



## ◆ Update on Anti-dumping Cases Concerning Taiwan & China in H1 2013

### March 12: EU Made a Final Antidumping Determination on Taiwan/China Stainless Steel Fasteners and Parts

According to the determination, the substantial rise in products imported from Thailand and Malaysia was due to the increased domestic capacity in both nations, which indicated that circumvention act did not exist in both nations. However, the act existed in the products imported from the Philippines, and EU decided to impose a 23.6% antidumping duty on suspected products imported from the Philippines.

### April 22: Canada Made an Initial Anti-dumping/Antisubsidy Determination on Galvanized Steel Wire from China, Israel, and Spain

CBSA determined that the dumping margin of Sunny Loan Top Co., Ltd was at 45.1%, and Tianjin Huayuan Times Metal Products Co., Ltd at 51.7%. The margin for China was 64.8% in general. The subsidy rate for Sunny Loan Top Co., Ltd was 15.0%. The subsidy rate for China was 15.0% in general.

### May 14: EU Embarked a Mid-term Review on China's Stainless Steel Fasteners

Given the application from Malaysian Precision Manufacturing SDN BHD, EU initiated the review, which focused on the anti-circumvention case on stainless steel fasteners made in China and imported from Thailand (whether or not the products were labeled as Thai origin).

### May 28: The EU Issued an Expiry Date of Anti-dumping Measures on China Stainless Steel Fasteners

According to EU, the measures will be due on February 1, 2014. Corporations of the member nations should submit the sunset review application 3 months prior to the due date. HS codes involved include 73181290, 73181491, 73181499, 73181559, 73181569, 73181581, 73181589, 73181590, 73182100, and 73182200.

### June 6: EU Initiated a Mid-term Review on Taiwan's Stainless Steel Fasteners and Parts

Given the application of Sheh Kai Precision Co., Ltd, the EU initiated the review on Taiwan Stainless Steel Fasteners and Parts. Products involved include 73181210, 73181410, 73181530, 73181551, 73181561, and 73181570.



## ◆ 2013上半年台湾与中国扣件业反倾销整理

### 3月12日 欧盟对华不锈钢紧固件及其配件作出反规避终裁

欧盟对原产于中国的不锈钢紧固件及其配件作出反规避终裁：自泰国和马来西亚进口的涉案产品大幅上升是由于其国内产量的增加，并不存在规避行为；但自菲律宾进口的涉案产品则存在规避行为，因此决定对自菲律宾转口（无论是否标明原产于菲律宾）的涉案产品征收23.6%的反倾销税。

### 4月22日 加拿大对中国等3国产镀锌钢丝作出反倾销和反补贴初裁

加拿大边境服务署发布公告，对原产于中国、以色列和西班牙的镀锌钢丝作出反倾销初裁，同时对原产于中国的镀锌钢丝作出反补贴初裁。裁定中国涉案企业香溢融通控股集团股份有限公司（Sunny Loan Top Co., Ltd）的倾销幅度为45.1%，天津市华源时代金属制品有限公司（Tianjin Huayuan Times Metal Products Co., Ltd）的倾销幅度为51.7%，中国普遍的倾销幅度为64.8%。香溢融通控股集团股份有限公司（Sunny Loan Top Co., Ltd）的补贴率为15.0%，中国普遍的补贴率为15.0%

### 5月14日 欧盟对华钢铁紧固件反规避进行期中复审调查

应马来西亚生产商Malaysian Precision Manufacturing SDN BHD的申请，欧盟对原产于中国的钢铁紧固件反规避进行期中复审立案调查。此次复审针对原产于中国、自泰国转口（无论是否标明原产于泰国）的钢铁紧固件反规避案。

### 5月28日 欧盟对华钢铁制紧固件发布反倾销措施即将到期公告

欧盟委员会发布公告称，对原产于中国的钢铁制紧固件的反倾销措施即将于2014年2月1日正式到期，成员国之企业须在自本公告发布之日起，至正式到期日3个月前的时间内向欧盟委员会提交反倾销日落复审申请。涉案产品海关编码为73181290、73181491、73181499、73181559、73181569、73181581、73181589、73181590、73182100、73182200。

### 6月6日 欧盟对华不锈钢紧固件及其配件进行反倾销期中复审调查

应世恺精密股份有限公司（Sheh Kai Precision Co., Ltd）的申请，欧盟委员会对原产于台湾的不锈钢紧固件及其配件进行反倾销期中复审立案调查。涉案产品海关编码为73181210、73181410、73181530、73181551、73181561、73181570。

## ◆ China Steel Faces 9 Antidumping Investigations in 2013

Since 2013, Chinese steel products have been involved in at least 9 antidumping investigations from the U.S., Australia, Canada, EU, etc.

