



FACTS & FIGURES 2017

Edition 2018



2 | Contents

Overview of the automotive year 2017	3-5
Association structure.....	6
Companies/Employees.....	7
Training.....	8-9
Total turnover, motor trades and repair sector	10
Key figures of the German motor trades and repair sector.....	11
Maintenance and repair	12-13
Criteria for purchases of new vehicles	14
Structure of vehicle owners/Duration of possession	15
Development of prices.....	16
First registrations of passenger cars	
listed by type of engine	17
listed by federal state	18
listed by cylinder capacity.....	19
First registrations of trucks.....	19
Used passenger car market	20
Transfers of ownership.....	21
Average age of passenger cars/Motor vehicle stocks.....	22
Passenger car equipment.....	23

Overview of the automotive year 2017 | 3

Changes compared to 2017

Passenger cars – first registrations	3.441.262	+ 2,7 %
Trucks – first registrations	306.609	+ 3,7 %
Motorcycles – first registrations	143.885	- 21,0 %
Passenger cars – transfers of ownership	7.298.282	- 1,4 %
Trucks – transfers of ownership	349.993	+ 2,7 %
Motorcycles – transfers of ownership	486.598	- 0,3 %
Passenger car-stocks	46.474.594	+ 1,5 %
Truck-stocks	3.031.139	+ 4,1 %
Motorcycles-stocks	4.372.978	+ 1,4 %
Passenger cars – deregistrations	8.633.154	+ 1,1 %
Utility vehicles – deregistrations*	497.413	+ 1,2 %
Number of motor vehicles per 1.000 inhabitants**:		
Passenger cars	561	+ 1,1 %
Trucks	44	+ 4,8 %
Total number of motor vehicles	605	+ 1,3 %
Average new passenger car price	30.350	+ 2,4 %
Average used passenger car price	11.250	- 1,6 %
Number of passenger cars served per repair shop**	1.260	+ 3,5 %
Number of orders per repair shop**	1.915	+ 2,7 %
Vehicle colours:		
Silver/Grey	28,5 %	
Black	25,6 %	
White	20,9 %	
Blue	10,1 %	

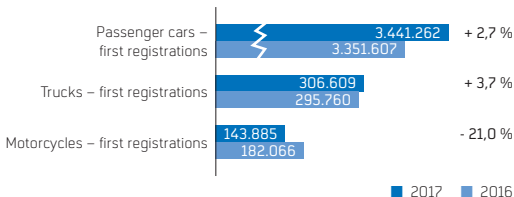
*including buses **partly provisional or estimated results

Sources: KBA, DAT, VDA, Status: April 2018

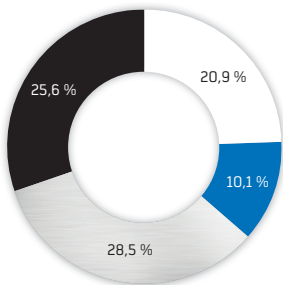
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4 | Overview of the automotive year 2017

First registrations

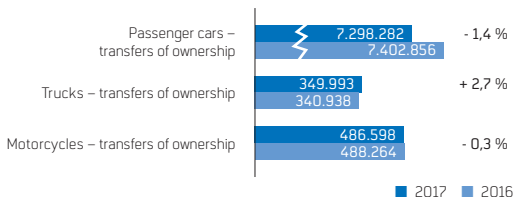


Passenger cars – first registrations listed by colours



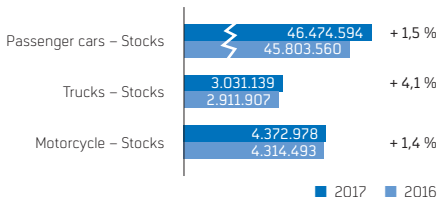
Source: KBA, Status: January 2018

Transfers of ownership



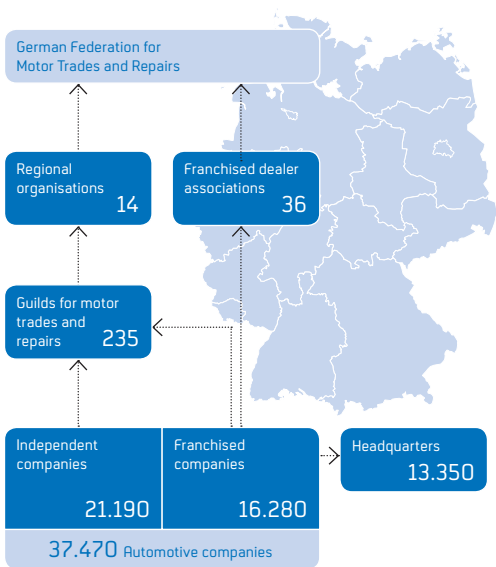
Source: KBA, Status: January 2018

Stocks



Source: KBA, Status: March 2018

6 | Association structure



Source: ZDK, Status: April 2018

Companies/Employees | 7

Companies of the motor trades and repair sector

- 0,7 %



37.470



37.740

total

Numbers of employees

- 1,3 %



449.640



455.500

total (Ø 12 per company)

