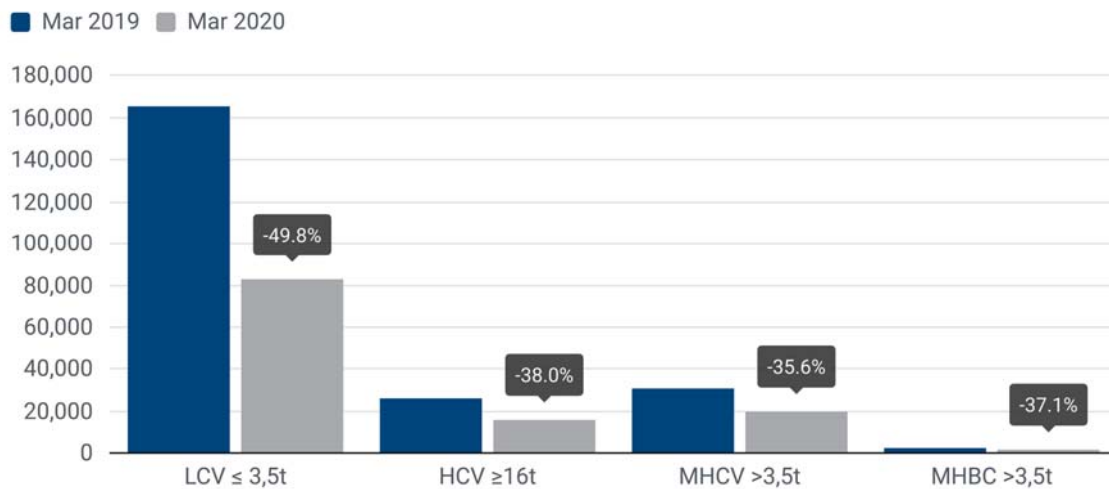


## NEW COMMERCIAL VEHICLE REGISTRATIONS EUROPEAN UNION<sup>1</sup> March 2020



### Commercial vehicle registrations: -23.2% first quarter of 2020; -47.3% in March

#### Total new commercial vehicles

In **March 2020**, demand for new commercial vehicles fell by 47.3% across the EU, as measures to prevent the spread of the coronavirus lead to the closure of dealerships. Each vehicle segment was strongly affected by the fallout of the COVID-19 outbreak and all 27 EU markets recorded substantial declines last month. The strongest drops were posted by Italy (-66.1%), Spain (-64.4%) and France (-63.1%).

In the **first quarter of 2020**, the EU commercial vehicle market contracted by 23.2% to 413,327 units as a direct consequence of March's substantial slowdown. The four major markets, Spain (-31.7%), France (-26.9%), Italy (-26.6%) and Germany (-14.4%), all faced double-digit losses so far this year.

<sup>1</sup> European Union refers to the new composition with 27 member states (excluding the United Kingdom). For year-on-year comparisons, historical data are recalculated to adjust to the new EU27 perimeter.

### **New light commercial vehicles (LCV) up to 3.5t<sup>2</sup>**

**March** registrations of light commercial vehicles took the biggest hit of all segments. Demand fell by half (-49.8%) compared to the year before, with registrations dropping from 165,455 vans in March 2019 to 83,141 units this year. With the exception of Hungary, which posted a more modest decline than other countries, all EU markets saw double-digit percentage drops last month, including the major ones. In Italy registrations tumbled by 71.2% and Spain saw a 67.2% drop.

**From January to March**, demand for new vans in the European Union shrank by 23.1%. Each of the four main EU markets performed worse than in 2019. Spain recorded the biggest drop (-33.5%), followed by Italy (-29.4%), France (-27.3%) and Germany (-11.8%).

### **New heavy commercial vehicles (HCV) of 16t and over<sup>3</sup>**

**During the third month of 2020**, EU demand for new heavy trucks declined significantly (-38.0%), marking the ninth consecutive month of decline. As a result of the COVID-19 pandemic, registrations dropped in all European markets and especially in France, where demand for heavy trucks was slashed by more than half (-50.2%).

**During the first quarter of the year**, heavy truck sales fell in all major EU markets, with France (-27.7%) and Germany (-25.9%) posting the strongest drops. This brought total registrations down to 54,168 heavy trucks so far in 2020, or 26.9% less than last year.

