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ANALYSIS OF AUTOMOBILE MARKET IN THE CZECH REPUBLIC

(Bachelors thesis)

Author: Michal Giláni
Leader of work: Ing. Michal Poláček

Břeclav october 2004

I confirm , that I have done the bachelor thesis independently with lead from Ing. Michal Poláček and I have presented all literal and technological sources.

Břeclav, october 2004

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author signature

I would like to thank Mr. Ing. Michal Poláček for his very usefull methodic help in guiding my bachelor thesis.

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Michal Giláni

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1 Introduction

The object of this work is to objectively evaluate the development and current situation of automobile market in the Czech republic, to analyse the position and possibilities of individual automobilesbrands representated on the Czech market and to outline the direction where it will go. The Diploma work is intent only for analysis of the market with new passenger cars and light commercial cars. (Objects of the work are not Trucks or buses and for this work I left out the lucrative market with used cars.

This work will be used by automobile sellers, who will use it as one of the sources for the choice of sales strategy of their new cars during the last 4 years. At the end I have created a new strategy, which will enable customers to buy a new car, that they could not buy before. This strategy is based on the principles of financing from aumobile dealer and leasing company.

In the prodution of this work I used the value information acquired from my practical knowledge from working with Citroën and Nissan.

2 Evaluation of the automobile market and it developments in the Czech Republic

Transition of the Czech Republic to a market economy made in 1990 sales caused sharp changes to unfold. Till that time (had a monopoly for automobile production and sell) the state firms Škoda Mladá Boleslav, trucks were made by Avia and Liaz and buses by Karosa Vysoké Mýto. Tatra Kopřivnice had in its production program all trucks and passanger cars. In production of passenger cars they made one type, which was appointed for the representatives of state and significant factories. The import before 1989 was expressively limited. Automobiles made in Eastern block, were imported for example: Soviet cars Lada, Moskvic a Volha, Romanian Dacie, Poland Fiats or Eastgerman cars of brand Wartburg and Trabant. It was possible to buy Ford or Fiat, but it was hard and could be done only in Tuzex. Automobile offer does not satisfy demand. Space after year 1989 meant overturn on Czech market with new cars.. Market principals begun and in most instances offer exceeded demand. All automobile producer , which sold products in West Europe made their own oficial represenations. Škoda Mladá Boleslav began the biggest and most reputable company in Czech republic, which was influenced by successful privatization, which made fusion between Škoda and german concern Volkswagen.

Competition between individual automobile producers is known in global mesure as hardest on the world . In the Czech Republic rivalry between dealers is very strong , because market with new cars in Czech is atypically, for Škoda tooks a 50 precent from share. This big share on European market is sporadic. For that is very interesting to observe , how other automobile dealers equalize with non standard situation and how Škoda Auto cope that uniqe position on market.

3 Analysis of Competetive Strategy

The meaning of strategy comes from the Greek strategos and it originaly meant general. In the time of Alexander Macedonian this meanig meant to use ability, strenght for conquer enemy and to make a total system of domination. This army terminology including basic conceptions penetrate in to bussiness sphere after World war II.

For often use in various areas have the meaning “starategy“ grown in to many definitions.

Henry Mintzberg define strategy with 5P:

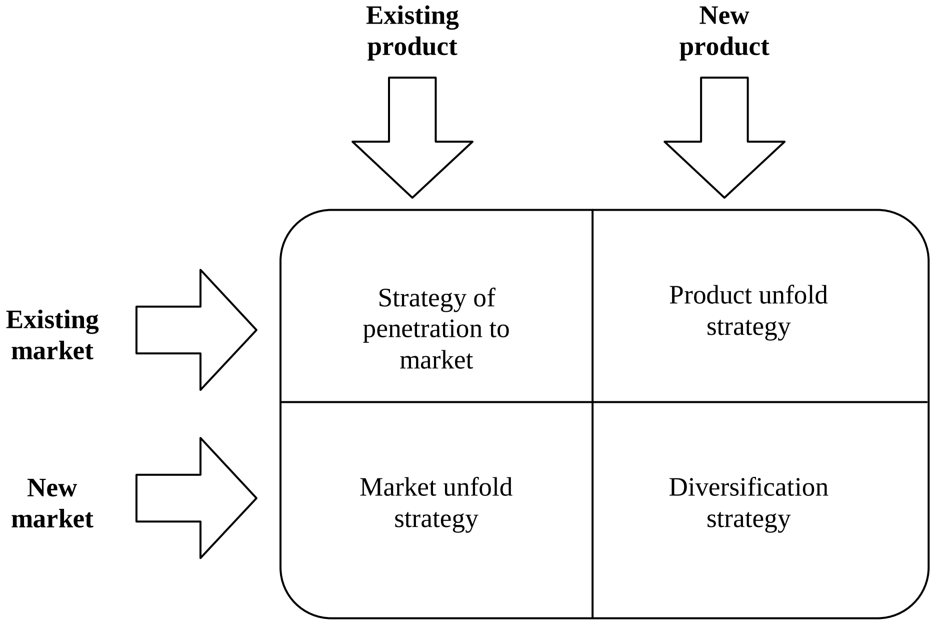
1. Plan – is an often used meaning and it appears in war, game theory and management definitions.
2. Ploy – it is ploy of plan manoeuvre proclaimed by competition to turn off them from similiar steps.
3. Pattern – conception based on belief, that when you consider behaviour then strategy is an empty meaning.
4. Position – it specify strategy with specific products put in to specific market
5. Perspective – key implications of that are: strategy is conception, abstraction in mind of interested regard, it is perspective shared with other members of company.

Hrons strategy presents direction and amount of company activity in long term horizont, which makes ideal instance equel between companies sources and changing external environment – especially market and customers.

3.1. Types of strategies

Disunite of various authors in strategy definition is similiar as in typologic strategy. First systematic attempt was made by Igor H. Ansoff.in 1965.

Picture 1: Grows the strategy - Ansoff



At this moment it is not an absolute count, but in the past it became very popular.

Chart 1 puts together strategies with similiar character, which Hron wrote in his book “Strategic management“.

Chart 1: Strategy type and closer character with examples

Strategy	Characteristic	Example
Forward Integration	Getting bigger part on management of retail and distributors of their products or their buying	In the end of 90. Mercedes started with buying individual dealers in Graet Britain,especially in London
Backward Integration	Getting bigger part on management of firm importers or their buying	Producer of automobile equipment belongs to PSA.
Horizontal Integration	Getting bigger part on management of competitors, or their fusion and buying	German Daimler-Benz, Mercedes producer fused in May 1998 with U.S. Chrysler.
Market Penetration	Getting bigger part of actual firm production on their actual markets with help of higher marketing	Every intensive advertisment, for example, Peugot for their new Peugeot 307.
Market Development	Introduction of new products on interesting foreign market	Peugeot made a new branch in J.A.R. in the beginning of year 2002
Product Development	Effort to increase sale or modification ofcurent products or servis	Facelift, new motorization
Concentric Diversification	Add new products or services, which refer existing activity of company	Nissan CZ set up own leasing company - Summit Leasing. in 2001
Conglomerate Diversification	Add new products or services, which do not refer existing activity of company	Group PSA own tratsportation and logistic firm Gefco.
Horizontal Diversification	Add new products or services , which do not refer existing activity of company., that are intended for sale to actual customers of this firm.	Ferrari dává do prodeje značkové parfémy Ferrari pro muže.
Joint venture	Two or more firms made a new law unit, firm, for purpose of reciprocal cooperation	Toyota and PSA made cooperative company TPCA and stasrted building factory in Kolín in 2002
Retrenchment	Revaluation cost and reduction of property for purpose to cancel production of products with decreasing sales and profit	Opel close down some factoryes
Divestiture	Sale of division or part of copmany	BMW sold in year 2002 british automobileproducer Rover.
Liquidation	Sale all company property for real price	Liquidation of traditional Brtish automobile producer (Talbot).

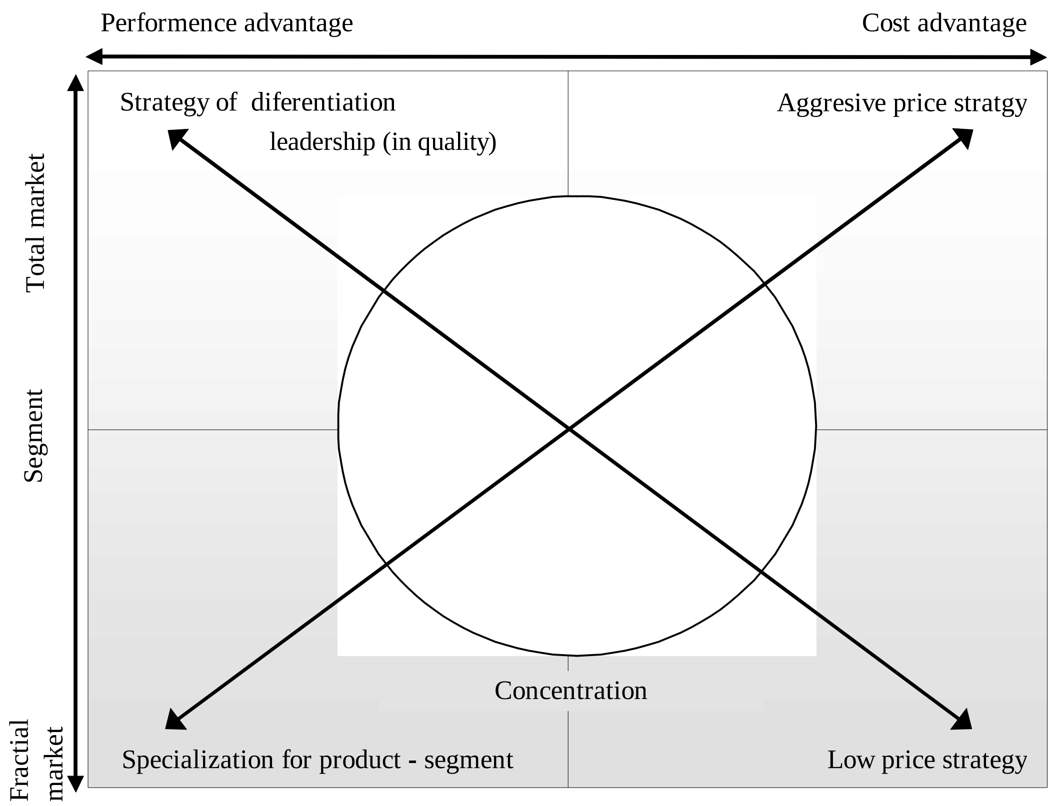
Source: *Characteristic Hron [2], examples by author*

3.2. Basic srategical conception

Many firms do not took their critical threat of their market imperfection in home, foreign and foreing competition. Thats the cause deficit of market interfected strategy. Porter [5] would besides customer requirements give a possibility of position, which enable to hold or increase profit againts competition, or building a new profit source.

Porter made the research basic factors of competition represented on picture 2.

Picure 2 : *Competition strategy - Porter*



Source: *PORTER, M. E. Konkurenční výhoda. 1. vydání. Praha: Victoria Publishing, 1993. 626 s. ISBN 80-85605-12-0.*

1. Possibility to profile on general market with performance and cost advantage.We can attemt to leading position in cost, or apply differation strategy
2. Successful strategic position would secured the concentration for suitable market recess.

Leading position in cost, or in price is neccesery to reach with decreasing unit cost under the level of significant competitors based on a qualified empleyees, innovation procedures secured higher productivity, technologies and standardization. Then we can realize competitors advantage based on relatively lower price.

Strategy of differentation is mostly based on flexibility, skills to adapt lies in product and service differentation. To get object we must meet differentation customer requirements so thats why we have to look for restriction applications, which increases usefulness of product. Third basic strategic concept lean on concentration to conception recess. Usefull to get automobile branch analysis is to use Philip Kotlers competition strategy, which is possible to demonstrate examples from automobile industry

3.1 Creating of competitive strategy

Kotler [3] classify what means their placement on market That can be leading, challenging, followering, non grand. So from this he conclude :

1. Leader
2. Follower
3. Challenger
4. Non grade

Leader of firms on market strongly holds his stands, which are attacted now and then by market challengers. Followers back to front want to hold their stands and adapt starategies of market leaders. Non grades are small firms handled recess which is not interesting for big firms

3.1.1 Market leader strategies

Company is appreciated leader in many branches of market. That firm has a biggiest part of maket and ordinary force other firms to pursue price changes for starting up the new products, norms, distribution and propagation Market leader is the orientation point for competitors. Firms has few possibilities, how to cope with leader position.