An analyst said that the frequently happened trade conflicts in the steel industry may be greatly related to the scale of Chinese steel product exports. In 2012, China exported 55.73 million tons of steel products (up 14% over 2011). The frequent antidumping investigations would somewhat refrain Chinese steel product exports. Once the antidumping rate is established, Chinese steel product exports will face high antidumping duties from the countries where the investigations are launched, which also increases the cost of the industry. When the industry increases the product price to offset the cost, it will then decrease the advantage of the export industry originally created by the low price. Chinese steel plants and steel product exporters



should diversify their export systems and be prepared to react to any possible investigation, as well as develop and produce high value added steel products to decrease the reliance on specific steel product imports.

## ◆ 2013年中国大陆钢材9起遭反倾销调查

2013年以来，中国大陆的钢材出口产品已经遭遇至少9起反倾销调查，包括美国、澳大利亚、加拿大及欧盟等多个国家和地区。

兰格钢铁资讯研究中心主任王国清分析，钢铁行业贸易摩擦频繁和中国大陆钢材产品的出口规模大有直接的关系，2012年，中国大陆出口钢材5,573万吨，较2011年增长14%。而频繁的反倾销调查对于今后中国大陆的钢材出口会有抑制作用。一旦倾销成立，中国大陆出口到发起国就要缴纳倾销税，这将增加出口企业的成本，出口企业提价抵消成本的过程又会削弱出口企业的出口低价优势。

## ◆ Fastener Exports of Hong Kong Dropped 6.56% to 28,720 Tons in 2012

In 2012, the fastener export amount of Hong Kong slightly dropped 6.56% to 28,720 tons, increasing 3.26% to USD 386,043 million in value. The increase of exports reflects the increase of costs. On the other hand, the appreciation of RMB pushes the export prices upward. China is still the largest export destination for Hong Kong (53% of the total export amount and 68% of the export value are to China).

Fastener imported from Hong Kong continued to be stable in 2012. The import amount increased 4.62% to 47,584 tons whereas the import value declined 1% to USD 324,338 million. China is the main supplier, representing 77% of the total amount, followed by Taiwan (10%) and Japan (4%).

## ◆ 2012年香港扣件出口下跌6.56%至28,720吨



2012年香港扣件出口量小幅下降6.56%至28,720吨，而出口值较2011年上升3.26%至386,043,000美元。出口数量的上升反映了成本价格上升，

另外人民币升值，使得出口价格直线上升。中国大陆仍为其最大的出口目的地，出口数量和金额到中国大陆分别占53%和68%的总量。

而进口方面，在2012年继续保持平稳。进口量上涨4.62%，至47,584吨，而进口值下降了不到1%至324,338,600美元。中国大陆为主要供应商，占总数的77%，其次是台湾和日本，分别占10%和4%。

## ◆ China Fastener Machinery En Route to Localization



Ever since China's R&D level achieved a certain degree of upgrade, the number of localized fastener machinery in domestic companies has turned very high. It is predicted that in 2020, production and inspection equipment in China's fastener companies will be comprehensively localized by over 80%.

According to the "2013~2018 Analytic Report on the Operational Condition and Development Trend of the China Lathe Industry", in 2012, fastener machinery production in China showed significant growth. Besides, with the government support, investment in the production reached RMB 798.515 billion (up 12.73% compared to 2012), and production value reached RMB 775.496 billion (up 12.5%).

## ◆ 中国紧固件设备呈现国产化发展趋势

现今中国紧固件的研发水平有了一定提升，企业中的设备也达到了很高的程度，预计2020年，中国紧固件企业中的生产和检测设备将会全面实行国产化达到80%以上。

根据《2013-2018年中国机床行业运营态势与发展趋势分析报告》中的内容可以看出，在2012年，中国的紧固件设备生产已出现大幅度的提升，并在政府支援下，投资达到了7985.15亿元，相对于2011年增长12.73%，并拥有7754.96亿元的产值。

## ◆ Global Industrial Fastener Market Value Expected to Reach USD 94.65 Billion by 2018

Transparency Market Research published a new market report "Industrial Fasteners Market (Externally Threaded, Aerospace Grade and Standard) for Automotive OEM, Machinery OEM, MRO and Construction Applications, 2012 - 2018," the global demand for industrial fasteners was valued at USD 65.50 billion in 2011 and is expected to reach USD 94.65 billion in 2018, growing at a CAGR of 5.4% from 2012 to 2018.

