



# AUTOMOTIVE INDUSTRY IN THE CZECH REPUBLIC

BASIC DATA AND FACTS

UPDATE FOR **2022**



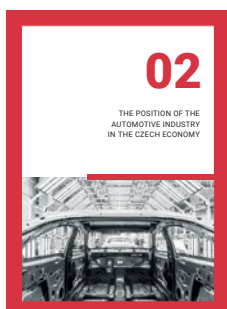
CZECH  
AUTOMOTIVE  
INDUSTRY  
ASSOCIATION

[WWW.AUTOSAP.CZ](http://WWW.AUTOSAP.CZ)



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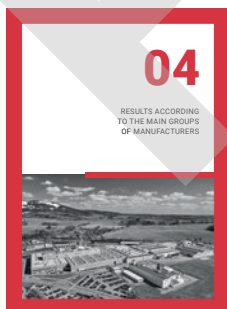
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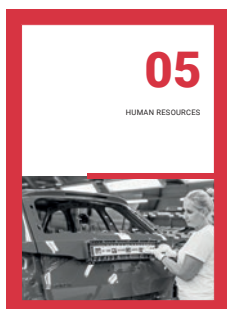
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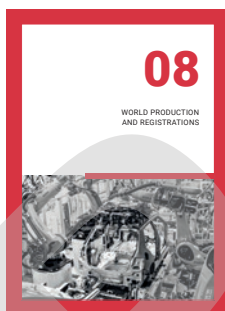
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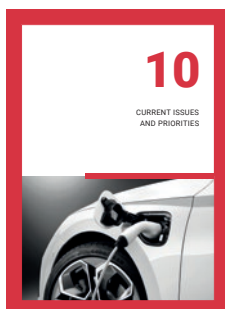
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# 01

## EXECUTIVE SUMMARY



automotive industry is currently facing, it still has growth potential and can significantly contribute to the transformation of the domestic economy towards a higher value added economy.

## Sales and exports increased despite market volatility

In 2022, despite all the ongoing problems and the continuing critical situation on world markets, the Czech automotive industry showed admirable tenacity. In total, AutoSAP member sales increased by 12.7% compared to 2021, exceeding CZK 1.2 trillion.

The growth in sales was driven by both final manufacturers (+14.7%) and domestic suppliers (+9.4%), as well as by a significant increase among special-purpose organisations (+24.8%). Likewise, total exports of the Czech car industry also increased year-on-year (+12.7%). The share of total sales was slightly lower in 2022 than in past years, with exports representing almost 82%. In total, AutoSAP members exported goods worth CZK 1,027 billion.

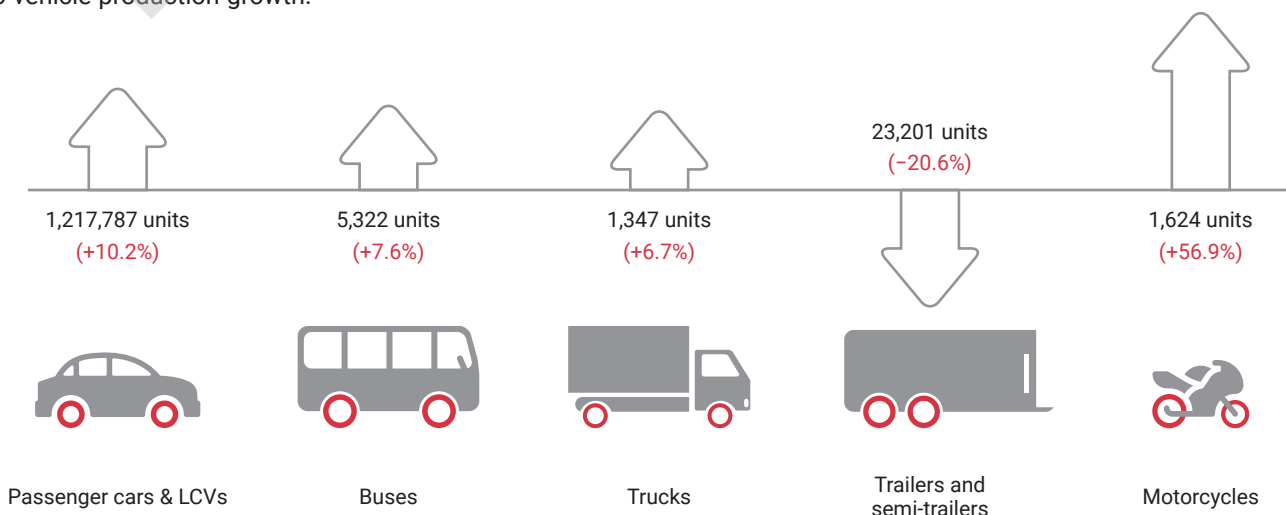
Germany remains the main export partner. Every year, approx. 30% of goods are exported to our western neighbour. Other important partners are traditional automotive countries, such as France, Slovakia, Great Britain, Poland, Italy and Spain. Essential is the presence and the key role of domestic companies in world supply chains.

