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The automotive industry and Candidate countries

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The substantial increase of manufactured goods in EU trade with countries applying for accession to the EU — so called Candidate countries — over the past decade was partly due to booming trade in the automotive industry. Among the 13 Candidate countries¹, five central European countries together with Turkey accounted for almost all of this trade with the EU. They imported more road vehicles (and parts) than they exported to the EU, but this trade deficit has been decreasing since 1997. One may note a strong link between these developments and foreign direct investment by large Western car manufacturers. Germany, France and Italy were the principal EU trading partners. Germany — by far the single most important trading entity — mostly exchanged parts and finished vehicles with Hungary, the Czech Republic and Slovakia. Poland, Slovenia and Turkey had closer trade relations — which date back almost thirty years — with France and Italy.

Statistics in focus

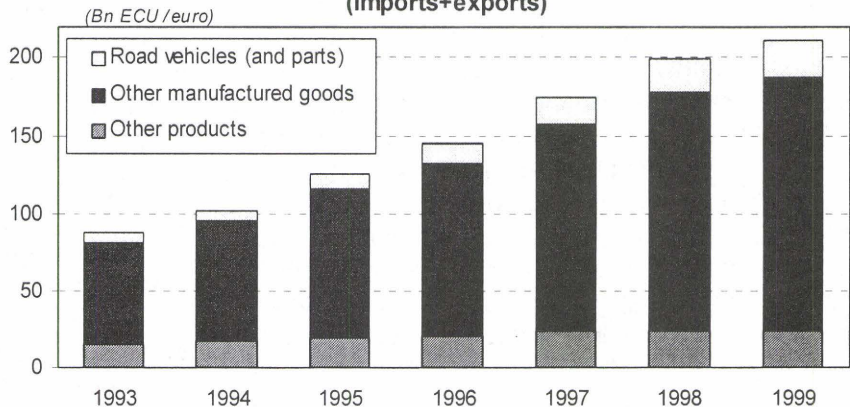
EXTERNAL TRADE

THEME 6 – 1/2001

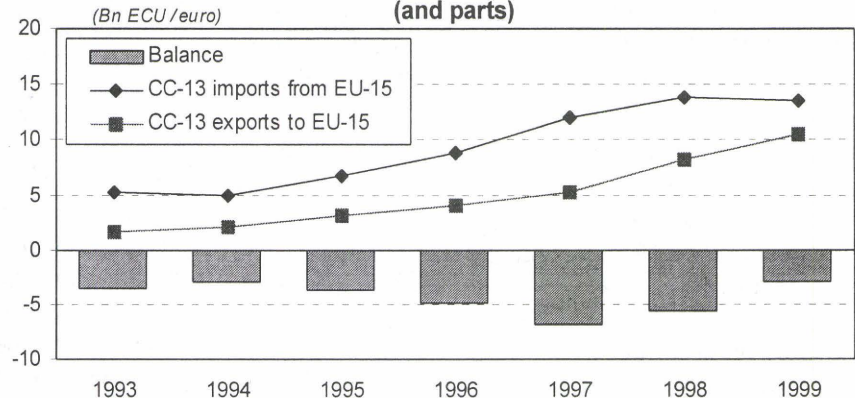
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Graph 1 - EU-15—Candidate countries total trade (imports+exports)



Graph 2 - EU-15—Candidate countries trade in road vehicles (and parts)



Reporter: EU-15 Sources: United Nations, Eurostat.



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¹ 13 Candidate countries (CC-13): Bulgaria, Cyprus, Czech Rep., Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia and Turkey.

Table 1 - Share of road vehicles (and parts) in trade between EU-15 and the Candidate countries (%)

Partner	(Imports+Exports)						
	1993	1994	1995	1996	1997	1998	1999
CC-13	7.8	6.8	7.8	8.9	9.9	11.0	11.4
CEC-5	8.5	8.1	9.2	10.5	11.2	13.1	13.8
SK	4.7	6.3	11.8	13.7	14.6	23.6	23.3
SI	14.3	14.5	14.4	15.1	14.4	16.3	15.9
CZ	7.8	7.5	8.1	10.0	11.4	13.0	14.0
HU	7.0	7.1	7.5	7.2	8.8	11.4	13.8
PL	8.5	7.2	8.5	10.8	11.1	10.8	10.8
CY	3.4	4.4	5.5	5.6	6.5	8.8	8.7
TR	8.3	4.7	6.3	7.7	9.8	8.6	8.7
LT	7.4	7.2	6.2	6.6	8.9	8.7	4.7
BG	5.6	5.0	6.8	4.7	3.5	4.9	4.5
LV	6.8	5.3	5.1	4.4	6.0	6.6	4.4
EE	7.2	6.6	5.3	5.3	6.6	5.7	4.1
MT	1.7	2.4	2.7	3.0	3.1	3.3	3.5
RO	4.0	2.5	2.4	2.7	2.6	4.1	3.2

Reporter: EU-15. Sources: United Nations, Eurostat.