Economic development in countries such as China, Brazil and India has led to a rise in disposable income of consumers which in turn has resulted in growing demand for automobiles. In addition, rise in construction and maintenance activities all across the world is expected to be an important factor which will boost the demand for fasteners over the forecast period. However, imposition of high antidumping duties by the European Union is expected to hamper growth of the fasteners market. Development of fasteners which are customized for niche application segments such as railways and solar equipment is expected to open opportunities for the growth of the market within the forecast period.

Asia Pacific accounted for the highest demand for industrial fasteners in 2012 and is expected to account for over 45% of the market by 2018.

## ◆ 2018年全球工业扣件市场金额将达946.5亿美金



市场研究机构 Transparency Market Research 近日公布全球扣件 2012 至 2018 年市场预测，扣件范围

为用于汽车 OEM、机械 OEM、MRO、建筑业的螺纹螺丝(含航太等级与标准等级)。2011 年全球工业扣件市场金额为 655 亿美金，该机构预测 2018 年将达到 946.5 亿美金，复合年均增长率(CAGR)为 5.4%。

中国、巴西、印度等国家的经济发展促使消费者的可支配收入上升，进而带动汽车产业需求之成长。此外，全球的建筑和维修事业也将在本次的预测年度推升扣件需求。然而欧盟的反倾销措施会阻碍扣件市场的成长。针对特定利基市场(例如铁路或太阳能设备)定制化的扣件将为扣件市场开启新机。

2012 年，环太平洋对扣件的需求为全球最高，预计到 2018 年其需求将占全世界市场的 45% 以上。

## ◆ China Power Tool Market to Exceed RMB 35 Billion in 2018

The product range of China power tools extends from 40 types of specifications in 1965, to 200 and 300 types nowadays. China can be regarded as a world's power tool manufacturing nation in terms of its capacity. Statistics indicate that market capacity of China power tools is rapidly increasing by 25% annually. Askci Corporation reports that the market capacity will reach RMB 20.5 billion by 2012.



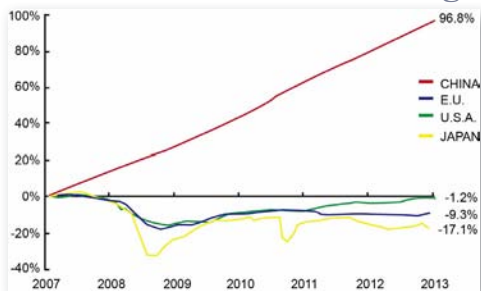
In the next few years, China-made power tools will take more market shares with further expansion into foreign nations, which will push the industry to a better prospect and brighter future. Askci Corporation predicts that China power tools market scale will exceed RMB 35 billion in 2018, and professional power tool market scale will exceed RMB 10 billion.

## ◆ 2018年大陆电动工具市场规模将超350亿元

中国大陆电动工具产品从1965年的十几个品种40多种规格，发展到目前的200多个品种、300多种规格。从生产数量上看，大陆可谓是世界电动工具的生产大国。据统计，大陆的电动工具市场容量正以每年25%以上的增速快速增长，2012年，中国的电动工具市场容量达到205亿元。

未来几年内，随着对外市场的扩张，大陆制电动工具所占份额将会进一步提高，将推动大陆相关企业向利好方向发展，行业前景可期。分析指出，2018年中国电动工具市场规模将超过350亿元；专业电动工具市场规模将超过100亿元。

## ◆ China Outruns US as the Top Manufacturing Nation with Production Value Higher than US by 1.26 Folds



For the first time in the past century, US lost the crown of top manufacturing nation to China. Ever since the outbreak of global financial crisis, China's industrial production value has almost doubled while the US was left with no evident growth.

The graph demonstrates the comparison of industrial production value (in %) since June

2007. Right now, China's industrial production value is higher than that of the US by 1.26 folds.

## ◆ 中国超美成头号制造国：工业产值是美国的126%

一个世纪以来，美国第一次失去了世界头号工业制造国的地位，让位给中国。全球金融危机以来，中国工业产值翻了一番，而美国没有增长。

图表为2007年6月以来工业产值比较（此处仅以制造业为例）；现在，中国的工业产值是美国的126%。



## ◆ Würth Reports EUR 4.9 Billion Sales for 1st Half of 2013

Würth Group closed the first half of 2013 with total sales of EUR 4.9 billion. This corresponds to a year-over-year decrease of 3.0 percent, which can be attributed to the difficult economic environment in key markets such as Germany, especially in the first quarter of the year 2013.

