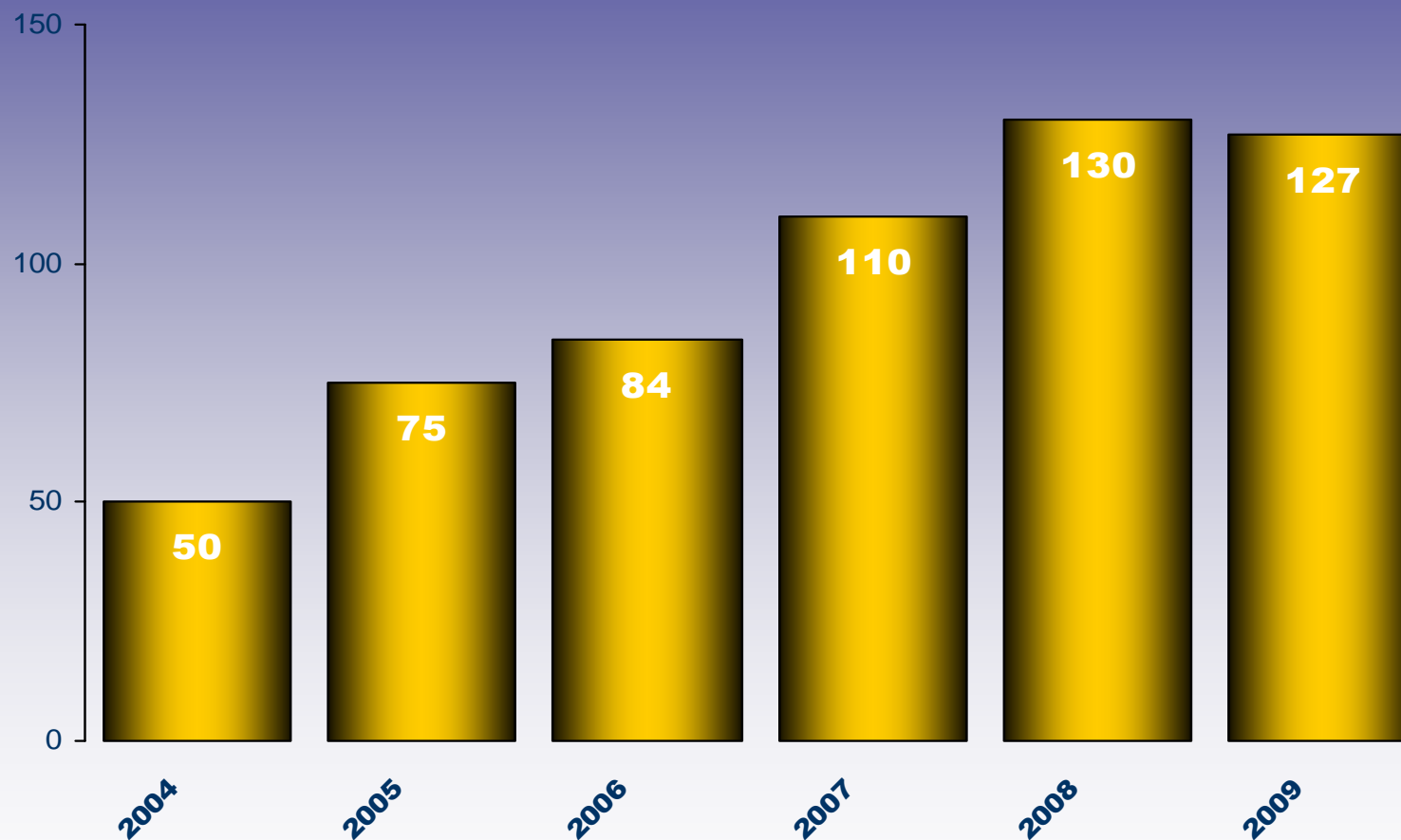
# Top 6 firms share in the machinery and industrial equipment market, IQ 2009 vs IQ 2008