How to read the table? e.g. in 1999, up to 23% of EU-Slovakian trade was in road vehicles (SITC 78).

Table 2 - Share of EU-15 in Candidate countries' road vehicles (and parts) trade (%)

Reporter	(Imports+Exports)				
	1994	1995	1996	1997	1998
CC-13			68.5	68.6	
CEC-5	68.5	71.9	71.1	72.2	77.8
SI	87.2	87.0	87.6	88.3	88.2
PL	87.7	87.5	82.6	78.2	78.7
SK	37.5	43.2	53.6	61.1	77.9
HU	53.6	54.8	61.3	64.8	74.6
CZ	57.6	64.5	62.0	66.2	73.9
LV	37.7	56.4	67.2	70.8	71.6
BU	:	:	66.5	68.3	:
TR	59.8	65.9	69.7	66.6	65.8
MT	69.6	67.3	63.9	61.8	64.5
RO	42.3	40.4	44.9	46.8	61.8
LT	51.9	47.6	47.1	56.3	58.8
EE	:	43.4	50.6	38.7	56.2
CY	48.3	48.2	48.0	47.2	47.9

Reporters: Candidate countries. Source: United Nations.

How to read the table? e.g. in 1998, Slovenia carried out 88% of its road vehicles (SITC 78) trade with EU-15.

Booming automotive trade

Most Candidate countries' economies increased their openness towards foreign trade over the past decade. In particular relations with the EU prospered while trade in manufactured goods² played an increasingly prominent role. Among manufactured goods, a booming trade in road vehicles (and parts, i.e. division 78 of the SITC) with the EU particularly reflected this evolution. Being one of the most internationally organised industries, car makers quickly integrated central Europe into their international production and distribution networks. Trade related to the automotive industry contributed to more than one tenth of total trade between the two blocks in 1999 (around 14% if we consider 5 central European countries – namely Poland, the Czech Republic, Hungary, Slovakia and Slovenia). Exports from the EU to the Candidate countries almost tripled while imports into the EU increased almost sevenfold between 1993 and 1999 (graphs 1 and 2).

Over the same period, the 13 Candidate countries imported more road vehicles (and parts) than they exported to the EU – although this deficit has decreased substantially since 1997, mainly due to Slovakia and the Czech Republic, for whom a constant trade deficit turned into a surplus in 1997/98. Candidate countries' automotive imports declined in 1999 in comparison to 1998. This was mainly the result of declining trade in the

Baltic states, Slovakia, Turkey, Bulgaria and Romania (graph 3). This drop reflects partly repercussions of the Russian financial crisis and the Kosovo conflict, which had a dampening effect on growth and trade in general throughout the whole region.

On the other hand, table 1 shows how the share in road vehicles (and parts) grew in importance in the trade of each Candidate country with the EU. In 1999 for example, exchanges involving the automotive industry reached almost a quarter of total trade between the EU and Slovakia (imports + exports), compared to a mere twentieth in 1993. Furthermore, the EU's share in total road vehicles (and parts) traded by the Candidate countries regularly increased from 1993 onwards to almost 70% in 1997. This rate stood at 88% for Slovenia and 79% for Poland in 1998 (table 2) and close to 78% if we consider the five central European countries as an entity in 1998.

Six countries stand out

This rapid increase in automotive trade was mainly due six of the thirteen Candidate countries – namely Poland, Czech Republic and Hungary followed by Turkey, Slovakia and Slovenia (sorted by decreasing order of magnitude). In 1999, these five central European countries plus Turkey were behind most road vehicles (and parts) traded between the EU and Candidate countries (graph 3). However, a less continuous evolution of trade with Turkey suggests that the nature of these flows was somewhat different.

² See 'Trade of Central European Countries', Statistics in focus, 02/1999, Eurostat. See also 'Central European Countries-Trade by product group', Statistics in focus, 03/2000, Eurostat.