Entries in the register of qualified craftsmen

- 0,4 %



62.136



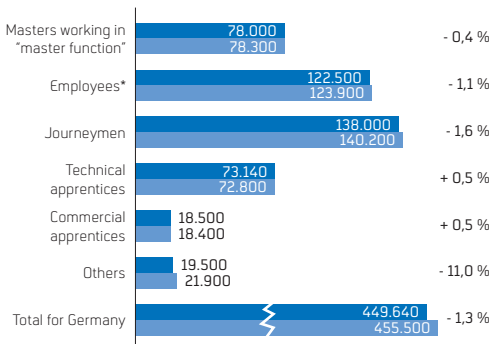
62.402

Cartechnicians

■ 2017 ■ 2016

Sources: ZDK, ZDH, Status: March 2018

Number of employees in the motor trades and repair sector



* Approx. 45% of the employees are to be assigned to the technical sector.

■ 2017 ■ 2016

Source: ZDK, Status: March 2018

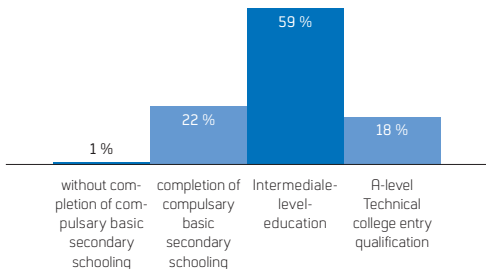
Apprentices in the motor trades and repair sector*

	2017**	2016	Changes in %
Total of motor vehicle mechatronic technicians	71.000	70.500	+ 0,71
Female apprentices	1.950	1.900	+ 2,63
Motor vehicle mechatronic technicians	1.950	1.900	+ 2,63
Share in total motor vehicle crafts	2,75 %	2,69 %	
other skilled trades	2.300	2.260	+ 1,77
Motor vehicle body and vehicle construction mechanics	1.000	980	+ 2,04
Warehouse logistics operators	650	640	+ 1,56
Vehicle painters	650	640	+ 1,56
Total of commercial apprentices	18.800	18.400	+ 2,17
Automotive sales management assistants	12.250	11.900	+ 2,94
Sales management assistants for retail, wholesale and foreign trade (combined)	550	600	- 8,33
Office administrators/secretaries	6.000	5.900	+ 1,69
Female auto. sales mgmt. assist. (percent.)	47 %	48 %	
Female office administrators/secretaries (percent.)	80 %	78 %	
Total of apprentices in the motor trades and repair sector	92.100	91.160	+ 1,03
New apprenticeship contracts	27.510	26.550	+ 3,62
Motor vehicle mechatronic technicians	22.210	21.400	+ 3,79
Automotive sales management assistants	5.300	5.150	+ 2,91
Total number of companies offering apprenticeship training	28.550	28.500	+ 0,18

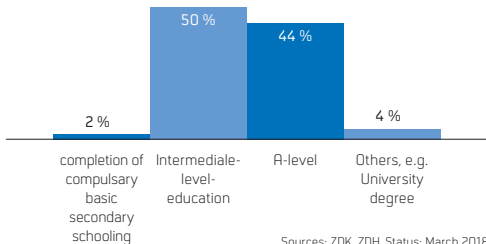
* This term refers to both men and women. ** 2017 is based on projections, as data from the German Confederation of Skilled Crafts (ZdH) was not available at the time of publication per 12/31/2017. Sources: ZDK, ZdH, Status: March 2018

This information is also available via www.kfzgewerbe.de/presse/publikationen/zahlen-fakten

