

Austria

Capital: Vienna
Population: 8.2 million
GDP:* \$283.8 billion
Currency: Euro
Language: German



Summary

Austria, with a population of 8.2 million, is one of the most densely motorized countries in the world: In the year 2006, approximately 5.72 million motor vehicles were registered, of which roughly 4.2 million are passenger cars. There are two important characteristics to note about the Austrian fleet: 1) Diesel engines dominate the market, powering around 75% of the passenger vehicles, and 2) U.S. automobiles represent less than two percent of the vehicles on the Austrian roads.

The average age of an Austrian car is 8.9 years, a figure that has been rising in recent years. The average lifespan of an Austrian passenger vehicle is 12 to 15 years. The average distance driven per vehicle and year is estimated at around 13,500 kilometers, a figure which has been falling over the past years.

Main Competitors

European and especially German automobiles dominate the passenger car market in Austria, an important factor in the success of German and European-made aftermarket parts. Notable is the success of Volkswagen, by far the most popular cars on the road in Austria:

Top 10 registered vehicle models (alphabetically)

Model (country)	2004		2005		2006	
	Units	%	Units	%	Units	%
Audi A4 (Germany)	7,352	2.4%	7,558	2.5%	7,017	2.3%
Ford Focus (Germany)	10,190	3.3%	9,394	3.1%	8,078	2.6%
Opel Astra (Germany)	8,050	2.6%	10,153	3.3%	7,564	2.5%
Peugeot 206 (France)	7,577	2.4%	6,351	2.1%	3,364	1.1%
Renault Megane (France)	10,529	3.4%	8,347	2.7%	7,332	2.4%
Skoda Fabia (Czech Rep.)	8,966	2.9%	8,541	2.8%	8,543	2.8%
Skoda Octavia (Czech Rep.)	5,307	1.7%	7,464	2.4%	7,306	2.4%
VW Golf (Germany)	22,809	7.3%	20,902	6.8%	17,948	5.8%
VW Passat (Germany)	5,959	1.9%	7,874	2.6%	9,461	3.1%
VW Polo (Germany)	8,929	2.9%	8,812	2.9%	9,129	3.0%

Source: Austrian Statistical Office, www.statistikaustria.at

Current Demand

The replacement parts market in 2003 (the last year for which figures exist) was worth \$1.92 billion, and industry experts estimate growth since then to be very slow or even negative. The most important revenue generators were chassis and body repairs, followed by drive trains, electric and electronic repairs, and small parts. Three important trends in the replacement parts market are the falling number of kilometers driven per vehicle and year, as well as the increasing popularity of automatic transmissions and air conditioning. As a result, the total market for replacement parts has been stagnant or negative, and within that market, brake, steering, and air conditioning service and repair are becoming more important.

The market for auto accessories in 2003 came to around \$1.92 billion. By far the most important aftermarket accessory in Austria is the aluminum rim, followed by practical accessories such as child seats, bike and luggage racks, and winter care equipment. Exciting new electronic technologies, including in-car navigation and entertainment systems, are gaining in popularity as they are increasingly on offer at cutthroat prices in electronics discount stores. Nearly all of the aftermarket electronics are imported from low-wage Asian countries. Customization is primarily a do-it-for-me market in Austria, and the emphasis is on understatement; there are very few obviously customized cars on the road. This is at least partly due to the strict registration requirements for vehicles that have been modified.



Best Prospects:

- Parts for air conditioning units
- Parts for automatic transmissions
- Brake parts
- Steering parts
- Aluminum and other light metal or designer rims
- Marketing and business tools for independent garage operators

Trade Events

AutoZum

January 14-17, 2009

Venue: Messezentrum Salzburg

Type: Targets Austrian auto sales, specialty parts and repair service professionals

URL: <http://www.autozum.at/>

Available Market Research

Motorcycle and ATV parts and accessories (Aug 2006)

Automotive Replacement Parts (Aug 2007)

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