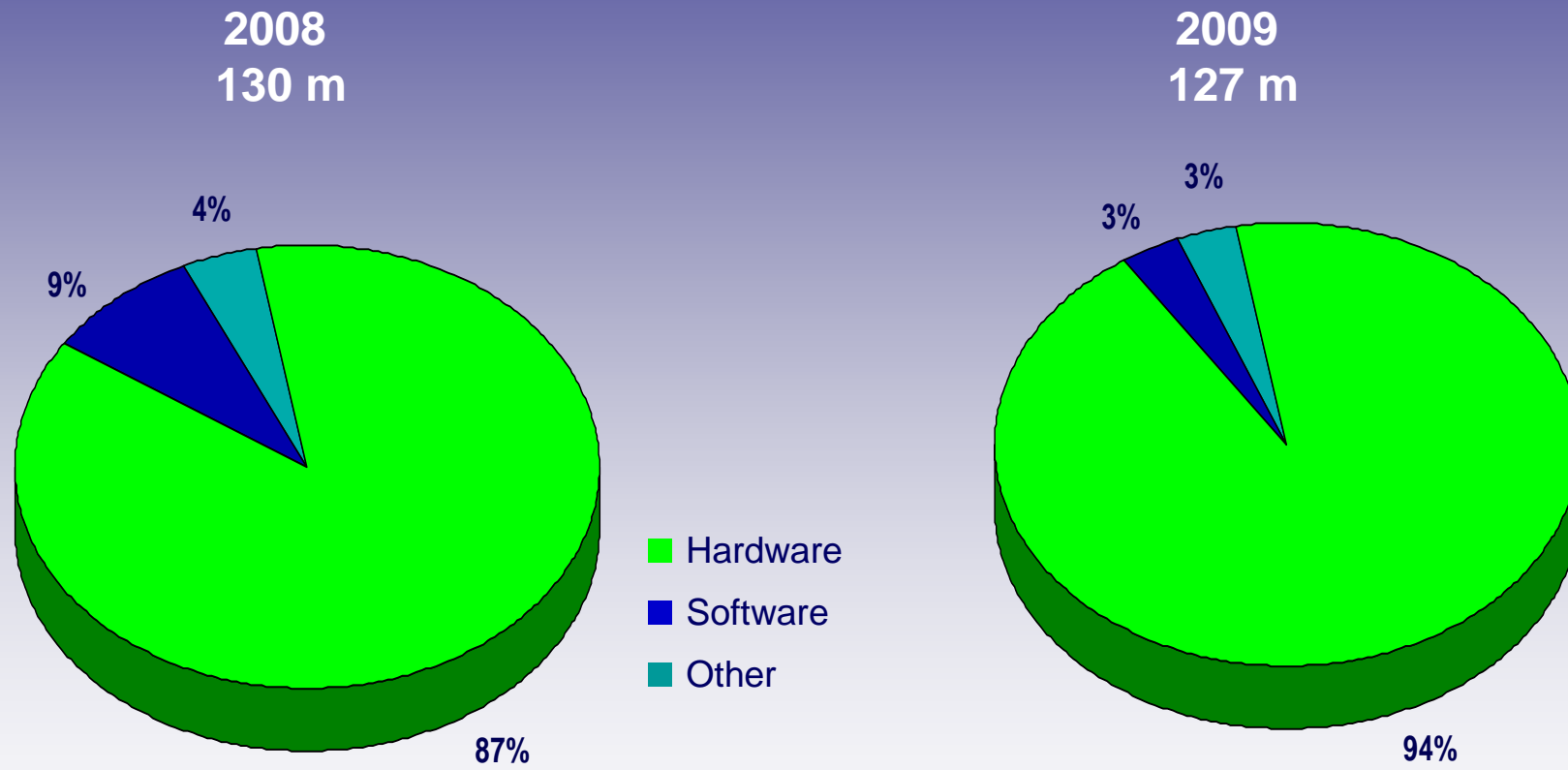
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Source: PLA

