



Polski Związek Przemysłu  
MOTORYZACYJNEGO

# Automotive Executive Barometer

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**Mirosław Michna**

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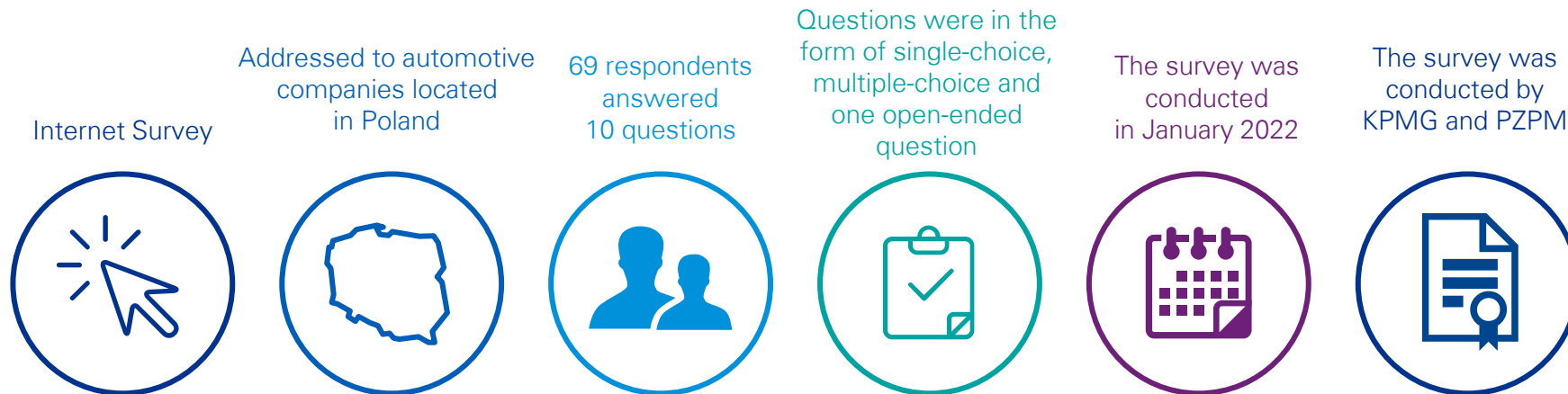
15 February 2022

**KPMG.pl**

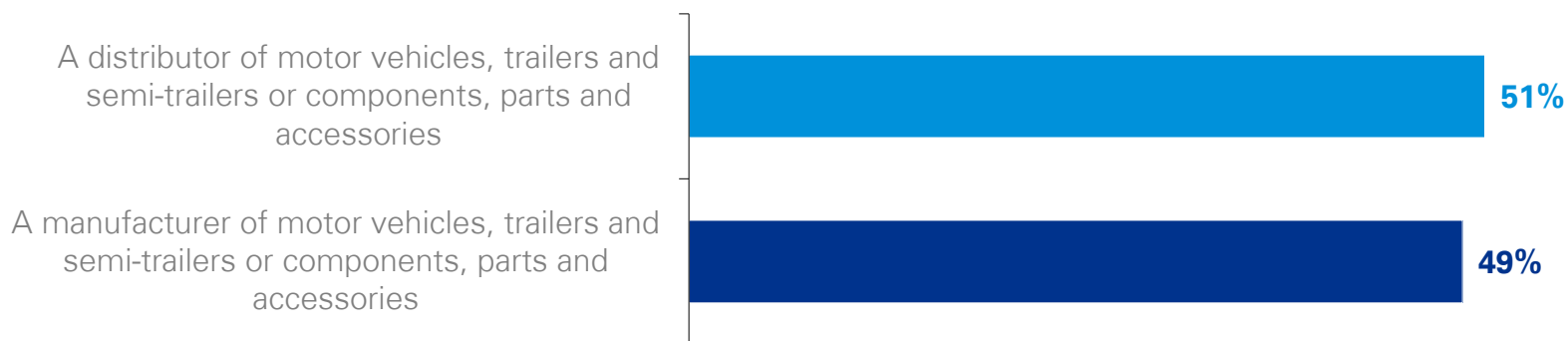
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# „Automotive Executive Barometer” Survey