The case of Turkey

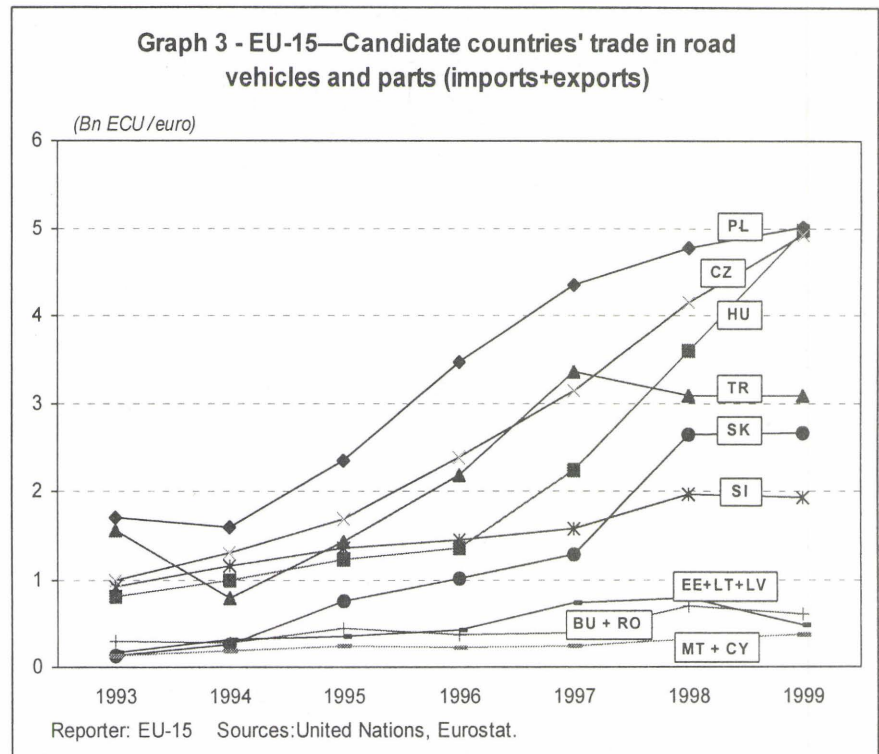
Indeed, Turkey's trade related to the automotive industry can be distinguished from that of many other Candidate countries' – simply for its geographical orientation. The share of vehicles traded with the EU in percentage of total road vehicles traded by Turkey was less than for many of the CECs (slightly more than 65% versus 75-90%) but its partners were geographically more diversified: Asia, Middle East and NIS play a key role in Turkish trade in road vehicles. As in some of the other Candidate countries, there is a huge components industry which supplies a multitude of components and parts to the main industry.

After an economic crisis which took its toll in 1994, Turkish trade in road vehicles with the EU almost tripled. However, figures fell again in 1998 while they continued to surge for the large Candidate countries: Poland, Czech Republic, Hungary. Although most countries felt the Asian and Russian crises (which erupted in 1997 and 1998 respectively), Turkey's automotive industry in particular suffered – probably due to its trade geographical orientation. Nevertheless, in value terms, Turkey ranked 4th as trading partner for the EU in 1999³ for road vehicles.

Other Candidate countries were far less involved in the automotive industry. The two small island economies of Malta and Cyprus⁴ for example had their economic interests in other industries, such as tourism. Estonia embraced trade in electronics. Similarly the other Baltic States, Romania and Bulgaria all had other interests outside the automotive industry (table 1).

³ See 'Turkey and the EU', *Statistics in focus*, 05/2000, Eurostat. See also 'Transformation Efforts of Turkish Automobile Industry for the Global Markets', *Université d'Evry: Gerpisa: Actes 20-Article 1*.

⁴ See 'Malta and the EU' *Statistics in focus*, 07/2000, Eurostat and 'Cyprus and the EU' *Statistics in focus*, 06/2000, Eurostat).



Key role of FDI

How did the road vehicles (and parts) become within such few years one of the leading division of products traded by several large central European countries (Poland, Czech Republic, Hungary, Slovakia and Slovenia) with the EU?

