

# Leasing market in Poland 2009

**Warsaw, January 2010**



Polish Leasing Association

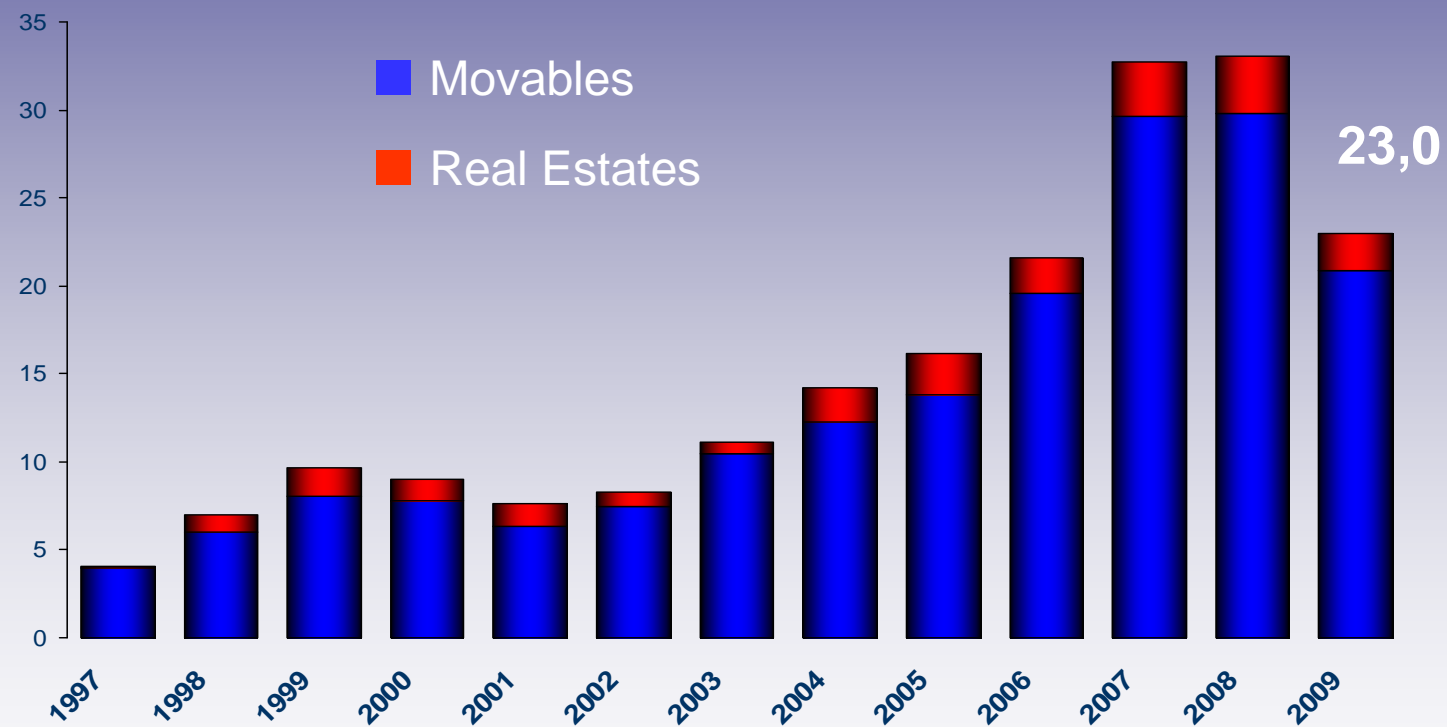
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Bankowy Fundusz Leasingowy S.A.  
BGŻ Leasing Sp. z o.o.  
BNP Paribas Lease Group Sp. z o.o.  
BRE Leasing Sp. z o.o.  
BZ WBK Finanse & Leasing S.A.  
Caterpillar Financial Services Poland Sp. z o.o.  
De Lage Landen Leasing Polska S.A.  
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DnB Nord Leasing Sp. z o.o.  
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Fortis Lease Polska Sp. z o.o.  
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Immorent Leasing Polska Sp. z o. o.  
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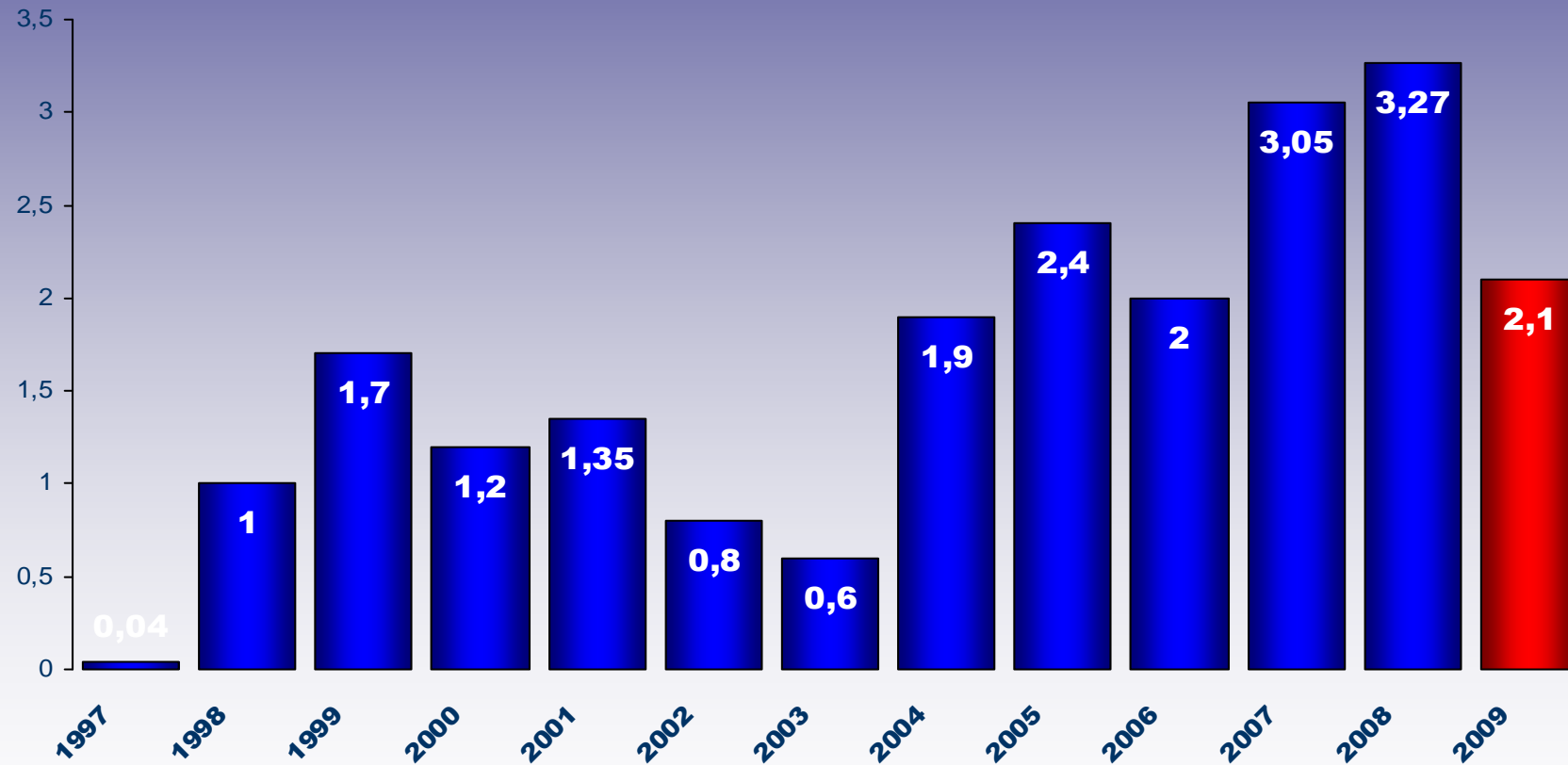
Masterlease Polska S.A.  
Mercedes-Benz Leasing Polska Sp. z o.o.  
Millennium Leasing Sp. z o.o.  
NOMA 2 Sp. z o.o.  
Nordea Finance Polska S.A.  
ORIX Polska S.A.  
PEKAO Leasing Sp. z o.o.  
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SG Equipment Leasing Polska Sp. z o.o.  
SGB-Trans-Leasing PTL Sp. z o.o.  
Siemens Finance Sp. z o.o.  
VB Leasing Polska Polska S.A.  
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Polski Związek Wynajmu i Leasingu Pojazdów