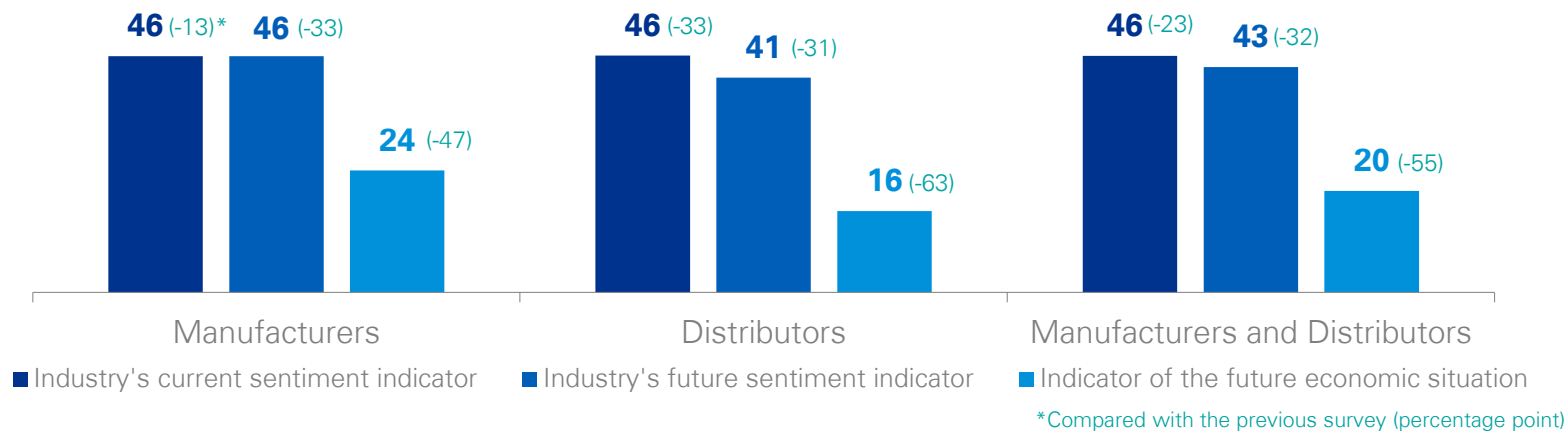


## Respondents' company profile:



# Automotive executives' sentiment

## Automotive Executives' Sentiment Indicator

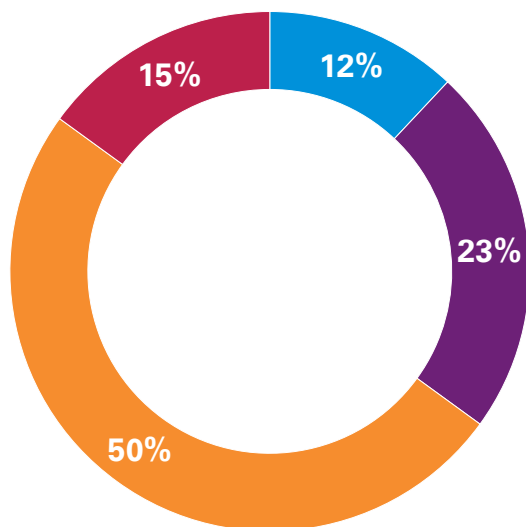


A result of more than 50 points signifies the prevalence of optimistic opinions. With regard to the future, a result of more than 50 points means improvement compared with the current situation.

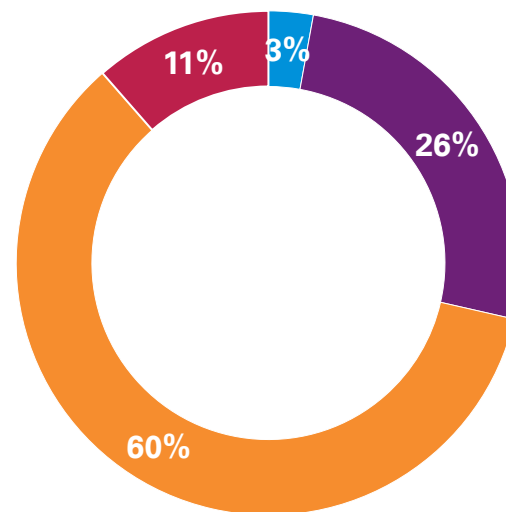
# Poland's economic situation

How do you expect Poland's economic situation to change in the next 12 months?

