

1993: Recession in the motor vehicle market

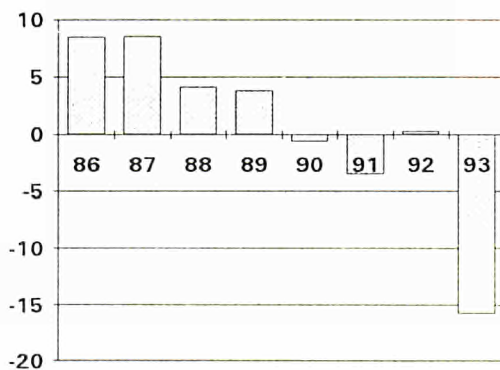
First registration of private and commercial vehicles

The internal market

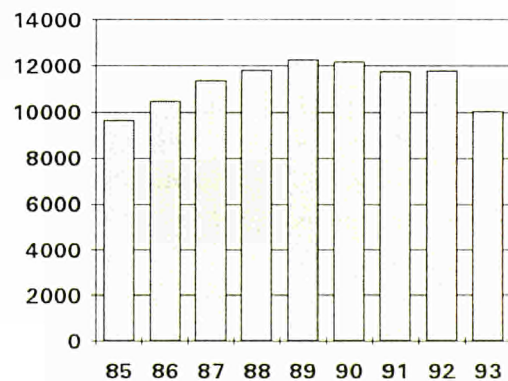
1993 has seen a marked downturn in sales of new vehicles. Sales of private and commercial vehicles have fallen by approximately -16% (EUR12) compared with 1992. This calculation is based on existing data covering about 80% of annual sales. Other available indicators show that the extent of the downturn will be amended when the remaining data (20% for 1993) are available. Analysis of monthly trends points to a variation of -14.7% for the whole of 1993.

EUR12

Annual variations(%)
(1993: on the basis of available data)



Number (1000)
(1993: estimate)



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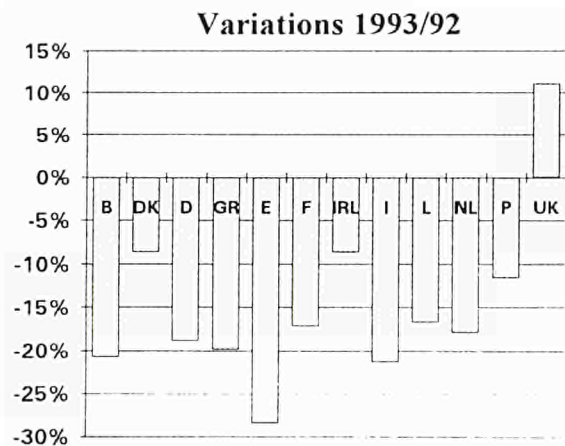
If we look at all the data for the period 1985-1993, different trends emerge. During 1985-1989, new vehicle sales increased by 4% to 8.5% annually. In contrast, the period 1990-1992 saw slight decreases in sales, which then fell more steeply in 1993. The number of sales estimated for 1993 is still greater than in 1985 (10. million compared with 9.6 million) but is a good deal lower than in the intervening years.

Year	Registrations EUR-12	Annual variations
1985	9643986	
1986	10463163	8,5%
1987	11354609	8,5%
1988	11819720	4,1%
1989	12268145	3,8%
1990	12190728	-0,6%
1991	11763690	-3,5%
1992	11796110	0,3%
1993		* -16,0%
1993	** 10058081	** -14,7%

* On the basis of available data

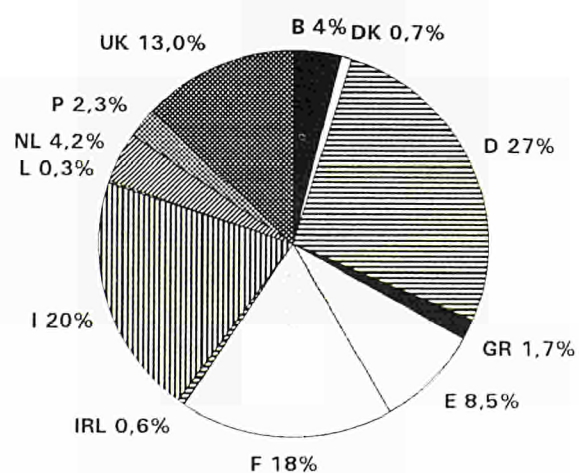
** Estimated figures for 1993

New vehicle registration (on the basis of available data) fell by -18.9% in Germany, -17.2% in France and -21.6% in Italy. The only increase is in the United Kingdom: 11%. In the other countries, the decreases vary between -28.4% in Spain and -8.7% in Ireland. However, the monthly trends point to a gradual improvement in most of the countries.