# Total net value of leasing in 1997-2009 (PLN bn)



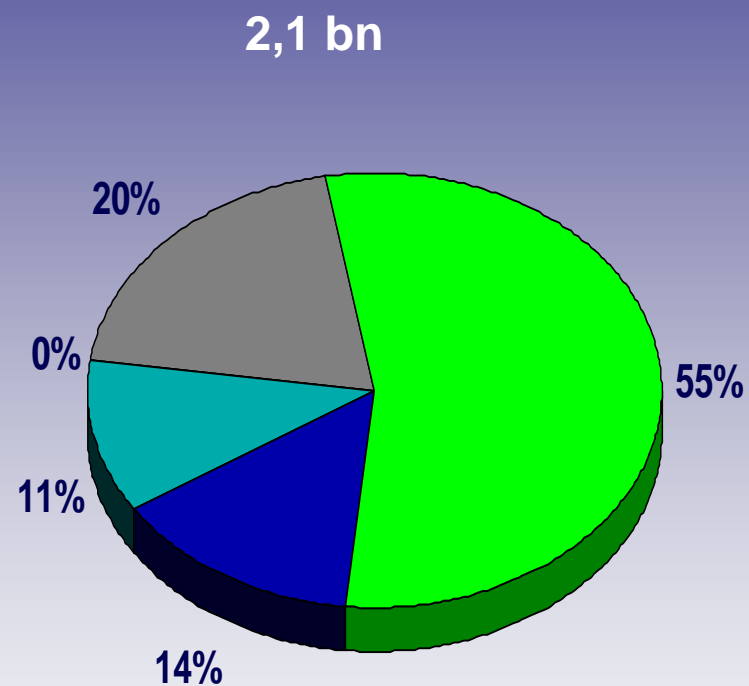
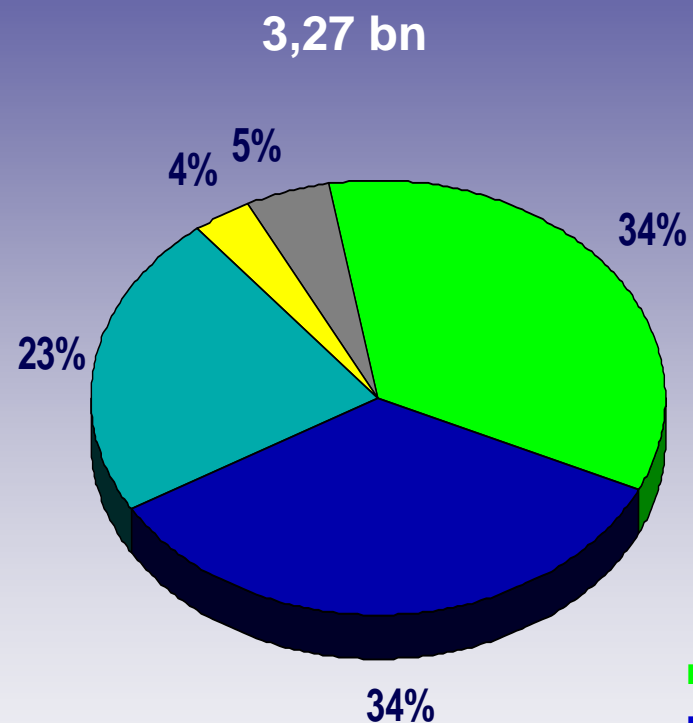
# Total net value of the real estate market 1997-2009 (PLN bn)