- They trying to fight
- Trying to imitate.
- Trying to avoid him

In case the firm does not have a monopol standing situation is not easy Other firms are trying to get advantage to exlusion of their mistakes. Leading company have to behave conservative, but challenger firm have to behave quiete liberal..

Leading firm can easy make a mistakes, becouse uderestimate competitor. It is not unusual case, that cost of dominant firm is increasing more faster then profit. Dominant firm according to Kotler [3] must generate activity at this three areas :

1. Must find the reason how to increase demand on the market
2. Must protect actual part of market with help of good defending and attacing action
3. May try to increase their part of market in case that total market stay the same

Ad 1) Increasing of total market

Dominant firm ussualy gain most market if total market get higher. When total sale of new automobiles in CR increases more than 17 500 units, Škoda thanks to that sold 12 000 passanger cars.

In general we can say, that leading firm on the market would search for :

- New product users
- New use of product
- Bigger use of product

New user must find producer, which did not use the car (strategy of market penetration) , or have to focus on women, young or make the representation in foreign country (strategy of geographic penetration)

Automobile producers are trying to pesuade their customers about new use of automobile and make a interesteng offer . New categories are arising which are suitable for “taking the family in day to work, theater, city and on the weekend to cottege or mountains“

Third strategy of enlarging the market is based on belief of customers to use the product more. Often use makes the product more weared,so user is forced to buy a new. In advertisment for Nissan Almera is presented day time table of ride with that car: „ 8:.30 starts a trip for shpping, but at 9.45 – ride through new highway, 13.00 – tasteing the curves, 14.20 – sightseeing trip, etc. Added wtih advertising slogan: „Nissan Almera. Simply you must ride.“

Ad 2) Market unit defence

Out of effort firm must secure „her bussiness“ from competitior attacks. Best way how to done that is continuously inovation. Leader of the market must not be content himself with „ things how they are“ ,but try to reach leading position with development of new products, services and increasing his effectivness of distribution and decreasing of cost. That is the way how he can hold his defensivness and value for customers. Kotler [3] actuate that leader firm is using military offensive principals. General must show to all his initiative, choose the right place and use all weaknesses of enemy. Best way how to defence is right placed attack

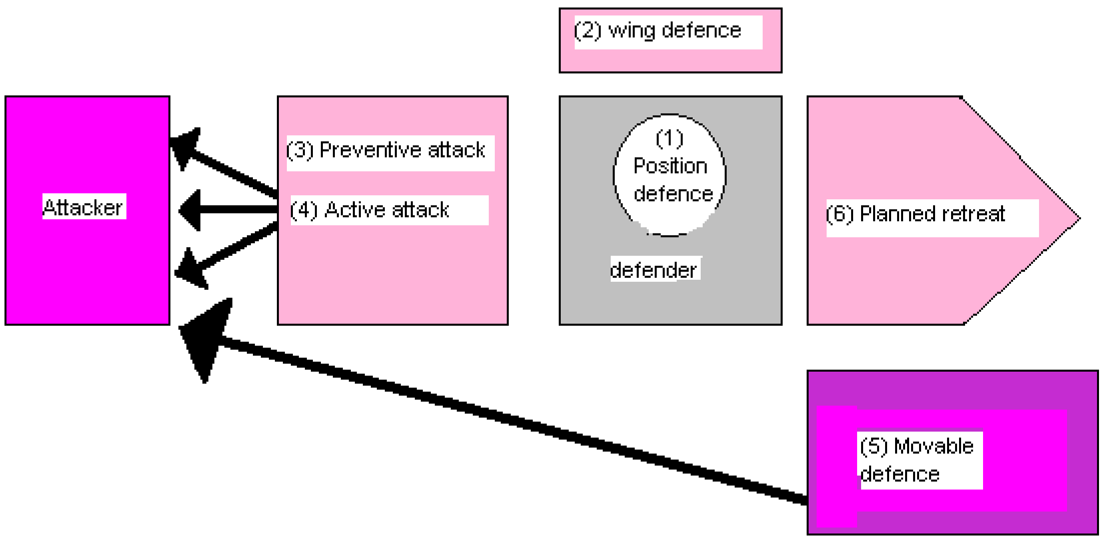
Automobile producers knows this very well Thanks that they offer more models, which is equiped wiht higher spectrum of engines, shorten time for development of individual models and models are often chaged.

Kotler [3] in his book Marketing and management writen : „It si important ,that leader firm to carefully calculate, which terain is important for defending in case, that we make some loss without big risk. Objective of defensive strategy is to increase possibility of attacks, spread out them in to less danger areas and increase their intensify. Which ever attack possibly danger the profit. However skill to defend and speed of reaction may affected loss of profit. Marketing specialists research best ways of reactions for price and other attacks.“ Dominant firms can use some of six defence strategies, which are shown on picture 3

Defence strategies from Kotler

1. Position defence
2. Wing defence
3. Preventive attack
4. Active defence.
5. Movable defence.
6. Planned retreat

Obrázek 1: Obranné strategie dle Kotlera



Positional defence

Main idea of positional defence is that is built proof fortify around the his teritory. That means that he must not only focus on one product, but he have to expand his bussiness in to other sphere. Fiat is orientated to printed matter, Nissam makes besides automobiles the ships and high-lift trucks, Hodna motor bikes, etc. Leader firms would make it untactical, if they just orient all their sources to building the fort for securing their actual products. But it is not good to overstate - Daimler makes an aeroplanes, but only profit is form Mercedes.

Wing defence

Leader firm on the market would not only point to securing their areas. They have to safe their wings and weak points, or prepare to counter-attack.

Some producers have moved to places, where no body would imagine 10 years before. Mercedes, tradicional producer of luxory automobiles, started to produce small car class A or mini car Smart or Škodas luxry car Superb.

Preventive attack

Firms defence can be attack as first. We can attack in these ways :

1. Partisan war on total market. Firms attack one competitor here and other elswhere, that makes them uncartaint.
2. Attack with low prices.
3. Strategy of constant pressure make the firm possible to hold their intiative in their hands and hold competitors in defensive.

Active attack

Very used attact againts leading firm is counter-attack. The market leader do not prove to watch without action, how competitor decreases prices, intensify promote, imporve products or make a sell invasion in specific teritories. The leader firm have two chances : go to frontial attack or attack to weakness places of opponent.

In case the makret teritory of leader firm is attacked is neccesery to use counter-attack. That is pointed for total market teritory of attacker. His goal is to make the attacker to withdraw his parts for securing that teritory.

„Smoke screen“ is other known form of active defense. We can make an economical or political „smoke screen“ which frighten the oponents Defender can attack to some weak products of competitor with decreasing prices or can start a premature advertisment for new product, which will be better than actual of competitor.

Movable defense

The point of this strategy is to make much more , becouse except defense of our teritory (leaders firm) wants to expand and diversificate.Expand of market force need from firm to move their normal products to basic needs and to make the research adapted for development of technologies and satisfying their needs. Strategy of market exapanding must not be overstated, becouse it can lead to breaking the basic military principals :

1. Princip of clear objective (watch clearly and reachable definated objectively).
2. Princip of power concentration (concentrate the power to weak points of opponent)

Adequate expanding have sens.Other possibility how to stabilize strategic standing of firm, is to diversificate her fom other field.

Planned retreat (limited defence)

It can come the situation when the biggiest firm have not ability to defence all areas of the market. The reason of that are spreaded powers, which want to use competitors with their ground attack. Best way how to defend it is planned regroup power – strategic. It deos not mean , that firm retreat all market, but firstly evaluate weak points , which must give up and move his power to external position. That strategy makes conditions for increasing competitor power and concentrate main power to advantageous positions. Amarican Chrysler ended in year 2001 his produce of traditional brand Plymouth

Ad 3) Expanding units in the market

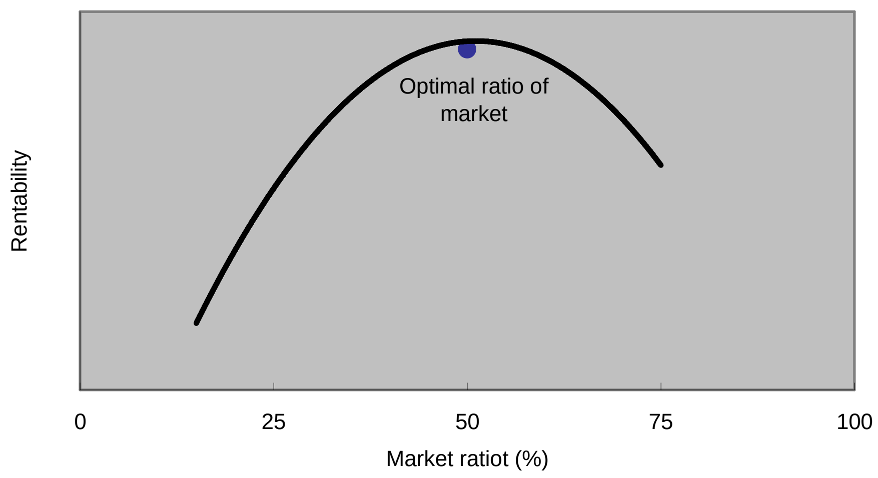
It is possible to increase the profit of leding firms with increasing unit on the market. Firms should not think, that reaching of higher ratio give them profit. Essential is choosing a strategy, which is used to reaching the best ratio of market. Real danger worries, that cost for that increase higher profits gets from this higher. That is why Kotler [3] recommend firms to equel three factors of possibilities which are going to rise their ratio on market :

1. Possibility to provocate antitrust restrictions

2. Economical costs. We can read from picture 4, that profit will be decreasing when exceed and optimal size of that ratio is 50% . If the firm increses the ratio, it will be done to exlusion of profit

3. Bad use of marketing mix strategy to get higer ratio on the market. Bad strategy can cause, that increasing of profit will not come. If company increases her ratios with help of low prices, in reality they are “buying“ it which makes decreasing the profit.

Picture 4: Vison of optimal market ratio



3.1.2 Strategy of market challanger

Challaneger and followers do call the firms on the second and third place from ratio of given sector. Follower firms can adopt one from two positions:

1. Attack to leading firm and other competitors and hardly apply for other market ratio (market challangers).

2. Technical manoeuvre and try to hold on market with minimal problem (market followers).

Definition of strategic objectives of opponent

Basic task of market challange is to define his objective This objective is usually increasing of market ratio. Then market challanger basely on Kotler [3] is choosing somebody to attack.

Choices for attack :

1. Attack of leading firm on the market. That strategy is very risky, but at other side it is potential income. It have a sense, if leader firm do not work good on the market. Alternative strategy is lieing in estabilishing inovation, that pulls off leader firm from whole segment. Attack to firm , which is same size , but do not make her work good and do not have enough money. That are firms, which have old products , sells for big prices or do not right satisfy customers.

2. Attack to small local or regional firms.

When firm attacks to leader company does not want to destroy it. Attack firm can only wanted to reach the bigger ratio on the market. Otherwise in attack of big company to small firm it means a destroying attack.

