



Global Car Production & Sales in 2018-2019



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Data source: OICA

Foreword

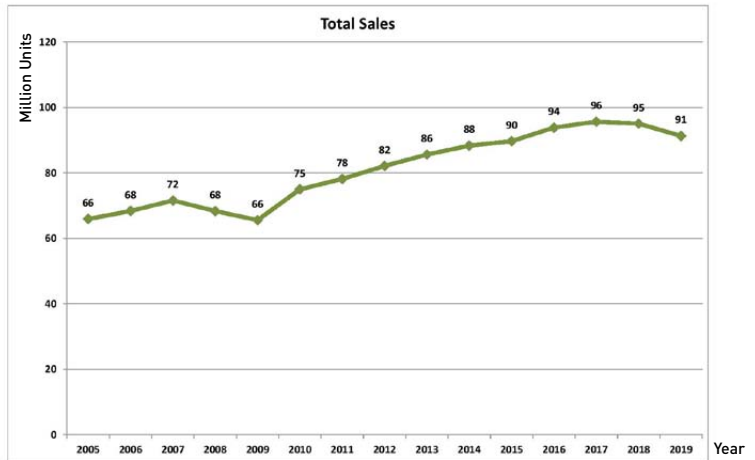
As the automotive industry was impacted by the dwindling global demand, the global car production and sales (export) both appeared a downward trend. The global car sales once appeared constant growth in 2009-2017. After reaching the highest record in 2017, the figure dropped by 1.8% in 2018 to 95,055,937 units and was down 4% to 91,296,738 units. In addition, the global car production was also down 5.4% from 2018.

In terms of continent, sales of almost all regions appeared a drop of 1-7%, except for that in Europe reaching a 1.63% growth. Asia and the Oceania appeared the most significant drop in sales (which was -7.19% from 2018) and the most significant drop in production (-6.44% from 2018). On the other hand, although the global car production was down in 2019, Africa, on the contrary, still appeared a slight 0.3% growth and CIS countries appeared a noteworthy 1.4% growth in the same year.

Table 1. Global Car Production & Sales in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
Global Production	93,267,008	91,786,861	-5.4%
Global Sales	95,055,937	91,296,738	-4%

Graph 1. The Trend of Global Car Sales in 2005-2019

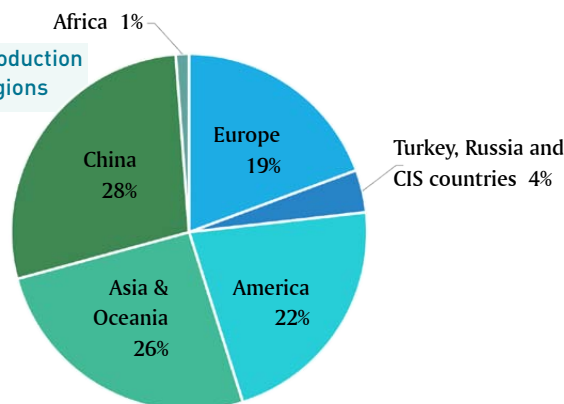


Car Production

Europe

Europe has been always one of the car manufacturing hubs. Europe produced 17.77 million units of vehicles in 2019, down 4.77% from 2018. Main production was concentrated on the EU, and the top 5 largest manufacturing countries in the region were Germany, Spain, France, Czech Rep. and UK (which has not been an EU member State since Feb/01/2020). These 5 countries represented over 70% of the total European car production. However, except for Spain reporting a slight 0.1% growth in production, other 4 countries all reported dwindling production. UK, in particular, showed the most significant drop of 13.9%.

Percentage of Production in Respective Regions



Amongst all European countries, Portugal took the lead with a 17.43% YoY increase and Serbia showed the most significant drop of 37.79%. Italy was kicked out of the “one million units” list in 2019 and was down 13.84% to 0.915 million units. Table 2 shows European car production in 2018-2019.

