



SHOWCASE EUROPE: AUTOMOTIVE SECTOR

FY 2007 - 2008 Strategic Plan

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1. General European Market Overview

The single European market is currently comprised of 25 countries and is benefiting the automotive industry. The unified market allows manufacturers to extend production facilities beyond national borders and permits easier and quicker distribution. With 180 million operating vehicles, an \$8.6 trillion economy and a population of some 376 million people, the European market will continue to be a good export market for the U.S. automotive industry.

In 2005, the five largest markets for aftermarket parts and accessories in Europe were Germany, Austria, UK, France, and the Netherlands. These countries dominate the European Union with an 80 percent share of the import market for automotive parts and accessories.

Export of U.S. automotive parts and accessories to various countries in Europe (in thousands):

(30230) Other parts and accessories of vehicles			
Country	\$ Value 2003	\$ Value 2004	\$ Value 2005
Austria	470,222	412,181	680,716
Belarus	0	39	122
Belgium	234,003	205,028	165,963
Bulgaria	1,399	1,148	606
Croatia	414	485	794
Cyprus	363	383	357
Czech Republic	5,773	4,382	13,184
Denmark	5,352	5,798	11,436
Estonia	111	693	764
Finland	16,746	13,762	16,906
France	244,112	357,813	407,101
Georgia	397	382	258
Germany	775,979	982,985	1,130,790
Greece	5,066	6,590	4,507
Hungary	57,411	50,847	46,899
Ireland	36,189	47,499	67,304
Italy	117,940	106,157	85,305
Latvia	265	574	582
Luxembourg	1,038	1,906	1,216
Malta	271	463	260
Netherlands, The	227,005	242,658	278,214
Norway	9,399	9,432	13,374
Poland	15,026	16,030	15,212
Portugal	23,517	18,111	15,428
Romania	10,281	11,618	5,629
Russia	17,303	23,040	21,365
Serbia & Montenegro	240	532	2,782
Slovakia	1,932	6,880	4,894
Slovenia	1,566	1,566	1,890
Spain	105,273	97,581	235,410
Sweden	176,883	209,357	157,216
Switzerland	12,500	15,771	11,195

Turkey	11,175	16,457	32,724
Ukraine	1,091	1,924	428
U.K.	531,168	621,809	549,871

Source: U.S. Census Bureau - Foreign Trade Statistics

2. Goal

The SCE Automotive Team aims to provide value-added support to U.S. exporters and to help them enter the European Union and the emerging markets of Central Europe, Russia and the other Newly Independent States (NIS) by coordinating trade promotion activities of the U.S. Commercial Service in Europe and the United States.

3. Showcase Europe Automotive Team Members

The SCE Automotive Team is comprised of the U.S. Commercial Service offices in the countries listed below. Although a few countries do not actively participate in coordinated Showcase Europe activities in the upcoming fiscal year, automotive specialists for all 33 countries can be approached on an individual basis.

Austria	Georgia	Romania
Belarus	Greece	Russia
Belgium	Hungary	Slovak Republic
Bulgaria	Ireland	Slovenia
Croatia	Italy	Spain
Czech Republic	Kazakhstan	Sweden
Denmark	Latvia	Switzerland
Estonia	Netherlands (The)	Turkey
Finland	Norway	Ukraine
France	Poland	United Kingdom
Germany	Portugal	Uzbekistan

- Opted out of FY06 activities
- Not a member of the SCE team.

See attachment I for a listing of SCE Automotive Specialists and contact information.

4. Objectives

The goal above will be achieved by:

- Counseling U.S. companies
- Monitoring the European automotive industry and drawing U.S. companies' attention to new commercial opportunities and regulatory developments
- Maintaining existing and developing new key industry contacts
- Identifying foreign manufacturers and their procurement needs
- Assisting foreign businesses and organizations to source U.S. automotive products and services

- Advocating on behalf of U.S. business interests
- Integrating the SCE Automotive Team programs with those of other groups, such as the domestic automotive team, industry associations and trade show organizers.
- Working closely with U.S. and European automotive associations, U.S. and European automotive industry and show organizers.
- Continuing to develop creative approaches to providing services and information more effectively and efficiently to our clients
- Maintaining and improving the content of the European Automotive website
- Sharing best practices
- Producing timely market research reports
- Promoting IBPs in order to maximize trade show attendance by foreign buyers
- Providing industry training at Tier I events

Members of the SCE Automotive Team are undertaking several initiatives to achieve the goals listed above. We encourage the SCE automotive members to continue developing great initiatives and to remain resourceful. Three initiatives that are worth pursuing and deserve our full attention in FY07-FY08 are:

4.1 Coordinated Promotion at Foreign Trade Shows

The initiative of bringing automotive specialists together at Automechanika in 2004 and 2006 produced a record number of industry export successes and resulted in dozens of satisfied U.S. exporters. The export successes were the result of several programs, including CS Frankfurt's Pathfinder Service and Showcase Global Program and the joint SCE & ODO Automotive Teams' Showtime Program. Each program is described briefly below.