Manufacturers



Distributors



■ Definitely improve

■ Improve

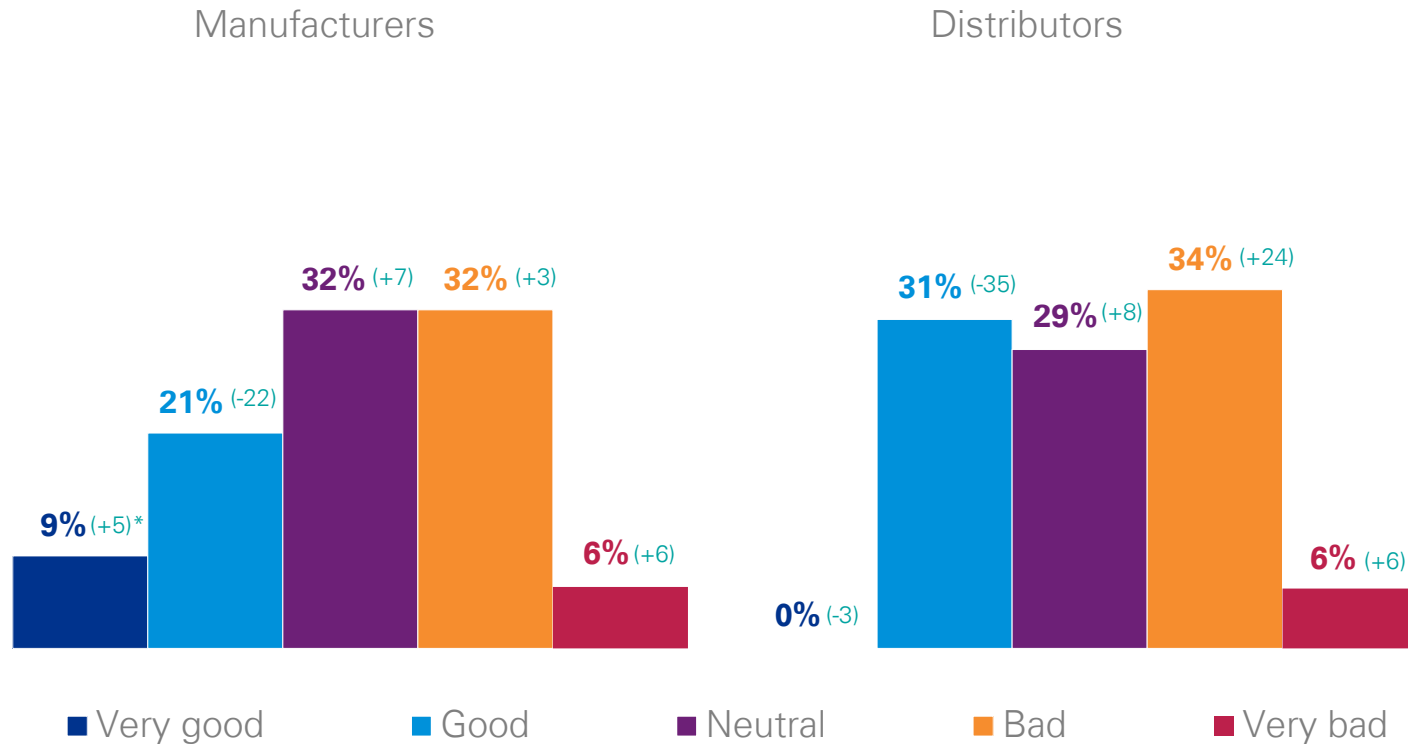
■ Remain unchanged

■ Deteriorate

■ Definitely deteriorate

# Current state of the automotive industry

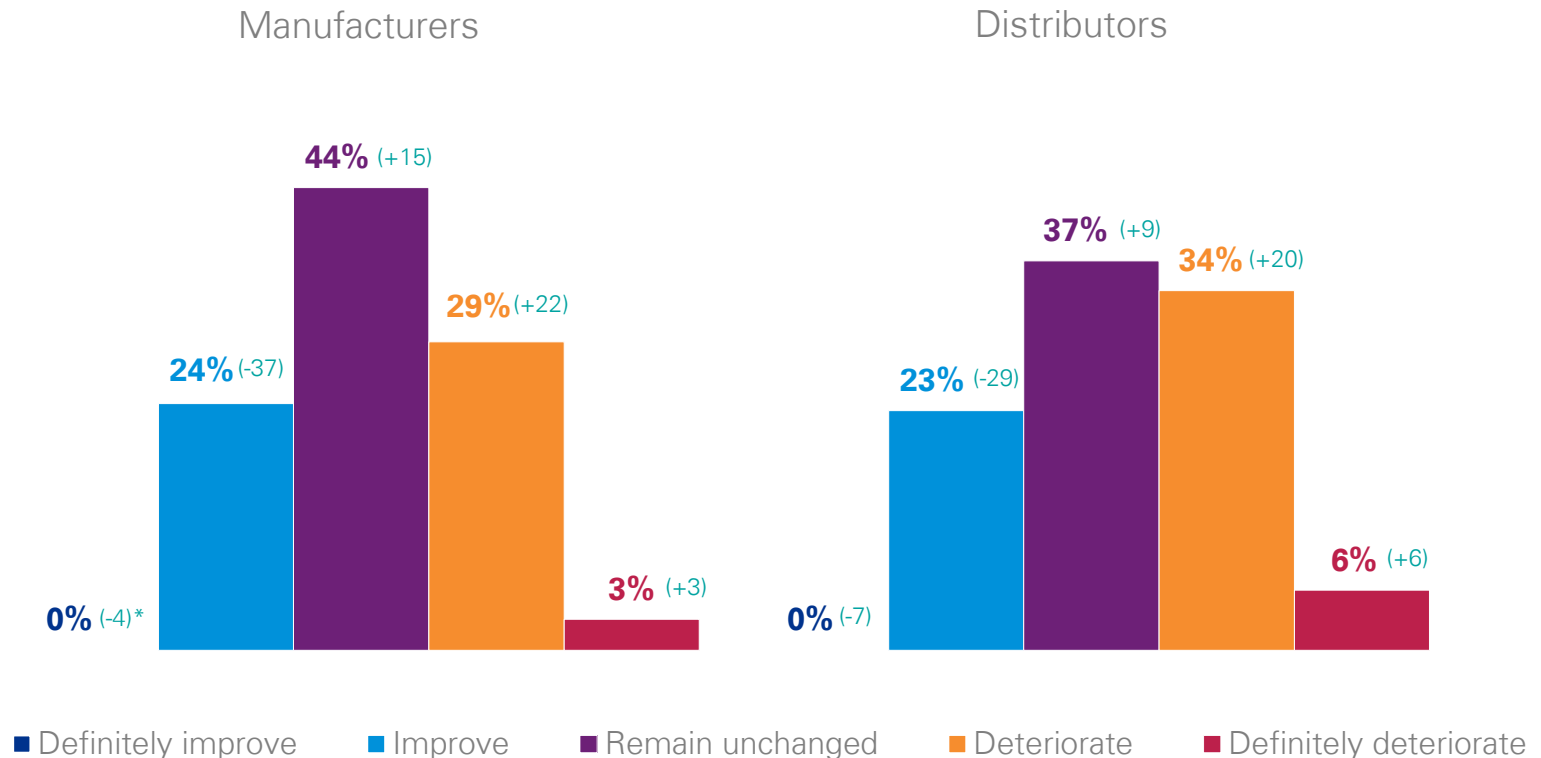
## What in your opinion is the current state of the automotive industry in Poland?



\* Compared with the previous survey (percentage point)