Table 2. European Car Production in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
Europe	18,660,528	17,770,266	-4.77%
Germany	5,120,409	4,661,328	-8.97%
Spain	2,819,565	2,822,355	0.10%
France	2,267,764	2,202,460	-2.88%
Czech Rep.	1,442,884	1,433,963	-0.62%
UK	1,604,328	1,381,405	-13.90%
Slovakia	1,093,215	1,100,000	0.62%
Italy	1,062,332	915,305	-13.84%
Poland	659,652	649,864	-1.48%
Hungary	463,000	498,158	7.59%
Romania	476,769	490,412	2.86%
Portugal	294,390	345,704	17.43%
Belgium	308,493	285,797	-7.36%
Sweden	291,000	279,000	-4.12%
Slovenia	209,378	199,102	-4.91%
Austria	164,900	179,400	8.79%
Netherlands	214,000	176,113	-17.70%
Finland	112,000	114,785	2.49%
Serbia	56,449	35,115	-37.79%

Note: Estimates in grey color



America

In 2018 America produced around 20.84 million units of vehicles, slightly up 0.8% from 2017 but appeared a further significant drop of 3.6% in 2019. N. America (USA, Canada, and Mexico) was the main production area of America and these three countries represented over 83% of America's total production. Although USA appeared a 3.7% drop in 2019, it is still the largest car manufacturing in the American region. Canada, with its production being the 3rd largest in N. America, also appeared a 5.4% drop. Mexico, being one of the countries in N. America reporting not that significant drop though, it still appeared a 2.8% drop due to the weak global car demand.

Table 3. American Car Production in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
America	20,847,618	20,102,759	-3.57%
N. America	17,424,475	16,783,398	-3.68%
USA	11,297,911	10,880,019	-3.70%
Mexico	4,100,770	3,986,794	-2.78%
Canada	2,025,794	1,916,585	-5.39%
S. America	3,423,143	3,319,361	-3.03%
Brazil	2,881,018	2,944,988	2.22%
Argentina	466,649	314,787	-32.54%
Colombia	75,476	59,586	-21.05%

In terms of S. America, Brazil taking the lead was the only one country in America that showed growth in car production. In 2019 Brazil produced 2.944 million units, up 2.2% from 2018. Argentina in the 2nd place appeared a slump of 32.5% to only 0.314 million units. The total car production of Brazil and Argentina represented over 90% of S. America's total car production. Colombia, ranked the 3rd largest car manufacturing country in the region also dropped by 21.1% to less than 0.1 million tons, making it the country that showed the most significant drop amongst all American countries. Except for Brazil taking a remarkable lead in production, other American countries all reported a slip.

Asia and the Oceania

Table 4. Asian & Oceanian Car Production in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
Asia & Oceania	52,656,826	49,266,873	-6.44%
China	27,809,196	25,720,665	-7.51%
Japan	9,729,594	9,684,298	-0.47%
India	5,142,809	4,516,017	-12.19%
S. Korea	4,028,834	3,950,617	-1.94%
Thailand	2,167,694	2,013,710	-7.10%
Indonesia	1,343,714	1,286,848	-4.23%
Iran	1,095,210	821,060	-25.03%
Malaysia	564,971	571,632	1.18%
Taiwan	253,241	251,304	-0.76%
Vietnam	237,000	250,000	5.49%
Pakistan	269,792	186,716	-30.79%
Philippines	8,400	8,400	0.00%
Australia	6,371	5,606	-12.01%
Bangladesh	-	-	-

Asia has been always a car manufacturing heartland and its more than 55% share in the global production shows a powerful influence over the automotive market. However, due to the stagnant global automotive market, Asia has also become the most hardly hit region in the world. Top 5 car manufacturing countries in this region were China, Japan, India, S. Korea and Thailand, all of which appeared a negative growth. China, with its production being down 7.51%, still kept its worldly leading position with the production of 25.72 million units, representing over 29% of the world's production. Japan ranked in the 2nd place reported only a 0.47% drop in production. Amongst all top 5 countries, India showed the most significant drop of 12.19%.

As for other Asian countries, Pakistan appeared the most significant drop of 30.79%. Other country appearing a two-digit drop also included Iran, which was down 25.03% to a volume below a million units (2018: 0.821 million units). The only two countries in Asia appearing growth were Vietnam and Malaysia, and Vietnam also took the lead in Asia with a 5.49% growth. Table 4 shows Asian and Oceanian car production in 2018-2019.

