
CAR MARKET OUTLOOK 2016

Description of 82 car markets from 2006 to 2015

Data of Sales, Production, Car level, Bodystyle, Segment, Brands and Models

4rd edition 2016

CORAM The Car Market Analysis



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CAR MARKET OUTLOOK 2016

PRESENTATION OF THE DATA

Introduction

Coram is very proud to present the fourth edition of the « Car Market Outlook».

This book gathers data of 82 car market from 2006 to 2015: Sales, productions, car levels, body styles, segments, main brands and main models are presented.

The CORAM Company

CORAM is a French company, dedicated to the car market analysis for more than 30 years.

CORAM has always been in touch with the car industry and has always provided analyses and studies about the car market to car manufacturer's headquarters.

You can visit our website www.coram-research.com to get updated information about the different activities of CORAM.

CORAM delivers for FREE many data at www.coram-data.com. This represents only a part of our database and is maybe not fully up to date..

CORAM publishes the "Car Market Outlook" that you have on your hand since 2013.

What is new from the third edition?

We have removed 5 countries (Bosnia, Brunei, Ecuador, Macedonia, Serbia) due to inconsistency of the 2015 data. 2015 data are available on request.

We have added 6 countries (Ivory Coast, Iraq, Jordan, Lebanon, Myanmar, New Caledonia) and we provide more detailed information for Ukraine.

This year, we took special attention to the split of commercial vehicle, ie the split between light commercial vehicles (LCV) and heavy commercial vehicles (HCV). Data provided by associations or governments refer some time to LCV and some time to HCV and are many time wrong labelled (ie data presented as LCV+HCV registrations are in fact only LCV registrations,...). In the Car Market Outlook, market sales data are now related to the accurate category LCV or HCV and "All CV" is provided only if LCV and HCV are available.

We have upgraded the segmentation of the Chinese market and we have switched from NBSC data (National Bureau of Statistics of China) to CAAM data (car manufacturers association). NBSC provides a more detailed segmentation of the sales, but the total market differs from more than 1.5 million of vehicles than the total market provided by CAAM.

We change the label of the bodystyle "Off-Road" to "SUV" which is more representative of the current market.

This may induces breakdown in data provided in the previous editions.

82 countries representing 99% of the world car market are presented

This book gathers data and information about the car market of 82 countries in the world. These countries represent more than 99% of the car's registration of the world.

ASIA		AMERICA	
ASEAN AREA		NORTH AMERICA	
IDN	Indonesia	CAN	Canada
LAO	Laos	USA	United States of America
MYS	Malaysia	LATIN AMERICA	
MMR	Myanmar	ARG	Argentina
PHL	Philippines	BRA	Brazil
SGP	Singapore	CHL	Chile
THA	Thailand	COL	Colombia
VNM	Vietnam	MEX	Mexico
INDIA		PRI	Puerto Rico
IND	India	PRY	Paraguay
JAPAN AREA		URY	Uruguay
HKG	Hong kong	VEN	Venezuela
JPN	Japan	EUROPE	
KOR	South Korea	WESTERN EUROPE	
TWN	Taiwan	AUT	Austria
MIDDLE EAST		BEL	Belgium
ARE	Unites Arab Emirates	CHE	Switzerland
BHR	Bahrein	DEU	Germany
IRN	Iran	DNK	Denmark
IRQ	Iraq	ESP	Spain
ISR	Israel	FIN	Finland
JOR	Jordan	FRA	France
KWT	Koweit	GBR	United Kingdom
LBN	Lebanon	GRC	Greece
OMN	Oman	IRL	Ireland
PAK	Pakistan	ITA	Italy
QAT	Qatar	LUX	Luxembourg
SAU	Saudi Arabia	NLD	Netherlands
TUR	Turkey	NOR	Norway
CENTRAL ASIA		PRT	Portugal
KAZ	Kazahstan	SWE	Sweden
CHINA		EASTERN EUROPE	
CHN	China	BGR	Bulgaria
AFRICA		CZE	Czech Republic
NORTH AFRICA		EST	Estonia
DZA	Algeria	HRV	Croatia
EGY	Egypt	HUN	Hungary
MAR	Morocco	LVA	Latvia
TUN	Tunisia	POL	Poland
CENTRAL AFRICA		ROU	Romania
AGO	Angola	SVK	Slovakia
CIV	Ivory Coast	SVN	Slovenia
KEN	Kenya	CIS	
MUS	Mauritus	BLR	Belarus
NGA	Nigeria	RUS	Russia
SOUTH AFRICA		UKR	Ukraine
ZAF	South Africa	OCEANIA	
		AUS	Australia
		NCL	New Caledonia
		NZL	New Zealand

The countries are ranking according to their ISO code

Due to the many ways of labelling the countries (in English, in their original language, in the different ways of labelling a country (ie United Kingdom, Great Britain,...)), the countries are labelled according to their ISO code with 3 letters : ie United Kingdom is labelled GBR (Great Britain), Switzerland is labelled CHE (Confédération Helvétique)...