1. **Choose of main attack strategy** After defination of opponent and objectives Kotler [3] shows possibilities to attack to enemy picture 5. It shows enemy , which occupies specific market area:

1. Frontial attack

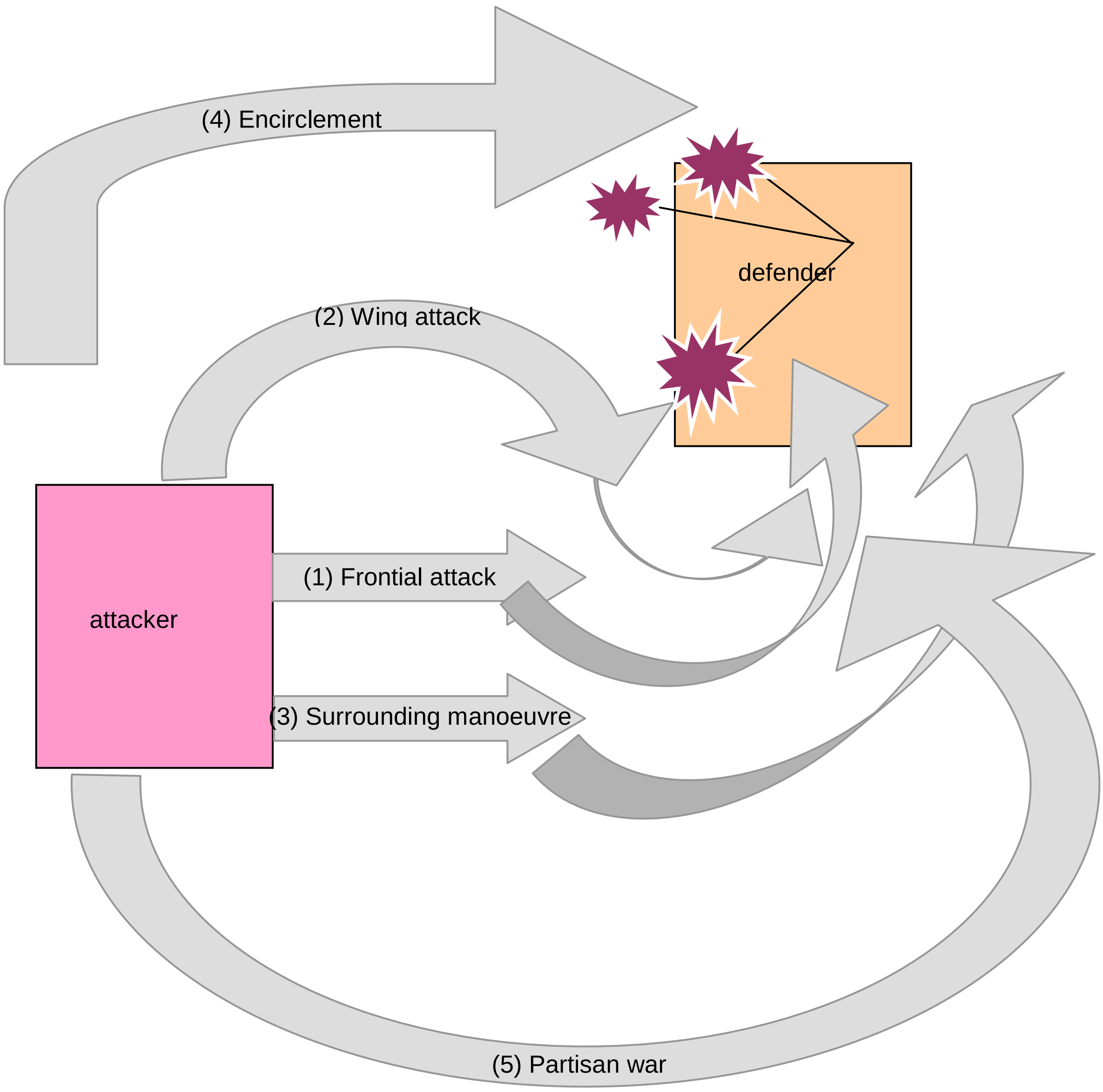
2. Wing attack

3. Surrounding attack

4. Encirclement

5. Partisan war

Picture 5: Kotlers attack strategy



Frontial attack

Frontial or side attack is when attacker throw all the power direct to producers, advertisment, prices and distiribution of competitor. Principle of power says : side with higher count of soldiers (sources) wins That principle is necessery to modify if defender have a stong payment or tereain advantage - then attacking forces must have superiority 3 : 1.

Modified frontial attack is characteriside with decreasin of prices appearence to competitor prices. It is definite alternative for pure frontial attack. Main objective is to persuade that attacker firm has same products as leader firm and they have it for lower price respective, that the price shows actual value of product. Leader firm should defense with price counter-attack Korean automobile producers especially Hyundai, offer their products for lower prices with increasing quality than competitor. Same as Škoda is trying to enforce with same quality cars as competitor on the E.U. market with better prices.

Wing attack

Kotler [3] writes „Army of enemy is strongest on place where is waitng a hit. In case that devote lower attention to wings and home font. Her weakness points (uncovered blocks) are easy object for enemy. Main principle of modern attack is to concentrate the power in to weakness point . It is possible to attack strong positions of enemy to hoild his force, but main attack can lead to wing or home font. Wing attack can have a two strategic dimensions, geographic and segment. From geographic point of view attacker is looking for the areas, where opponet is not so good. Othere wing attack strategy is to looking for not covered markets, which are secured by leader firms. For example japanase automobile producers resolved to manage unused customer market of economical cars in U.S.A.“ [2]

2 KOTLER, P. *Marketing management.* 10. rozšířené vydání. Praha: Grada Publishing, 2001. 720 s. ISBN 80

Kotler [3] says that wing strategies is other name for knowing of market segment moves. Reason is in appearing space, which is not filled with an acutal profile of product and their filling and developing in to the strong market segments. That strategy is one of modern marketing philosphy traditions, which say, that sens of marketing is to „discover needs and satisfy them“. Attractions of wing attacks is based on that attacker have probably of succes than frontal attacks and are especialy for attackers, which have lower sources than their enemies.

Surround maneuvre

Objective of key manauvre is to take forcibly wide area of enemyees with help of quickfire attack on several fronts. In case of that attack must enemy defend his frontal positions, wing and home font. That maneuvre have sens, if attacker have a big sources and belief, that quick surround brake attack of enemy.

Encirclement

This attacking strategy is minimal direct, becouse it is trying to avoid direct agressions againts actual enemy line. It offer three admissions:

1. Diversification by reciprocal un assosiation products.
2. Diversification of new geographic markets with current products.
3. Move to new technologies , wchi pull of current products.

Other encirclement strategy is technological jump. That is often used on tehnicly difficult products. We must slowly produce new technologies than simulate competitor products and leading of difficult front attacks. In moment ,when are best results they are starting attack with moving battle field to area of new technologies,which has big competitor advantage.

Strategy of encirclement is often used in automobile industry. Invention of commnon rail systém was a big technological step. Thanks that system the torque was increased, decreased use of fuel, decreased noise and emisions and more long service visits. Mercedes or PSA group reacted soon to revolution system and get good place in sale of compression ignition motors. Otherwise Ford or japanese producer underrated new trend and they are hardly getting the loss.

Partisan war

That strategy is used by bigger firms againts smaller. That is why it is inpossible to attack front or wing. So he is using a short timed attacks in border lines of enemy. Purpose of that is to demoralise opponet, or také some of his segments. Attacker can use convinient or unconvinient instrument. Military doctorine says, that small continuous attacks make to enemy bigger losses,disorganisations than some bigger attack. Partisan attacker can think, that it is more effective attack to small, isolated and badly defended markets than to bigger and strong markets. This strategy can be very expansive, but less than frontal,wing or encircle attack. Very important is that partisan war is usually preparation before real war, becouse bigger attack is needed for destroying the enemy.

One of partisan war exaple is in dealer of Škoda – Vista car company in Hodonín. That company built showroom increases prices which are differet from official price list. This company destroyed their competitors in wide area. Even employees were stealing customers form other dealers. This is breaking a conditions of Škodou Auto a. s. and damaging other dealers but it makes Vista car succesfull.

Kotlers marketing memorandum [3]: War loops

To be enemy have some advantages: When two firms area challenging, that have these consequences for attacker:

- Visibility. Angry of rivality makes visibility. It increases their visibility and interest for profit.
- Hope for survival stimulates inovation. Hard competitors does not leave the competitors to sleep. You must fight, not sleep..
- Feedback. Marked benchmarking informations tells if firm is increasing or decreasing. That corrective actions area usally faster and cheaper.
- Support of market development. Cost for developing and building are divided in to many subjects.
- Development of the brand Best way how to confrontate needs is to work with easier and new knowledges.

- Price protection. When price war beguns prices does not help to create the price standards. They are protecting margin and profit.
- Creating of the barier. Firms , which want to reach the branch are haunted with fight of two rivals, that is not suitable with their ideas about profit bussiness.
- Better morals. Rivalry between firms holds the employees in watchfullness and loyal

3.1.3 Strategy of market followers

This strategy is actualy concerned to developments of spare parts, after World war 2 japaneese auto producers duplicated american cars. Many firms built their strategy on legendary cars, for example in Czech is produced car Kaipan, which is duplicate of legendary Lotus Seven.

Kotler [3] writen about that strategy that: „It is hard to say, that followers miss soever strategy. Follower must know, how to hold actual customers and how to get some new. Every follower is trying to reach objective, with advanteges of placement, services, financy. It is often attacked objective of challangers.“ [3]

Here are four strategies, which can follower use:

1. **Swindler:** duplicates products of leading firm and sell them direct on market or with help of fake dealers. (In automobile industry – wheels, motorcar accesories, etc)
2. **Parasite:** imitate products, distribution, advertisment and other charecteric charectors of ledeing firm.
3. **Imitator:** duplicates some characters of products, but use different packing, advertisment, etc.
4. **Upravovatel:** tooks products of leader firm, adjust and improve them. He can go to other markets, becouse he want to avoid direct confontation with leader firm.

3 KOTLER, P. *Marketing management.* 10. rozšířené vydání. Praha: Grada Publishing, 2001. 765 s. ISBN 80-247-0016-6.

3.1.4 Non grand scale market strategy

Some firms in automobile industry specialise for space and corner on the market. (recess). That firms are involved to finding that recess on the market and avoiding of confotation with bigger company.

The big firms often know the potential of market recess. That is why this firms, makes companies, which are able to operate the recess. Becouse Mercedes did not want to establish the firm, so he bought known company AMG, which is specialised for tuning for years.

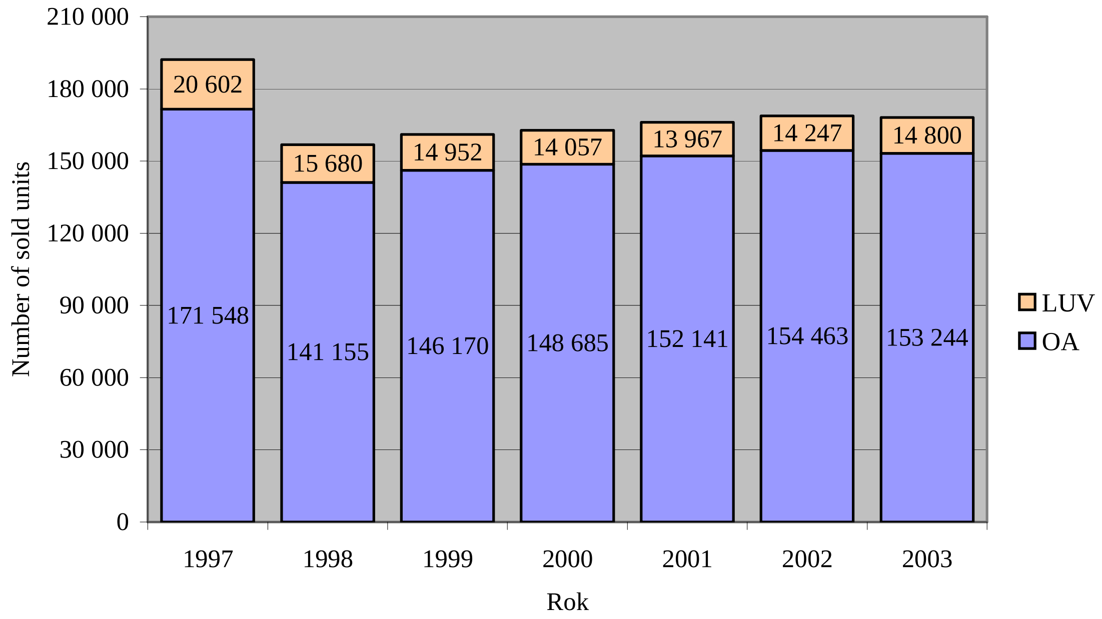
Essential is, that firms having small ration on the market can be profitable with strategy of non grand scale. It is imporatant, that he knows customers good and that he complyes their hopes better than other firms. Main object of non grand scale is in theese three points: produce, defence and expand. The strategy have a risk, that recess can dry or be attacked by opponent. Then firm ramain highly specified sources, which are not suitable for other use.

4 Analysis of automobile market in CR

4.1 Division of market according to the business category

Development of the automobile market duplicates an economical development in the Czech republic. Many economs consider situation on the automobile market as one of the indicaters of the Czech economy. Sale of new cars increased till year 1997. That year was record of sales and in this moment nothing indicates the same sharp sales.After fall in 1998 sales are constantly and slowly increasing.

Picture 6: Total sales of passenger and light commercial automobiles in CR 1997-2003



Sale of new OA in bussiness categories

Divide for categories is adjusted by SDA statistician. From year 1997 - 2004 SDA divided pasanger automobiles to theese categories :

Small cars + mini

Representative of that class are Škoda Felicia and Fabia, Peugeot 206, VW Polo, Fiat Punto, Opel Corsa, Renault Clio and other. Small cars are major produced with three or five doors bodywork, but Škoda Fabia Sedan or Renault Thalia are not. This class is best saled on our market thanks to Skoda. Ratio of smal and mini cars exceed up 50% in traced time. Reason for that is small buying power of population. Customers in E.U. use theese cars as second or third automobile in family, but in czech market it is usually only first and one car in family. That makes Skodas big sales, which has in basic model 5 doors bodywork and lot of space.