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Source: PLA

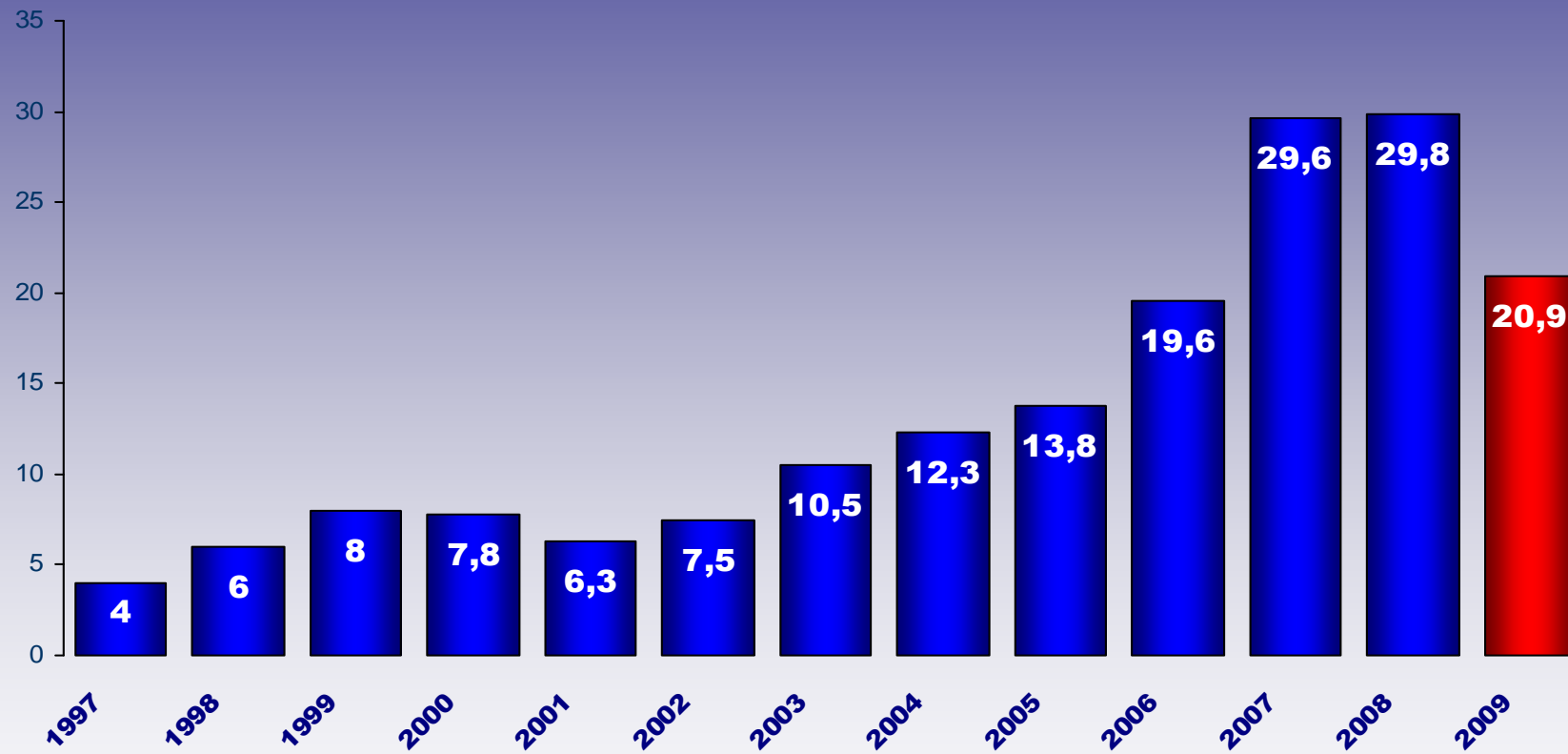
# Real estate market structure 2008 vs. 2009