Reasons can be found in the large influx of foreign direct investment into the region. In general, foreign direct investment (FDI) may be linked both to exports and imports: FDI increases production capacities and therefore export capacities (if the main motivation of the firm is not to take advantage of the domestic market). Moreover foreign firms may have a high propensity to import. This could explain that a positive contribution to the trade balance is not automatically linked with FDI flows, i.e. it may even contribute to a deterioration of the trade balance in the short run. Nevertheless, one may discuss the existence of such systematic links between foreign direct investment and evolution of trade⁵, but the case is quite clear for

⁵ See Michael Freudenberg and Françoise Lemoine, 'Les pays d'Europe centrale et orientale dans la division du travail en Europe', *Economie internationale*, n°80, 4eme trimestre 1999.

many of the Candidate countries.

The rapid growth of FDI since the beginning of the 90's gradually reshaped the pattern of comparative advantages and thus of trade, especially in the automotive industry. Investors saw Central Europe as a lower factor cost area close to major markets, with a skilled labour force and a potential domestic market. Customers were expected to have a strong aspiration to own a car. Countries also attracted investors by using special tariff policies and subsidies schemes⁶. This was particularly the case in Hungary with creation of customs-free zones in which car manufacturers were encouraged to locate manufacturing or warehouse sites⁷. Most investments were done via privatisation of former state owned enterprises, which attracted Western investors⁸. For example,

⁶ See also *Economic Survey of Europe, 2000 n°1*, Secretariat of the ECE, Geneva.

⁷ See Rob van Tulder and Winfried Ruigrok, 'European Cross-National Production Networks in the Auto Industry: Eastern Europe as the Low End of European Car Complex', *BRIE Working Paper 121*, May 1998.

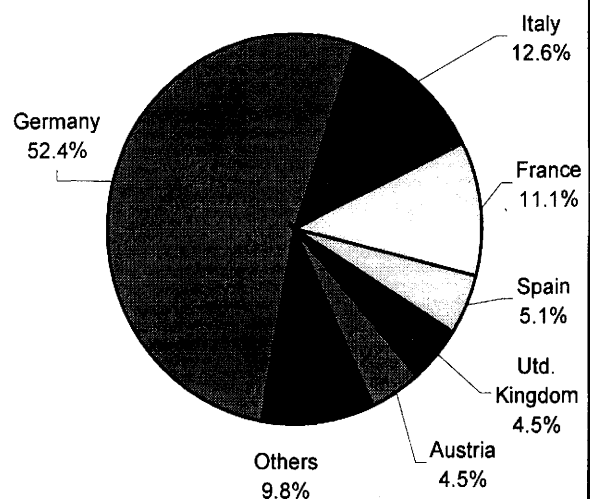
⁸ 'Skoda Auto: impact on Czech Trade Balance', *IPB Bank, Economic Focus Report*, March 2/2000.

Table 3 EU Member states–Candidate countries' trade in road vehicles and parts (Imports + Exports) (Mio ECU / euro)

Reporter	1993	1994	1995	1996	1997	1998	1999
EU-15	6 828	6 934	9 819	12 875	17 299	22 009	24 035
UEBL	317	370	445	542	681	775	864
DK	52	63	70	113	130	147	145
D	2 974	2 934	4 376	5 888	8 475	11 342	12 572
EL	43	49	62	75	95	84	96
E	176	241	331	535	850	1 052	1 215
F	1 156	1 205	1 243	1 668	1 766	2 399	2 670
IRL	2	3	7	17	21	24	44
I	1 157	1 015	1 691	2 005	2 420	2 733	3 011
NL	184	227	261	335	473	642	590
P	9	14	21	26	53	70	76
A	226	216	456	528	633	913	1 086
FIN	48	67	69	88	134	157	146
S	140	153	231	242	424	547	432
UK	344	377	556	814	1 145	1 123	1 089

Reporters: EU Member States. Sources: United Nations, Eurostat.

Graph 4 Share of EU Member states in EU–Candidate countries' trade in road vehicles (and parts), 1999



How to read the graph? e. g., in 1999, Germany accounted for half of the road vehicles (and parts) trade between EU-15 and Candidate countries.

Volkswagen and the Skoda Auto privatisation had a great impact on the Czech trade balance.

Modernising these factories also helped in gaining comparative advantages in such a short time span. Interestingly, during two years (1991 to 1992) around 90% of the CECs' car production capacity was acquired by only four car manufacturers: Volkswagen, General Motors (Opel), Fiat and Renault. In 1998, almost all the existing car production capacity had been taken over, or was controlled by Western car makers⁹. Nowadays, the four car makers mentioned above together with Daewoo dominate the automotive industry of the region. The Suzuki car plant in Hungary was one of the few belonging to a Japanese manufacturer. Being cautious with investments in the CECs, Japanese car makers came later to the region. There seems to be more interest lately, as reports of a possible involvement of

Toyota in Poland¹⁰ prove.