Lower middle class

This class in called Golf, afte VW Golf, which made in 70s mesures for lower middle class. Other represantative are Skoda Octavia, Opel Astra, Ford Escort and Focus, Peugeot 307, Nissan Almera etc. Cars in this class are typicly pruduced in wide range of bodywork. That are three – five doors bodywork, 4 doors sedan, extended kombi and in last years is produced the new version after lower middle class MPV (for example Citroën Xsara Picasso, Nissan Almera Tino, Renault Megane Scénic). It is second sold class after small cars with ratio about 30 %.

Middle class

Uniquw leader of this class is VW Passat. Other are Opel Vectra, Ford Mondeo, Renault Laguna etc. Major models are offered in sedan and kombi version. Ratio of this class is about less than 10 % Middle class is ussually liked by bussiness men. So thats why major sold automobiles are bussines cars.

Hgher and luxory class

Best known representative of this class are luxory brands as BMW, Mercedes or Audi. They have many models for sell. Other automobile models are for example Opel Omega, Nissan Maxima, Volvo S 60, S 80 This is not very interesting for mass production, with it 2% is used for presenting a luxory automobiles in category, but for brands as Mercedes, BMW, Audi and others is this sale crusial.

Terain automobiles

Ratio of this car is increasing thanks to new underclass SUV. Theese automobiles have four-wheel drive and bodywork of raging tereain cars, but they are specifed for quality roads Every year are new models. Best known are Honda CRV, Toyota RAV4, Nissan X-Trail, Mercedes M, etc. Negligible sales makes classic tereain cars as Nissan Patrol, Toyota Land Cruiser or Mitsubishi Pajero.

Bigspace automobiles (MPV)

Ratio of class MPV is going to increase thanks to smaller midivans, which ar deduced by middle class automobiles. This cars are not so expansive like a classic MPV (for example Renault Espace, VW Sharan), but for family car are ideal. Firs european midivan was Renault Megane Scénic and from second half of 90s have new competitiors in Citroën Xsara Picasso, Opel Zafira, Toyota Corolla Verso, etc.

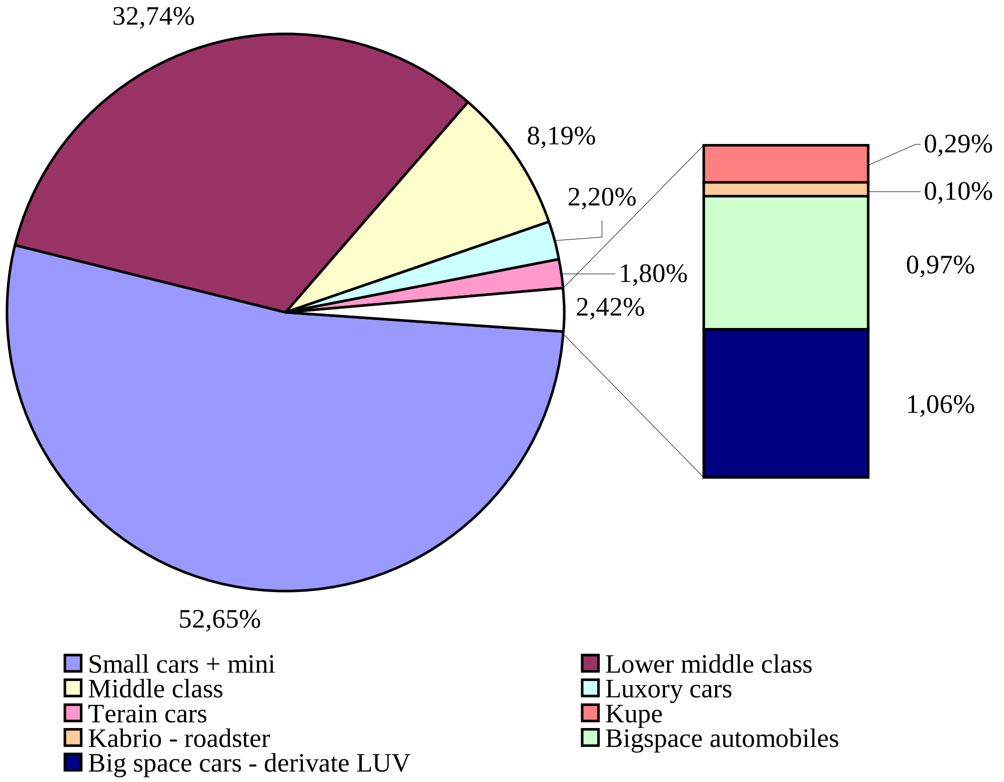
Bigspace automobiles – derivative LUV

That category was established by adapt of cars, which were produced original as light commercial cars. Representative are Citroën Berlingo, sister model Peugeot Partner and Renault Kangoo. Higher bodywork makes a bigger space in car. Their popularity is rising , becouse they are very universal and in Czech is possibly in five doors version with counter to get back the value added tax. That is why passanger model is more sold than light commercial and we can wait more sales

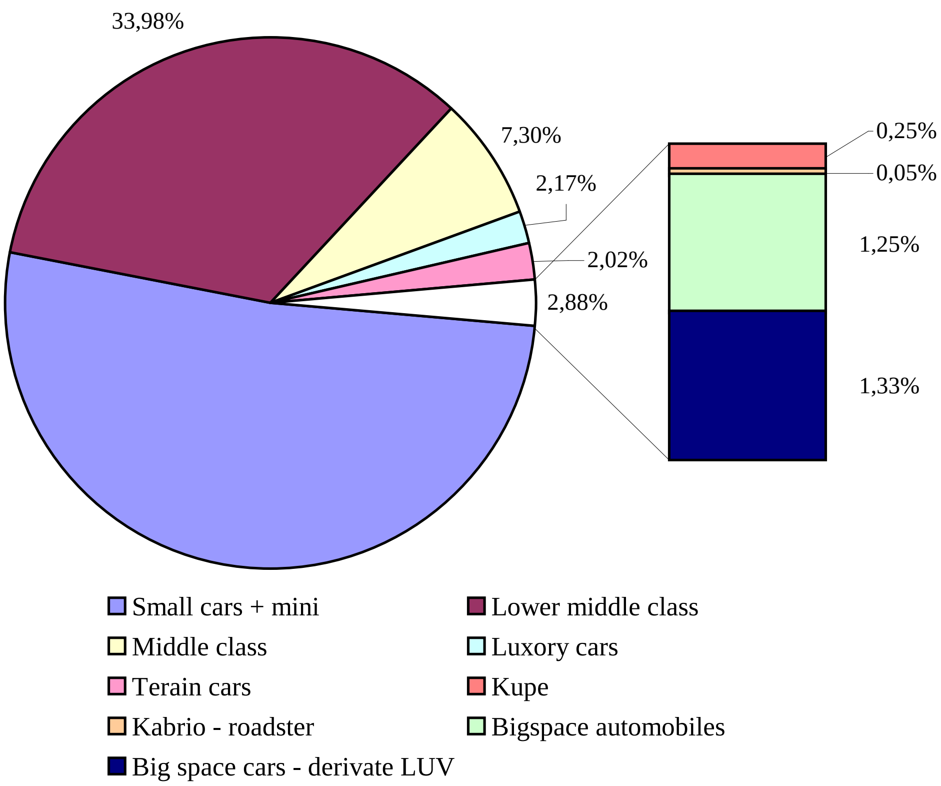
Kupe and kabrio – roadster

Theese sport cars are in the border of segment on the czech market. Their decreasing of ratio is not made by unpopularity, but in change of models to other categories. For example Renault Megane Coupe.

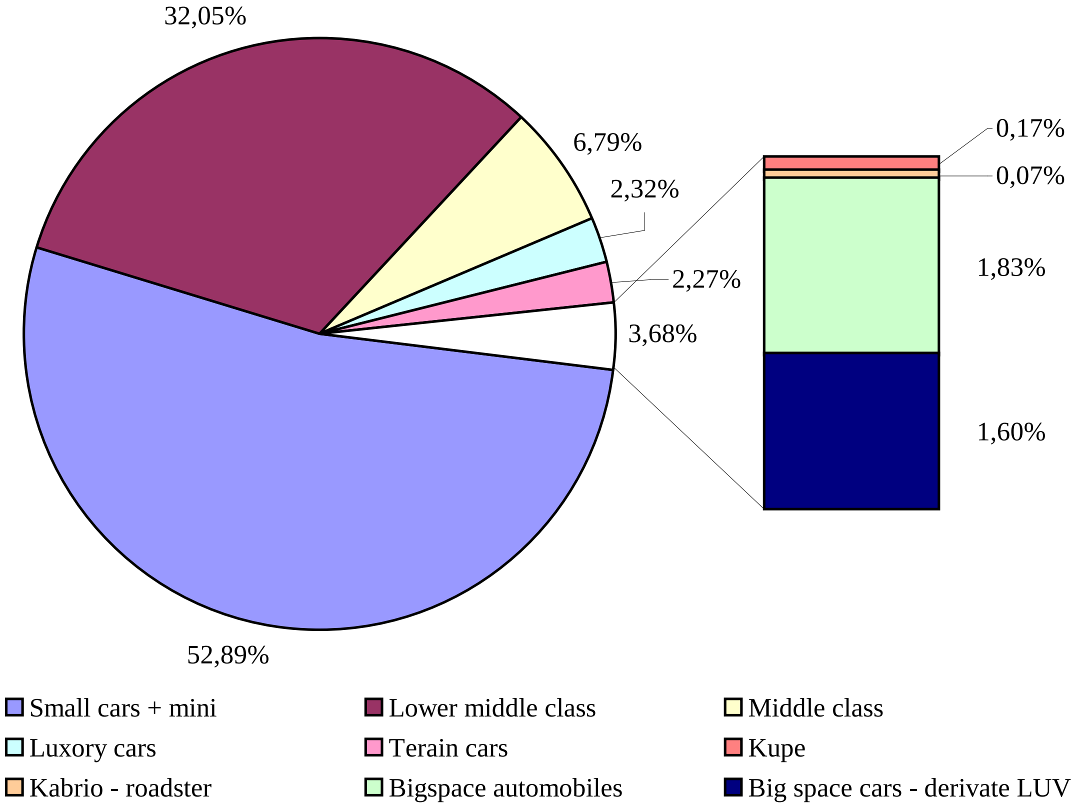
Picture 7:Ratio of sale classes on the makret in CR -2000



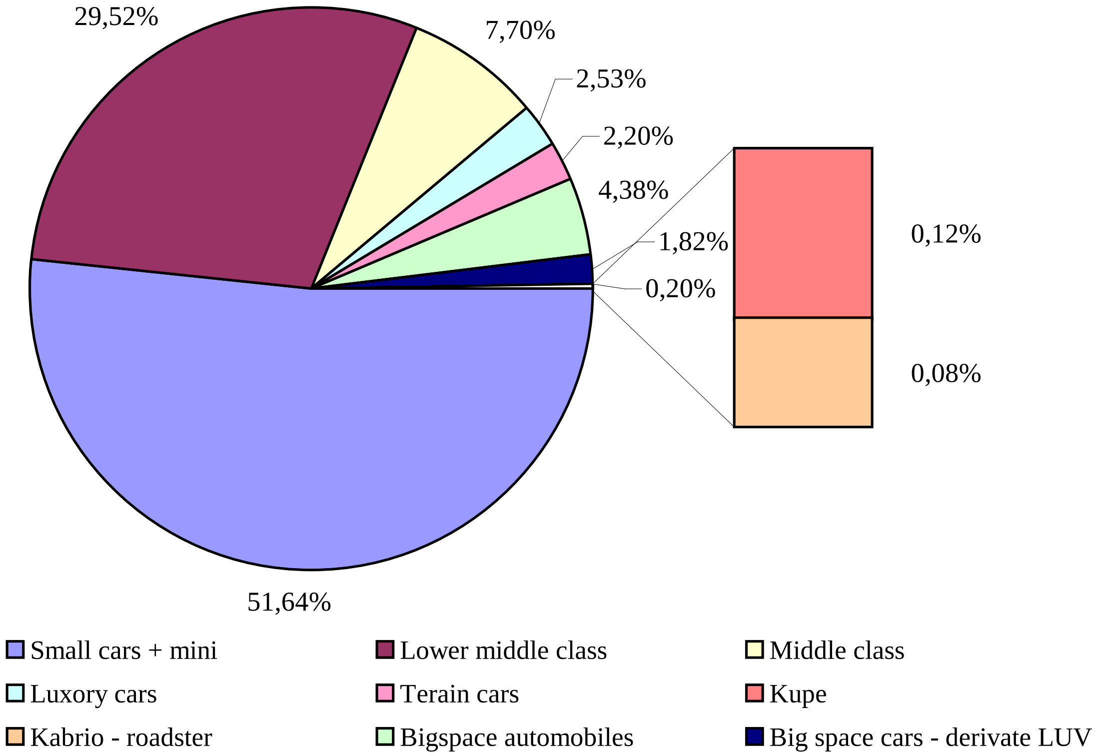
Picture 8: Ratio of sale classes on the makret with passanger cars in CR - 2001



