



2018全球汽車製造 ~大國生產遇瓶頸，新興製造國成長幅度吸睛~

2018 Global Car Production

Major Car Manufacturing Countries Face Bottlenecks, While Emerging Countries Show Eye-Catching Growth Margins

Note: Audi, BMW, JLR, Mercedes, Scania and Daimler Trucks data not reported
Estimate

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Data source: OICA

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According to the latest statistics of International Organization of Motor Vehicle Manufacturers (OICA), the global car production amounted to 95,706,293 units in 2018. Compared to the figure of 2017 (recorded at 96,746,802 units), it showed a slight drop of 1.1%. To view by region, Europe shared 21,333,651 units of production in 2018, down 1.4% from 21,634,302 units in 2017; Americas shared 20,800,328 units, a bit down 0.4% from 20,714,030 units in 2017; Asia-Oceania shared 52,449,078 units, down 1.8% from 53,395,211 units in 2017; Africa shared 1,123,236 units, a significant 12.0% increase from 1,003,259 units in 2017. Africa was also the only region in the world showing a two-digit year-on-year growth.

Europe

Stagnant Capacity in W. Europe, But Fast Growth in E. Europe

Germany, Spain, France and the UK have usually been considered the car manufacturing heartlands in Europe; however, the combined performance of these four countries in 2018 does not seem as good as it was before. Although the sum of the annual production of these four countries still represented more than 50% of the Europe's total, only France showed a slight 2.0% increase from year 2017 and the other countries (Germany/Spain/the UK) reported a decline within the range of 1-10%. The decline margin of Germany or the UK was even higher than that of Europe, reaching -9.3% and -8.3% respectively. What's worth mentioning is that the production of Italy, typically considered one of the main car manufacturing countries in Europe, not only has been outperformed by those of Czech Rep. and Slovakia, but also appeared a slump of 7.2% if compared to the data of 2017.

Countries showing significant growths were mainly located in E. Europe, such as Slovakia, Romania, Hungary and Slovenia. Their growth margins were within the range of 5.6%-31.1%.

To view from the pan-Europe perspective, countries showing the top 3 growth margins were: Austria (69.7%), Portugal (67.7%) and Romania (31.1%).

Table 1. Production of Major European Car Manufacturing Countries in 2018

Unit: Vehicles				
All Vehicles	2017	2018	YoY Ratio	Difference
Europe	21,634,302	21,333,651	-1.4%	-300,651
Germany	5,645,584	5,120,409	-9.3%	-525,175
Spain	2,848,317	2,819,565	-1.0%	-28,752
France	2,225,700	2,269,600	2.0%	43,900
The UK	1,749,385	1,604,328	-8.3%	-145,057
Czech Rep.	1,305,865	1,345,041	0%	39,176
Slovakia	1,032,445	1,090,000	5.6%	57,555
Italy	1,142,210	1,060,068	-7.2%	-82,142
Poland	689,783	659,646	-4.4%	-30,137
Romania	363,688	476,769	31.1%	113,081
Hungary	418,435	430,988	3.0%	12,553
Belgium	377,002	308,493	-18.2%	-68,509
Portugal	175,544	294,366	67.7%	118,822
Slovenia	189,852	209,378	10.3%	19,526
Austria	97,200	164,900	69.7%	67,700
Finland	108,839	112,104	3.0%	3,265
Serbia	79,124	56,449	-28.7%	-22,675

America

YoY Ratio of N. America's Production Dragged Down to Negative by Canada, While Brazil Reported Far-Above-the-Average Growth

The production of America in 2018 did not show a very significant change. Its YoY ratio was only 1%.

The YoY ratios of USA and Mexico were within the range of 0%-1%. However, due to the -7.9% drop of Canada, the combined performance of USA/Canada/Mexico was down 0.2% to 17,436,070 units. Nevertheless, the sum of the production in these three countries still represented more than 80% of the America's total.

Table 2. Production of Major American Car Manufacturing Countries in 2018 Unit: Vehicles

All Vehicles	2017	2018	YoY Ratio	Difference	All Vehicles	2017	2018	YoY Ratio	Difference
America	20,714,030	20,800,328	0.4%	86,298	Argentina	473,408	466,649	-1.4%	-6,759
- NAFTA	17,478,820	17,436,070	-0.2%	-42,750	Colombia	77,000	72,800	-5.5%	-4,200
USA	11,189,985	11,314,705	1.1%	124,720	Chile	-	-	-	0
Mexico	4,094,832	4,100,525	0.1%	5,693	Ecuador	-	-	-	0
Canada	2,194,003	2,020,840	-7.9%	-173,163	Peru	-	-	-	0
- S. America	3,235,210	3,364,258	4.0%	129,048	Uruguay	-	-	-	0
Brazil	2,736,802	2,879,809	5.2%	143,007	Venezuela	-	-	-	0

South America, different from its counterpart in N. America, showed a more remarkable production growth margin in 2018, reporting a 4.0% YoY ratio and reaching 3,364,258 units. Main car manufacturing countries in this region were Brazil, Argentina and Colombia. Brazil, in particular, reported a 5.2 YoY ratio (better than the performance of S. America). The production of Brazil even represented more than 85% of S. America's total, leaving Argentina (the 2nd place) and Colombia (the 3rd place) far behind. Brazil was the country showing the highest YoY ratio in 2018 and Canada was the country showing the worst YoY ratio in the same year.

Asia-Oceania


YoY Ratios of China and S. Korea were Down, But Remained on Top of the List

The production of Asia-Oceania in 2018 remained above the 50 million units level as it was in 2017. Although the production in this region was higher than the combined production in Europe and America, it was still down 1.8% from 2017 and its margin of change was more significant than those of Europe and America.