The **Pathfinder Service** offers a list of German buyers (including the booth location, company description, product line, names of buyers, e-mail addresses, and web-sites) to U.S. manufacturers several weeks before the show. This allows U.S. companies to take appropriate action before they arrive at the show.

The **Showcase Global Program** ensures that automotive specialist worldwide receive information on U.S. exhibitors for dissemination to foreign buyers. This is meant to stimulate foreign buyers to travel to and visit U.S. companies at the trade show. The SCE Team envisages using the Industry-Focused Promotion program, an automated version of the Showcase Global Program, at subsequent show.

The **Showtime Program** informs U.S. exhibitors of the automotive specialists at a trade show, who are available for one-on-one counseling session. This program is distinct in that it encourages companies to register for a counseling session in advance, thereby, allowing automotive specialist to prepare for the meeting.

With the desire to develop similar activities at other foreign trade shows where a significant number of U.S. exhibitors are present, the SCE Team selected two additional events to actively promote with the support of the ODO Team. They are the Autopromotec (Bologna, Italy – May 23-27, 2007) and Automechanika Istanbul (Istanbul, Turkey – April 19-22, 2007).

4.2 Quicktake

The outcome of a poll taken in August 2005 revealed that 23 of the 30 active SCE members were in favor of rolling out the Quicktake program, at no charge for the U.S. client, for the automotive sector. Quicktake offers a pre-screened U.S. exporter a glimpse of their potential on the various European markets in an attempt to direct the company to best prospect markets.

In October 2006, another poll was taken in order to obtain automotive specialists' feedback on the Quicktake program as a for-fee service. Preliminary feedback showed positive results to the survey. Training will be required to facilitate the successful continuation of Quicktake.

4.3 U.S. Supplier Search

The U.S. Supplier Search is one of the pioneering programs that aims to broaden and deepen relationships between U.S. auto parts suppliers and European manufacturers. This initiative endeavors to provide European manufacturers with a list of prescreened, interested U.S. suppliers. A cost-recovery fee of \$400-800 is charged for this service. Main point of contact for this initiative is Eve Lerman (Automotive Team Leader).

5. Market Information and Research

All market research should be e-mailed directly to CS The Hague (Natasha Keylard), which is responsible for posting the information on the SCE website (<http://www.buyusa.gov/europe>).

5.1 Planned Market Research

The minimum requirement for post to opt-in to the SCE Automotive Team is to prepare a planned automotive market report. This year, you can select one of six topics. The market research **deadline is September 13, 2007**. This will allow us to package all market briefs for distribution at AAIW 2007. CS Hague will add all reports to the Showcase Europe website.

Topic choices are:

- Automotive Accessories and Parts
- Diesel Parts and Services
- Garage Repair and Maintenance Equipment
- Sport Utility Vehicles
- Automotive Chemicals
- Tuning Products

5.2 Unplanned Market Research

Unplanned market research should be written as market development warrants. Suggested topics include:

- Recycling in the Automotive Industry
- Motorcycle Accessories
- Specialty Equipment
- Industrial Body Industry (trucks and utility vehicles)

6. Market Promotion and Events

The SCE Automotive Team will work closely with Domestic Automotive Team, Automotive Associations and other relevant groups to promote Tier I and Tier II events. In FY07, the SCE Automotive Team will concentrate on two Tier 1 events (Autopromotec and Automechanika Istanbul) and it will continue developing a number of Tier II shows across Europe.

Increasing efforts are made to accommodate U.S. exporters' requests to speak with commercial specialists from multiple countries. Depending on the budget situation and potential contribution that an event may bring to a particular market, SCE Automotive Team members are requested to attend one Tier I event and are encouraged to support Tier II events with market research and contact list of potential buyers.