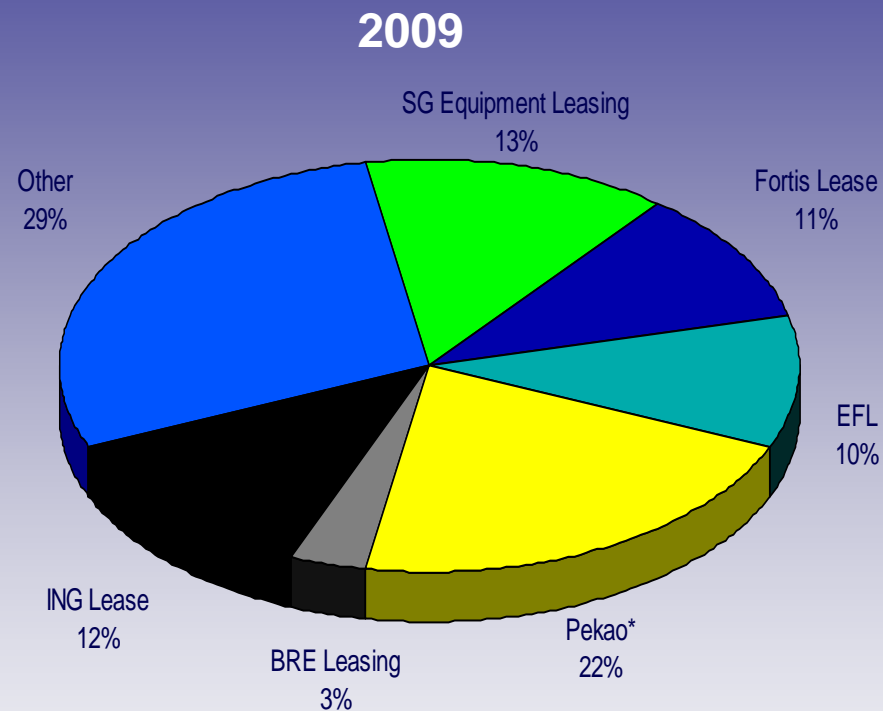
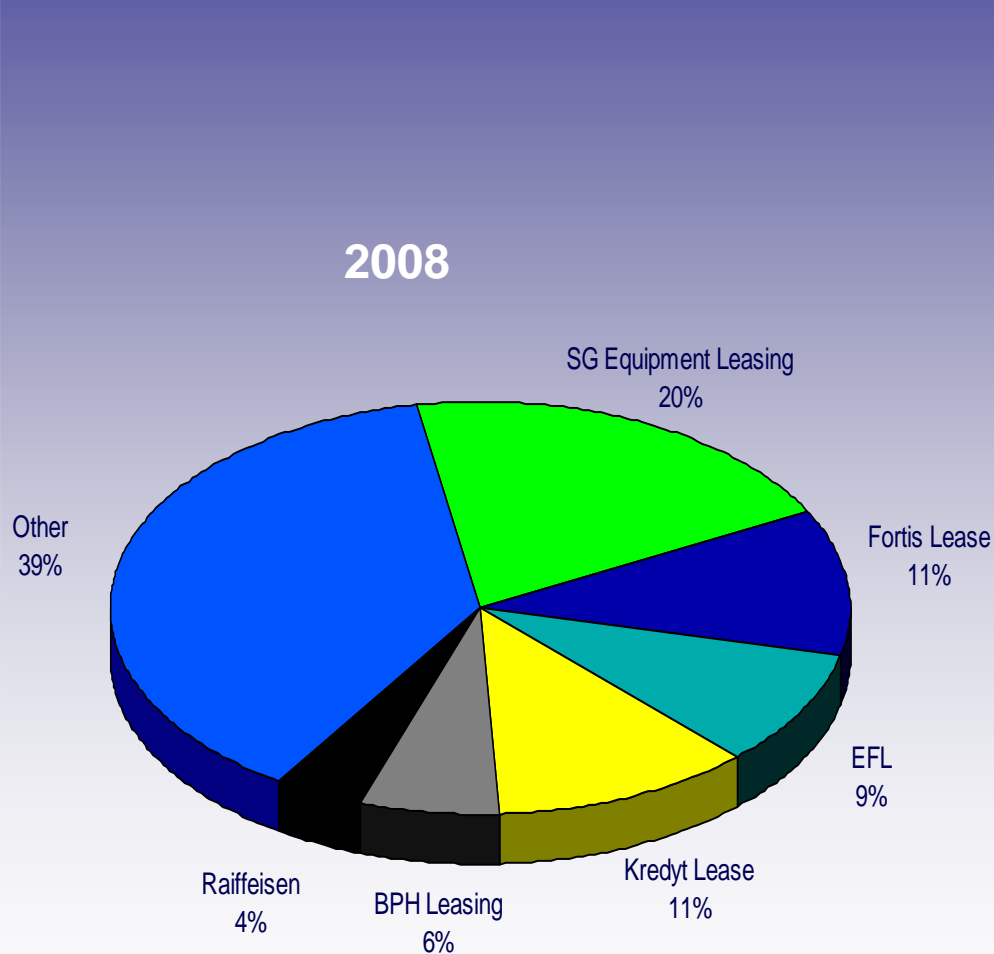
# IT leasing market in IQ of the years 2004-2009 (PLN m)



# IT leasing market per asset type IQ 2009 vs IQ 2008



# Top 6 firms share in the IT leasing market IQ 2009 vs IQ 2008



\* Pekao Leasing Sp. z o.o. & Pekao Leasing i Finanse S.A.



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Source: PLA

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