# Future condition of the automotive industry

## How do you expect the automotive industry's situation in Poland to change in the next 12 months?

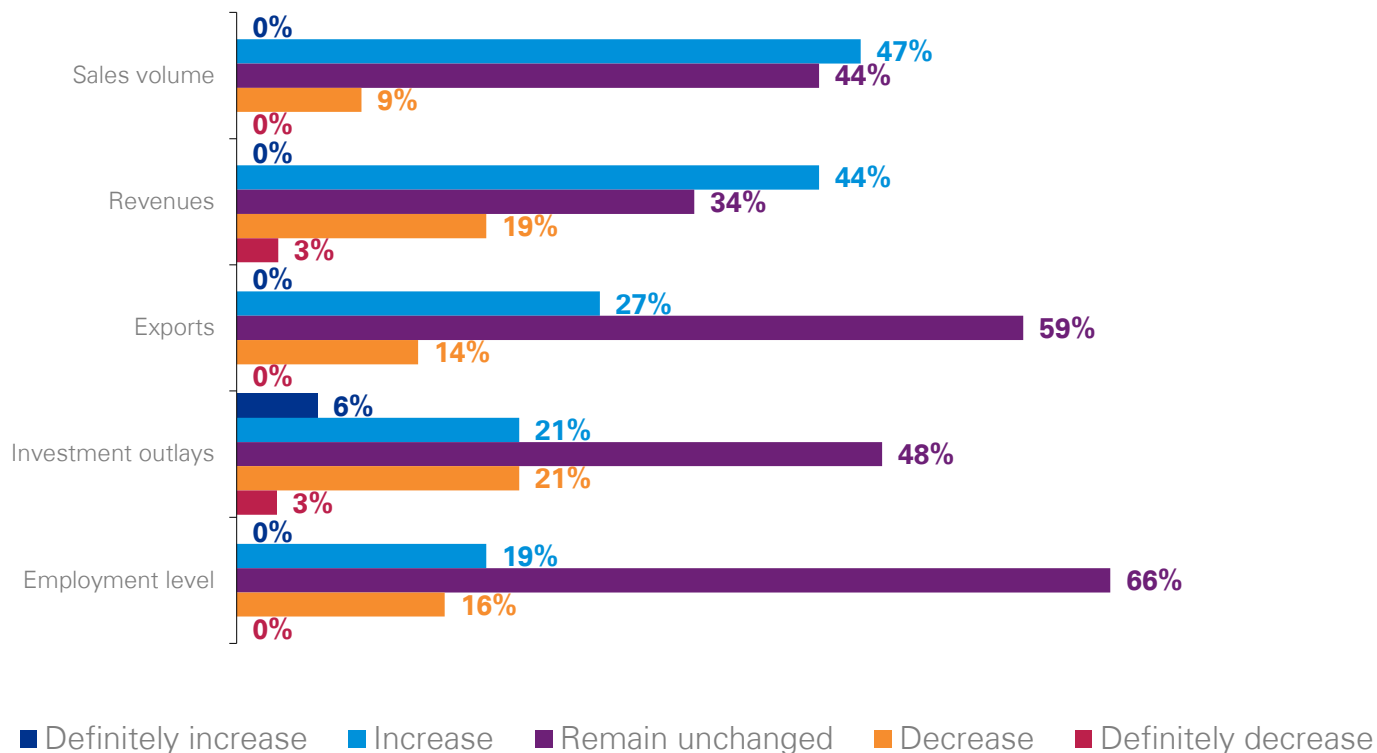


\*Compared with the previous survey (percentage point)