6.1 SCE Tier 1 Events

The show organizers of Automechanika Istanbul and AutoPromotec have applied for Trade Fair Certification. Consequently, CS Izmir and CS Milan have requested support from the SCE and ODO Automotive Teams. ODO has been requested to help with the recruitment of U.S. exhibitors, to share their general expertise, help with the general promotion of the show at other events and to send an ODO automotive specialist to each show. The SCE Team will do the same and depending on the number of U.S. exhibitors ultimately registered to exhibit at each show by February 2007, the SCE Team may offer additional programs. This may include the Showtime Program and the use of the Industry-Focused Promotion Program to encourage foreign buyers to visit the U.S. companies at the show. Training is also under consideration.

Automechanika Istanbul - Istanbul, Turkey – April 19-22, 2007

Number of U.S. exhibitors in 2005: 10

Broad number of sectors present in the both the OE and aftermarket.

Website: <http://automechanika.messefrankfurt.com/istanbul/en>

Host: Berrin Erturk, CS Izmir
SCE: Natasha Keylard, CS The Hague
ODO: TBD

Autopromotec – Bologna, Italy – May 23-27, 2007

Number of U.S. exhibitors in 2005: 32

Sectors represented at the show:

- Plants, equipment and material for: car repair workshops, vehicle body repair shops, vehicle electricians, tire retailers, car dealers, service stations, car washes and specialized centers for the repair of means of transport
- Machinery, equipment, moulds and materials for tire specialists
- Equipment, materials and products for the sale and repair of tires
- Machines and equipment for engine overhaul
- Spare parts, components
- Car services

Website: http://www.autopromotec.it/index_en.php

Host: Andrea Rosa, CS Milan
SCE: Natasha Keylard, CS The Hague
ODO: TBD

6.2 SCE Tier II Events

The following Tier II events are **optional**. The events are organized by date. Team members' participation and any other commitment of SCE resources will depend on budget availability, market potential and recruitment of buyer delegations.

The SCE team members listed below are willing to support Tier II events by sending out promotional information to their clients and/or providing automotive colleagues with contact lists of buyers. **The contact list of buyers should be used for internal purposes to promote visits to the U.S. Pavilions.**

Austria	Denmark	Netherlands	Turkey
Belgium	France	Poland (but limited)	U.K.
Bulgaria	Germany	Slovak Republic	
Croatia	Greece	Sweden	
Czech Republic	Italy	Switzerland	

My Special Car Show – Rimini, Italy (Apr 13 – 15, 2007)

Background information: <http://www.myspecialcar.it>

CS Contact: Andrea Rosa

Activity: ODO recruitment and OIO foreign buyer promotion support requested

Tuning World Bodensee - Friedrichshafen, Germany (Apr 28 – May 1, 2007):

Background information: <http://www.tuning-world-bodensee.de>

CS Contact: Paul Warren-Smith

Activity: No SCE activity planned so far.

ReMaTec 2007 – Amsterdam, the Netherlands (June 17-19, 2007):

ReMaTec is the world's largest trade exhibition for the automotive remanufacturing industry. In 2005, CS The Hague worked with the show organizer to support the 12 U.S. exhibitors at the show, of which three were members of the U.S. Pavilion. The Europe and Automotive Teams supported this event by contacting each exhibitor prior to the show.

CS Contact: Natasha Keylard

Activity: Recruitment, pre-show promotion, on-site counseling.

Moscow International Motor Show 2007 – Moscow, Russia (Aug 29 - Sep 2, 2007)

Background information: <http://www.motorshows-ite.com>

CS Contact: Alexander Kansky

Activities: ODO recruitment support requested

IAA Motor Show – Frankfurt, Germany (Sep 13 – 23, 2007):

Background information: <http://www.iaa.de>

CS Contact: Paul Warren-Smith

Activities: No SCE activity planned so far.

The 3rd Athens Tuning Show – Athens, Greece (Sep 23 – 24, 2007):

CS Contact: George Bonanos

Activities: Support requested to promote the show.

EquipAuto 2007 – Paris, France (October 11-16, 2007):

EQUIP AUTO is a leading trade show for automotive equipment in 2005.

CS Contact: Stephanie Pencolé

Activity: Possibilities under assessment

7. Performance Measures

Number of export successes

Total U.S. dollar value of export successes

Number of clients counseled as part of SCE activities (Showtime/IBP/etc.)

Number of planned market research

Number of unplanned market research

Number of IPSS

Number of ICPs

Number of Gold Key Services

Business Facilitation Services

Number of other services (e.g. Single Company Promotion; CMR; Customized Contact Lists)

Number of local trade events hosted

Number of international trade events supported

Number of advocacy projects

Number of training sessions offered

Attachment I: SCE Automotive Specialists

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Updated: October 20, 2006