

Spain Autos Report Q4 2015

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Abstracts

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BMI forecasts a 16.5% increase in vehicle sales in 2015 coming from a forecasted 15.0% increase in the passenger car segment and a 26.3% increase in the commercial vehicle (CV) segments. Past 2015, we forecast growth to taper off to a period of slower single digit growth after two years of double-digit growth, expanding by 2.4% in 2016 and averaging 4.7% annually from 2016 to the end of our five-year forecast period in 2019. Thus, we do not expect Spain's vehicle market to reach volumes similar to its pre-crisis levels above 2mn units over the next five years.

Spain's long-term sales outlook remains subdued owing to our weak private consumption outlook for the country. Spain's ageing vehicle fleet means that the country has the potential to boost new car sales growth over the next five years through a replacement cycle but we do not believe this will actually materialise. Spain's auto sector recovery is based on shaky foundations and still remains reliant on PIVE subsidies, which we currently expect to expire by end-2016.

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