

# Egypt Autos Report Q4 2015

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## Abstracts

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**BMI View:** Without marked improvements in private consumption fundamentals such as employment growth metrics and credit growth indicators, we have revised down our vehicle sales forecast for 2015 to a decline of 6.1% followed by a 4.2% recovery in 2016 but volumes will not surpass their 2014 levels until 2017. Less promising demand for commercial vehicles also forms part of our downbeat view, after demand from heavy construction industries falls after the large scale Suez dredging activities end.

In addition to this market decline we also anticipate a shake-up in the country's competitive landscape. The shake-up is taking place as a result of Egypt's FTA with the EU. Sales of imported vehicles are growing at a much faster rate than domestically-produced sales, which are actually contracting and imports now account for a bigger share of the market than they have previously. This has prompted Daimler to withdraw from its local assembly operations as vehicles imported from Europe are more cost-effective, but we do not believe this marks the beginning of a mass exodus from the country.

## Contents

BMI Industry View

SWOT

Political

Economic

Operational Risk

Industry Forecast

Production, Sales And Trade

Table: Autos Total Market - Historical Data And Forecasts (Egypt 2013-2019)

Table: Passenger Car Market - Historical Data And Forecasts (Egypt 2013-2019)

Table: Commercial Vehicle Market - Historical Data And Forecasts (Egypt 2013-2019)

Imports Claim Bigger Share

Lesson From Australia

Table: Egypt Total Market Sales By Brand, 2014

Outlook Still Bleak Despite Importer Outperformance

Production Threats

Macroeconomic Forecast

Table: Egypt - Components Of GDP (% Of Total)

GDP By Expenditure

Table: Egypt - Private Consumption Forecasts

Table: Egypt - Government Consumption Forecasts

Table: Egypt - Fixed Investment Forecasts

Table: Egypt - Net Exports Forecasts

Industry Risk Reward Index

Sub-Saharan Africa - Risk/Reward Index

Outperformers Are Production Hubs

Policy Not Always Positive

Weak Currency A Barrier To Improvement

Company Profile

Volvo

GB Auto

General Motors Egypt (GM Egypt)

Regional Overview

Table: Sub-Saharan Africa - Autos Production Investment

Kenya Builds On Hub Advantage

Slowly But Surely For Cameroon

Nigerian Policy Keeps Investment Coming In

Global Industry Overview

1. CURRENCY WEAKNESS HURTING AFRICAN GROWTH
2. INCREASING LOCAL CONTENT IN TROUBLE SPOTS
3. SUVs ROLLING ON
4. TECH/AUTOS LINES ARE BLURRING

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Egypt 1990-2025)

Table: Key Population Ratios (Egypt 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Egypt 1990-2025)

Table: Population By Age Group (Egypt 1990-2025)

Table: Population By Age Group % (Egypt 1990-2025)

Methodology

Industry Forecasts

Sector-Specific Methodology

Sources

Risk/Reward Index Methodology

Table: Automotive Risk/Reward Index Indicators And Weighting Of Indicators

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