

The Netherlands

Market Environment

492,130 New passenger cars were sold in Holland in 1992 plus 87,149 commercial vehicles. 5.7 Million passenger cars and 646,000 commercial vehicles are presently registered in the Netherlands.

In 1991 there were approximately 9,100 officially registered garages in Holland.

Automotive maintenance revenue in 1992 rose to US \$ 5 billion.

The 1992 value of the automotive tools market in the Netherlands was US \$ 187 million and for garage equipment US \$ 117 million.

The Dutch are increasingly using more complex and more sophisticated workshop products.

The Netherlands automotive parts and equipment sector is dominated by imports which account for 85 per cent of the total market.

The bulk of automotive product sales in the Netherlands are handled by 200 importers and 220 wholesalers through 200 outlets. The 20 largest importers control about 70% of the automotive product turnover at the wholesale level.

The market is strong and growing but competition is fierce in certain areas. For instance 22 garage lift manufacturers are already represented in this small country.

The 1991 garage equipment sales in millions of US \$ were estimated at:

Garage lifts	10.0
Wheel balancing equipment	3.9
Tire equipment	1.5
Oil and grease equipment	1.5
Alignment equipment	1.2
Brake test equipment	8.5
Motor testers	10.0
Exhaust emission analyzers	5.2
Compression test equipment	3.3
Exhaust extractors	2.1
High pressure cleaners	1.5
Garage software	1.5
Straightening equipment	3.0
Body repair equipment	1.2
Car wash streets	5.5
Paint spray equipment	1.5