

Vietnam Automobile Standard Report Q2/2017

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Abstracts

Global automobile production has continuously grown over years but the rate has decreased since reaching the peak of 5.45% in 2012. The largest automobile factories mainly concentrate in North America , Western Europe and East Asia. The Middle East, Southeast Asia, Southwest America and North Africa are expected to become the major car markets in the world in 2020.

The global auto sales reached 90.78 million items in 2015, increasing 2.0% compared to 2014, China and the United States still remained the two leading markets worldwide. North America grew 2.5%, Europe developed very slowly, while Russia and South America revealed signs of decline. Global automobile export increased slightly since 2012, but the growth rate was low, only about 3-4% due to the impacts from the European sovereign debt crisis and the maritime disputes between Japan and China .

Vietnam automobile industry is currently stopping at simple assembly. The average localization ratio is about 10%. Components and core parts requiring high technology for producing complex parts such as body, engine gearbox ... are hardly invested properly and most of which are imported.

Automobile assembly and manufacture has generally tended to grow strongly since 2013, while deeply slumped in 2011 - 2012. The reason is that after 2013, the economic recovery, along with the explosion of consumer lending, low and stable lending rates, government's policies supporting the development of the auto industry have driven the production of the sector. Since 2013, the automobile consumption in Vietnam has continuously increased over the years, making the market become more exciting with unprecedented high growth rates, particularly in 2015 (with the rate reaching 55.9%) and the first 3 months of 2016.

In the first quarter of 2016, Thailand overtook Korea and China to become the leading

market in supplying automobile for Vietnam. The reason is that pick-up truck models of automobile brands worldwide almost concentrate in Thailand, while consumption of them in Vietnam has tended to rise.

With the forecasted growth rate of 10-15% in the period of 2016 - 2020, the automobile industry will continue to grow strongly in the segment of locally assembled vehicles, meanwhile, the truck segment will slow down due to the demand balance.

The “Vietnam Automobile Industry Report Q2/2016” elaborated by Vietnam Industry Research and Consultant Jsc. (VIRAC) draws an all-around picture about the auto sector in Vietnam, brings to readers a clear insight about the historical and current developing trends of the industry by categories: materials, production – consumption, export – import, price movement and distribution system. Specifically, the report analyzes the economic situation in general and the auto industry in particular through the latest data updated to Q2/2016, beside the forecasts about the output, scale and expanding trend of the sector in the future. The report also mentions about related products such as trucks, cars, buses, specialized vehicles, etc. It also give detail information about large businesses in the industry such as Truong Hai, Toyota or Ford, etc. through analyzing their financial statements, technology status and market shares in order to position and identify the level of competitiveness among firms in the market.

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