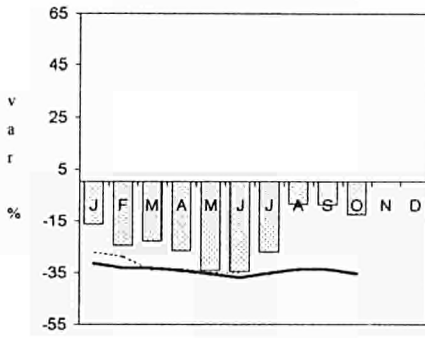
The structure of the internal market

Four countries (Germany, Italy, France and the United Kingdom) account for 77.5% of first registrations in 1992 (27%, 20%, 18% and 13% respectively). Spain follows with 8.5% of the market, while the remaining countries vary between 4.2% for the Netherlands and 0.3% for Luxembourg.

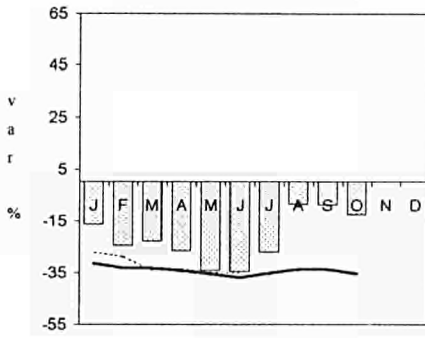


FIRST REGISTRATION OF PRIVATE AND COMMERCIAL CARS
1993

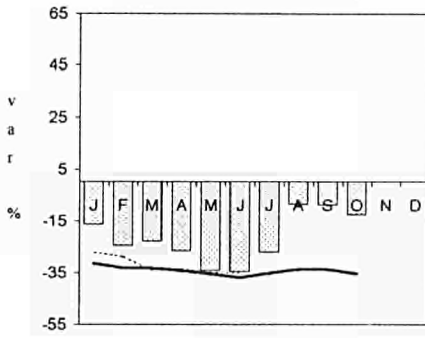
BELGIQUE - BELGIE



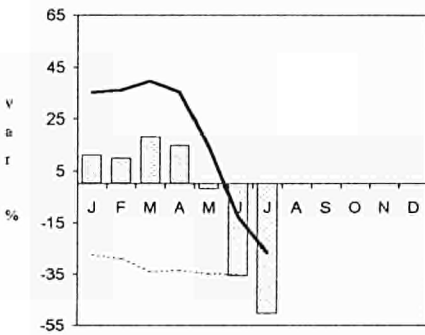
DANMARK



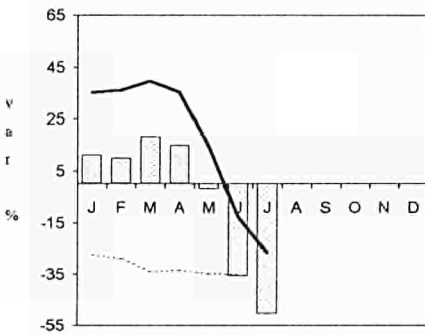
DEUTSCHLAND



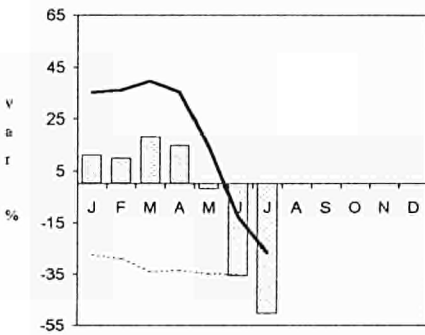
HELLAS



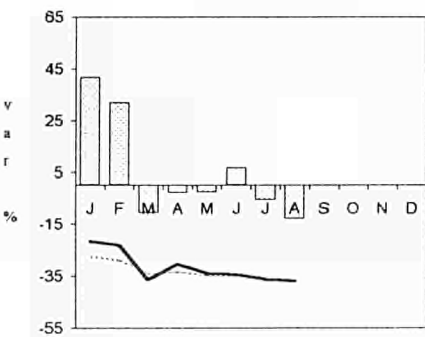
ESPANA



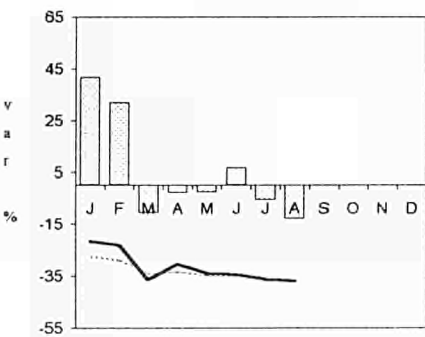
FRANCE



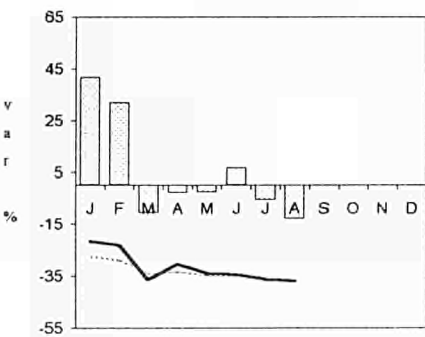
IRELAND



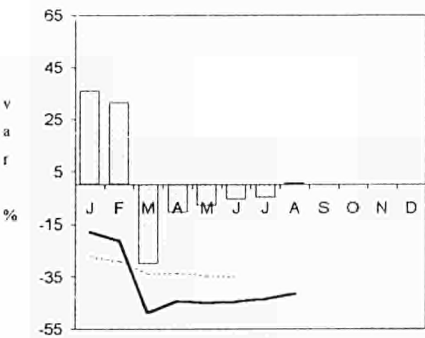
ITALIA



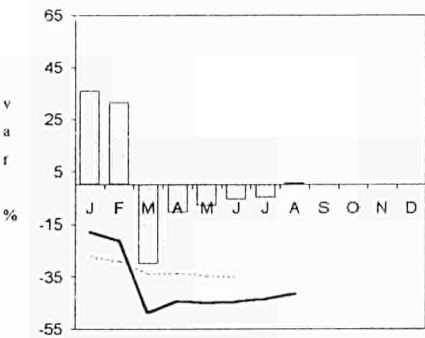
LUXEMBOURG



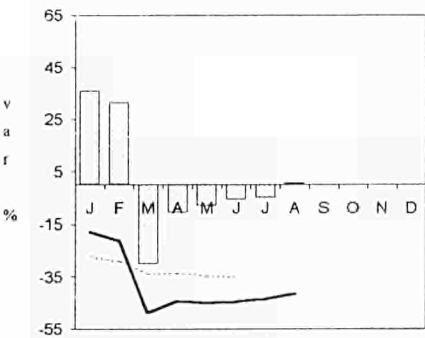
NEDERLAND



PORTUGAL



UNITED KINGDOM



□ % change over 12 months, adj., 3-MMA
left-hand scale

----- EUR, adj., 3-MMA
right-hand scale

———— National, adj., 3-MMA
right-hand scale

First registration of private and commercial motor vehicles 1993 (1000)

Year	B	DK	D	GR	E	F	IRL	I	L	NL	P	UK	EUR12
1985	385	160	2419	75	558	1779	60	1760	30	510	85	1824	9644
1986	405	164	2774	69	719	1903	58	1831	33	569	101	1837	10463
1987	426	125	2923	51	948	2129	54	2002	33	559	110	1985	11355
1988	443	89	2847	58	1057	2217	62	2184	34	481	194	2155	11820