- Retail outlets
- Industrial
- Office buildings
- Hotels and leisure
- Others

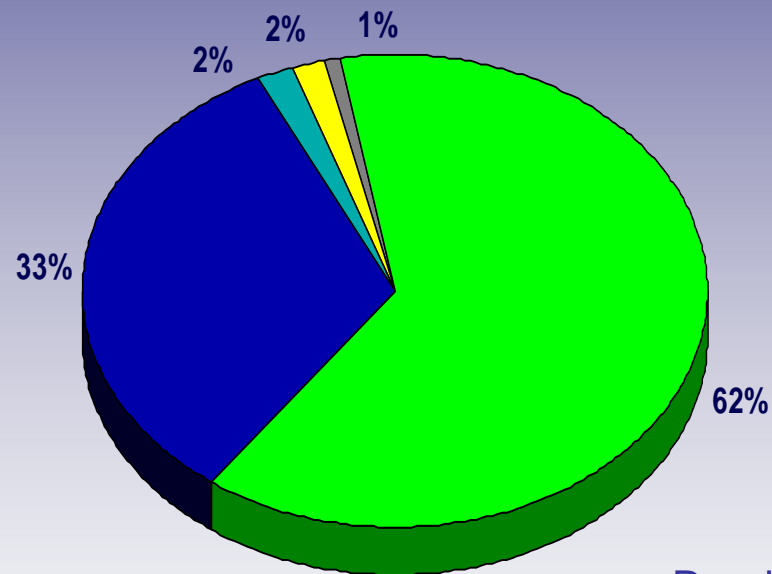


## Total net value of the movables leasing market 1997-2009 (PLN bn)

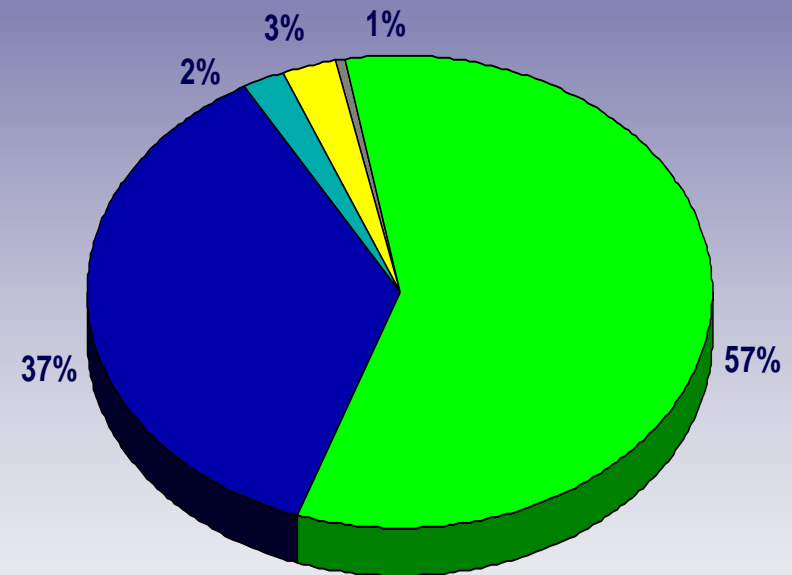


# Movable leasing market by asset type 2008 vs 2009

2008 – 29 790,8 m

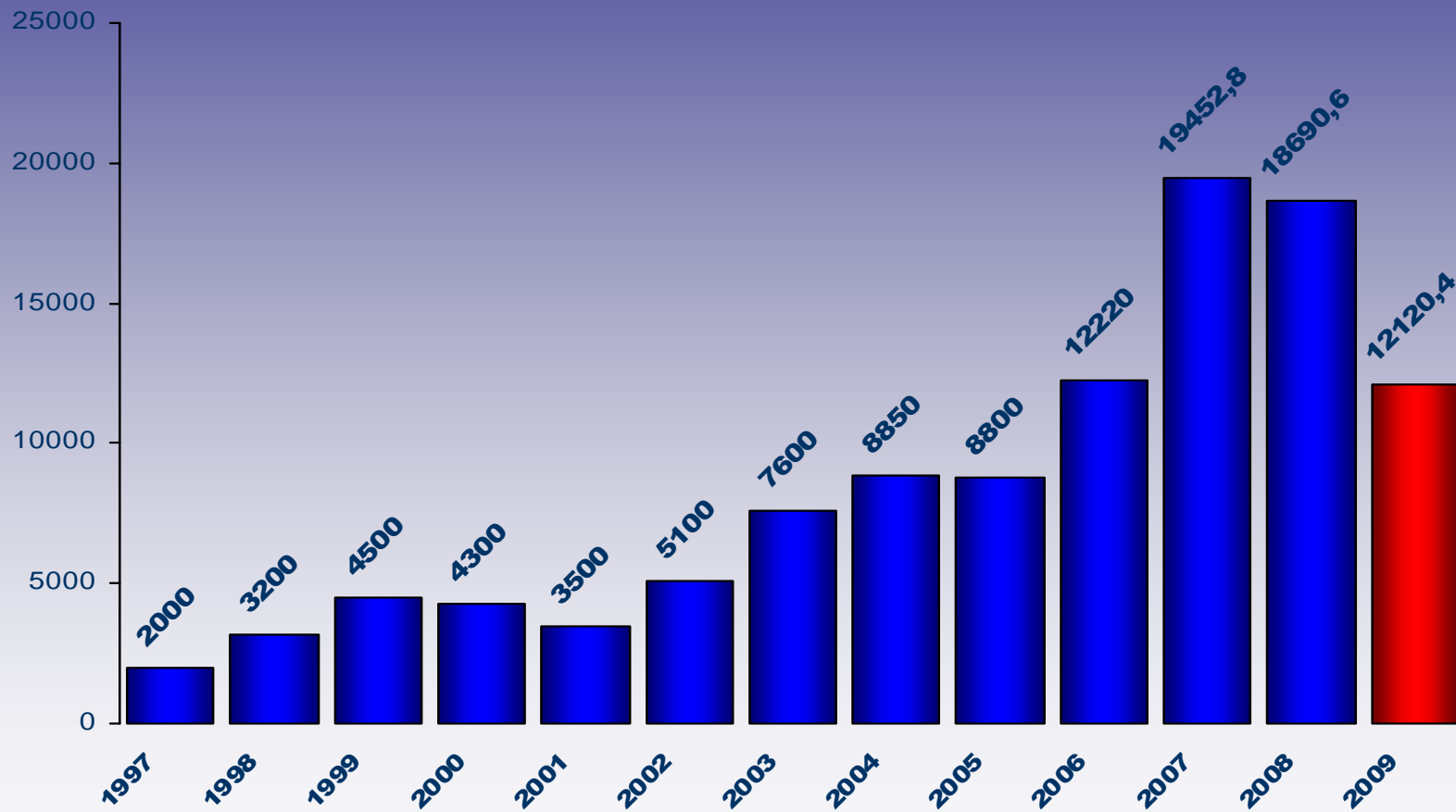


2009 – 20 923,3 m



- Road transportation
- Machinery & industrial equipment
- Computers and office equipment
- Railway, aircraft, ships
- Other