Robert Friedmann, Chairman of the Central Managing Board of the Würth Group, regards the situation as challenging, but is nonetheless optimistic for the second half of the year. "Incoming orders in our electronics group and the development of our automotive businesses give us reason to expect stronger sales growth in the Würth Group over the next six months."

## ◆ Würth集团2013上半总销售额达49亿欧元



Würth集团公布2013年上半年总销售额达49亿欧元。因为在关键市场(例如：德国)的经济环境不佳，导致2013年上

半销售比前一年降低3%。

Würth集团董事会主席Robert Friedmann认为目前情况深具挑战，但对2013年下半年表现仍表示乐观。「2013下半年之经济情势已经逐渐复苏，而电子部门的订单和汽车领域业务的开发，都让我们有充分理由期待未来6个月更强劲的销售成长。」

## ◆ Bossard Shows 29.4% Net Profit Growth for 2013 1st Half



In the first half of 2013, Swiss Bossard showed a substantial growth. Its revenue increased by 25% and the regional revenue in Europe also increased by 44%.

The reason generating this result was the acquisition of KVT Fastening by Bossard in the last season of 2012. In addition, it also benefited from the slight recovery of the market as well as requests from new customers.

## ◆ 瑞士Bossard集团2013年上半年净利成长29.4%

2013年上半年瑞士Bossard集团获得大幅成长，其营业额增加了约四分之一，欧洲市场的营业额约成长了44%。

Bossard集团营业额大幅成长的原因由于2012年最后一季收购了KVT Fastening公司，除了该项特殊效果外，该集团亦受惠于市场的略微复苏及新客户所带来的新需求。

**Bossard Group's Revenue in H1 2013**  
2013上半年Bossard集团营业额

European Market / 欧洲市场	CHF 195.5 million / 1亿9,550万瑞朗	43.8% ↑
US Market / 美国市场	CHF 73.1 million / 7,310万瑞朗	3.1% ↑
Asian Market / 亚洲市场	CHF 28.6 million / 2,860万瑞朗	7.7% ↑
Global Market / 全球市场	CHF 311.5 million / 3亿1,150万瑞朗	23.9% ↑

## ◆ Fastenal Fastener Sales Grow 1.9% in Q2



Industrial and construction product supplier Fastenal Co (Fast) announced its financial report, stating the recent net earning for Q2 grew 7.7% to US\$0.121 billion resulted from the continuous growth of revenue and profit ratio. However, the company said that the uncertainty of the global economy and U.S. economic policies in some ways inhibited the growth of revenue.

In the past quarters, the growth of Fastenal's revenue slowed down due to the weak market demand for industrial supplies and non-residential projects. The fastener sales of the company in Q2 went up by 1.9%, over the 1.7% in Q1, which was, however, far below the 7.8% growth rate in Q2 last year.

In the first half of 2013, the price deflation of part of products offset the sales of products at higher prices, and the fastener sales grew 5.1% to US\$1.65 billion. Up to the end of June, Fastenal has 2,677 stores (+1.6% over the same period last year).

## ◆ Fastenal第二季扣件销售增长1.9%

工业及建筑用品销售商Fastenal Co(FAST)发布财报称，第二季度净盈利增长7.7%，达1.21亿美元，得益于营收和利润率的持续增长。不过，该公司表示，全球经济不确定性以及美国经济政策的不确定性在一定程度上限制了其营收的增长。

最近几个季度，由于工业产品和非住宅建筑市场需求的疲软，Fastenal的营收增长已经减速。其中，第二季度该公司扣件产品销售增长1.9%，与第一季度的1.7%相比有所增长，但仍远远低于去年第二季度7.8%的增长率。

2013年上半年，由于部分价格通货紧缩抵消了较高的产品销量，扣件产品的销售增长5.1%，为16.5亿美元。截至6月底，Fastenal旗下总计拥有2,677家店面，较上年同期增加1.6%。

## ◆ Swiss Nobel Biocare Reports Revenue and Profit Declines in H1 2013

In the 1st half of 2013, Swiss dental implant manufacturer, Nobel Biocare, reported declines of the revenue and the profit. The net profit was EUR 21.3 million, 21.6% lower than the same period in 2012. The revenue was down 2.4% over the same period of 2012 to EUR 289.4 million.