1989	461	78	2832	86	1149	2274	78	2362	34	494	177	2241	12268
1990	499	81	3059	115	1004	2309	83	2347	39	502	210	1942	12191
1991	489	84	3429	168	914	1970	69	2341	44	496	223	1537	11764
1992	486	85	3152	199	1008	2106	70	2355	38	492	277	1528	11796

Annual variations (%)

Year	B	DK	D	GR	E	F	IRL	I	L	NL	P	UK	EUR12
1986	5,3	2,6	14,7	-7,5	29,0	7,0	-3,5	4,0	10,4	11,5	19,2	0,7	8,5
1987	5,2	-23,5	5,4	-26,5	31,8	11,9	-7,3	9,4	0,0	-1,8	8,7	8,1	8,5
1988	4,0	-29,4	-2,6	13,5	11,5	4,2	14,6	9,1	3,7	-14,0	76,1	8,5	4,1
1989	4,0	-11,5	-0,5	48,5	8,7	2,6	26,8	8,1	1,4	2,8	-8,7	4,0	3,8
1990	8,1	3,2	8,0	34,7	-12,6	1,5	6,0	-0,6	12,6	1,5	18,8	-13,3	-0,6
1991	-1,9	4,0	12,1	45,3	-9,0	-14,7	-17,5	-0,3	14,0	-1,1	6,1	-20,8	-3,5
1992	-0,7	1,5	-8,1	18,7	10,3	6,9	2,1	0,6	-14,3	-0,7	24,1	-0,6	0,3
1993*	-20,8	-8,7	-18,9	-19,9	-28,4	-17,2	-8,7	21,3	-16,7	-18,0	-11,6	11,0	-15,8

* : On the basis of available data

Number of months for which data are available in 1993

Year	B	DK	D	GR	E	F	IRL	I	L	NL	P	UK	EUR12
1993	10	10	10	7	6	10	8	10	8	8	10	8	

Methodological notes

Private and commercial vehicles: Road motor vehicles for the transport of passengers, with seats for a maximum of 9 people, including the driver. This also covers hire cars and mixed-use vehicles (for transporting goods in addition to or instead of passengers).

First registration: corresponds to the number of vehicles registered for the first time by the reporting country during the reference period.

Source: Monthly Bulletin: Services and Transport - Short-term trends

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