The countries are ranking according to the alphabetic order of these codes. The first country is AGO (Angola) and the last one is ZAF (South Africa).

The English name of the country is used for labelling the country.

Sources of the data

More than one hundred different sources are used

Several sources have been used for editing this book: The World Bank, United Nations, International Monetary Fund, OICA, domestic car manufacturer associations, domestic statistical institute, and the archives of CORAM.

The body style and the car segmentation are setup by Coram (see the specific chapter about “Car segmentation”).

In total, more than one hundred sources have been used.

CORAM checks and processes all data

Coram gathers the data and we spend a lot of time for checking the consistency of them. We observe very frequently that data provided by different suppliers could be different for the same topic. Our skill and our experience guide us to choose the most relevant data. So it is not possible to label the sources of each table. All data are processed by CORAM in order to get consistency across countries and definition.

The Vehicle classification

Two classes of vehicles are existing

We are considering two classes of vehicles, the “**vehicles for the transportation of passengers**” (“Passenger Car” or “PC”) and the “**vehicles for the transportation of goods**” (“Commercial Vehicles” or “CV”). The difference is usually based on a comparison of the weight of the passengers vs the weight of the goods that can be transported. If the weight of the passengers transported is higher than the weight of the goods then the car is defined as a “vehicle for transportation of passengers” otherwise it is a “vehicle for the transportation of goods”.

The vehicle classification is declared by the car manufacturer during the homologation process according to the domestic regulations. Domestic regulations are different across the world. This vehicle classification is labelled “Domestic type” in the “Car Market Outlook”.

“Domestic type” covers the “Cars” and “Light Truck” in USA, Canada, Mexico.

The vehicles for the transportation of passenger are split in “**Personal Cars**” (“PC”) and “**Buses**” (“BUS”). The difference is usually based on the number of people transported. As usual, “Buses” are added to “Commercial Vehicle” (but not in China by CAAM for example).

The vehicles for transportation of goods are split in “**Light Commercial Vehicle**” (“LCV”) and “**Heavy Commercial Vehicles**” (“HCV”). The difference is usually based on the weight of the car or their payload.

The “Car Market Outlook” is focused on “Personal Cars” and “Light Commercial Vehicle”

The “Car Market Outlook” is focused on “Personal Cars” and “Light Commercial Vehicle”. As the definition of “Light Commercial Vehicle” is inconsistent across the countries, we use the following rules for homogenizing the definitions across the countries:

*a “Personal Car” is carrying less than 15 passengers

*a “Light Commercial Vehicle” can be driven with the same driving licence than a “Personal Car”. Accordingly, the weight limit of the LCV changes across the countries, from 3500 kg in Europe (with some exceptions) to 6350 kg in USA for example.

*Some vehicles declared as LCV by the manufacturer are reclassified as “Personal Car” (Some SUV or estate vehicles).

*MPV and SUV which are classified as Light Truck in North America are reclassified as “Personal Car”.

*Small van are splitted between the van version and the MPV version (In Spain for example, all small van are declared as LCV, even MPV version (Ford Tourneo for example)).

This classification is called “International type” in the “Car Market Outlook”.

Car segmentation

CORAM has set up a worldwide segmentation

Several car segmentations are used in the car industry. For example, each car manufacturer has its own car segmentation and some car data providers have set up their own segmentation too. None of them are public.

CORAM has setup a worldwide vehicle segmentation for passenger cars and commercial vehicles. The CORAM's segmentation is applied to more than 3500 models used for the edition of this book. You may contact us if you are interested to get more information about our segmentation.

You will find below a short description of the CORAM's segmentation.

The CORAM segmentation is defined by Segments, Body styles and Levels

Segment

The segment is related to the benefit provided by the car. Segments are classified from low/few benefits to high/many benefits. Segments are not related to the size of the car.

For passenger cars 6 segments are defined:

- AA: downtown car: Smart, Toyota iQ
- A: urban car: Renault Twingo, Maruti Alto, Wuling Hongguang
- B: multi-purpose car: VW Gol, Chevrolet Ford Fiesta
- C: family car : Peugeot 308, VW Golf, Buick Excelle, Toyota Corolla
- D: entry luxury car : Ford Fusion-Us, VW Passat
- E: luxury car : Audi A6, BMW 5-series, Mercedes E-series
- F : upper luxury car : Audi A8, Mercedes S-class,...

For LCVs the segments are

- MKV: mini van: Wuling Sunshine
- F1: urban lcv : Citroën Berlingo
- K1: multi-purpose lcv: VW Transporter, Hyundai Starex, Renault Traffic
- K3: inter-city lcv : Kia Bongo, Fiat Ducato
- K5: first version of HCV drivable with a passenger car driving licence
- P1: small pick up : Fiat Strada
- P2: medium pick up: Toyota Hilux, Nissan Frontier, Ford Ranger
- P3: heavy pick up: Ford F, Dodge RAM, Toyota Tundra

A Truck segment covers all Heavy commercial vehicles.

Body style

The body style is related to a usage of the car. There are 8 body styles: hatchback, sedan, estate, mpv, suv, sport, pick-up and van.