Educational background of apprentices in skilled trades



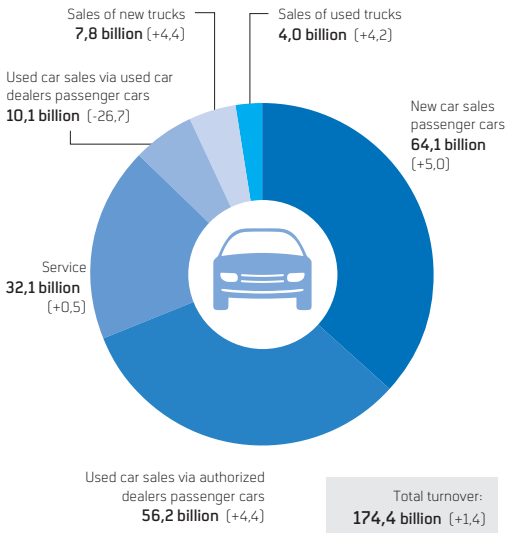
Educational background of apprentices in commercial vocations



Sources: ZDK, ZDH, Status: March 2018

10 | Total turnover, motor trades and repair sector

Listed in billion € (Change to 2016 in percent)



Source: ZDK, Status: February 2018

Passenger cars

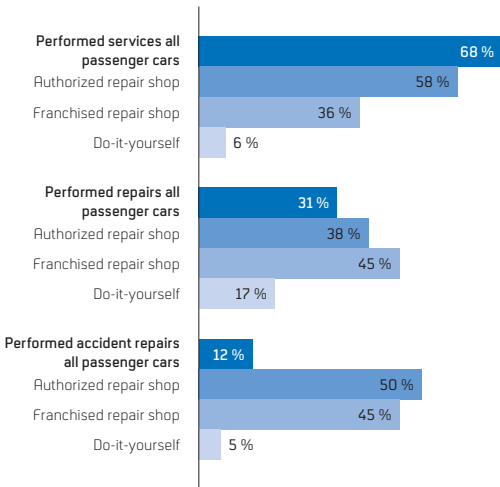
	Actual Value 2017
Return on turnover (before tax)	1,5 %
$\frac{\text{Earnings before taxes}}{\text{Total corporate turnover}} \times 100$	
Productivity	82,1 %
$\frac{\text{Productive hours}}{\text{Hours of presence}} \times 100$	
Turnover on parts per employee in the parts business	546.704 €
$\frac{\text{Turnover on parts}}{\text{Number of employees in the parts business}}$	
Cross profit new car sales	11,0 %
$\frac{\text{Turnover new car sales} - \text{offset cost of new car purchases}}{\text{Turnover new car sales}} \times 100$	
Cross profit used car sales	9,7 %
$\frac{\text{Turnover used car sales} - \text{offset cost of used car purchases}}{\text{Turnover used car sales}} \times 100$	
Cross profit customer service (CS) incl. external services (ES)	59,3 %
$\frac{\text{Turnover CS including ES} - \text{paid productive wages} - \text{offset cost of ES}}{\text{Turnover CS including external services}} \times 100$	
Cross profit parts service (PS)	31,1 %
$\frac{\text{Turnover PS} - \text{offset parts acquisition costs PS}}{\text{Turnover PS}} \times 100$	

The composition of the sample varies from year to year. Source: ZDK, Status: April 2018

This information is also available via www.kfzgewerbe.de/presse/publikationen/zahlen-fakten

12 | Maintenance and repair

Work of passenger cars 2017



Source: DAT, Status: January 2018

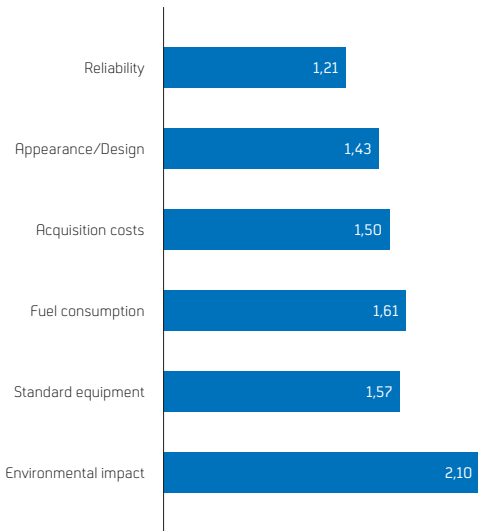
Works and costs for maintenance and wear

Year	Maintenance work per vehicle (unit)	Maintenance costs per vehicle (€)	Wear repairs per vehicle (unit)	Wear costs per vehicle (€)
2017	0,87	275	0,53	167
2016	0,88	265	0,55	171
2015	0,79	235	0,52	162
2014	0,83	245	0,55	171
2013	0,91	261	0,61	191
2012	0,90	252	0,65	215
2011	0,96	255	0,62	173
2010	0,91	230	0,67	201
2005	0,98	212	0,79	186
2000	1,06	215	0,78	145
1995	1,20	205	0,82	155
1990	1,29	165	1,01	155