# Company's future situation

## In the next 6 months your company will:

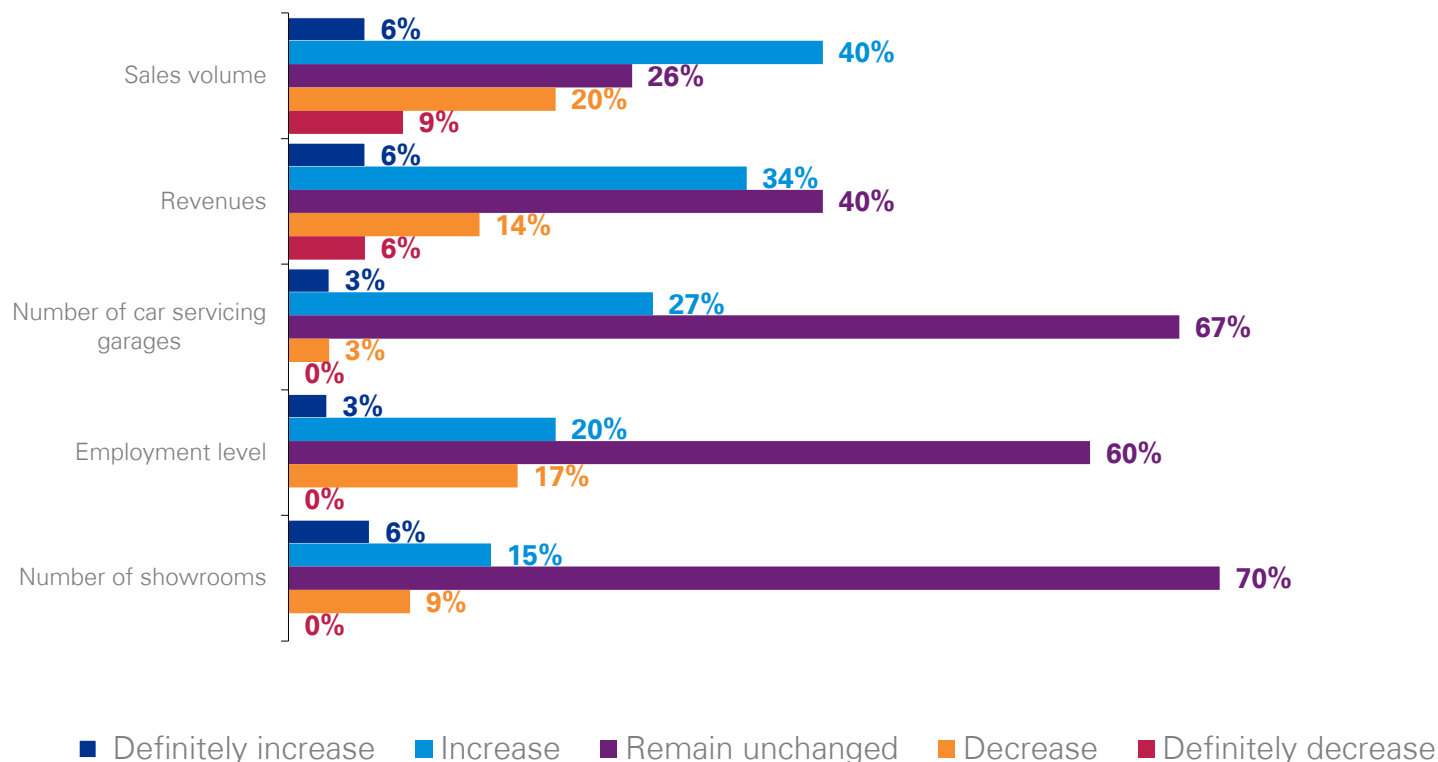
### Manufacturers



# Company's future situation

## In the next 6 months your company will:

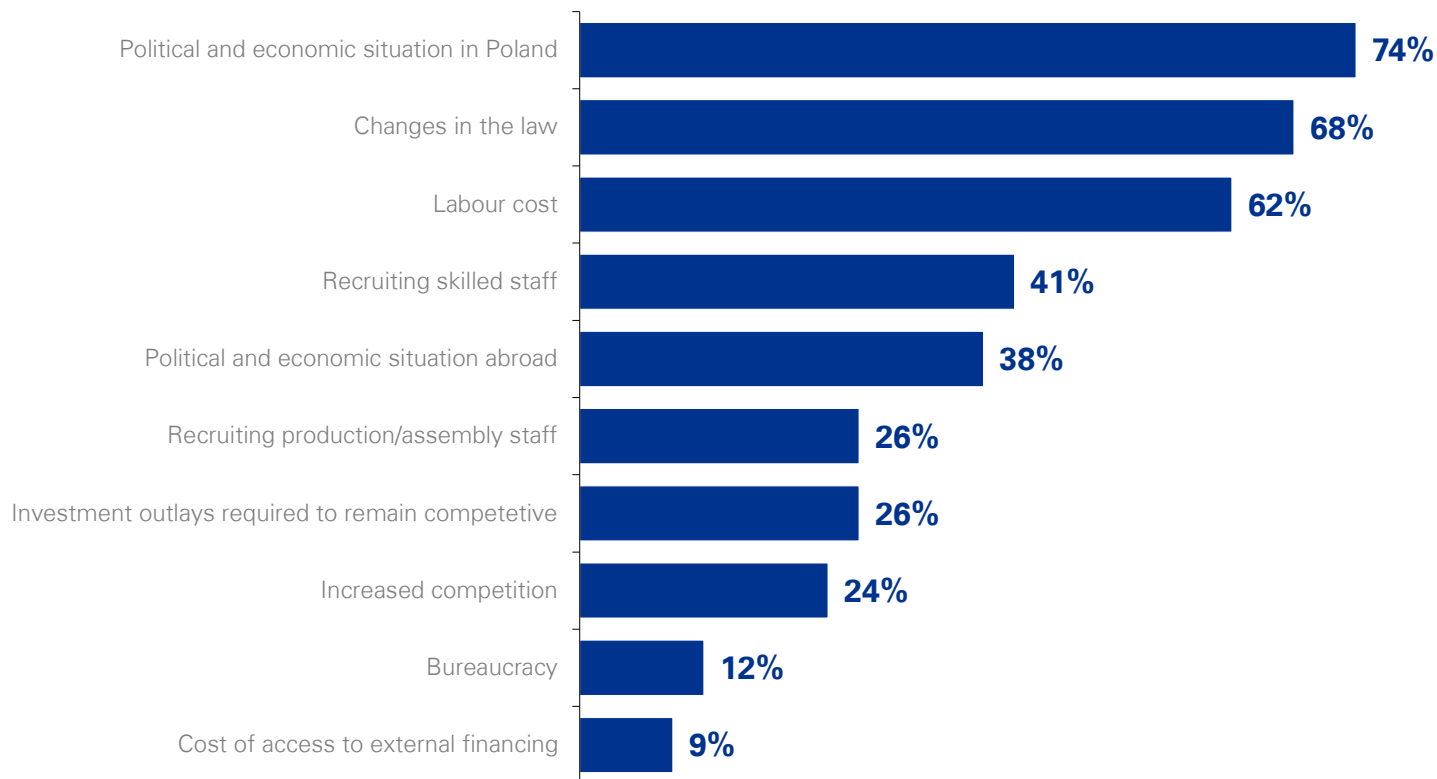
### Distributors





## What are the major issues the automotive sector in Poland will face within the next 6 months?\*

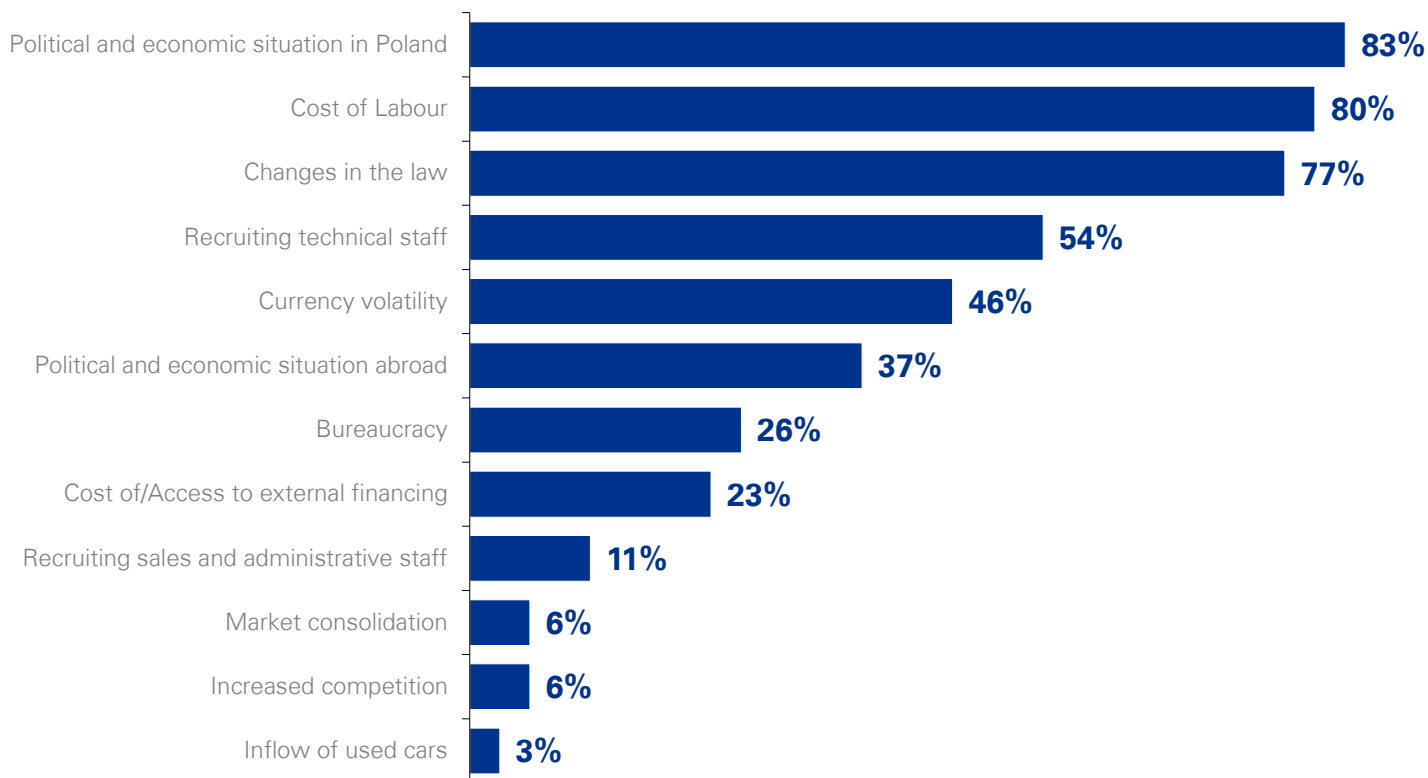