Turkey, Russia, and CIS Countries

Table 5. Turkish Car Production in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
Turkey	1,550,260	1,461,244	-5.7%

Turkey, a transcontinental country located in Western Asia and Europe, has a well-developed car manufacturing country. In 2019 its car production was down 5.7%, however, compared to other regions, its production was still competitive and reached 1.461 million units. Turkey's production exceeded those of Czech Rep. and UK and was also higher than that of Indonesia in Asia.

Table 6. Russian & CIS Countries' Car Production in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
CIS Countries	2,051,752	2,080,572	1.4%
Russia	1,768,546	1,719,784	-2.8%
Uzbekistan	220,667	271,113	22.9%
Kazakhstan	31,545	49,400	56.6%
Belarus	23,235	30,487	31.2%
Ukraine	6,623	7,265	9.7%
Azerbaijan	1,136	2,523	122.1%

Although the global production was down in 2019, the combined production of Russia and CIS countries in the same year was still up 1.4%. Except for Russia, which was down 2.8% to 1.719 million, the other CIS countries all appeared a growth 9-122%. Azerbaijan, in particular, showed the highest growth. Although Azerbaijan's production was less than 3,000 units, it was still up 122.1% from 2018. Kazakhstan appeared the 2nd highest growth in the region, with a 56.6% growth and a production of nearly 0.5 million units.



Africa

Table 7. African Car Production in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
Africa	1,102,036	1,105,147	0.3%
South Africa	610,854	631,983	3.5%
Morocco	402,085	394,652	-1.8%
Algeria	70,597	60,012	-15.0%
Egypt	18,500	18,500	0.0%

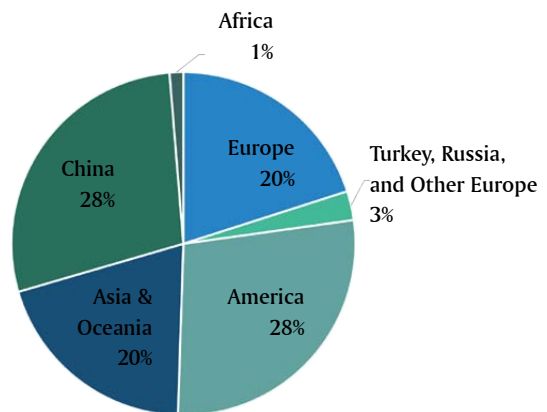
Compared to other regions, Africa does not have a well-developed car manufacturing industry. However, during the global production contraction, Africa still maintained a slight growth of 0.3%. South Africa, in particular, showed the highest growth, up 3.5% to 0.631 million units, not to mention that more than 60% of cars in this region were produced in South Africa. Top 4 car manufacturing countries in Africa were South Africa, Morocco, Algeria and Egypt. Amongst these countries, Algeria appeared the most significant drop of 15%, Morocco also appeared a slight drop of 1.8%, and South Africa was the only one among the top 5 countries with a growing result. Table 7 shows African car production in 2018-2019.

Car Sales

Table 8. European Car Sales in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
Europe	18,015,891	18,310,445	1.63%
Germany	3,822,060	4,017,059	5.10%
France	2,632,621	2,693,977	2.33%
UK	2,734,276	2,676,918	-2.10%
Italy	2,121,781	2,131,916	0.48%
Spain	1,563,496	1,501,260	-3.98%
Poland	633,284	656,265	3.63%
Belgium	639,444	644,041	0.72%
Netherlands	522,870	538,742	3.04%
Sweden	418,090	418,478	0.09%
Austria	394,038	382,333	-2.97%
Switzerland	336,640	356,039	5.76%
Czech Rep.	281,893	281,423	-0.17%
Portugal	267,721	271,817	1.53%
Denmark	258,001	264,256	2.42%
Norway	186,836	189,823	1.60%
Romania	158,278	189,025	19.43%
Hungary	159,654	162,659	1.88%
Finland	136,881	155,147	13.34%
Ireland	151,115	142,494	-5.70%
Greece	110,490	122,366	10.75%
Slovakia	111,865	113,863	1.79%
Slovenia	74,136	84,503	13.98%
Croatia	69,190	72,072	4.17%
Luxemburg	57,707	60,239	4.39%
Lithuania	36,266	47,382	30.65%
Bulgaria	42,731	43,767	2.42%
Estonia	31,367	37,211	18.63%
Latvia	19,325	19,488	0.84%
Cyprus	14,833	14,250	-3.93%
Iceland	19,953	13,137	-34.16%
Malta	9,049	8,495	-6.12%