France, Italy and Germany main partners

With whom did the Candidate countries exchange goods in the EU? Below we take a closer look at trade relations between each EU country and the Candidate countries considered as a single entity.

Within the EU, Germany, Italy and France were the top partners for the ongoing east- and west bound trade (graph 4 and table 3). They contributed to more than three quarters of the total automotive trade between the two sets of countries. German trade increased more than fourfold between 1993 and 1999, while French and Italian trade figures more than doubled over the same period. Germany was by far the most important EU player — it accounted for more than half of total automotive related trade between the EU and the thirteen Candidate countries.

A breakdown of the data at SITC group level¹¹ shows that (graph 5) finished cars (SITC 781) dominated exports to France and Italy. Furthermore, parts and accessories (SITC 784) clearly dominated imports from Italy as well as imports from Germany. Over the period, the Candidate countries imported more and more parts and accessories from Italy and Germany, whilst they imported increasing numbers of finished cars from France.

Important suppliers of parts and accessories

Trade between the five largest central European countries ("largest" in terms of trade related to the automotive industry — Czech Republic, Hungary, Poland, Slovenia, Slovakia) and the EU had several interesting aspects. For example, did these transition countries become exporters and importers of vehicles or also important suppliers of parts and accessories to the European

⁹ See: Rob van Tulder, Winfried Ruigrok, doc. cited on footnote 7, p2-11-12. See also: M. Freudenberg and F. Lemoine, CEPII, document de travail, cited on footnote 5.

¹⁰ 'The Automotive industry in central and eastern Europe: perspective to 2005', Economist Intelligence Unit, 2000.

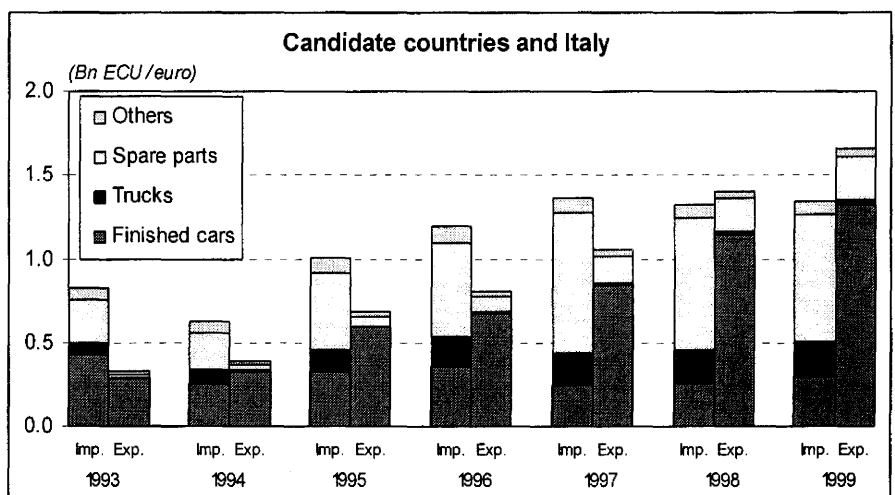
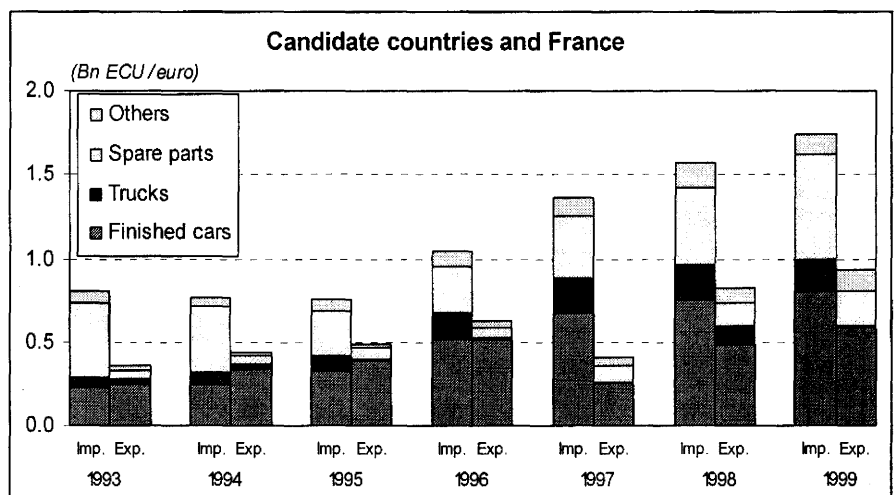
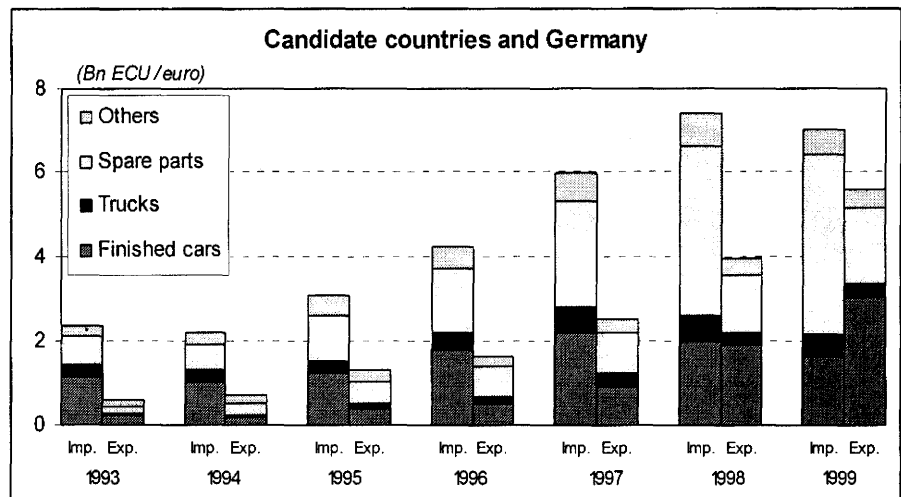
¹¹ See Methodology page 7.