# Total net value of the vehicles leasing market 1997-2009 (PLN m)



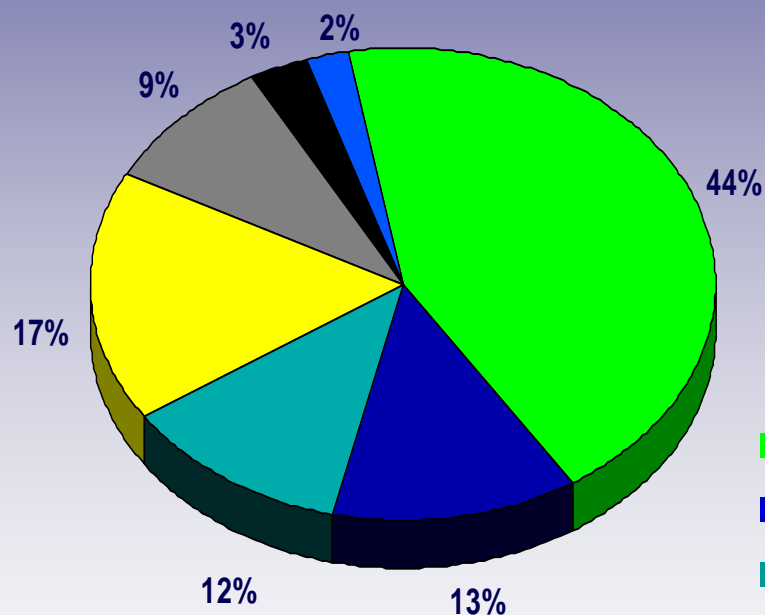
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Source: PLA

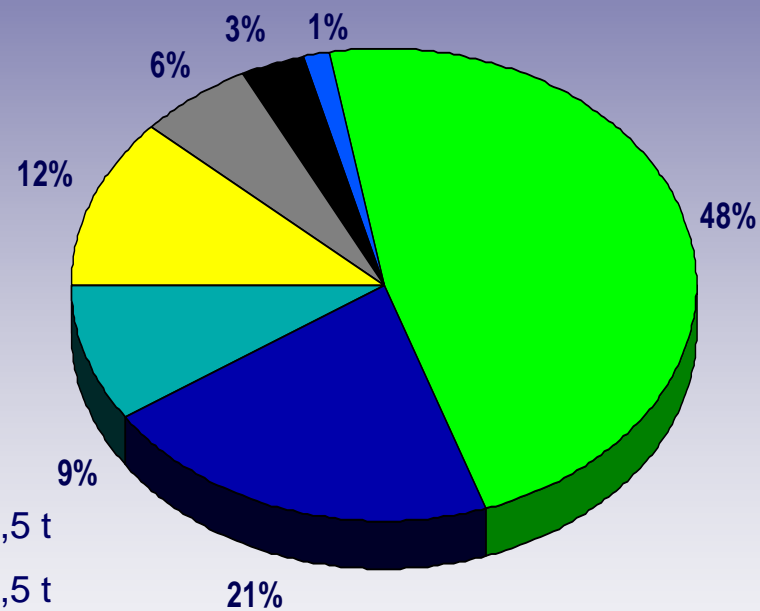


# Vehicle leasing market by vehicle type 2007 vs 2008

2008 – 18 690,6 m



2009 – 12 120,4 m



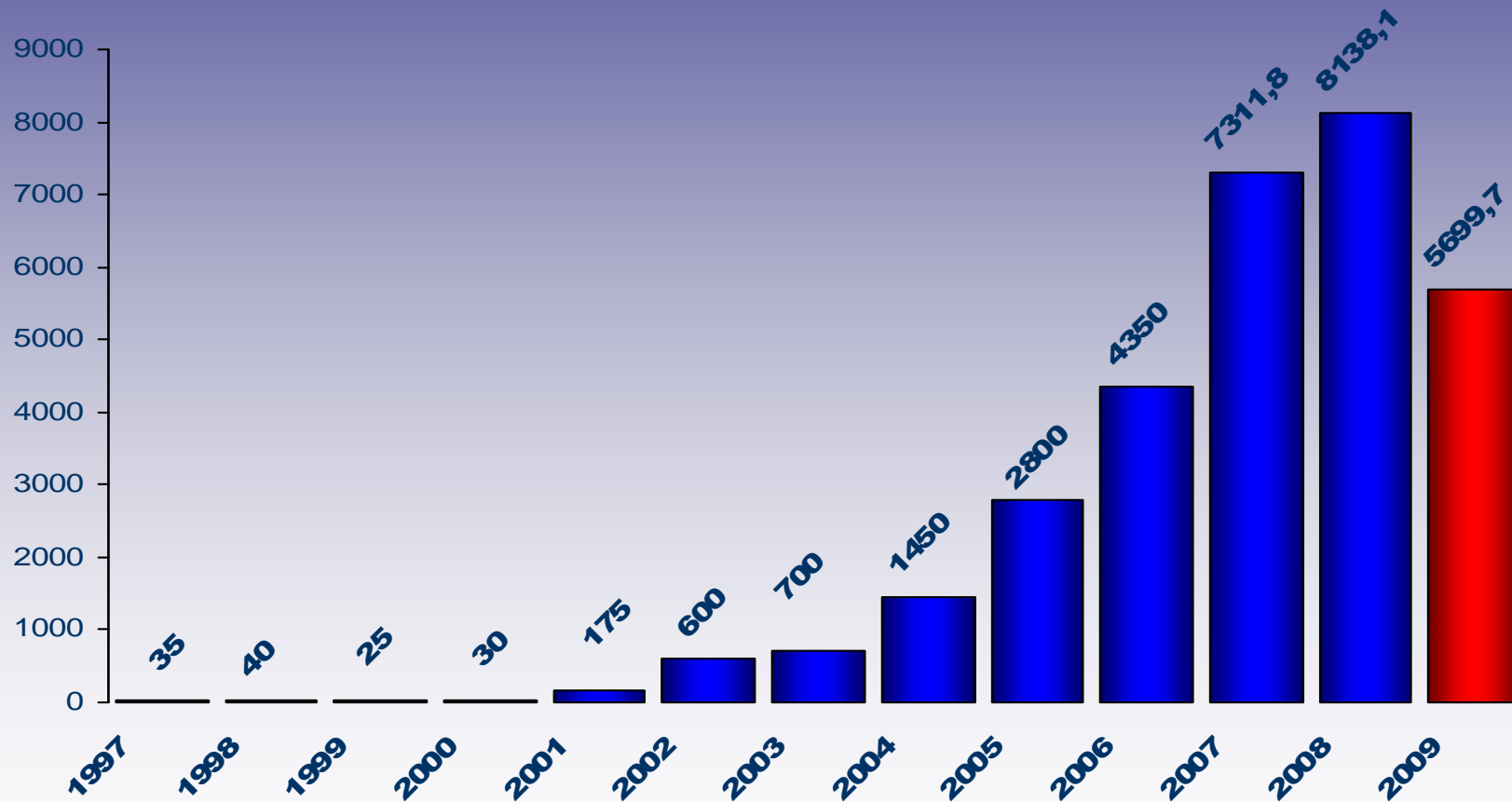
- Passenger cars
- Commercial < 3,5 t
- Commercial > 3,5 t
- Truck tractors
- Trailers/semi trailers
- Buses
- Other