Picture 9: Ratio of sale classes on the makret with passanger cars in CR - 2002



Picture 10: Ratio of sale classes on the makret with passanger cars in CR - 2003



4.2 Analisis of car company representation

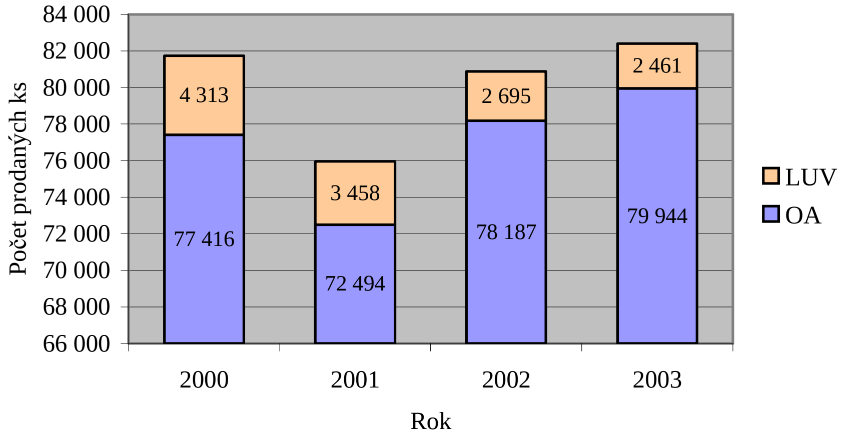
Individual importers and dealars are very important part of automobile chain, becouse they mediate final contact with czstomer. In the year 2003 were on the czech market 42 automobile brands. Market situation for dealers is not easy, cost for building or rent of showroom is high, they must have required service, qualified emploees, and other thigs, all about tens milions. Individual dealers can not sell or service more cars than from one brand, so the selling is realy hard, becouse in czech is half lower margin than in E.U. That is the reasen why the dealers net is changing and developing.

Changes were made by exporters too. Company Motokov loss in year 2001 importer license for automobiles Citroën and Hyundai. Importer of Citroënu have direct french producer and Hyuandai have company Auto Palace Group, which imports the japaneese Mazda, that double representation is passing on the czech market.