To illustrate the performance of the automotive industry in 2022, the increase in sales and exports was significant (+11.8% and +11.6%, respectively) compared to the record year 2019. Generally speaking, the sales and export growth can be considered a great success by domestic companies. And this against the backdrop of increased production costs due to increased material and transportation costs, accompanied by extreme increases in energy prices in late 2021 and 2022.



## Development of vehicle production

In 2022, the Czech automotive industry faced a number of daunting challenges. Despite the ongoing shortages of semiconductors and other components, the war in Ukraine, difficulties in production and logistics chains, a total of 1,249,281 road vehicles of all types were produced between January and December. This represented an increase of 9.4% compared to 2021 and 5.3% compared to 2020. After two years of stagnation, the Czech automotive industry returned to vehicle production growth.



# 02

## THE POSITION OF THE AUTOMOTIVE INDUSTRY IN THE CZECH ECONOMY



Developments in the basic macroeconomic indicators of the Czech Republic (GDP, industrial production, exports, average wages and possibly others) are a regular part of this publication.

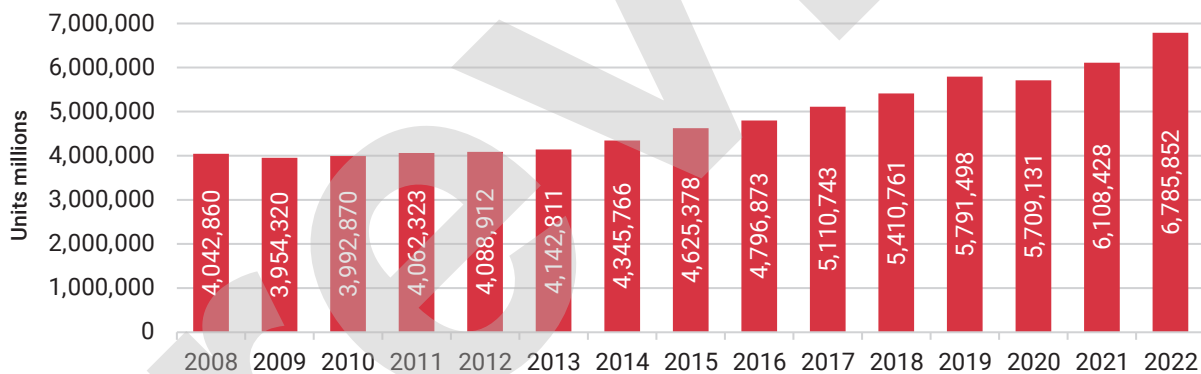
These figures may differ partially from those in previous editions as the CSO revises the data regularly. Aggregate data for AutoSAP are compiled from data provided by member firms via database sheets and publicly available sources (especially the business register), or from expert estimates. Graphs and brief comments present the position of AutoSAP companies and the automotive industry as a whole within the Czech industry and the Czech economy.