Source: DAT, Status: January 2018

14 | Criteria for purchases of new vehicles

Criterion | Importance 2017

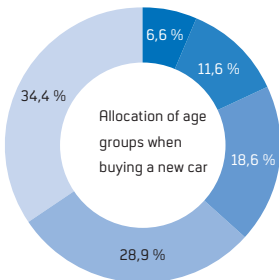


Rating: 1 = very important, 4 = not important

Source: DAT, Status: January 2018

This information is also available via www.kfzgewerbe.de/presse/publikationen/zahlen-fakten

Structure of vehicle owners by age 2017



Age of new vehicle buyers

- up to 29 years
- 30 – 39 years
- 40 – 49 years
- 50 – 59 years
- over 60 years

Source: MPS,
Status: January 2018

Duration of possession of the vehicle 2017 [2016]

For new vehicles on average	73 months (76 months)
For new vehicles, if the previous vehicle was a new vehicle	74 months (77 months)
For new vehicles, if the previous vehicle was a used vehicle	69 months (75 months)
For used vehicles on average	81 months (84 months)
For used vehicles, if the previous vehicle was a new vehicle	125 months (122 months)
For used vehicles, if the previous vehicle was a used vehicle	71 months (77 months)

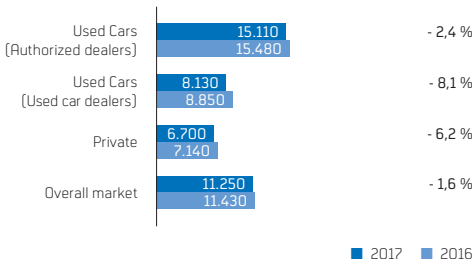
Source: DAT, Status: January 2018

16 | Development of prices

Development of prices for new vehicles*



Development of used car prices*

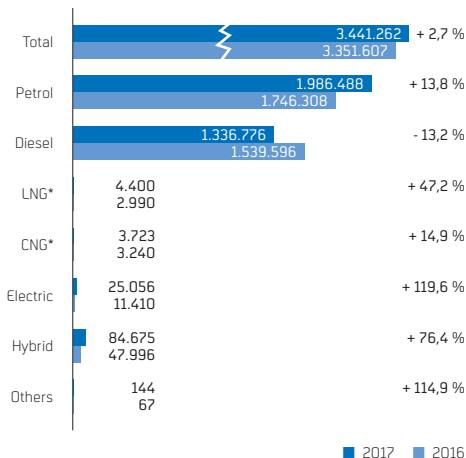


* Average price in Euro

Source: DAT, Status: January 2018

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First registrations of passenger cars listed by type of engine | 17

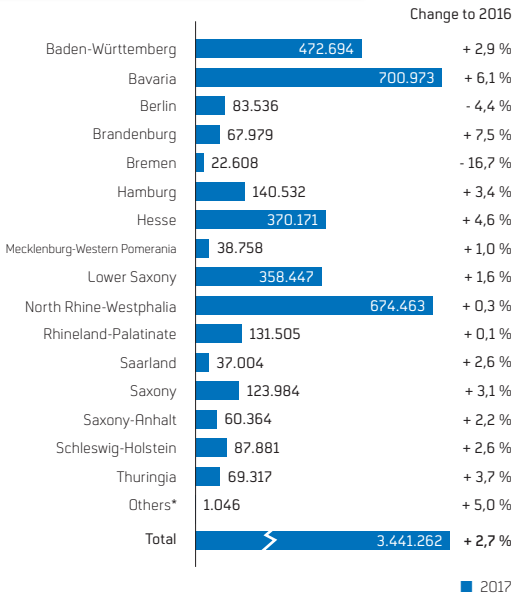


* incl. dual fuel

Sources: KBA, ZDK, Status: January 2018

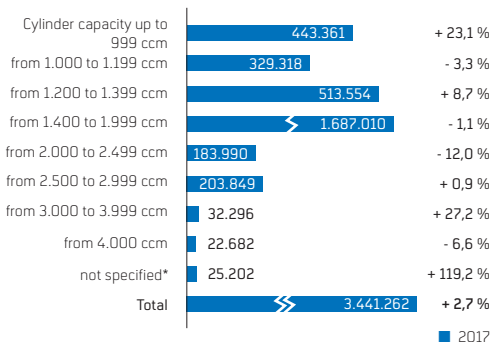
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18 | First registrations of passenger cars listed by federal state