Chart of sold automobiles on the czech market

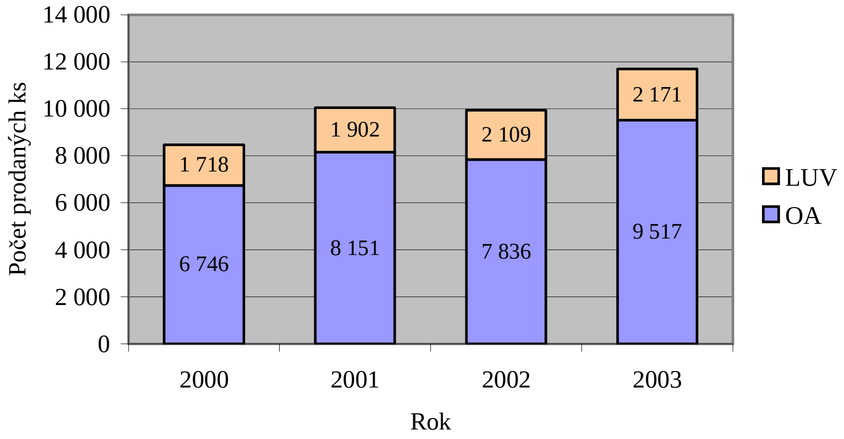
Škoda

Picture 11: Sold of Škoda in CR 200-2003



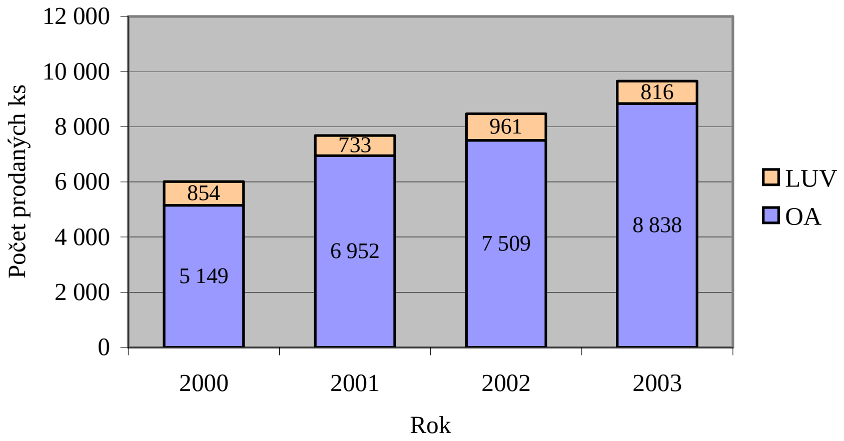
Volkswagen

Picture 12: Sold of Volkswagen in ČR 2000-2003



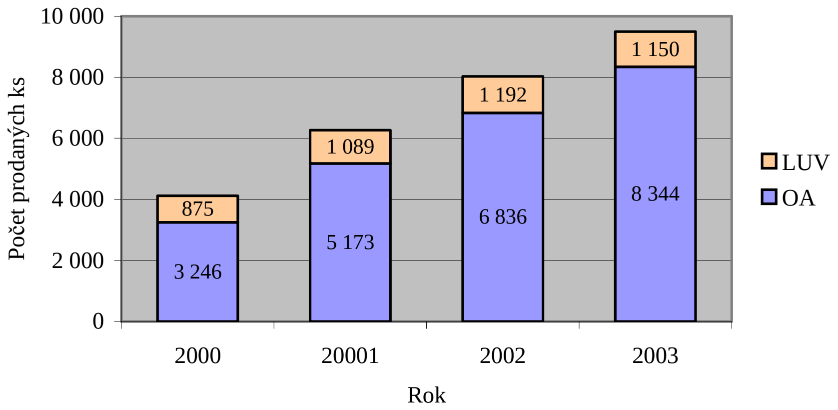
Renault

Picture 13: Sold of Renault in ČR 2000-2003



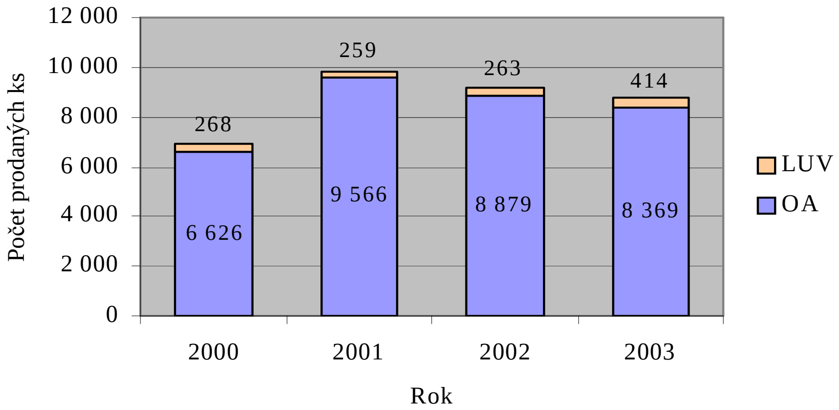
Peugeot

Picture 14 :Sold of Peugeot in ČR 2000-2003



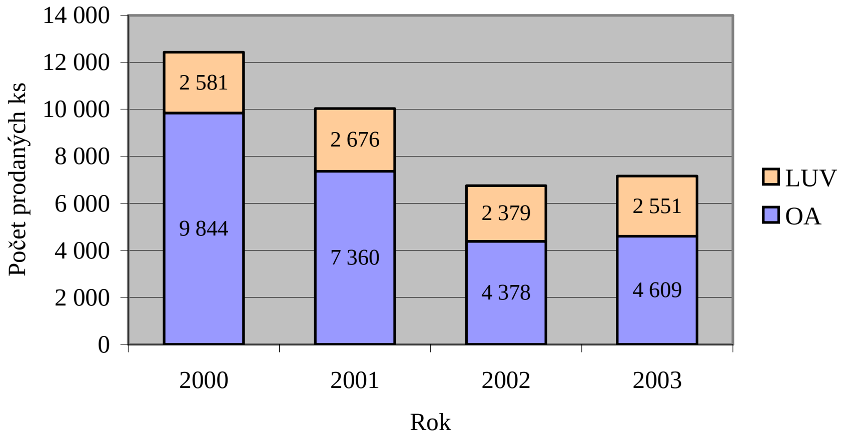
Opel

Picture 15: Sold of Opel in ČR 2000-2003



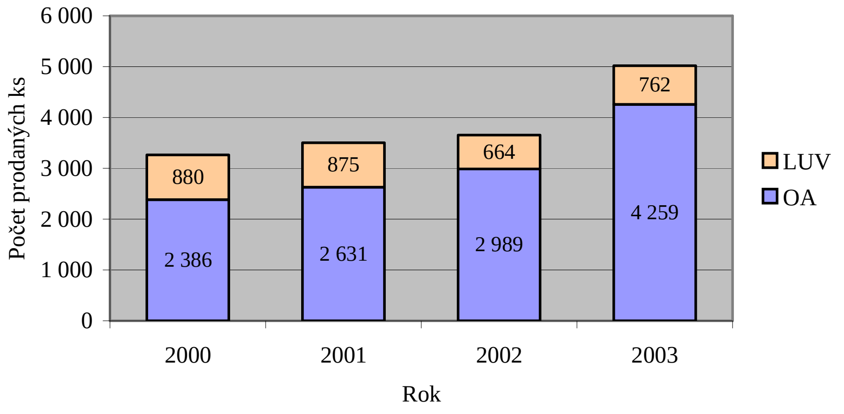
Ford

Picture 16: Sold of Ford in ČR 2000-2001



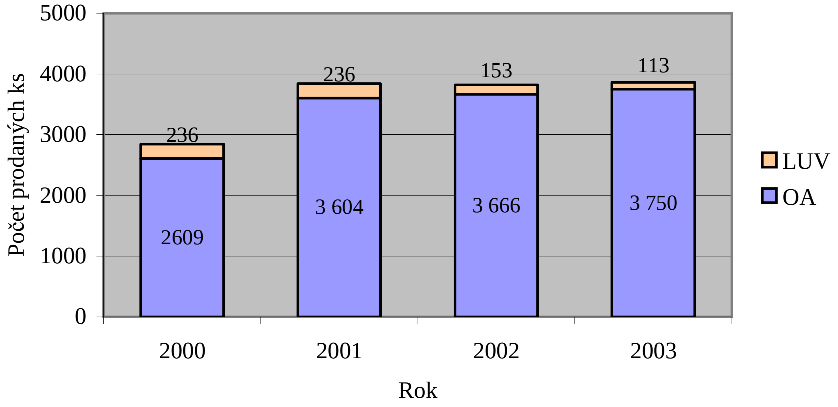
Citroën

Picture 17: Sold of Citroën in ČR 2000-2003



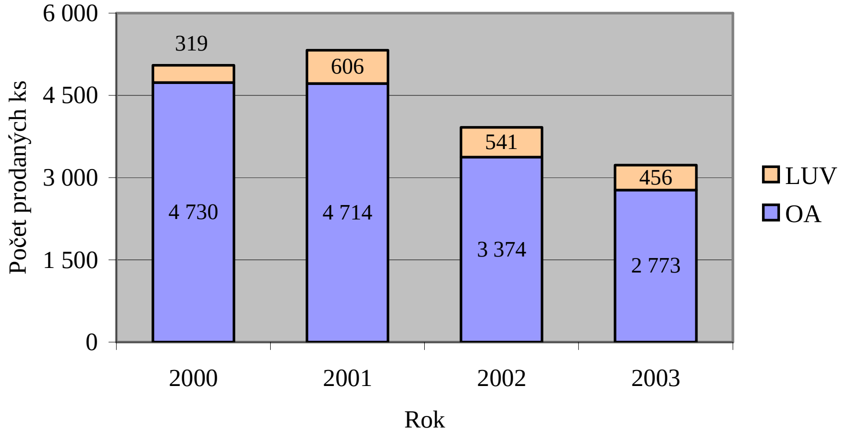
Toyota

Picture 18:Sold of Toyota in ČR 2000-2003



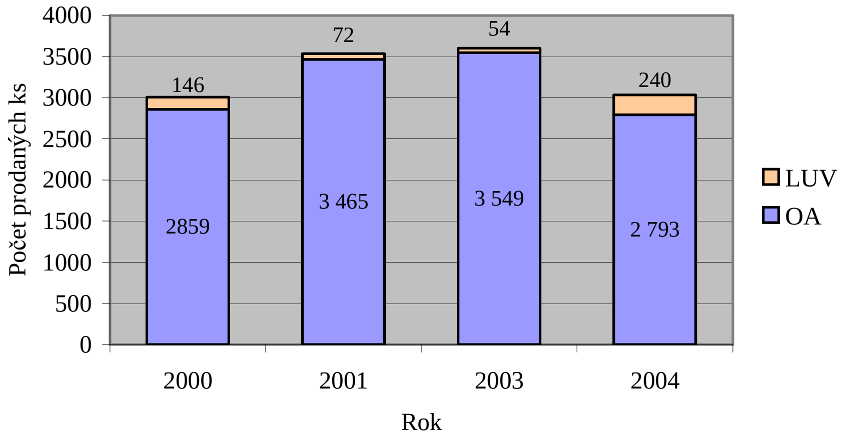
Fiat

Picture 19: Sold of Fiat in ČR 2000-2003



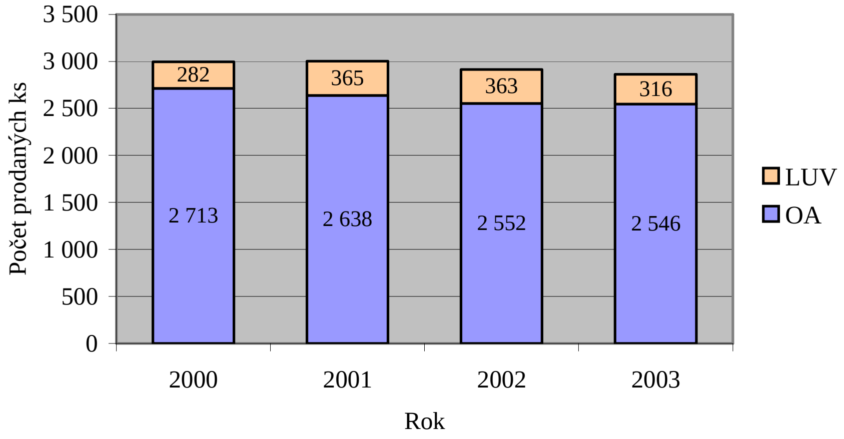
Seat

Picture 20: Sold of Seat in ČR 2000-2003



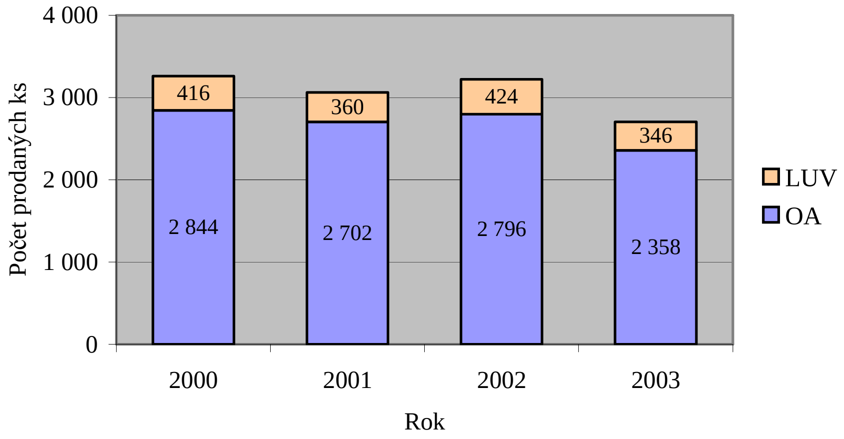
Nissan

Picture 21: Sold of Nissan in ČR 2000-2003



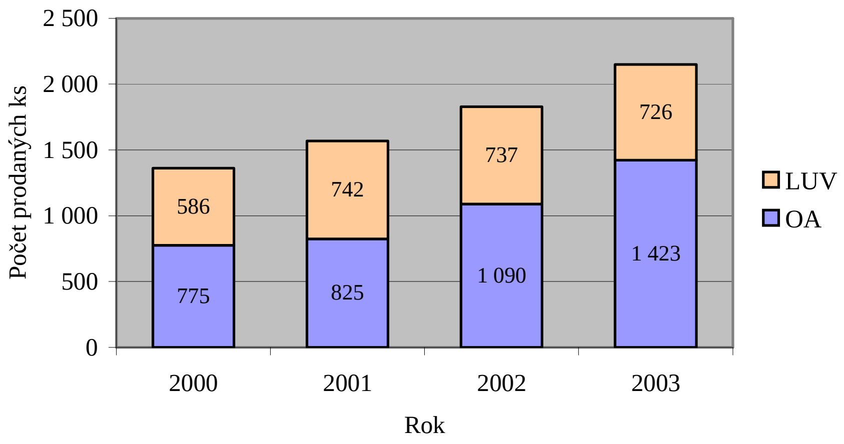
Mazda

Picture 22: Sold of Mazda in ČR 2000-2003



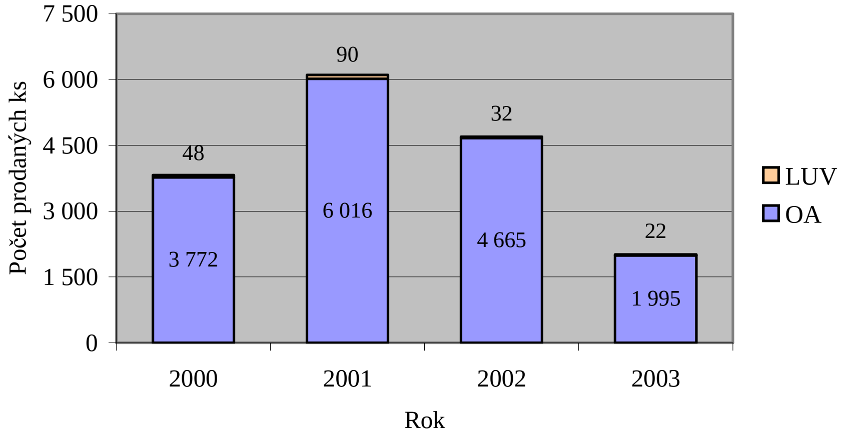
Mercedes-Benz

Picture 23: Sold of Mercedes-Benz in ČR 2000-2003



Daewoo

Picture 24: Sold of Daewoo in ČR 2000-2003



5 Changes in the automobile market after entering the E.U.

On 30th. September 2002 the E.U. ended blocal extractions, which left for 15 years automobile producer selling new cars only by authorizations importer, dealers with fixed terms. They could control after sale activity. Automobile producers could dictate prices and placement in individual country and could not alowed to sell cars in other country. Sales were not suitable for terms of free-market.

New E.U. rules enable automobile producers to choose what interior they want or garant them exclusiveness in definetd area. But it will not be together. Sellers can open the showroom every where in E.U. coutries and they can sell more than one brand of automobiles. Only space for one brand must be separeted Every dealers will get cars from importer with same conditions.

Very interisting, is that ended sell and after sell service. Sellers must not operate services, in reverse they can get authorizations to many brands together. Rules tells that automobile producers must provide to dealers same informations, diagnostics, instruments and software. Independent servicemen must have same prices. Authorizations services are able to buy from pruducer and direct from subcotractorm, that means with better conditions.

Imopratnt is, that something will not change. They will still choose, who will be in their sellers net. They will not be compeld deliver cars to independent dealers selling via inetrnet or in to supermarkets, but they will not obstruct their dealers from that. That change in sell in E.U. is very also interisting for Czech republic

6 Proposal of passenger automobiles sale

Sale strategy becomes from price policy and econoimical situation on the market. We must first know for who will be specifed this straegy, if for sale of automobiles or service. In our case we orient to car sell which indirectly increases the service customers. We must first make the marketing plan, decision what will we offer and to who better than competitors.

When customers usually buy the car, they receive discounts, presents so we have to change this and make some innovation in this strategy. Customer with money will come if we make them a good offer, but those without money it does not help them with buying, when they receive added winter tires. It does not increases their month payments for possible leasing. I would recommend to focus on the new financil product. If we want to increases ascual leasing we must cooperate on the new product with leasing company (CAC, Summit Leasing, atd.). Together with them we make the special terms of profinancy.

That makes, that custeomer will give 20 % of car price forward (advance payment) and then will pay lower payments, thank that he will pay a 20% in the end(every time) Decreased advance payment in start increases remaining value of automobile. In the last payment, they will have a chance to buy car direct (20%) or extand their payments for longer time. Now if we want a car we must pay a 40% advance payment, then we pay till end so the remaining value is 1000 Kč so that is why are our payments cheaper.

Very interesting on this product is that, cooperate in financy makes automobile leasing payments avaible to people which do not have money for actual leasing. Biggest problem in making of new strategy, was that it is very hard to make something new in this industry and it is hard to prevail on the market.This strategy is not used by any brands in our market, so i hope, that will be succesfull.

7 Implementation of selected strategy in practice

Best sold passanger cars of Citroen are C3 and C2 , which is used by young and middle age population. From our marketing study we know, that theese cars are best for our potential customers. Many of them would like to buy it, but only increased payments can make it possible.

For compare i write down actual leasing of Citroen C3 and new strategy of sale, which will use the profinance and is more advantegeou.

These payments are without accident and state insurance. It is buy of new car Citroen C3 in cost: 300 000,- Kč. Remaining value is 1000 + 19% VAT and long of payment is 48 months.

Advance payment with VAT		Month payment with VAT	Total cost
20%	**60 000,- Kč**	**5 795,- Kč**	339 350,- Kč
25%	**75 000,- Kč**	**5 453,- Kč**	337 934,- Kč
30%	**90 000,- Kč**	**5 111,- Kč**	336 518,- Kč
35%	**105 000,- Kč**	**4 769,- Kč**	335 102,- Kč
40%	**120 000,- Kč**	**4 427,- Kč**	333 686,- Kč
45%	**135 000,- Kč**	**4 085,- Kč**	332 270,- Kč

These payments are without accident and state insurance. It is buy of new car Citroen C3 in cost: 300 000,- Kč. Remaining value is 60 000 Kč and long of payment is 48 months.

Advance payment with VAT		Month payment with VAT	Total cost
20%	**60 000,- Kč**	**4 275,- Kč**	325 200,- Kč
25%	**75 000,- Kč**	**3 562,- Kč**	321 000,- Kč
30%	**90 000,- Kč**	**2 850,- Kč**	316 800,- Kč
35%	**105 000,- Kč**	**2 137,- Kč**	312 600,- Kč
40%	**120 000,- Kč**	**1986,- Kč**	308 400,- Kč
45%	**135 000,- Kč**	**1870,- Kč**	304 320,- Kč

For example: Month payment will by advance payment 25% - 75 000 be about 3562 ,which is in actual economical situation finacly rached cost. For major potential customers it is better than cost 5453 of acual leasing

That makes, that this car will be reachable for people with smaller cash or for those who can not pay so big payments. I informed the Citroen company about this strategy. They are now negotiate with CAC Leasing. Now are more informations trade secret:

8 Conclusion

In the Czech market of passenger and light commercial automobiles , there is no low-quality car. The hard competition in this market does not let any bad car stay alive. The marketibility of individual brands and models depends on their image, design, use value, and the marketing strategy of a single producer. The Automobile market in Czech Republic is different the from E.U. market by the strong standing of the home producer and the lower purchasing power of the population. Presumed increase of Czech citizens will increase their living standard and the sale of automobiles. One impuls for the buying of new cars is that the Czech car park is very obsolated. We can presume, that the MPV category will inrease, especialy mini van and cars with compression ignition engines. The Czech customer will probably look more at his safety and the interior of his automobile.