## Gross Domestic Product (GDP)

The evolution of GDP in current prices is shown in Chart 2.1.1. The next chart, 2.1.2, shows the change in GDP compared with the previous year, calculated in constant prices.

**Gross domestic product of the Czech Republic using the income method at current prices**

D 2.1.1

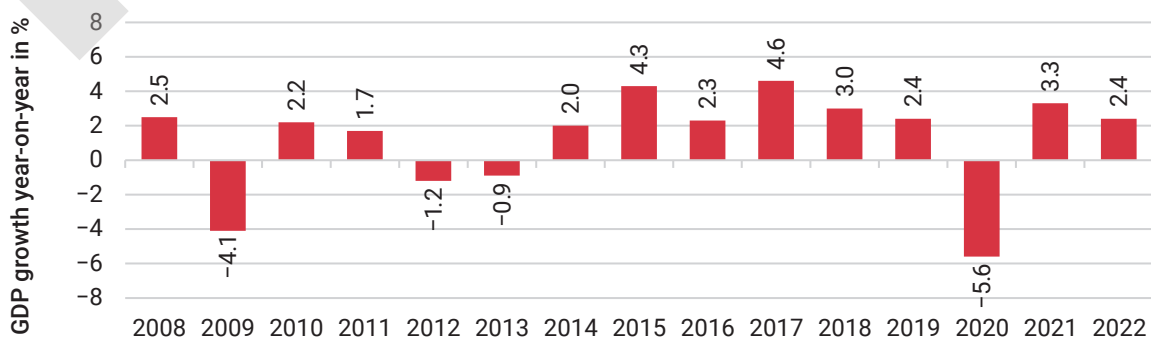


Source: the CZSO – File "GDP – Time series of quarterly accounts indicators" of 30 June 2023

The domestic economy grew in 2022, but gross domestic product grew at a lower rate than in 2021. The main drivers of full-year growth were gross capital formation expenditure and external demand. Government final consumption expenditure contributed +0.1 pp, gross fixed capital formation +1.4 pp, change in inventories +0.9 pp and external demand +0.6 pp.