### **New medium and heavy commercial vehicles (MHCV) over 3.5t<sup>4</sup>**

**In March of this year**, total new truck registrations in the EU continued to suffer from the slowdown in demand for heavy-duty trucks, decreasing by 35.6%. The four largest EU markets all recorded significant declines last month: France (-49.3%), Italy (-33.5%), Spain (-30.8%) and Germany (-27.6%).

**Three months into 2020**, 66,376 new trucks were registered across the European Union, down 24.8% compared to the first quarter of 2019. Similar to their performance in the heavy-truck segment, Germany (-26.4%) and France (-23.1%) reported the biggest losses, followed by Spain (-15.1%) and Italy (-12.3%) with slightly less extreme declines.

### **New medium and heavy buses & coaches (MHBC) over 3.5t**

**In March 2020**, EU demand for new buses and coaches plunged by 37.1% to 1,905 units. Germany (+11.8%), Austria (+12.3%), Estonia (+800.0%) and Cyprus (+33.3%) were the only markets in the region to post growth last month. All other EU countries recorded significant losses in March, and Spain (-68.8%) in particular.

**From January to March**, bus and coach registrations contracted by 10.3%, with 7,637 new vehicles registered in total across the European Union. Despite the March drop, overall demand remained positive in three of the four major EU markets so far this year: Germany (+12.4%), Italy (+9.5%) and France (+6.8%). By contrast, Spanish registrations were down 37.2% during the first quarter.

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<sup>2</sup> Including light buses & coaches

<sup>3</sup> Excluding heavy buses & coaches

<sup>4</sup> Excluding medium and heavy buses & coaches

## PROVISIONAL

### EU+EFTA<sup>1</sup> NEW REGISTRATION FIGURES BY COUNTRY NEW LIGHT COMMERCIAL VEHICLES (LCV) UP TO 3.5T<sup>2</sup>

	March 2020	March 2019	% change 20/19	Jan-Mar 2020	Jan-Mar 2019	% change 20/19
AUSTRIA	1,886	4,288	-56.0%	8,072	10,873	-25.8%
BELGIUM	4,386	7,807	-43.8%	19,248	22,192	-13.3%
BULGARIA	365	592	-38.3%	1,358	1,411	-3.8%
CROATIA	539	756	-28.7%	1,915	2,238	-14.4%
CYPRUS	74	155	-52.3%	419	448	-6.5%
CZECH REPUBLIC	1,079	1,782	-39.5%	3,650	5,029	-27.4%
DENMARK	2,743	3,356	-18.3%	8,035	8,674	-7.4%
ESTONIA	288	415	-30.6%	1,026	1,235	-16.9%
FINLAND	1,220	1,380	-11.6%	3,512	3,929	-10.6%
FRANCE	16,798	47,772	-64.8%	88,258	121,353	-27.3%
GERMANY	20,880	27,939	-25.3%	63,907	72,472	-11.8%
GREECE	344	617	-44.2%	1,577	1,897	-16.9%
HUNGARY	2,083	2,237	-6.9%	5,649	6,245	-9.5%
IRELAND <sup>3</sup>	1,448	3,042	-52.4%	9,388	11,055	-15.1%
ITALY <sup>4</sup>	4,950	17,186	-71.2%	32,452	45,964	-29.4%
LATVIA	145	228	-36.4%	489	647	-24.4%
LITHUANIA	328	392	-16.3%	925	1,231	-24.9%
LUXEMBOURG	246	554	-55.6%	1,119	1,375	-18.6%
NETHERLANDS	6,359	7,640	-16.8%	19,169	23,393	-18.1%
POLAND	4,328	6,432	-32.7%	13,389	17,030	-21.4%
PORTUGAL	1,557	3,190	-51.2%	6,636	8,726	-24.0%
ROMANIA	983	1,308	-24.8%	3,350	4,249	-21.2%
SLOVAKIA	453	610	-25.7%	1,621	1,785	-9.2%
SLOVENIA	396	1,125	-64.8%	2,176	3,353	-35.1%
SPAIN	6,708	20,461	-67.2%	36,323	54,586	-33.5%
SWEDEN	2,555	4,191	-39.0%	5,651	10,054	-43.8%
<b>EUROPEAN UNION</b>	<b>83,141</b>	<b>165,455</b>	<b>-49.8%</b>	<b>339,314</b>	<b>441,444</b>	<b>-23.1%</b>
EU14 <sup>5</sup>	72,080	149,423	-51.8%	303,347	396,543	-23.5%
EU12 <sup>6</sup>	11,061	16,032	-31.0%	35,967	44,901	-19.9%
ICELAND	87	156	-44.2%	303	382	-20.7%
NORWAY	2,753	3,472	-20.7%	8,196	8,919	-8.1%
SWITZERLAND	2,282	3,645	-37.4%	6,961	8,111	-14.2%
EFTA	5,122	7,273	-29.6%	15,460	17,412	-11.2%
UNITED KINGDOM	30,247	66,123	-54.3%	67,907	102,743	-33.9%
<b>TOTAL (EU + EFTA + UK)</b>	<b>118,510</b>	<b>238,851</b>	<b>-50.4%</b>	<b>422,681</b>	<b>561,599</b>	<b>-24.7%</b>
<b>WESTERN EUROPE (EU14 + EFTA + UK)</b>	<b>107,449</b>	<b>222,819</b>	<b>-51.8%</b>	<b>386,714</b>	<b>516,698</b>	<b>-25.2%</b>

