



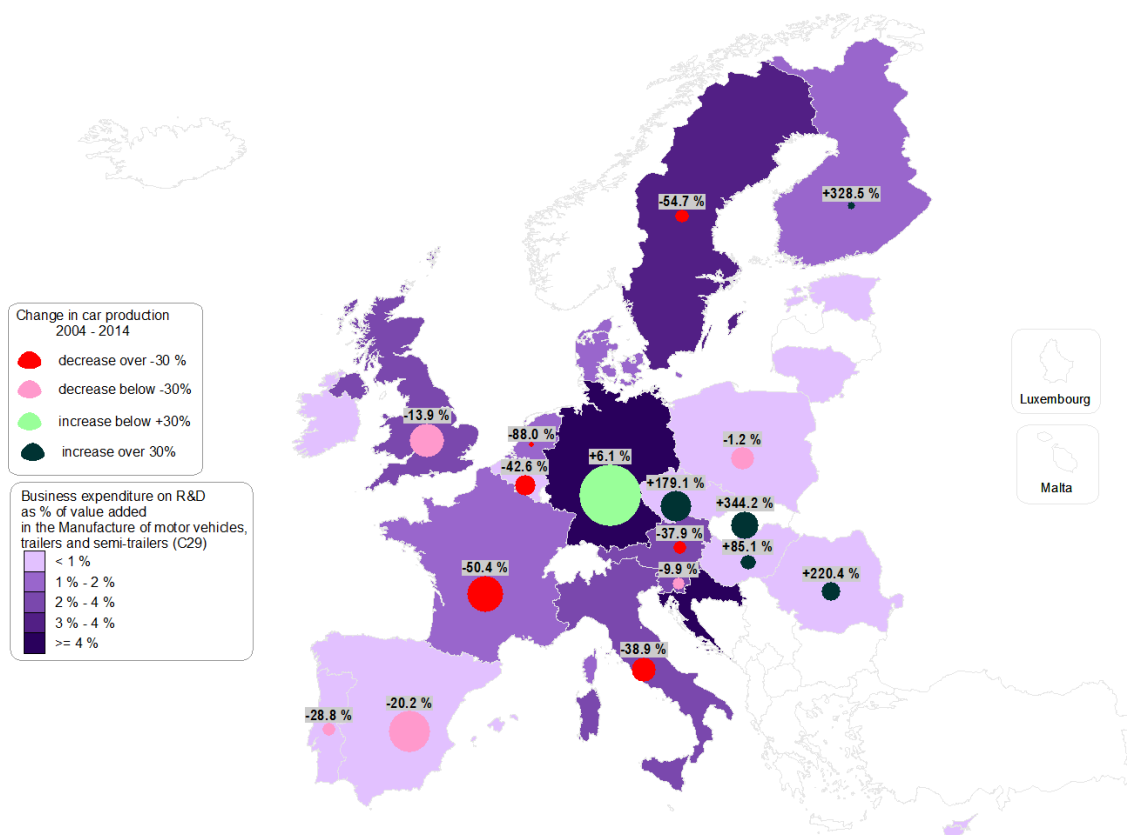
European Commission

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NEWSLETTER on STI Data and Indicators

DG RTD, A4, Analysis and monitoring of national research policies

1. OICA statistics on motor vehicle production



Source: DG Research and Innovation - Unit for the Analysis and Monitoring of National Research Policies
Data: Eurostat, Organisation Internationale des Constructeurs d'Automobiles (OICA)
Note: Size of the bubbles correspond to the number of vehicle sold in 2014.

Cars and other motor vehicles are classified as medium-high tech (but contain an increasing share of high-tech products, including ICT). Their production represents 7.6% of EU manufacturing jobs (2.3 million) 9% of value added in manufacturing (150 billion €) and a production value of over 700 billion € per year. OICA (the International Association of Motor Vehicle Manufacturers) published in spring its motor vehicle production data (cars and commercial vehicles) for 2014 (see Annex 1). In 2014 motor vehicles production increased in the EU by 4.6% to reach 17 million, while the

world total increased by only 2.6% to reach 90 million.

The EU was in 2014 the world's largest producer of motor vehicles after China (23.7 million, +7.3%), followed by the US (11.7) and Japan (9.8). Looking at the trend over the last decade and at cars reveals a shift of production in the EU from southern and western Europe (an exception being Germany) to central and eastern Europe, with the strongest growth in Slovakia, the Czech Republic and Romania.