Top 5 car manufacturing countries were: China, Japan, India, S. Korea and Thailand. China represented more than 50% of the total production in this region. In 2018, except for China and S. Korea showing -4.2% and -2.1% growths respectively, the growths of the other 3 leading countries were all positive and the growths of India and Thailand were even close to 10%. Countries in this region showing dropping production were China, Iran, and Taiwan. Iran and Taiwan even reported two-digit declines.

On the other hand, India, Thailand, Indonesia, Malaysia and Pakistan, where major car manufacturers strengthened their investments, all showed growths of around 10% in 2018. However, Vietnam, usually considered one of the hotspots for FDIs, only reported a 0.2% growth.

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SIZE RANGE: #2-516 (M2-M8)



MATERIAL: Steel, Stainless Steel
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Table 3. Production of Major Asian & Oceanian Car Manufacturing Countries in 2018

Unit: Vehicles				
All Vehicles	2017	2018	YoY Ratio	Difference
Asia-Oceania	53,395,211	52,449,078	-1.8%	-946,133
China	29,015,434	27,809,196	-4.2%	-1,206,238
Japan	9,690,674	9,728,528	0.4%	37,854
India	4,792,231	5,174,645	8.0%	382,414
S. Korea	4,114,913	4,028,834	-2.1%	-86,079
Thailand	1,988,823	2,167,694	9.0%	178,871
Indonesia	1,218,106	1,343,714	10.3%	125,608
Iran	1,515,396	1,095,526	-27.7%	-419,870
Malaysia	501,700	565,000	12.6%	63,300
Pakistan	250,800	269,700	7.5%	18,900
Taiwan	291,563	253,241	-13.1%	-38,322
Vietnam	236,571	237,000	0.2%	429
Australia	-	-	-	0
Bangladesh	-	-	-	0
Philippines	-	-	-	0

thousands units per year, the annual production volumes of Russia (plus former CIS countries) and Turkey remained at the level of around 2 million units respectively.

Except for Ukraine showing a significant drop of 22.9%, Russia and other former CIS countries all reported two-digit growths. The region's largest car manufacturing country, Russia, showed a 13.9% YoY ratio and Belarus even showed a growth margin of up to 73.0%. However, more than 90% of the production in this region was contributed by Russia.

Turkey has a different story, however. In 2018, its annual production reached around 1.55 million units, down 8.6% from the same period in 2017. Turkey originally took the lead in 2017 until Russia outpaced it in 2018.

Table 4. 2018 Car Production of Russia/Formal CIS Countries/Turkey in 2018

Unit: Vehicles				
All Vehicles	2017	2018	YoY Ratio	Difference
Russia/Formal CIS Countries	1,617,241	1,910,744	18.1%	293,503
Russia	1,551,909	1,767,674	13.9%	215,765
Uzbekistan	140,247	220,667	57.3%	80,420
Kazakhstan	19,071	31,545	65.4%	12,474
Belarus	13,428	23,235	73.0%	9,807
Ukraine	8,586	6,623	-22.9%	-1,963
Azerbaijan	0	0	-	0
Turkey	1,695,731	1,550,150	-8.6%	-145,581

Russia/Formal CIS Countries/Turkey Production of Turkey Sloped Down and was Outpaced by Russia

Not as big as the scale of other European/American/Asia-Oceanian markets reaching the average production of tens of



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Africa

Morocco Demonstrated Further Growth Potential and South Africa Kept Moderate Growth

South Africa and Morocco are the two largest car manufacturing countries in Africa. In 2018, 610,854 units of cars and 402,085 units of cars were respectively produced in South Africa and Morocco. The total production of these two countries reached more than a million units.

To generalize the performance of the top 5 countries in this region, except for Tunisia showing a decline of 8.0% in 2018, other countries all showed positive growths. The production of Morocco in 2018 not only became closer to that of South Africa, its YoY ratio in the same year was even 5 times that of South Africa. In addition, though the production of Egypt was much less than those of other countries in the region, its production in 2018 was still nearly doubled from the record in 2017.

Conclusion

With the trade tension escalation between the U.S. and China starting in 2018, the promotion of carbon emission reduction policies for new vehicles in Europe and America, and the conditions in the Middle East, the global market continues to be filled with gloom and uncertainties, which indirectly makes investors become more cautious about their investments or determine to temporarily halt their projects. The interplay of these factors may influence the will of leading car manufacturers to make investments. In order to diversify the potential risk, some investors may consider moving to other emerging markets which are not involved in the disputes amongst the economic and political powers and have their products assembled there. This may be why the performance in some emerging markets was comparatively better than that in some developed countries.

These emerging markets are rich in natural resources, able to offer sufficient & inexpensive labor force, and enjoy more favorable tariff rates, so they have recently become the key focal points in the global automotive market. Although Europe, USA, and China still take the lion's share altogether in the global car sales, the growth rates in these emerging markets were still far above the level of other major car manufacturing countries which reported almost stagnant growths in the same year. ▣

Table 5. Production of Major African Car Manufacturing Countries in 2018

Unit: Vehicles				
All Vehicles	2017	2018	YoY Ratio	Difference
Africa	1,003,259	1,123,236	12.0%	119,977
South Africa	589,951	610,854	3.5%	20,903
Morocco	341,802	402,085	17.6%	60,283
Algeria	60,606	70,597	16.5%	9,991
Egypt	36,000	69,007	91.7%	33,007
Tunisia	1,900	1,700	-8.0%	-200
Botswana	-	-	-	0
Kenya	-	-	-	0
Libya	-	-	-	0
Nigeria	-	-	-	0
Sudan	-	-	-	0
Zimbabwe	-	-	-	0



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