Automobile brands, which will improve thein situation on the Czech market, are from the French and probably South Corean producers. Otherwise Škoda´s market ratio will decrease. Japaneese cars have a big potential and their sale will increase thanks to special models for Europe.Becouse many producers are connected, we will see cars with the same engines, bodywork and other technical parameters. Some identical cars are sold in different brands, dealers, networks, etc. The Development and production of automobiles continues and some car are very hard to categorize.

The Automobile industry is a very dynamic branch, which is constantly developing. The production of new automobiles in the Czech Republic is starting in the year 2005. That is the second automobile production in our country. This development will have a big influence on the Czech market and its observation will be very interesting too.

9 Reference list

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Auto Tip – year 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004

Automobil revue – year 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004

Auto motor a sport – year 1998, 1999, 2000, 2001, 2002, 2003, 2004

Citroën magazín – year 2001, 2002, 2003, 2004

Nissan magazín – year 1999, 2000, 2001, 2002, 2003, 2004

Svět motorů – year 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004

Catalogues:

Auto katalog – model year 2003

Web pages: in Attachment 1

Resumé

Diplomová práce hodnotí stav a vývoj trhu s novými osobními a lehkými užitkovými automobily v České republice. Analyzuje jednotlivé segmenty osobních automobilů, postavení a možnosti jednotlivých automobilových značek zastoupených na českém trhu. Zároveň nastiňuje jejich pravděpodobný vývoj v nejbližších letech. Tato práce bude sloužit především automobilovým prodejcům, kteří ji využijí jako jeden z podkladů pro rozhodování a volbě strategií při prodeji nových automobilů.

Resume

This Diploma Thesis evaluates the situation and development of the Passenger and Light Commercial cars market in the Czech republic. The author analyses individual classes of passenger cars and the position and chances of particular car trade marks sold on the Czech market. At the same time the Diploma Thesis outlines the probable development of the car companies in the nearest future. This work will principally serve as information for car dealers, who could use this analyse when deciding and choosing strategies for selling new cars.

Attachments

Attachment 1: Web pages of individual automobile producers

Attachment 2: Sales OA and LUV in ČR 1-12/2001 (brands)

Attachment 3: Ratios of individual categories - class on the market with passanger and light commercial cars in ČR v 4Q 2001

Attachment 4: Sales OA and LUV in ČR za období 1-12/2002 (dle značek)

Attachment 5: Ratios of individual categories - class on the market with passanger and light commercial cars in ČR v 4Q 2002

Attachment 6: Sales OA and LUV in ČR za období 1-12/2003 (dle značek)

Attachment 7: Ratios of individual categories - class on the market with passanger and light commercial cars in ČR v 4Q 2003

Attachment - Příloha 1

AUDI	*IVG, s.r.o.*	www.audi.cz
BMW	*AuTec Group, a.s.*	www.bmw.cz
CITROEN	*Citroen ČR, s.r.o.*	www.citroen.cz
DAEWOO	*Daewoo Motor Czech, s.r.o.*	www.daewoocz.cz
DAF	*DAF Trucks CZ, s.r.o.*	www.daftrucks.cz
FIAT	*Fiat ČR, s.r.o.*	www.fiat.cz www.alfaromeo.cz
FORD	*Ford Motor Company s.r.o*	www.ford.cz
HONDA	*Honda ČR, s.r.o.*	www.honda.cz
HYUNDAI	*Hyundai Motor CZ s.r.o.*	www.hyundaimotor.cz
Chrysler/Jeep	*DaimlerChrysler Automotive Bohemia*	www.daimlerchrysler.cz
IVECO	*Fiat ČR, s.r.o.*	www.iveco.cz
JAGUAR	*Motokov, a.s.*	www.motokov.cz/jaguar
KIA	*Kia Motors Czech, s.r.o.*	www.kiamotors.cz
LADA	*CS AutoLada,s.r.o.*	www.lada.cz
MAN	*MAN užitková vozidla ČR s.r.o.*	www.man.cz
MAZDA	*Auto Palace Praha k.s.*	www.mazda.cz
MERCEDES	*DaimlerChrysler Automotive Bohemia*	www.daimlerchrysler.cz
MITSUBISHI	*MMC Automobile ČR, s.r.o.*	www.mitsubishi-motors.cz
NISSAN	*Nissan ČR,s.r.o.*	www.nissan.cz
OPEL	*Opel C+S, s.r.o.*	www.opel.cz

PEUGEOT	*Peugeot ČR,s.r.o.*	www.peugeot.cz
RENAULT (OA/PC)	*Renault ČR,a.s.*	www.renault.cz
RENAULT (NA/T)	*Renault Truck ČR, s.r.o.*	www.renaultvi.cz
SAAB	*Wallicar,s.r.o.*	www.saabcr.cz
SEAT	*IVG, s.r.o.*	www.seat.cz
SCANIA	*Scania Czech Republic,s.r.o.*	www.scania.com
SUBARU	*Subaru ČR, s.r.o.*	www.subaru.cz
SUZUKI	*Suzuki Motor Czech, s.r.o.*	www.suzuki-motor.cz
TOYOTA	*Toyota Motor Czech, s.r.o.*	www.toyota.cz
VOLVO OA	*Volvo Auto Czech, s.r.o.*	www.volvo.cz
VOLVO NA	*Volvo Truck Czech, s. r.o.*	www.volvo.cz
VW	*IVG, s.r.o.*	www.volkswagen.cz
APRILIA	*A Spirit, a.s.*	www.aprilia-cz.cz
CAGIVA	*Cagiva, s.r.o.*	www.cagiva.cz
Hero Puch	*Impexta 3000, s.r.o.*	www.impexta.cz
Harley Davidson	*KLASIK MOTO, a.s.*	www.harleydavidson.cz
KAWASAKI	*Asko KC, s.r.o.*	www.kawasaki.cz
PIAGGIO	*Motokov, a.s.*	www.motokov.cz/piaggio
TRIUMPH	*Triumph ČR,s.r.o.*	www.triumph.cz
YAMAHA	*Yama Moto Sport, a.s.*	www.yamaha.cz

Attachment – Příloha 2

Prodeje OA a LUV v ČR za období 1-12/2001

Sales of PC + LCV in CR 1-12/2001

1-12/2001	OA / PC		LUV / LCV		Celkem / Total		
Značka / Make	Ks Units	Podíl Share	Ks Units	Podíl Share	Ks Units	Podíl Share	Pořadí Pos.
Alfa Romeo	323	0,22%			323	0,20%	25.
AUDI	1074	0,73%			1074	0,67%	19.
BMW	623	0,43%			623	0,39%	21.
Citroen	2631	1,80%	875	5,85%	3506	2,18%	11.
Daewoo	6016	4,12%	90	0,60%	6106	3,79%	7.
FIAT	4714	3,23%	606	4,05%	5320	3,30%	8.
Ford	7360	5,04%	2676	17,90%	10036	6,23%	3.
Honda	1967	1,35%			1967	1,22%	14.
Hyundai	1164	0,80%	308	2,06%	1472	0,91%	16.
Chrysler/Jeep	205	0,14%			205	0,13%	27.
Jaguar	51	0,03%			51	0,03%	34.
KIA	828	0,57%	324	2,17%	1152	0,71%	18.
Lada	505	0,35%	72	0,48%	577	0,36%	22.
Lancia	7	0,00%			7	0,00%	40.
Mazda	2702	1,85%	360	2,41%	3062	1,90%	12.
Mercedes	825	0,56%	742	4,96%	1567	0,97%	15.
Mitsubishi	693	0,47%	131	0,88%	824	0,51%	20.
Nissan	2638	1,80%	365	2,44%	3003	1,86%	13.
Opel	9566	6,54%	259	1,73%	9825	6,10%	4.
Peugeot	5173	3,54%	1089	7,28%	6262	3,89%	6.
Proton	0	0,00%			0	0,00%	43.
Renault	6952	4,76%	733	4,90%	7685	4,77%	5.
SAAB	56	0,04%			56	0,03%	32.
Ssang Yong	73	0,05%			73	0,05%	30.
SEAT	3465	2,37%	72	0,48%	3537	2,20%	10.
Subaru	246	0,17%			246	0,15%	26.
Suzuki	1288	0,88%	14	0,09%	1302	0,81%	17.
Toyota	3604	2,47%	236	1,58%	3840	2,38%	9.
Volvo	436	0,30%			436	0,27%	23.
VW	8151	5,58%	1902	12,72%	10053	6,24%	2.
Zastava Yugo	2	0,00%	1	0,01%	3	0,00%	41.
*MB LUV/LCV jen/only VITO							

Celkem SDA Total CIA	**73338**	**50,17%**	**10855**	**72,60%**	**84193**	**52,25%**	

1-12/2001	OA / PC		LUV / LCV		Celkem / Total		
Značka / Make	**Ks Units**	**Podíl Share**	**Ks Units**	**Podíl Share**	**Ks Units**	**Podíl Share**	**Pořadí Pos.**
Ostatní / Others							
Škoda	72494	49,60%	3458	23,13%	75952	47,14%	1.
Tatra	1	0,00%			1	0,00%	42.
TAZ			18	0,12%	18	0,01%	38.
Tatra Beta			65	0,43%	65	0,04%	31.
Lublin			365	2,44%	365	0,23%	24.
JLaureta			22	0,15%	22	0,01%	35.
Porsche	20	0,01%			20	0,01%	36-37.
Asia Motors			11	0,07%	11	0,01%	39.
TATA			20	0,13%	20	0,01%	36-37.
Magma			54	0,36%	54	0,03%	33.
Land/Range Rover	137	0,09%	33	0,22%	170	0,11%	29.
Rover**	172	0,12%			172	0,11%	28.
Ost.oficiální Oth. oficial	8	0,01%	51	0,34%	59	0,04%	
Celkem ostatní Total others	**72832**	**49,83%**	**4097**	**27,40%**	**76929**	**47,75%**	
Celkem ostatní + SDA / Total others + CIA							
	146170	**100,00%**	**14952**	**100,00%**	**161122**	**100,00%**	
*OA/PC=MTX(7ks/Units) Ferrari(1ks/Units) LUV/LCV=Multicar **Inclusive 2xMGF							

Attachment – příloha 3

Podíly jednotlivých obchodních kategorií- tříd na celkovém trhu s novými osobními automobily v ČR v 4Q 2001

Shares of various bussines categories-classes on total brand new passenger cars in CR in 4Q 2001

OA / PC	4Q 2001		z toho / from this	
Kategorie - Třída / Category - Class	Ks / Units	Podíl / Share	SDA / CIA	Podíl / Share
Malé vozy + mini / Small Cars + Mini	75502	51,65%	23403	31,91%
Nižší střední / Low Middle	49665	33,98%	29248	39,88%
Střední / Middle	10667	7,30%	10551	14,39%
Vyšší a luxusní / High and Luxury	3175	2,17%	3121	4,26%
Terenní / Off-Road	2956	2,02%	2819	3,84%
Kupé / Coupé *	359	0,25%	359	0,49%
Kabrio-Roadster / Cabrio-Roadster	72	0,05%	63	0,09%
Velkoprostorové / MPV	1826	1,25%	1826	2,49%
Velkoprostorové / MPV derivat LUV / LCV	1948	1,33%	1948	2,66%
* nezahrnuty / notinclusive Renault and Jaguar				
Celkem / Total	**146170**	**100,00%**	**73338**	**50,17%**

SDA/CIA 2001

Podíly jednotlivých obchodních kategorií-tříd na celkovém trhu s novými lehkými užitkovými automobily v ČR v 4Q 2001

Shares of various bussines categories-classes on total brand new Light Commercial Vehicles in CR in 4Q 2001

LUV / LCV	4Q 2001		z toho / from this	
Kategorie - Třída / Category - Class (nosnost/Payload)	Ks / Units	Podíl / Share	SDA / CIA	Podíl / Share
Malá / Small (0,0 - 0,6 t)	1426	9,25%	227	2,00%
Střední / Middle (0,601 - 1 t)	4946	32,07%	2538	22,41%
Větší / Upper (1,001 - 1,5 t)	8339	54,07%	7954	70,23%
Velká / Large (>1,501 t)	712	4,62%	607	5,36%
Celkově / Total	**15423**	**100,00%**	**11326**	**73,44%**
z toho/from this 4 x 4	538	3,49%	474	4,19%
Ze statistiky NA / From statistic of Trucks - N1	321		283	
Celkem N1 / Total N1	**15744**	**100,00%**	**11609**	**73,74%**