Slovakia, also nicknamed 'Detroit of the East' has now the highest car production per capita worldwide (0.2 cars per inhabitant/year), while the Czech Republic produces three times as many cars as Italy, once a leading EU producer. However, all major car factories in EU-13 countries are today foreign-owned (see table below). Some locally owned bus/truck manufac-

turers (Czech Republic: Sor, Hungary: Ikarus Romania: Roman, Poland: Solaris) though still exist, plus small scale craft production of cars. Since business R&D expenditure mostly takes place in the headquarter countries of motor vehicle manufacturers, EU-13 countries still have a relatively low R&D intensity of their motor vehicle industry.

Car production in 2013 (in 1000) in EU-13 countries by headquarter of manufacturer (source OICA)

Headquarter Production	Germany	France	Italy	USA	Japan	Korea
Czech Republic	Volkswagen (Skoda) 586	PSA (Peugeot, Citroën) 116			Toyota 69	Hyundai 303
Hungary	Volkswagen (Audi) 43, Daimler 109				Suzuki 161 (plus Fiat 5)	
Poland	Volkswagen 154		Fiat 244	GM (Opel) 108		
Romania		Renault (Dacia) 343		Ford 68		
Slovakia	Volkswagen (VW) 281, Audi 64	PSA (Peugeot, Citroën) 232				Hyundai (KIA) 313
Slovenia		Renault 89				

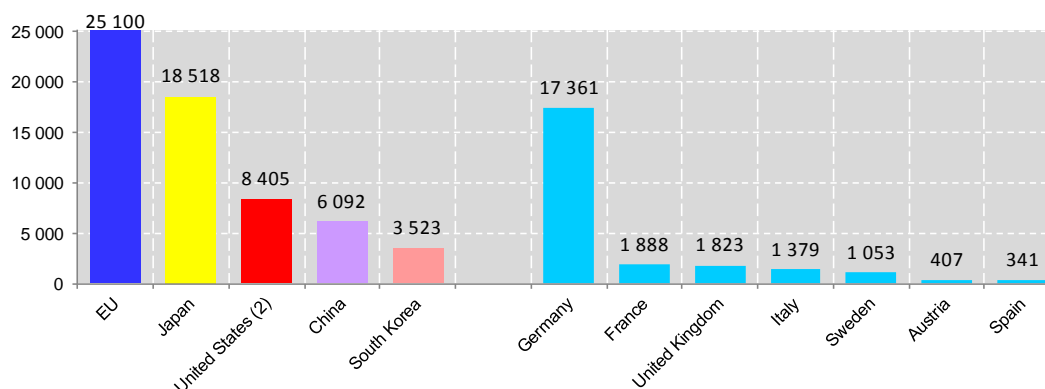
In addition: Great Wall company (China) assembling ca. 1000 cars in Bulgaria (in cooperation with Litex company at Lovech) Foreign bus producers in EU-13: Poland: Volkswagen (MAN, Scania), Volvo; Czech Republic: IVECO.

2. Data on R&D expenditure in the motor vehicle industry

Eurostat data on business R&D expenditure in the motor vehicle industry show Germany being by far the biggest EU spender in this area. The German motor vehicle industry spent over 17 billion Euro on R&D in 2012, a much higher amount compared to France (1.9), the UK (1.8) or Italy (1.4) and representing almost 70% of EU business R&D expenditure in the motor vehicle sector and over 20% of the world total (which amounted to about 80 billion € in 2012).

This high level of R&D spending of the German automobile industry has contributed to its expansion in the last decade. According to the R&D Industrial Scoreboard Volkswagen (11.7 billion €) was in 2013 the company with the highest R&D spending worldwide, while the top 15 R&D spenders included two other German car manufacturers (Daimler and BMW) and two from outside the EU (Toyota, ranked 7th, and General Motors).

Business expenditure on R&D in the manufacture of motor vehicle, trailers and semi-trailers (million of Euros), 2012⁽¹⁾



Source: DG Research and Innovation - Unit for the Analysis and Monitoring of National Research Policies

Data: Eurostat, OECD, The Alliance of Automobile Manufacturers (CAR - Centre for Automotive Research)

Note: (1) Elements of estimation were involved in the compilation of the data (EU is an estimate based on available data).

AT, SE, CN, US: 2011.

(2) US spending trends (in million of Euros): 19 000 (2000), 12 861 (2005), 7 619 (2010) and 8 405 (2011).