## ◆ 瑞士人工植牙大厂 Nobel Biocare 2013年上半年营业额及盈利减少



2013年上半年瑞士人工植牙大厂 Nobel Biocare 营业额及盈利减少，该公司净利达2,130万欧元，较2012年同期减少了21.6%，营业额较2012年同期减少2.4%，达2亿8,940万欧元。

## ◆ Baosteel President: Steel Overcapacity Is Only Minor



President Hsu of China Iron and Steel Association (CISA) and Baosteel said in a directors meeting of CISA that the current steel industry shows only a slight overcapacity. He added, "Overcapacity is a common issue faced by Chinese manufacturing industries, especially the steel industry, which is deemed as the very cause of the difficulties. In terms of the capacity utilization, the scale of Chinese steel industry is not only large but also flexible, so if the utilization comes to 80%, the capacity can be considered fully utilized." He also thinks that there was no over capacity in China before 2006 and the slight overcapacity has been there since 2006. "The 75%-80% capacity utilization is slight overcapacity; 70%-75% capacity utilization is medium overcapacity; the capacity utilization below 70% is severe overcapacity." Experts from the steel industry explained that the current capacity utilization of Chinese steel industry lies between 70%-75%, so the overcapacity is at a slight-to-medium level.

## ◆ 宝钢董事长：钢铁仅是轻度产能过剩

日前，新任中钢协会会长、宝钢集团董事长徐乐江在中国钢铁工业协会会议上公开提出，钢铁行业现在处于轻度过剩状态。

徐乐江表示：「产能过剩是包括钢铁在内，中国制造业面临的一个普遍性问题，钢铁行业尤为典型，并被认为是目前行业陷入困境的罪魁祸首。如果按照产能利用率来划分的话，中国钢铁业规模庞大，回旋余地大，所以中国钢铁业的产能利用率达到80%就应该认为是产能充分利用了。」并认为，在2006年前中国就不存在钢铁产能过剩的问题，2006年至今，中国钢铁业也只是轻度产能过剩，「75%-80%之间的产能利用率为轻度产能过剩，70%-75%之间为中度产能过剩，而低于70%就是严重的产能过剩。」

关于此议题，钢铁专家表示，现在中国的钢铁业产能利用率在70%-75%之间，所以可以确定产能过剩在轻度和中度之间。



## ◆ China's Steel & Automobile Companies Listed on the 2013 Ranking of Top 500 Corporations

In the list by "Fortune" Magazine, the nations with the largest number of companies in the ranking are: US (132 companies), China (95), Japan (62), France (31), Germany (29), and UK (27).

Chinese companies listed in the ranking mainly come from steel, automobiles, resource, chemical engineering, and financial industry. Anshan Iron And Steel Group dropped 31 places, Baosteel Group dropped 25 places, China Minmetals dropped 23 places, and MCC dropped 22 places. CCPC and WISCO also dropped in the ranking.

## ◆ 2013年世界500强企业出炉 中国上榜企业集中钢铁、汽车等领域

在2013年《财富》世界500强企业中，上榜企业数量最多的国家依次是：美国132家、中国95家、日本62家、法国31家、德国29家、英国27家。

今年中国的上榜公司主要分布在钢铁、汽车、资源、化工、金融等领域，鞍钢下降31位、宝钢下降25位、五矿下降23位、中冶下降22位，中化、武钢等排名也出现下滑。



## ◆ Gem-Year Signs RMB 331 Million Railway Fastener Contract

Gem-Year Industrial announced that it has signed a contract for fastener supply (purchase no. F01) worth RMB 331 million with GRCI. The revenue of Gem-Year in 2012 was RMB 2.596 billion (-3.96% over the same period). The revenue resulted from the sale of high-speed fasteners represented 21.08% of its total revenue (-19.53% over the same period). The decrease in rail fastener sales of 2012 resulted from the situation of high-speed construction in China, which still stayed at the low-level recovering process. In 2012, the total signed contract for high-speed rail and metro fasteners totaled RMB 1.071 billion.