Europe was the world's 3rd largest car sales market, following Asia and America, and was also the only region in the world that appeared growth in 2019. Europe sold around 18.31 million units of cars in 2019, up 1.63% from 2018. Top 5 countries in this region with the highest car sales were: Germany, France, UK (not an EU member State), Italy and Spain. These 5 countries represented more than 71% of the total car sales in Europe. Germany with the highest car sales in the region also showed the highest growth margin amongst the 5 countries, while Spain showed the worst decline of 3.98%. In the UK, due to the impact of BREXIT, local consumers adopted a more conservative behavior in consumption, thus making car sales in the UK drop by 2.1%. The country in Europe appearing the most significant drop was Iceland, which was down 34.16%, despite growth in almost all countries in the region. Lithuania even appeared a growth of 30.65%. What's worth noting is that almost all countries with a two-digit growth were in E. Europe, while countries in N. Europe appeared growth ranging from 1.6% to 13.34%. In 2020 car manufacturers face stricter CO2 emission requirements and for consumers they still need longer time to assess whether to buy electric vehicles or not, which will also become a barrier for future car sales in Europe. Table 8 shows European car sales in 2018-2019.



Percentage of Car Sales in Respective Regions

America

America, which amounted to the sales of 25.309 million units of cars in 2019, slipped 1.57% but remained the world's 2nd largest car sales market (more than 80% of the sales were in N. America). The top 5 countries with the highest car sales in America were USA, Brazil, Canada, Mexico and Argentina. Amongst these five countries, only Brazil appeared a 12.94% growth in sales and the other countries all slipped (Argentina was down nearly 50%, the worst in the region).



In Latin America (one of the new emerging markets), Brazil showed a great potential for car sales, as it had an impressive and more than 12% growth despite the global market contraction. Argentina, Chile, Colombia and Peru were countries with higher car sales in the region, but their growth margins were negative or kind of slowed down. Dominica grew from the sales of less than 200 units in 2018 to more than 20,000 units in 2019, showing a spiking sales growth of 12,959% and making it the country in the region with the highest sales growth margin. Venezuela was also a country in the region that showed more than doubled car sales, a growth of 116.55%. The car sales in South and Central America represented 17.7% of America's total. Table 9 shows American car sales in 2018-2019.

Table 9. American Car Sales in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
America	25,712,290	25,309,176	-1.57%
N. America	21,107,852	20,815,530	-1.38%
USA	17,701,402	17,480,004	-1.25%
Canada	1,984,992	1,975,855	-0.46%
Mexico	1,421,458	1,359,671	-4.35%
Central & S. America	4,604,438	4,493,646	-2.41%
Brazil	2,468,434	2,787,850	12.94%
Argentina	773,641	408,674	-47.18%
Chile	417,495	345,512	-17.24%
Colombia	245,622	248,689	1.25%
Peru	147,916	155,697	5.26%
Ecuador	130,783	120,516	-7.85%
Puerto Rico	90,000	101,931	13.26%
Panama	45,396	46,900	3.31%
Uruguay	44,215	40,605	-8.16%

Unit: Vehicle	2018	2019	YoY Ratio
Costa Rica	39,530	36,686	-7.19%
Bolivia	34,000	29,884	-12.11%
Paraguay	32,795	27,874	-15.01%
Guatemala	25,400	24,588	-3.20%
Dominica	167	21,810	12959.88%
Guadeloupe	20,029	19,206	-4.11%
Martinique	17,720	17,912	1.08%
Trinidad	13,324	14,688	10.24%
Honduras	12,373	11,400	-7.86%
El Salvador	9,373	8,000	-14.65%
Jamaica	7,176	7,176	0.00%
Guyana	6,890	6,761	-1.87%
Venezuela	2,078	4,500	116.55%
Cuba	6,098	3,015	-50.56%
Bahamas	1,644	1,644	0.00%
Nicaragua	11,811	1,600	-86.45%
Belize	528	528	0.00%