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Source: PLA

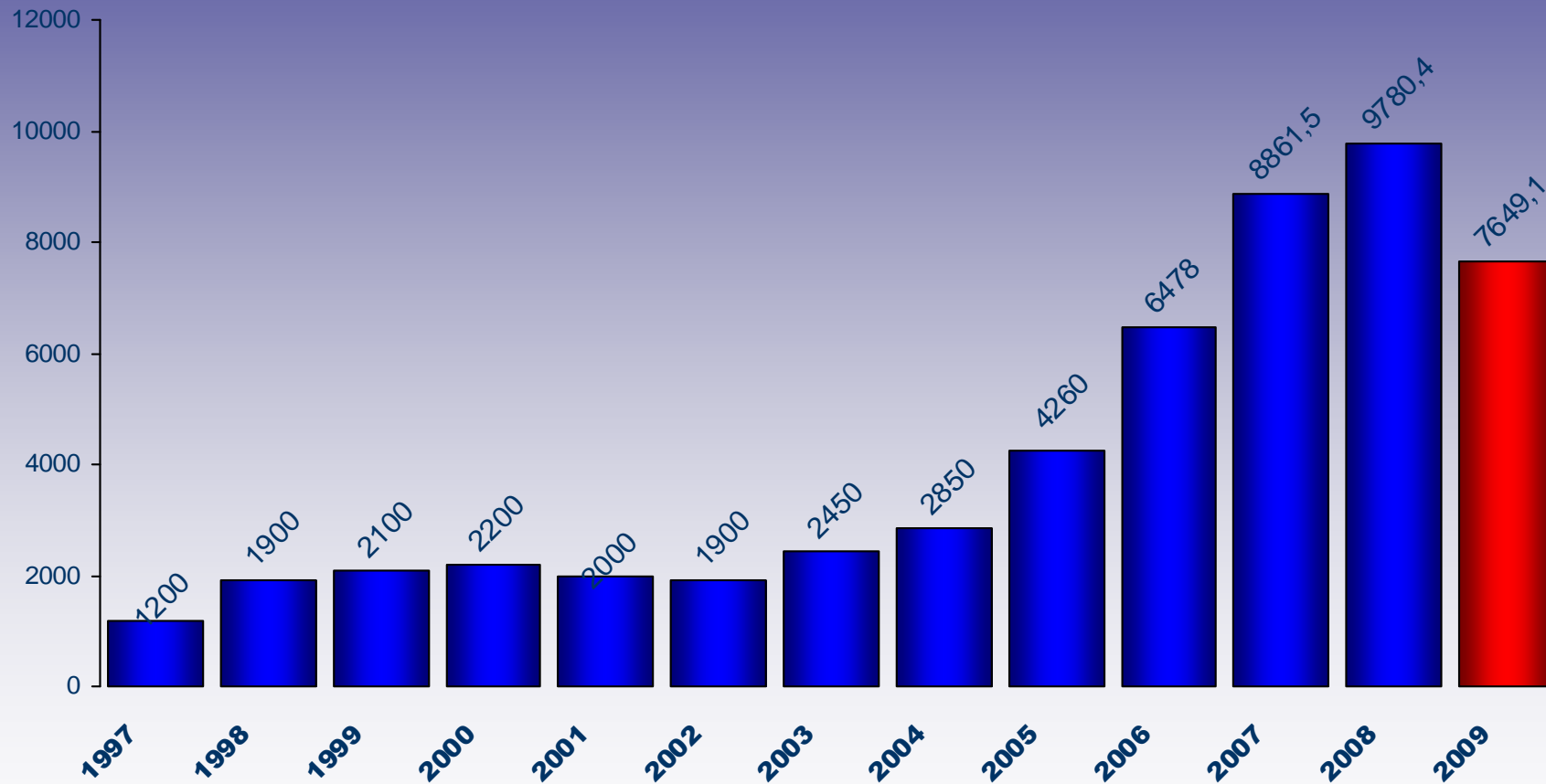
# Total net value of the passenger cars leasing market 1997-2009 (PLN m)