**Change in GDP compared to the previous year calculated in constant 1995 prices**

D 2.1.2

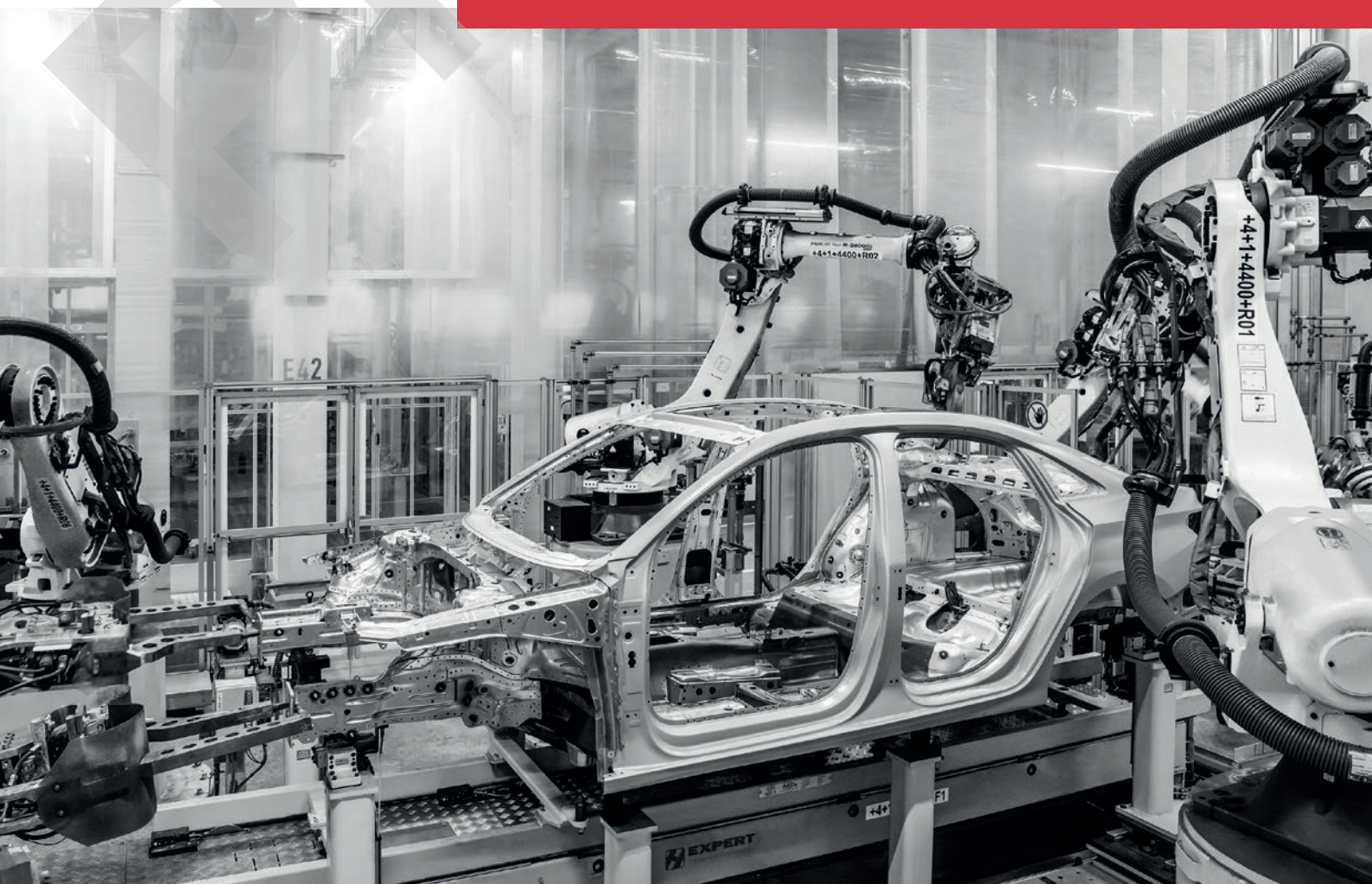


Source: the CZSO – File "GDP – Time series of quarterly accounts indicators" of 30 June 2023

For the full year 2022, the domestic economy grew by 2.4% compared to 2021.