Table 10. Asian, Oceanian and Middle East's Car Sales in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
Asia, Oceania, Middle East	47,410,253	44,003,150	-7.19%
China	28,080,577	25,768,677	-8.23%
Japan	5,272,067	5,195,216	-1.46%
India	4,400,136	3,816,891	-13.26%
S. Korea	1,827,141	1,795,134	-1.75%
Indonesia	1,152,789	1,043,017	-9.52%
Australia	1,121,396	1,034,379	-7.76%
Thailand	1,086,929	1,007,552	-7.30%
Iran	959,628	655,515	-31.69%
Malaysia	598,714	604,287	0.93%
Saudi Arabia	403,857	528,883	30.96%
Philippines	401,345	415,826	3.61%
Vietnam	246,500	280,742	13.89%
UAE	13,900	263,000	1792.09%
Israel	271,497	258,622	-4.74%
Taiwan	423,182	219,075	-48.23%
Pakistan	254,938	186,581	-26.81%
New Zealand	156,032	154,479	-1.00%
Kuwait	103,235	113,000	9.46%
Kazakhstan	97,472	97,474	0.00%
Singapore	95,206	90,900	-4.52%
Iraq	53,528	76,700	43.29%
Uzbekistan	61,400	68,000	10.75%
Oman	63,598	63,500	-0.15%
Qatar	47,508	47,550	0.09%
Hong Kong	39,139	34,116	-12.83%
Bahrain	35,962	30,200	-16.02%
Lebanon	35,301	23,383	-33.76%
Jordan	21,236	22,000	3.60%
Nepal	21,059	21,805	3.54%
Myanmar	15,098	21,707	43.77%

Asia, the Oceania, and the Middle East

Unit: Vehicle	2018	2019	YoY Ratio
Syria	7,800	12,700	62.82%
Brunei	13,000	11,600	-10.77%
Laos	8,906	10,400	16.78%
Sri Lanka	13,081	9,545	-27.03%
New Caledonia	8,214	7,761	-5.51%
Tahiti	7,168	7,300	1.84%
Azerbaijan	4,000	6,700	67.50%
Turkmenistan	5,665	5,795	2.29%
Bangladesh	4,650	4,900	5.38%
Cambodia	4,057	4,567	12.57%
Mongolia	6,440	3,800	-40.99%
Tajikistan	2,430	2,450	0.82%
Kyrgyzstan	2,345	1,505	-35.82%
Yemen	1,200	1,200	0.00%
Palestine	146	109	-25.34%

This region is not only the world's largest car manufacturing hub, but also the largest market for car sales. In 2019 the full-year sales in this region exceeded the total in Europe and America, reaching 44 million units (but the sales growth were still negative with a slip of 7.19%). Sales in China represented more than 58% of the region's total. However, sales in China in 2019 were down month after month and the total sales compared to 2018 were also down 8.23%. Top 5 countries with the highest car sales in this region all appeared a drop. India, in particular, showed a two-digit drop to less than 3.9 million units.

In this region, Taiwan showed the most significant drop of 48.23% to less than 0.3 million units, or 0.219 million units in 2019. Countries with the most significant growth in this region were mostly in Western Asia and the Middle East. UAE, in particular, showed a spiking growth of 1,792.09% and the sales in UAE grew from slightly over 10,000 units in 2018 to over 0.26 million units in 2019. Azerbaijan was the country with the 2nd highest sales growth margin in the region, reaching 67.5%.