### Manufacturers



\*results do not add up to 100%, multiple-choice question in the survey

## What are the major issues the automotive sector in Poland will face within the next 6 months?\*

### Distributors

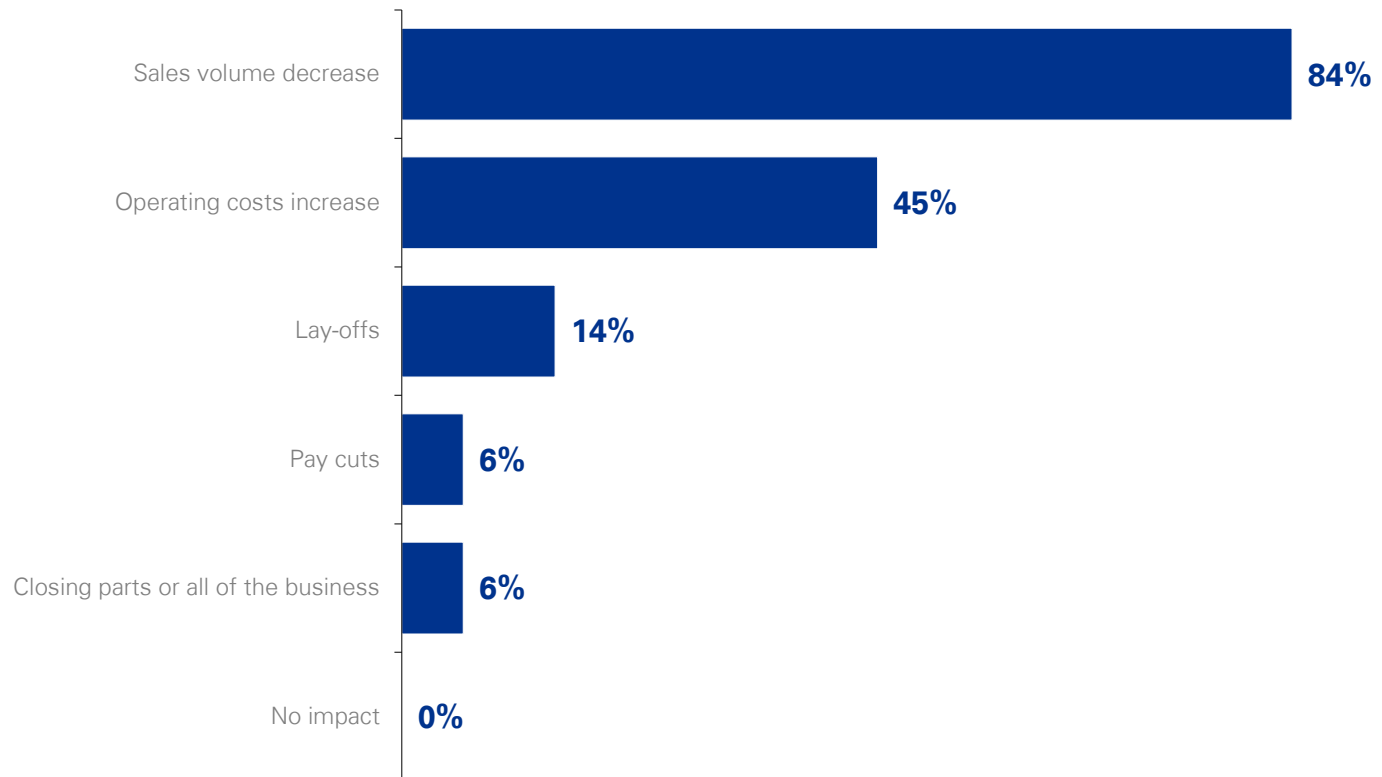


\*results do not add up to 100%, multiple-choice question in the survey

# The semiconductor availability crisis impact

## How has the global semiconductor shortage crisis affected your company?\*

### Manufacturers and Distributors

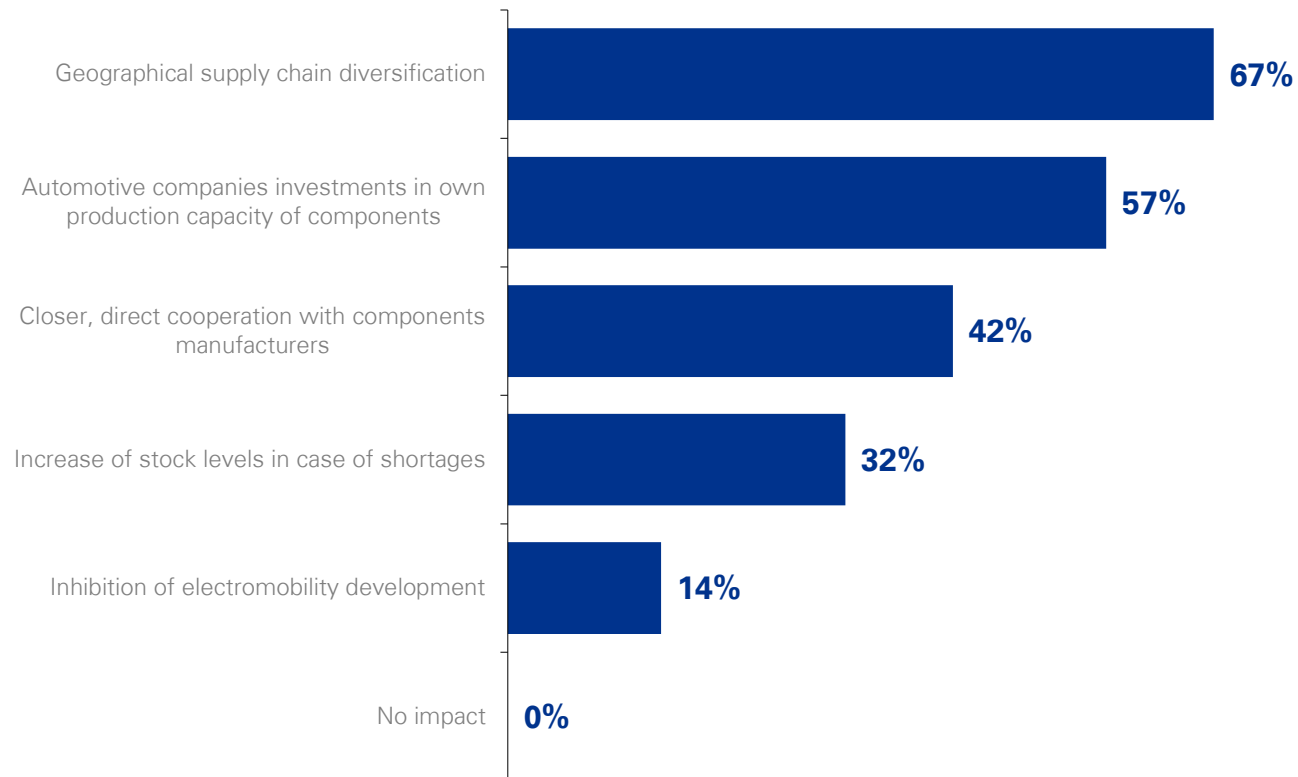