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Source: PLA

# Total net value of the machinery and industrial equipment leasing market 1997-2009 (PLN m)

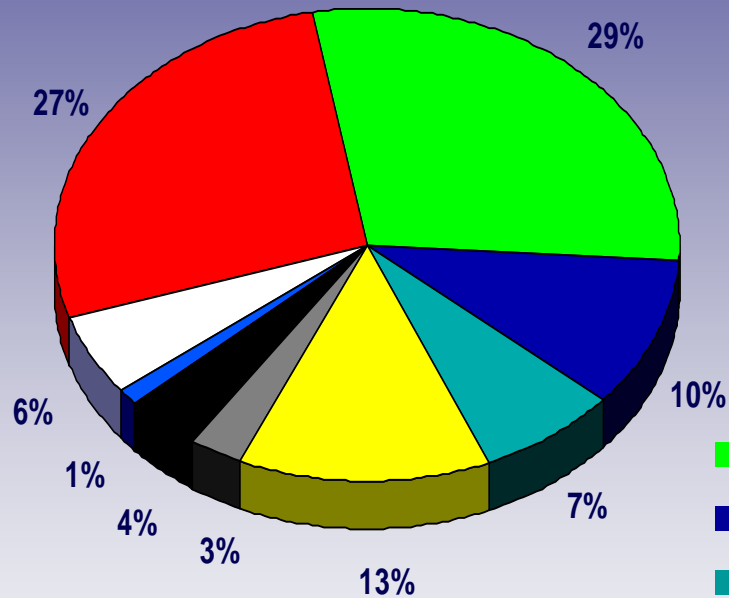


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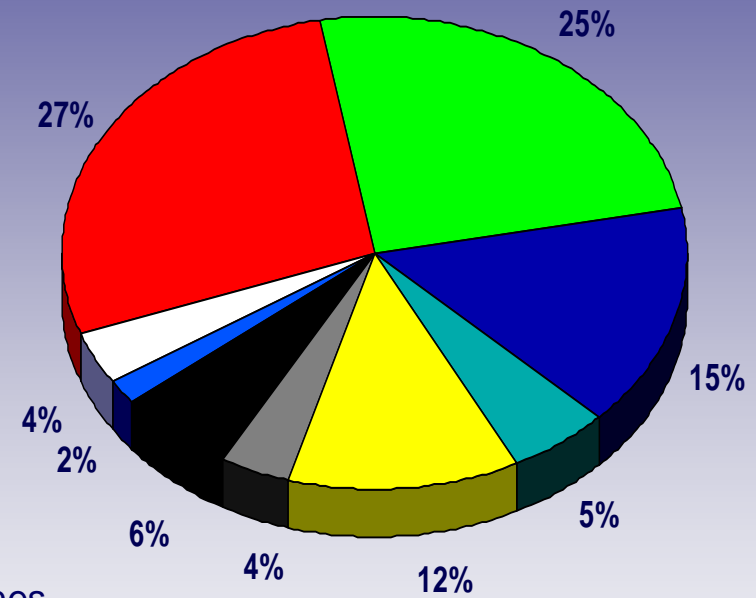
Source: PLA

# Machinery and industrial equipment leasing market by asset type, 2008 vs 2009

2008 – 9 780 m

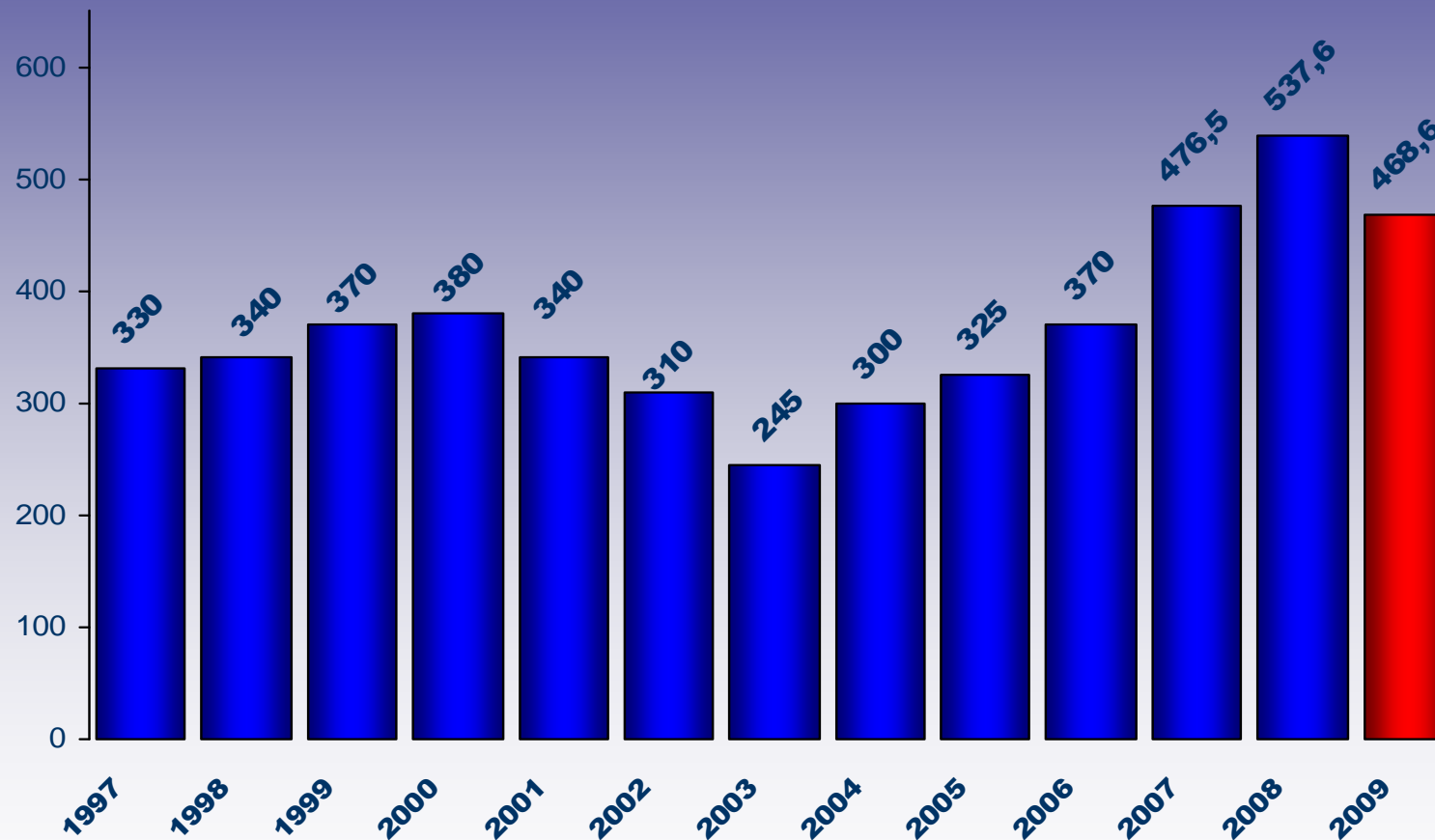


2009 – 7 649,1 m



- Construction
- Agricultural
- Printing machines
- Metal procession and plastic production machines
- Food industry machines
- Gastronomic equipment
- Forklifts
- Other