automobile industry? What were, at the SITC group level, the main products traded by the five countries mentioned above with the EU? Graph 6 shows that there has been very little growth in eastbound EU exports of both finished cars (SITC 781) and trucks (SITC 782) between 1995-99. This stands in sharp contrast to the enormous increase in automotive parts (SITC 784) sent eastwards over the same period, which almost tripled in value terms. The other way around, there has been significant growth of westbound exports of finished cars from the Candidate countries into the EU. In addition, EU imports of automotive parts fabricated in central Europe have also increased substantially – roughly in proportion to the rise in imports of finished cars. In terms of a trade balance, a constant deficit has been recorded in the spare parts trade. On the other hand the five CECs mentioned above became net exporter of finished cars to the EU in 1998. This trade surplus even increased in 1999 in comparison to the year before.

This suggests that the countries in question assembled vehicles using parts received from the EU and then sent back these finished vehicles. It also suggests that central Europe has also become an important supplier of parts and accessories for the EU car industry.

Trivially, demand for automotive components is linked to the level of motor vehicles production and to the demand for replacement parts. However, the car component manufacturing industry was also submitted to a changing strategy in the car making world, namely to out-source much of component manufacturing¹² under intense price competition. In addition, component manufacturers were encouraged to invest in central Europe in order to supply nearby production sites with

Graph 5 - Candidate countries' evolution of trade in road vehicles



Imports from Germany, France or Italy to Candidate countries, exports from Candidate countries to Germany, France or Italy.

Reporters: Germany, France and Italy. Source: Eurostat.

high quality spare parts¹³.

¹² See 'Panorama of European Business', Eurostat, 2000.

¹³ See Frédéric Bourassa, 'La restructuration du secteur automobile en Europe Centrale', in *Problèmes économiques*, n°2673, July 2000.

Table 4 - Road vehicles (and parts): main flows from Candidates countries to EU Member states (Mio ECU/euro)