Turkey, Russia and Other European Countries

Table 11. Turkish, Russian, and Other European Countries' Car Sales in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
Turkey, Russia and Other European Countries	2,681,996	2,496,720	-6.91%
Russia	1,821,320	1,778,841	-2.33%
Turkey	641,541	491,909	-23.32%
Ukraine	96,302	102,542	6.48%
Belarus	52,345	63,275	20.88%
Serbia	28,000	29,250	4.46%
Bosnia	23,934	11,358	-52.54%
Moldova	6,386	6,875	7.66%
Macedonia	4,400	4,660	5.91%
Albania	2,448	3,400	38.89%
Georgia	3,520	3,400	-3.41%
Armenia	1,800	1,210	-32.78%

In 2019 the car sales in Turkey, Russia, and other European countries dropped by 6.91% to 2.496 million units. The main sales in the region were generated in Russia, Turkey, and Ukraine. Among these three countries, Russia took the lion's share in sales, but still showed a drop of 2.33% to 1.778 million units, representing around 71% of the region's total. Turkey showed a more significant drop to less than 0.5 million units (down 23.32%). Ukraine, on the contrary, showed a growth of 6.48%.

Countries that appeared a significant drop included Bosnia and Armenia. Other countries, however, still showed a growth of 6-38%. Albania, in particular, hit a growth of 38.89% though its sales were below 3,500 units. Belarus was one of the countries that appeared a two-digit growth (reaching 20.88%). Table 11 shows Turkish, Russian, and other countries' car sales in 2018-2019.

Africa

Table 12. African Car Sales in 2018-2019

Unit: Vehicle	2018	2019	YoY Ratio
Africa	1,235,507	1,177,247	-4.72%
South Africa	552,226	536,611	-2.83%
Egypt	184,456	170,000	-7.84%
Morocco	177,359	165,916	-6.45%
Algeria	127,300	125,000	-1.81%
Tunisia	51,427	48,700	-5.30%
Reunion	32,349	33,419	3.31%
Libya	18,000	22,500	25.00%
Ivory Coast	9,640	11,165	15.82%
Mauritius	10,134	10,439	3.01%
Nigeria	17,000	9,800	-42.35%
Ghana	7,073	5,700	-19.41%
Kenya	7,416	5,643	-23.91%
Senegal	5,831	5,500	-5.68%
Zambia	3,806	3,255	-14.48%
Cameroon	3,079	3,079	0.00%
Angola	2,404	2,830	17.72%
Uganda	1,885	2,500	32.63%
Gabon	2,013	2,461	22.26%
Zimbabwe	3,904	2,150	-44.93%
Madagascar	1,995	1,900	-4.76%
Tanzania	2,380	1,900	-20.17%
Sudan	1,968	1,696	-13.82%
Malawi	1,514	1,538	1.59%
Congo	771	1,089	41.25%
Burkina Faso	1,074	1,074	0.00%
Botswana	8,171	1,050	-87.15%
Liberia	288	288	0.00%
Brurundi	44	44	0.00%

Although the car production in Africa appeared growth in 2019, the sales in the region was on a decline (down 4.72% to 1.177 million units). The main sales were generated in South Africa (0.536 million units; down 2.83%), representing more than 45% of the region's total. The countries ranked after South Africa in the region were: Egypt, Morocco, Algeria, and Tunisia. Top 5 countries all appeared a decline of 2-5% in sales. Congo was the country in the region showing the most significant growth of 41.25%, though its sales were less than 2,000 units. Botswana was the country that showed the most significant decline of 87.15% and its sales reached only 1,050 units. Table 12 shows African car sales in 2018-2019.

Conclusions

With the global consumers' consumption behaviors becoming more conservative, the automotive market started to turn weak with declining sales and dropping productions. Since 2018, the weak global automotive market has been always one of the key factors causing the sluggishness of global manufacturing. In 2019, the global car sales dropped by 3.759 million units, which had been the most significant drop since the financial crisis. In addition, the declining demand in China and India was also one of the reasons that resulted in the sluggish global automotive market. China was ranked the first place in global car sales, however, in 2019 the sales in China were down 8.23% (nearly a decline of 2.311 million units).

What's worth noting is that, although the main markets for car sales all appeared a decline, according to an ITRI report, the electric vehicles market continues to grow and the global sales of EVs have recently exceeded 5 million units. The report also forecasts that by 2020 EVs may represent 6% of the global car sales and by 2021 may further exceed 10% of the global car sales. In addition, due to the increasing influence of the idea of the global sharing economy, it may still take time to analyze whether the global production and sales will continue to drop or not.