## ◆ 晋亿实业签3.31亿铁路扣件合约

晋亿实业发布公告，近日与贵广铁路有限责任公司就第F01包号扣件物资的采购和供应签订总价为3.31亿元的买卖合同。

晋亿实业2012年实现营收25.96亿元，同比下降3.96%。其中高铁扣件收入占主营业务收入的21.08%，而高铁扣件收入同比下降19.53%。2012年公司铁路扣件销售规模较上年同期下滑较多的主要因为中国高速铁路建设仍处于低水平的恢复过程之中。晋亿实业2012年度签订高铁及地铁扣配件订货合同金额共10.71亿元。

## ◆ Market Strategy on the Emerging Nations Empowers TOYOTA

According to the news report by "The Sankei Shimbun", TOYOTA vice chairman Yasumori Ihara, who is in charge of the business operations in emerging nations such as China, states in the convention of new operation held in Nagoya that TOYOTA plans for a sales goal, where emerging nations including China will account for 5 million sales among the 10 million global sales. It is known that TOYOTA's actual sales in 2012 were 3.7 million units.

Ihara says, "We hope to establish enough business foundations in emerging nations to support our company." He added, "Production in our sales zones will be the basis of our operation to stabilize local business foundations and enhance the balance of income and expenditure."

Further, he tells that TOYOTA will set bases in emerging nations like Myanmar, Cambodia, and Kenya. In addition, the company will cooperate with Daihatsu Motor Co. Ltd. on passenger cars.



## ◆ 丰田汽车加力新兴国家市场战略

据日本《产经新闻》报导，丰田汽车公司负责中国等新兴国家事务的副社长伊原保守，当日在日本名古屋召开的新经营大会上表示，丰田汽车未来计划，1,000万辆汽车销售目标占比中，中国等新兴国家将会占一半约500万辆。而据悉，2012年丰田在新兴国家的实际销量为370万辆。

副社长伊原不仅称「希望未来在新兴国家建立起足以支撑丰田公司的经营基础」，并表示「将会以在销售地区进行生产作为基本点，达成在当地构建稳固的事业基础和强化收益体系」。此外，他还透露丰田将会布局缅甸、柬埔寨以及肯尼亚等新兴市场，并称将会与大发工业公司合作发展小型车事业。

## ◆ Automotive Sales In China Expected to Reach 27.7 Million Units



During 2012-2019, the automotive sales in China are expected to double while that in the EU will strive to maintain the level achieved in previous years.

The forecast shows that the 2013 sales in China is expected to be 18.1 million units and may reach 27.7 million units by 2019. By then, Chinese market will be as huge as the total market scale of the US and Western Europe. The automotive sales of the European market (i.e. the EU and European Free Trade Association) will be 12.1 million units and will be 14.9 million units by 2019. In the same period, the automotive sales of the U.S. will increase from 15.4 million to 16.7 million units.

The forecast states that the automotive markets in Western industrialized countries have saturated and the passion of European car owners to buy new cars has declined. The automotive markets in emerging countries will continue to grow because more and more people can afford to buy cars and show their interest in buying them. By 2019, the global car manufacture will be about 25 million units, 2/3 of which will be from China and the other from emerging economies in Asia. North America (12.3%) and EU (11.4%) will total 1/4 of the global production; there will also be a slight increase in South America (8.1%) and East Europe (6.5%). The production of cars in Germany will continue to grow and will grow to nearly 1 million units to 6.3 million units during 2010-2019. The total production of cars in Spain, France, UK, and Italy will increase nearly 1.2 million units to 8 million units.

## ◆ 2019年中国汽车销量有望达到2,770万辆

据德国财经网站报导，2012~2019年，中国市场汽车销售量将翻一番，而欧盟市场勉强维持前几年水平。

预测报告显示，2013年中国市场汽车销量预计为1,810万辆，到2019年达到2770万辆。届时中国市场容量将几乎相当于美国和西欧的总和。欧洲市场（欧盟+欧洲自由贸易联盟国家）今年汽车销量为1,210万辆，到2019年达到1,490万辆；同期美国汽车销量将从1,540万辆增至1,670万辆。

预测也认为，西方工业国家汽车市场基本饱和，欧洲汽车拥有者受经济危机影响购买新车热情降低。中国和其他新兴国家汽车市场将持续增长，因为有越来越多的人能买得起汽车，也有购车意愿。汽车生产方面，到2019年全球将生产约2,500万辆，约2/3来自中国和亚洲其他新兴经济体；北美（12.3%）和欧盟（11.4%）合计占1/4；南美（8.1%）和东欧（6.5%）也将小幅增长。德国汽车产量将继续上升，2010~2019年将增加近100万辆至630万辆；西班牙、法国、英国和意大利总计将增加120万辆至约800万辆。