Flow	Exports							Imports						
	1993	1994	1995	1996	1997	1998	1999	1993	1994	1995	1996	1997	1998	1999
PL-F	31	24	31	82	30	61	77	109	90	158	318	332	443	435
PL-I	261	227	314	373	541	605	604	265	226	352	468	585	526	571
PL-D	170	203	317	356	522	594	759	472	416	632	1 132	1 334	1 414	1 343
SI-F	268	355	370	387	187	494	237	251	318	228	279	324	374	365
SI-I	29	69	138	138	227	231	205	146	100	143	98	100	112	151
SI-D	53	51	56	104	272	223	395	121	160	232	233	239	275	286
HU-F	1	2	7	17	17	21	22	24	52	59	50	85	114	138
HU-I	7	9	11	23	28	57	148	72	79	75	77	86	129	146
HU-D	82	127	257	277	358	629	1 323	361	429	392	427	981	1 753	2 183
CZ-F	30	30	49	68	110	171	254	34	76	98	163	183	159	203
CZ-I	22	29	37	57	156	223	167	57	47	83	196	149	127	140
CZ-D	222	224	364	475	716	1 135	1 577	345	476	598	777	935	1 054	1 148
SK-F	1	2	7	27	15	6	6	8	10	20	39	44	51	41
SK-I	1	34	56	37	39	214	352	18	16	17	28	29	22	20
SK-D	34	57	205	316	492	1 185	1 152	49	105	284	360	454	819	675
TR-F	18	21	15	34	40	65	328	317	161	119	132	310	320	439
TR-I	8	12	131	174	61	70	181	225	115	276	264	338	304	213
TR-D	37	45	59	69	93	115	285	706	289	485	872	1 405	1 243	803

Exports to Germany France or Italy. Imports from Germany, France or Italy.

Reporters: F (France), I (Italy), D (Germany). Source: Eurostat.

Few important exporters

70% of total automotive trade between the Candidate countries and the EU in 1999 (table 4) was carried out between Germany, France and Italy on the one side and the Czech Republic, Hungary, Poland, Slovenia, Slovakia and Turkey on the other.

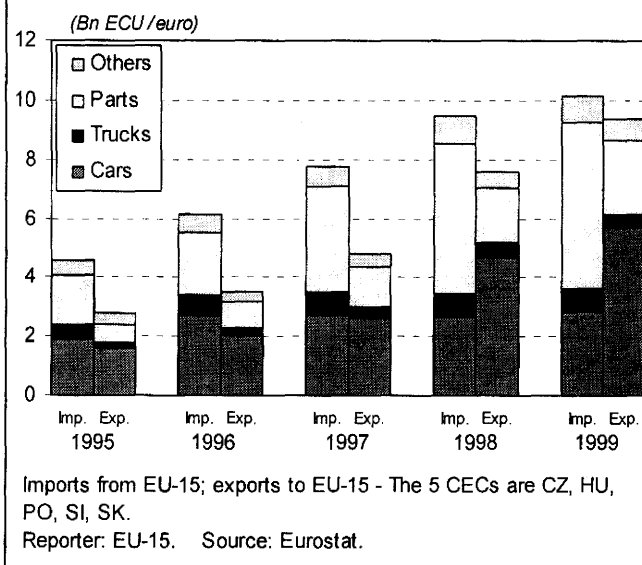
One can note that after 1996 trade amongst the countries strongly intensified, in particular between the partners mentioned above. Also, Germany became more and more the prime partner for most automotive related trade with the six Candidate countries. For most of them, trade with Germany increased regularly during most of the period 1993-99 (although with exceptions).

Hungary, Slovakia and the Czech Republic all recorded some stunning growth figures in their commercial exchanges with Germany, in particular between 1997-99 for both exports and imports. Apart from Germany, Poland's trade with Italy increased relatively strongly (more than doubled between 1993 and 1999), as did trade between Turkey and France (more than a twofold increase between 1993 and 1999). Also, Slovenia had long standing links with France and trade flows in road vehicles (and parts) between the two countries were often more substantial than those observed between Slovenia and Italy or Slovenia and Germany, for example.

These geographical links often result from direct investment and thus investment decisions taken in the early nineties, as explained previously, but may also be explained through historical ties.

For example, Fiat has been present in Poland since 1966 and General Motors (in particular through its German based subsidiary, Opel) has been present in Hun-

Graph 6 - The 5 CECs' main car traders and EU-15: trade in road vehicles



gary for over 30 years now. Renault has co-operated with automobile producers in Slovenia since 1972. Thus historic ties certainly helped when these large multinationals together with Volkswagen of Germany acquired approximately 90% of total existing car production capacity in the central Europe¹⁴ between 1991-92.

¹⁴ See: Rob van Tulder, Winfried Ruigrok, doc. cited on footnote 7.

Table 5 - Who traded what and with whom in 1999 ?