SDA/CIA 2001

Attachment – příloha 4

10 Prodeje OA a LUV v ČR za období 1-12/2002

Sales of PC + LCV in CR 1-12/2002

1-12/2002	OA / PC		LUV / LCV		Celkem / Total		
Značka / Make	Ks Units	Podíl Share	Ks Units	Podíl Share	Ks Units	Podíl Share	Pořadí Pos.
Alfa Romeo	293	0,20%			293	0,18%	26.
AUDI	1141	0,77%			1141	0,70%	19.
BMW	803	0,54%			803	0,49%	21.
Citroen	2989	2,01%	664	4,72%	3653	2,24%	10.
Daewoo	4665	3,14%	32	0,23%	4697	2,89%	7.
FIAT	3374	2,27%	541	3,85%	3915	2,41%	8.
Ford	4378	2,94%	2379	16,92%	6757	4,15%	6.
Honda	1626	1,09%			1626	1,00%	15.
Hyundai	1210	0,81%	132	0,94%	1342	0,82%	17.
Chrysler/Jeep	220	0,15%			220	0,14%	28.
Jaguar	66	0,04%			66	0,04%	32.
KIA	787	0,53%	436	3,10%	1223	0,75%	18.
Lada	386	0,26%	42	0,30%	428	0,26%	23.
Lancia	0	0,00%			0	0,00%	40-42.
Mazda	2796	1,88%	424	3,02%	3220	1,98%	12.
Mercedes *	1090	0,73%	737	5,24%	1827	1,12%	14.
Mitsubishi	887	0,60%	148	1,05%	1035	0,64%	20.
Nissan	2552	1,72%	363	2,58%	2915	1,79%	13.
Opel	8879	5,97%	263	1,87%	9142	5,62%	3.
Peugeot	6836	4,60%	1192	8,48%	8028	4,93%	5.
Renault	7509	5,05%	961	6,84%	8470	5,20%	4.
SAAB	64	0,04%			64	0,04%	33.
Ssang Yong	17	0,01%			17	0,01%	38.
SEAT	3549	2,39%	54	0,38%	3603	2,21%	11.
Subaru	306	0,21%			306	0,19%	25.
Suzuki	1441	0,97%	47	0,33%	1488	0,91%	16.
Toyota	3666	2,47%	153	1,09%	3819	2,35%	9.
Volvo	731	0,49%			731	0,45%	22.
VW	7836	5,27%	2109	15,00%	9945	6,11%	2.

Celkem SDA Total CIA	**70097**	**47,14%**	**10677**	**75,96%**	**80774**	**49,63%**	

1-12/2002	OA / PC		LUV / LCV		Celkem / Total		
Značka / Make	**Ks Units**	**Podíl Share**	**Ks Units**	**Podíl Share**	**Ks Units**	**Podíl Share**	**Pořadí Pos.**
Ostatní / Others							
Škoda	78187	52,59%	2695	19,17%	80882	49,70%	1.
Tatra	0	0,00%			0	0,00%	40-42.
TAZ			0	0,00%	0	0,00%	40-42.
Dacia	24	0,02%	163	1,16%	187	0,11%	29.
Lublin**			354	2,52%	354	0,22%	24.
JLaureta			18	0,13%	18	0,01%	36-37.
Porsche	18	0,01%			18	0,01%	36-37.
Multicar			75	0,53%	75	0,05%	31.
TATA	4	0,00%	8	0,06%	12	0,01%	39.
Magma			43	0,31%	43	0,03%	34.
Land/Range Rover	206	0,14%	24	0,17%	230	0,14%	27.
Rover	123	0,08%			123	0,08%	30.
Ost.oficiální Oth. oficial	26	0,02%	0	0,00%	26	0,02%	35.
Celkem ostatní Total others	**78588**	**52,86%**	**3380**	**24,04%**	**81968**	**50,37%**	
Celkem ostatní + SDA / Total others + CIA							
	148685	**100,00%**	**14057**	**100,00%**	**162742**	**100,00%**	
*OA/PC=MTX Ferrari(6ks/Units),MGF(4ks/Units),Gordon(5ks/Units),Kaipan(11ks/Units)							

Attachment – příloha 5

Podíly jednotlivých obchodních kategorií-tříd na celkovém trhu s novými osobními automobily v ČR v 4Q 2002

Shares of various bussines categories-classes on total brand new passenger cars in CR in 4Q 2002

OA / PC	4Q 2002		z toho / from this	
Kategorie - Třída / Category - Class	**Ks / Units**	**Podíl / Share**	**SDA / CIA**	**Podíl / Share**
Malé vozy + mini / Small Cars + Mini	78642	52,89%	21895	31,24%
Nižší střední / Low Middle	47654	32,05%	26169	37,33%
Střední / Middle	10097	6,79%	10057	14,35%
Vyšší a luxusní / High and Luxury	3450	2,32%	3382	4,82%
Terenní / Off-Road	3375	2,27%	3165	4,52%
Kupé / Coupé *	250	0,17%	239	0,34%
Kabrio-Roadster / Cabrio-Roadster	110	0,07%	83	0,12%
Velkoprostorové / MPV	2724	1,83%	2724	3,89%
Velkoprostorové / MPV derivat LUV / LCV	2823	1,60%	2383	3,40%
* nezahrnuty / notinclusive Renault and Jaguar				
Celkem / Total	**148685**	**100,00%**	**70097**	**100,00%**
Z toho SDA / from this CIA	**70097**	**47,14%**		

SDA/CIA 2002

Podíly jednotlivých obchodních kategorií-tříd na celkovém trhu s novými lehkými užitkovými automobily v ČR v 4Q 2002

Shares of various bussines categories-classes on total brand new Light Commercial Vehicles in CR in 4Q 2002

LUV / LCV	4Q 2002		z toho / from this	
Kategorie - Třída / Category - Class (nosnost/Payload)	**Ks / Units**	**Podíl / Share**	**SDA / CIA**	**Podíl / Share**
Malá / Small (0,0 - 0,6 t)	606	4,15%	210	1,87%
Střední / Middle (0,601 - 1 t)	4762	32,63%	2258	20,13%
Větší / Upper (1,001 - 1,5 t)	8193	56,14%	7831	69,81%
Velká / Large (>1,501 t)	1034	7,08%	916	8,17%
Celkově / Total	**14595**	**100,00%**	**11215**	**76,84%**
z toho/from this 4 x 4	562	3,85%	530	4,73%
Ze statistiky NA / From statistic of Trucks - N1	436		388	
Celkem N1 / Total N1	**15031**	**100,00%**	**11603**	**77,19%**

Attachment – příloha 6

11 Prodeje OA a LUV v ČR za období 1-12/2003

Sales of PC + LCV in CR 1-12/2003

1-12/2003	OA / PC		LUV / LCV		Celkem / Total		
Značka / Make	Ks Units	Podíl Share	Ks Units	Podíl Share	Ks Units	Podíl Share	Pořadí Pos.
Alfa Romeo	405	0,27%			405	0,24%	23.
AUDI	1348	0,89%			1348	0,81%	17.
BMW	982	0,65%			982	0,59%	20.
Citroen	4259	2,80%	762	5,46%	5021	3,02%	7.
Daewoo	1995	1,31%	22	0,16%	2017	1,21%	14.
FIAT	2773	1,82%	456	3,26%	3229	1,94%	9.
Ford	4609	3,03%	2551	18,26%	7160	4,31%	6.
Honda	1270	0,83%			1270	0,76%	18.
Hyundai	1463	0,96%	273	1,95%	1736	1,05%	16.
Chrysler/Jeep	332	0,22%			332	0,20%	26.
Jaguar	79	0,05%			79	0,05%	30.
KIA	286	0,19%	350	2,51%	636	0,38%	22.
Lada	350	0,23%	35	0,25%	385	0,23%	24.
Mazda	2358	1,55%	346	2,48%	2704	1,63%	12.
Mercedes *	1423	0,94%	726	5,20%	2149	1,29%	13.
Mitsubishi	933	0,61%	124	0,89%	1057	0,64%	19.
Nissan	2546	1,67%	316	2,26%	2862	1,72%	11.
Opel	8369	5,50%	414	2,96%	8783	5,29%	5.
Peugeot	8344	5,48%	1150	8,23%	9494	5,72%	4.
Renault	8838	5,81%	816	5,84%	9654	5,81%	3.
SAAB	70	0,05%			70	0,04%	31.
Ssang Yong	5	0,00%			5	0,00%	38.
SEAT	2793	1,84%	240	1,72%	3033	1,83%	10.
Subaru	212	0,14%			212	0,13%	28.
Suzuki	1767	1,16%	22	0,16%	1789	1,08%	15.
Toyota	3750	2,46%	113	0,81%	3863	2,33%	8.
Volvo	809	0,53%			809	0,49%	21.
VW	9517	6,26%	2171	15,54%	11688	7,04%	2.
*MB LUV/LCV jen/only VITO							
Celkem SDA	**71885**	**47,25%**	**10887**	**77,94%**	**82772**	**49,83%**	

Total CIA							

1-12/2003	**OA / PC**		**LUV / LCV**		**Celkem / Total**		
Značka / Make	**Ks Units**	**Podíl Share**	**Ks Units**	**Podíl Share**	**Ks Units**	**Podíl Share**	**Pořadí Pos.**
Ostatní / Others							
Škoda	79944	52,55%	2461	17,62%	82405	49,61%	1.
Dacia	28		322	2,31%	350	0,21%	25.
Lublin			55	0,39%	55	0,03%	32.
JLaureta			18	0,13%	18	0,01%	37.
Porsche	22	0,01%			22	0,01%	36.
Multicar			93	0,67%	93	0,06%	29.
TATA	1	0,00%	2	0,01%	3	0,00%	39.
Magma			48	0,34%	48	0,03%	33.
Land/Range Rover	185	0,12%	82	0,59%	267	0,16%	27.
Rover	36	0,02%			36	0,02%	35.
Ost.oficiální Oth. oficial	40	0,03%	0	0,00%	40	0,02%	34.
Celkem ostatní Total others	**80256**	**52,75%**	**3081**	**22,06%**	**83337**	**50,17%**	
Celkem ostatní + SDA / Total others + CIA							
	152141	**100,00%**	**13968**	**100,00%**	**166109**	**100,00%**	
*OA/PC=Ferrari(17ks/Units),Kaipan(19ks/Units),Gordon(3ks/Units),Bentley(1ks/Unit)							

Attachment – příloha 7

Podíly jednotlivých obchodních kategorií-tříd na celkovém trhu s novými osobními automobily v ČR v 4Q 2003

Shares of various bussines categories-classes on total brand new passenger cars in CR in 4Q 2003

OA / PC	4Q 2003		z toho / from this	
Kategorie - Třída / Category - Class	**Ks / Units**	**Podíl / Share**	**SDA / CIA**	**Podíl / Share**
Malé vozy + mini / Small Cars + Mini	78569	51,64%	20422	28,41%
Nižší střední / Low Middle	44907	29,52%	23239	32,33%
Střední / Middle	11721	7,70%	11540	16,05%
Vyšší a luxusní / High and Luxury	3850	2,53%	3820	5,31%
Terenní / Off-Road	3351	2,20%	3165	4,40%
Kupé / Coupé *	190	0,12%	168	0,23%
Kabrio-Roadster / Cabrio-Roadster	118	0,08%	96	0,13%
Velkoprostorové / MPV	6667	4,38%	6667	9,27%
Velkoprostorové / MPV derivat LUV / LCV	2768	1,82%	2768	3,85%
* nezahrnuty / notinclusive Renault and Jaguar				
Celkem / Total	**152141**	**100,00%**	**71885**	**100,00%**
Z toho SDA / from this CIA	**71885**	**47,25%**		

SDA/CIA 203

Podíly jednotlivých obchodních kategorií-tříd na celkovém trhu s novými lehkými užitkovými automobily v ČR v 4Q 2003

Shares of various bussines categories-classes on total brand new Light Commercial Vehicles in CR in 4Q 2003

LUV / LCV	4Q 2001		z toho / from this	
Kategorie - Třída / Category - Class (nosnost/Payload)	**Ks / Units**	**Podíl / Share**	**SDA / CIA**	**Podíl / Share**
Malá / Small (0,0 - 0,6 t)	164	1,13%	164	1,43%
Střední / Middle (0,601 - 1 t)	5719	39,30%	2836	24,72%
Větší / Upper (1,001 - 1,5 t)	7535	51,78%	7478	65,19%
Velká / Large (>1,501 t)	1134	7,79%	993	8,66%
Celkově / Total	**14552**	**100,00%**	**11471**	**78,83%**
z toho/from this 4 x 4	540	3,71%	456	3,98%
Ze statistiky NA / From statistic of Trucks - N1(bez Sprinterů	447		413	
Celkem N1 / Total N1	**14999**	**100,00%**	**11884**	**79,23%**