ANNEX 1: OICA 2014 Motor vehicle production statistics

2014 PRODUCTION STATISTICS				
Country	Cars	Commercial vehicles	Total	% change
Argentina	363,711	253,618	617,329	-22.0%
Australia	145,607	34,704	180,311	-16.5%
Austria	136,000	18,340	154,340	-7.3%
Belgium	481,637	35,195	516,832	2.6%
Brazil	2,314,789	831,329	3,146,118	-15.3%
Canada	913,533	1,480,357	2,393,890	0.6%
China	19,919,795	3,803,095	23,722,890	7.3%
Czech Rep.	1,246,506	4,714	1,251,220	10.4%
Egypt	17,830	9,190	27,020	-30.8%
Finland	45,000	35	45,035	484.6%
France	1,495,000	322,000	1,817,000	4.4%
Germany	5,604,026	303,522	5,907,548	3.3%
Hungary	224,630	2,400	227,030	2.1%
India	3,158,215	681,945	3,840,160	-1.5%
Indonesia	1,011,260	287,263	1,298,523	7.6%
Iran	925,975	164,871	1,090,846	46.7%
Italy	401,317	296,547	697,864	6.0%
Japan	8,277,070	1,497,488	9,774,558	1.5%
Malaysia	547,150	49,450	596,600	-0.8%
Mexico	1,915,709	1,449,597	3,365,306	10.2%
Netherlands	0	29,807	29,807	2.1%
Poland	473,000	120,904	593,904	0.6%
Portugal	117,744	43,765	161,509	4.9%
Romania	391,422	0	391,422	-4.8%
Russia	1,683,677	202,969	1,886,646	-13.6%
Serbia	9,980	695	10,675	-2.1%
Slovakia	993,000	0	993,000	1.8%
Slovenia	118,533	58	118,591	26.5%
South Africa	277,491	288,592	566,083	3.7%
South Korea	4,124,116	400,816	4,524,932	0.1%
Spain	1,898,342	504,636	2,402,978	11.1%
Sweden	154,173	N.A.	154,173	-4.3%
Taiwan	332,629	46,594	379,223	12.0%
Thailand	742,678	1,137,329	1,880,007	-23.5%
Turkey	733,439	437,006	1,170,445	4.0%
Ukraine	25,941	2,810	28,751	-43.0%
UK	1,528,148	70,731	1,598,879	0.1%
USA	4,253,098	7,407,601	11,660,699	5.4%
Uzbekistan	245,660	0	245,660	-0.4%
Others	554,845	107,240	662,085	2.9%
Total	67,525,346	22,222,084	89,747,430	2.6%

More info: <http://www.oica.net/category/production-statistics/>

Calendar of data releases and indicator based publications

Update of: 22/07/2015 (grey= already published)

2015	Eurostat data updates	Commission indicator based reports	Data and indicator based reports other organisations
January			
February	GBAORD final (2013) Tertiary attainment (2014, prov.) High growth enterprises data (provisional, 2013) IPR (patent 2012), Community Trademarks (2013), RCD (2013)	Winter forecast (ECFIN)	European Patent Office , EPO annual results (2014)
March	R&D intensity (2013 update)	Europe 2020 publication (ESTAT)	Times Higher Ed. World Reputations Ranking OICA world motor vehicle production data
April	Education headline indicators (LFS)	Skills forecast (Cedefop)	OECD R&D expenditure data
May	High tech trade (2014) Venture capital (2014) Education enrolment, graduates	Innovation Union Scoreboard (GROW) Spring Forecast (ECFIN)	IMD World Competitiveness Yearbook European Venture Capital Association (EVCA) 2014 European Private Equity Report
June	Education spending		
July	IPR (Patents, 2012), Community Trademarks (2014), RC Designs (2014)		UNESCO UIS STI stats release
August			Academic Ranking of World Universities (Shanghai)
September	GBAORD (2014 preliminary) Knowledge intensive activities (2014) Employment high-tech (2014) HRST (stocks and job mobility, 2014) Final high growth enterprise data (2013)		WEF Global Competitiveness Report WIPO/Cornell/INSEAD Global Innovation Index OECD Education at a Glance
October		European Competitiveness report (GROW)	World Bank Doing Business OECD STI Scoreboard (2-yearly) BDI/Telekom Innovation Indicator
November	R&D intensity (2014 preliminary, 2013 final) Economic data on high-tech (2014) HRST (education inflows, 2013)	Education Monitor (EAC) Autumn Forecast (ECFIN) Industrial R&D Investment Scoreboard (JRC) Annual Growth Survey (ECFIN)	Top500.org: Top 500 Supercomputer list
December	ICT household data (2015) ICT enterprise data (2015) IPR Statistics (patents 2013), CTM (2014), RCD (2014)	SheFigures (3-yearly (RTD) Joint Employment Report (EMPL)	WIPO World Intellectual Property Indicators

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