A truck body style covers all Heavy commercial vehicles.

Level

3 levels are defined

- Mainstream: the "average" level of benefits, defined by high volumes car manufacturers
- Entry level: very restricted benefits (far below the average of the market) in order to get the lowest price as possible
- Premium: benefits above the average of the market

Please note that the level of a car may change from one country to another.

Description of the data provided

Data are provided in several sheets per country:

The data provided covers general data about the country and specific data related to the car market.

The data are presented in several sheets:

General Data, Market segmentation (in volume), Market segmentation (in market share), Main brands /or Main brands and models in the market.

For few countries, the data available are not enough detailed for determining the market segmentation. For these countries only General Data and Main brands are provided.

General Data

This section provides the main data related to the vehicle market of the country:

- *total sales of the market: volumes, trend and world ranking
- *total sales per domestic type: volumes of PC (or Cars for USA/CAN/MEX), LCV (or Light Truck for USA/CAN/MEX), HCV and All commercial vehicles
- *vehicle production: volumes (according to OICA), trend and world ranking
- *vehicle production per type according to OICA : volumes of PC and All commercial vehicles.
- *country balance: = production divided by sales. If the ratio is higher than 1, the country is a net exporter of vehicles.
- *economy : 4 indicators for describing the wealth of the economy and of the people : GDP, GDP per capita, Inflation rates and unemployment rate (source IMF)
- *exchange rate of the local currency against US dollar and Euro (source Banque de France)
- *population and households: Total population and world ranking (source UN data), number of household (source CORAM)
- *Gasoline and fuel price at the end of the year in USD and EURO

Market in volume

This section provides detailed information about the vehicle market in volumes:

- *sales per "Domestic Type"
- *sales per "International Type"
- *car level: according to CORAM's segmentation
- *body style: according to CORAM's segmentation
- *segment: according to CORAM's segmentation

Market in market share

This section provides detailed information about the vehicle market share:

- *sales per Domestic Type
- *sales per International Type
- *car level: according to CORAM's segmentation
- *body style: according to CORAM's segmentation
- *segment: according to CORAM's segmentation

Main brands and models

- *The 25 main brands per country. Brands with sales below 100 units are not indicated.
- *The 45 main models

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304	VNM	Vietnam
308	ZAF	South Africa

TEMPLATES

COUNTRY

AREA

CONTINENT

General data

2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
------	------	------	------	------	------	------	------	------	------

TOTAL SALES

Total	
Trend (%)	
World ranking	

TOTAL SALES per DOMESTIC TYPE

Personal Car	
Light Commercial veh.	
Heavy Commercial veh.	
All commercial veh	

VEHICLE PRODUCTION

Total	
Trend (%)	
World ranking	
Personal Car	
All commercial veh	

COUNTRY BALANCE

Production / registration	
---------------------------	--

ECONOMY

GDP growth (%)	
GDP Per capita (\$ppp)	
Inflation rate (%)	
Unemployment rate (%)	

EXCHANGE RATE

1 € = xx lcu	
1 \$ = xx lcu	

POPULATION (000)

Total	
World ranking	
Number of household	

GASOLINE PRICE (end of year)

us\$/l	
€/l	

DIESEL PRICE (end of year)

us\$/l	
€/l	

n = none

lcu = local currency unit

COUNTRY

AREA

CONTINENT

Market in volume (units)

2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
------	------	------	------	------	------	------	------	------	------

TOTAL SALES per DOMESTIC TYPE

Total (-)	
Personal car	
Light commercial veh.	
Heavy Commercial veh.	
All commercial veh.	

TOTAL SALES per INTERNATIONAL TYPE

Personal car	
Light commercial veh.	
Heavy Commercial veh.	

CAR LEVEL

Entry	
Mainstream	
Premium	

BODY STYLE

Hatchback	
Sedan	
Estate	
MPV	
Sport	
SUV	
Pick-up	
Van	
Truck	

SEGMENT

A0	
A	
B	
C	
D	
E	
F	
P1	
P2	
P3	
MKV	
F1	
K1	
K3	
K5	
TRUCK	

blank = no sale

COUNTRY

AREA

CONTINENT

Market in %

2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
------	------	------	------	------	------	------	------	------	------

TOTAL SALES per DOMESTIC TYPE

Total (-)	
Personal car	
Light commercial veh.	
Heavy Commercial veh.	
All commercial veh.	

TOTAL SALES per INTERNATIONAL TYPE

Personal car	
Light commercial veh.	
Heavy Commercial veh.	

CAR LEVEL

Entry	
Mainstream	
Premium	

BODY STYLE

Hatchback	
Sedan	
Estate	
MPV	
Sport	
SUV	
Pick-up	
Van	
Truck	

SEGMENT

A0	
A	
B	
C	
D	
E	
F	
P1	
P2	
P3	
MKV	
F1	
K1	
K3	
K5	
TRUCK	

blank = no sale

COUNTRY

AREA

CONTINENT

Total market	
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MAIN BRANDS IN MARKET

% cum%

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MAIN MODELS IN MARKET

VOLUME

--	--