(%)

Partner	Road vehicles (SITC 78)				Motor cars (SITC 781)				Car parts (SITC 784)			
	Exports		Imports		Exports		Imports		Exports		Imports	
	Country of destination	Share	Country of origin	Share	Country of destination	Share	Country of origin	Share	Country of destination	Share	Country of origin	Share
CZ	D	79	D	77	D	75	D	63	D	87	D	88
	F	13	F	14	I	14	F	24	F	11	F	8
	I	8	I	9	F	11	I	14	I	2	I	4
HU	D	89	D	88	D	87	D	63	D	92	D	97
	I	10	I	6	I	12	F	23	I	5	I	2
	F	1	F	6	F	1	I	15	F	3	F	1
PL	D	53	D	57	I	77	D	46	D	62	D	60
	I	42	I	24	D	18	F	45	I	32	I	35
	F	5	F	19	F	5	I	9	F	7	F	5
SI	D	47	F	45	D	44	D	44	D	58	F	73
	F	28	D	36	F	28	F	34	F	35	D	14
	I	24	I	19	I	28	I	21	I	8	I	13
SK	D	76	D	92	D	72	D	65	D	97	D	97
	I	23	F	6	I	28	F	35	F	2	F	2
	F	0	I	3	F	0	I	0	I	1	I	1
TR	F	41	D	55	F	53	D	73	D	48	F	40
	D	36	F	30	D	27	F	21	I	34	D	37
	I	23	I	15	I	19	I	6	F	18	I	24

How to read this table? In 1999, Germany accounted for 75% in the total export of motor cars (SITC 781) from the Czech Republic to Germany, France and Italy.

Reporters: D (Germany), F (France), I (Italy) Source: Eurostat.

A further rise in 2000

As pointed out above, Germany, France and Italy accounted for more than three quarters of total east-west automotive trade in 1999. Table 5 depicts how these three countries interacted with the six most important Candidate countries. For example, the Czech Republic, Hungary and Slovakia traded both cars and parts almost exclusively with Germany in 1999. One can notice that Hungary¹⁵ and Slovakia specialised in providing parts and accessories to Germany (97%). Turkey imported cars primarily from Germany in 1999. Although Germany was the prime trading partner for Poland, Slovenia and Turkey in 1999, a closer look reveals that France and Italy

were also important partners. Indeed, for Poland, Slovenia and Turkey, trade in finished motor cars with France and Italy was sometimes as important as with Germany. For example, Italy received an impressive percentage of assembled motor cars from Poland (77% of all assembled vehicles heading for Germany, France and Italy). The other way around, France send a substantial number of cars to Poland, while it was also the prime supplier of parts to Slovenia and Turkey.

Latest figures for 2000 suggest a further rise in automotive related trade.

¹⁵ See: "Automotive parts manufacturing in Hungary" Ministry of Economic Affairs, Hungary, February 2000.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Data sources: The analysis of bilateral trade between the EU and the Candidate countries for road vehicles (division 78 of the SITC) is based on figures reported by the EU Member States. All the data are according to the EU declarations (except for Table 2). They are stored in Comext database: EEC special trade domain for EU data, Comtrade domain for Austria, Finland and Sweden in 1993 and 1994 and Candidate countries data.

Goods classification: The analysis was done at division level and group level of the SITC revision 3.

Division 78 of the SITC: Road vehicles.

Product groups : **781** Cars: motor cars and other motor vehicles principally designed for the transport of persons (other than public type vehicles); **782** Trucks: motor vehicles for the transport of goods and special purpose motor vehicles; **783** Road motor vehicles, NES; **784** Spare parts: parts and accessories of the motor vehicles of group 722, 781, 782 and 783; **785** Motorcycles (including mopeds) and cycles, motorised and non-motorised, invalid

carriages; **786** Trailers and semi-trailers, other vehicles.

Manufactured goods: sections 5, 6, 7 and 8 of the SITC.

Country aggregates: EU: EU-15

Central european countries (CECs): Albania, Bulgaria, Hungary, Poland, Romania, Estonia, Latvia, Lithuania, Bosnia-Herzegovina, Croatia and Slovenia; Czech Republic, Slovakia, Serbia Montenegro and the FYROM.

Candidate countries (CC-13): Bulgaria (BG), Cyprus (CY), Czech Rep. (CZ), Estonia (EE), Hungary (HU), Latvia (LV), Lithuania (LT), Malta (MT), Poland (PL), Romania (RO), Slovakia (SK), Slovenia (SI) and Turkey (TR).

Statistical values: EU data CIF/FOB

In this report, 1 Bn euro= 1000 million euro

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