\*results do not add up to 100%, multiple-choice question in the survey

# The semiconductor availability crisis impact

**In your opinion, what will be the long-term impact of the semiconductor crisis on the automotive industry?\***

## Manufacturers and Distributors

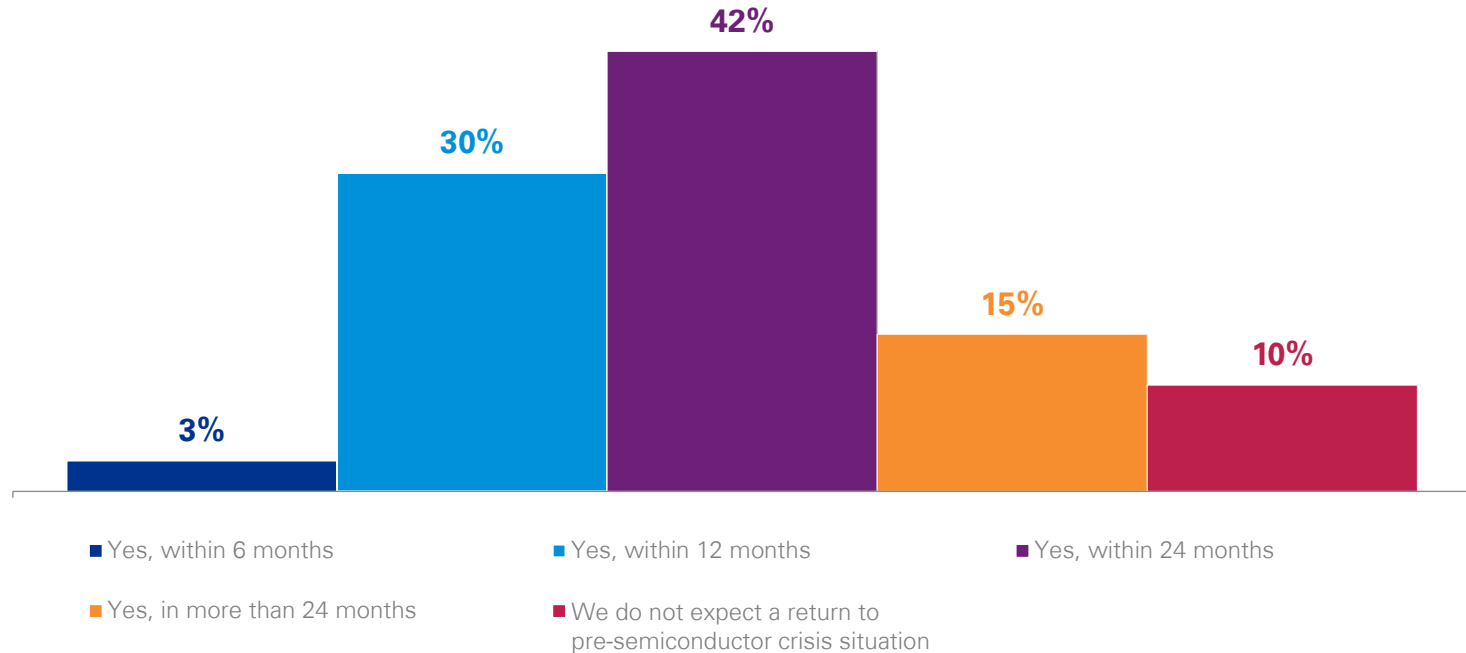


\*results do not add up to 100%, multiple-choice question in the survey