## Total net value of the IT leasing market 1997-2009 (PLN m)

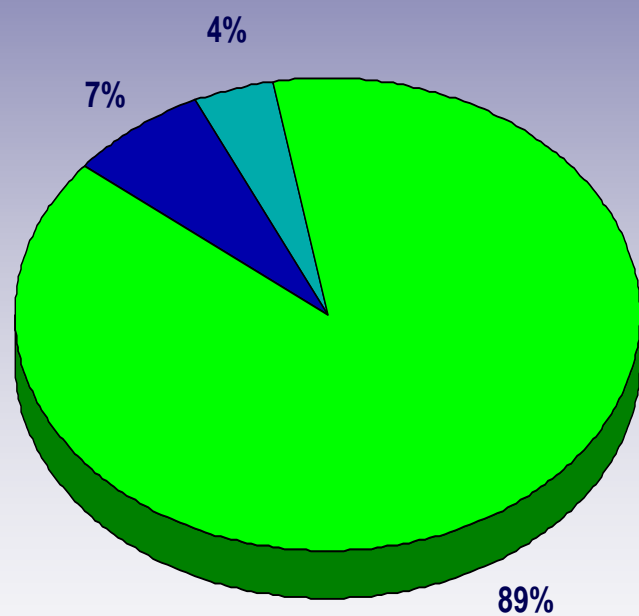


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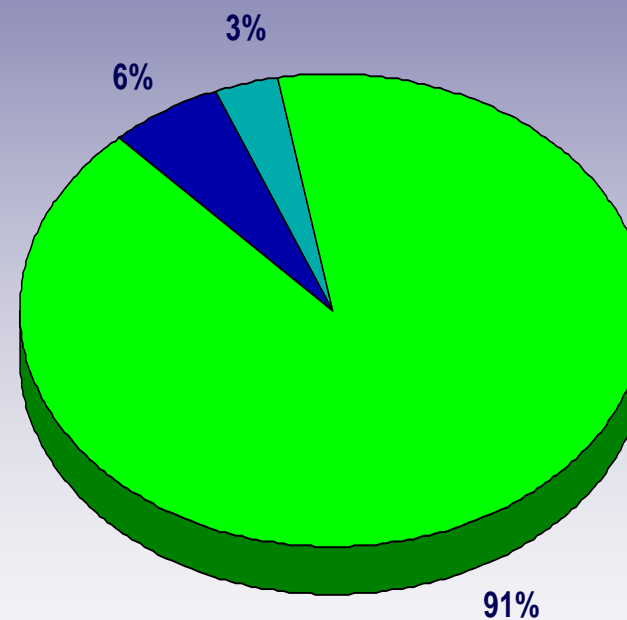
Source: PLA

# IT leasing market by asset type 2008 vs 2009

2008 – 537,6 m

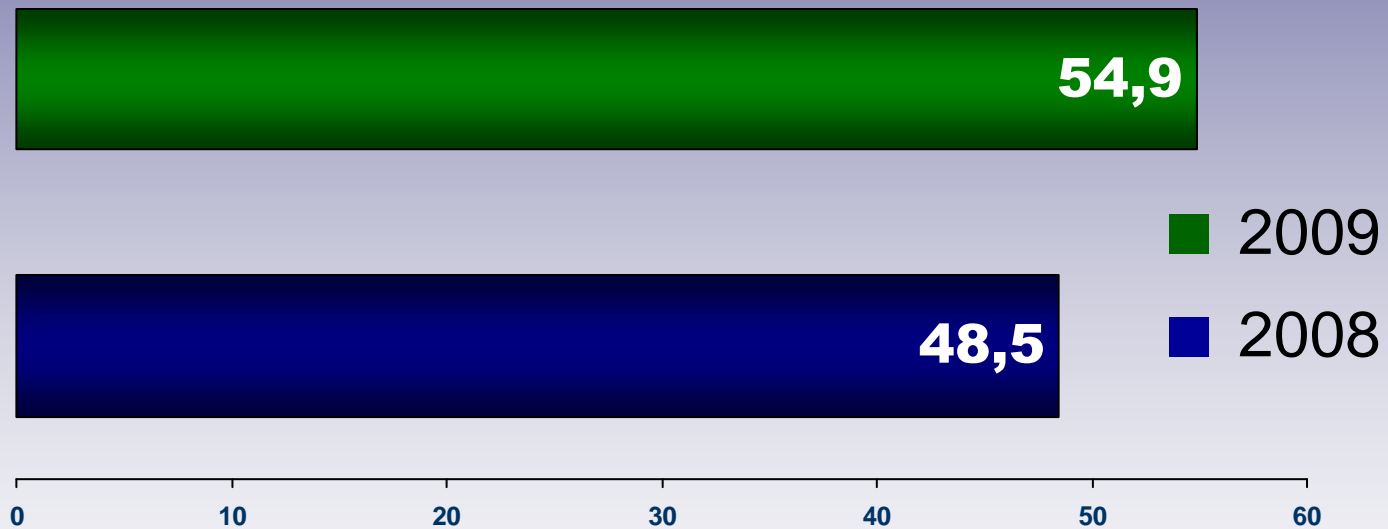


2009 – 468,6 m



■ Hardware  
■ Software  
■ Other

## Movable leasing market outstandings (PLN bn)



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