# 03

## DEVELOPMENT OF VEHICLE PRODUCTION



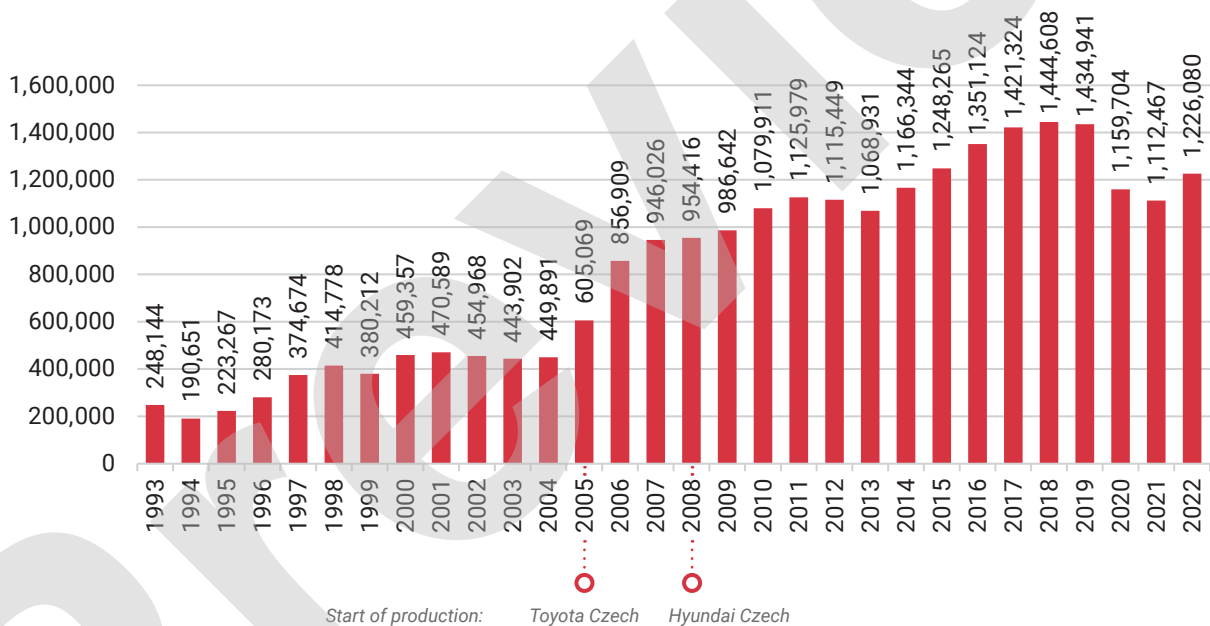


## Development of vehicle production

From 1993 to the end of 2022, 24,694,795 motor vehicles were produced in the Czech Republic. The year 2022 added 1,226,080 newly produced motor vehicles to the annual total (see Chart 3.1.1), an increase in production of 10% over the previous period. The year-on-year changes in motor vehicle production volumes are documented in Chart 3.1.2. The chart shows a dip between 2019 and 2020 related to the COVID-19 pandemic. Production in 2022 slowly began to approach pre-COVID successes, but it is still clear that 2022 was affected by ongoing problems in supply chains, the impact of the war in Ukraine, the energy crisis and high inflation.

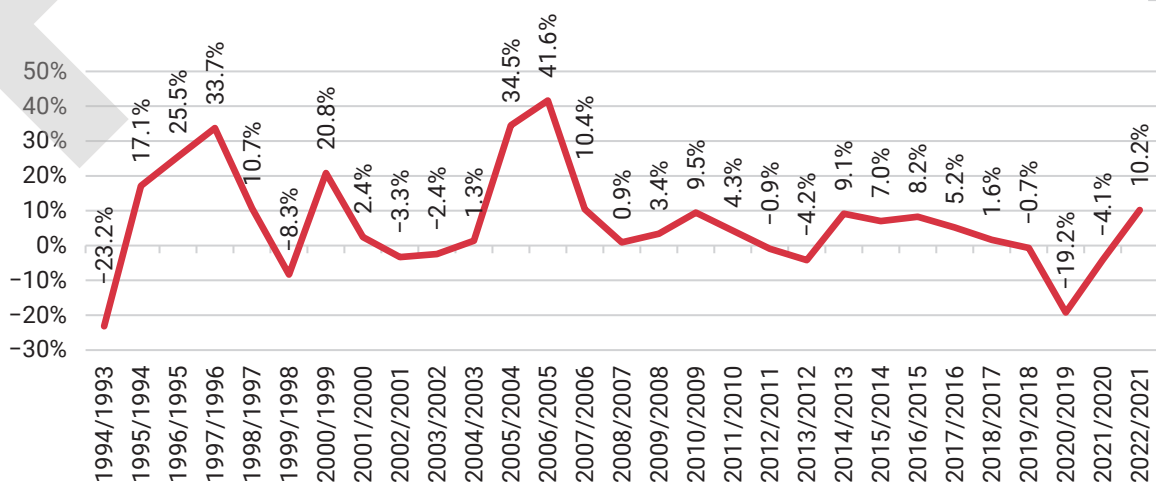
### Motor vehicle production

D 3.1.1



### Annual changes in motor vehicle production

D 3.1.2



Domestic passenger car manufacturers produced a total of 1,217,787 vehicles. The production of passenger cars has traditionally accounted for the dominant part of the volume of motor vehicles produced. Škoda Auto retained the largest share of total production in the Czech Republic with 56.9%, followed by Hyundai with 26.5% and TOYOTA with 16.6%.