# The semiconductor availability crisis impact

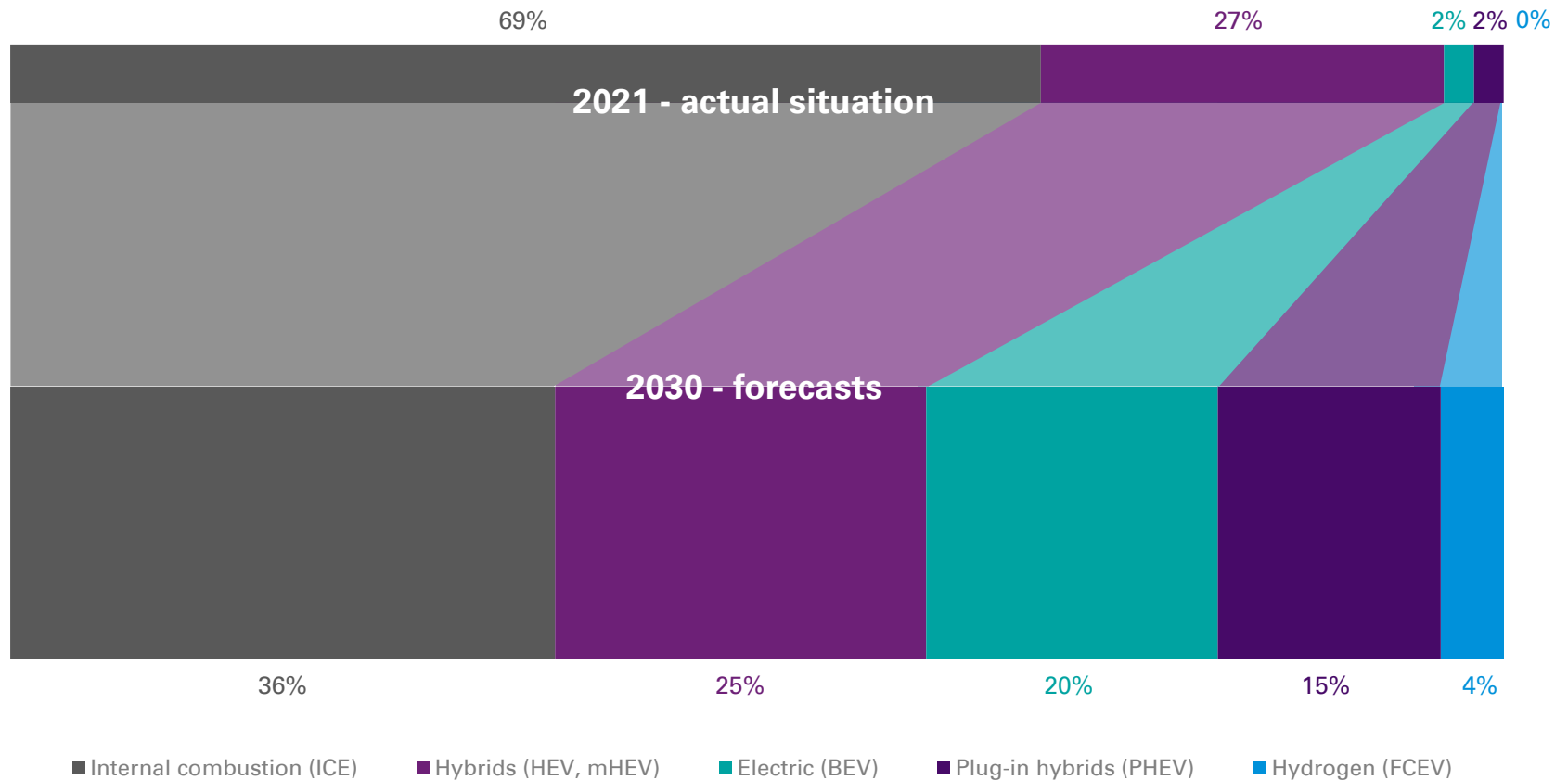
## Do you expect vehicle supply levels to return to pre-semiconductor crisis level?

Manufacturers and Distributors



# Share of new car powertrains in 2030

**In your opinion, what percentage share will be achieved by each powertrain technology in new passenger car sales in Poland by 2030?**





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