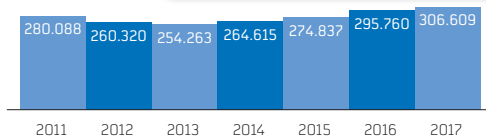
* Vehicles which cannot be assigned to a federal state (German Federal Agency for Technical Relief, German Armed Forces, etc.) Source: KBA, Status: January 2018

First registrations of passenger cars listed by cylinder capacity | 19



* Including vehicles with rotary piston engines with no cylinder capacity data and electric engines

First registrations of trucks* | 19



* Towing vehicles not included

Source: KBA, Status: January 2018

This information is also available via www.kfzgewerbe.de/presse/publikationen/zahlen-fakten

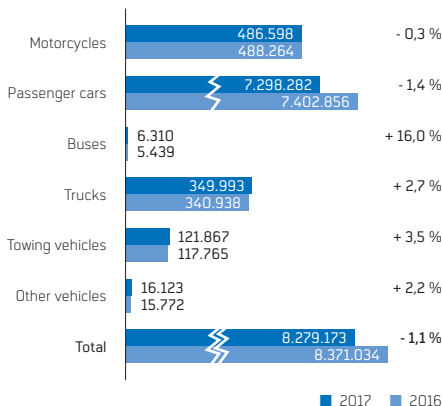
20 | Used passenger car market

Overview of key figures

New car sales (authorized dealers)		Used car sales		Private		Total		Change
2017	2016	2017	2016	2017	2016	2017	2016	
Market share in %								
51	47	17	21	32	32	100	100	0,0 %
Transfer of ownership in million cars								
3,74	3,49	1,25	1,54	2,32	2,38	7,30	7,40	-1,4 %
Total turnover in billion €								
56,5	54,0	10,1	13,6	15,5	17,0	82,1	84,6	-3,0 %
Average age of cars (years)								
4,4	4,4	8,0	7,8	8,9	8,4	6,5	6,4	+1,6 %
Average mileage								
50.540	51.480	84.150	90.400	106.770	103.310	74.040	76.200	-2,8 %
Average purchase price in €								
15.110	15.480	8.130	8.850	6.700	7.140	11.250	11.430	-1,6 %

Source: DAT, Status: January 2018

Total overview



Source: KBA, Status: January 2018

22 | Average age of Passenger cars

In years

Source: KBA, Status: March 2018



22 | Motor vehicles stocks

General overview, 1. January 2018*

Vehicles	Total	Change to 1 Jan'17 in %
Motorcycles	4.372.978	+ 1,4
Passenger cars	46.474.594	+ 1,5
Buses	79.438	+ 0,6
Trucks	3.031.139	+ 4,1
Towing vehicles**	2.204.482	+ 1,6
Others***	296.377	+ 2,5
Total	56.459.008	+ 1,6

* Not including temporarily out-of-service vehicles

** Including articulated towing vehicles, equipment carriers, tractors and normal towing vehicles

*** Motorhomes and ambulance vehicles are here considered as passenger cars

Source: KBA, Status: March 2018

Equipment	New cars buyer	
	2017	2016
Safety		
Adaptive cruise control	18 %	17 %
Bending light system	35 %	34 %
Alarm system	18 %	16 %
Drowsiness detection	20 %	13 %
High-beam assistent	18 %	18 %
Light sensor	62 %	56 %
Night view assistent	5 %	5 %
eCall	12 %	7 %
Emergency brake assistent	30 %	27 %
Rain sensor	67 %	65 %
Tyre pressure sensor/monitor	100 %	100 %
Side-impact airbag	74 %	79 %
Lane departure warning system	24 %	19 %
Lane change assistent	13 %	12 %
Traffic sign recognition	16 %	9 %
Xenon lights	28 %	29 %
Comfort		
Intelligent parking assist system	24 %	23 %
Parking aid/Parktronic	68 %	62 %
Electric tailgate	21 %	19 %
Electric seat adjustment	30 %	26 %
Hands-free system (fitted)	60 %	52 %
Head-up Display	8 %	7 %
Air conditioning	93 %	93 %
Navigation system	60 %	59 %
Radio	95 %	76 %
Sliding roof	20 %	20 %
Seat heater	67 %	64 %
Sport seats/leather seats	35 %	38 %
Sport-/Leather-/Multifunctionsteeringwheel	74 %	71 %
Parking heating	10 %	10 %
Cruise control	71 %	69 %
Central locking	93 %	95 %

Source: DAT, Status: January 2018

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