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

<sup>1</sup> Malta not available

<sup>4</sup> ANFIA estimates

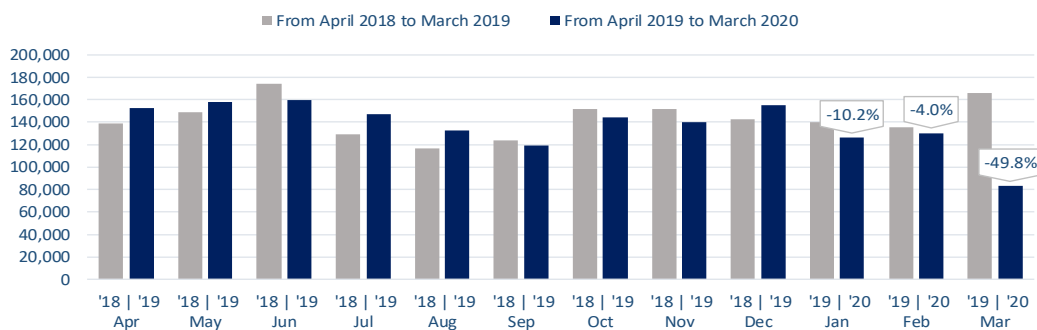
<sup>2</sup> Including light buses and coaches

<sup>5</sup> Member states before the 2004 enlargement

<sup>3</sup> LCV ≤6t

<sup>6</sup> Member states having joined the EU since 2004

### New light commercial vehicle registrations in the EU - 12 month trend



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## PROVISIONAL EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY NEW HEAVY COMMERCIAL VEHICLES (HCV) OF 16T AND OVER<sup>1</sup>

	March 2020	March 2019	% change 20/19	Jan-Mar 2020	Jan-Mar 2019	% change 20/19
AUSTRIA	459	965	-52.4%	1,417	2,153	-34.2%
BELGIUM	473	950	-50.2%	1,819	2,821	-35.5%
BULGARIA	123	351	-65.0%	624	1,064	-41.4%
CROATIA	47	96	-51.0%	201	326	-38.3%
CYPRUS	1	4	-75.0%	11	11	0.0%
CZECH REPUBLIC	470	716	-34.4%	1,421	2,001	-29.0%
DENMARK	325	367	-11.4%	1,023	1,195	-14.4%
ESTONIA	32	80	-60.0%	173	323	-46.4%
FINLAND	206	209	-1.4%	676	702	-3.7%
FRANCE	2,316	4,649	-50.2%	9,200	12,726	-27.7%
GERMANY	4,760	6,735	-29.3%	13,598	18,363	-25.9%
GREECE	31	32	-3.1%	110	80	37.5%
HUNGARY	201	446	-54.9%	759	1,178	-35.6%
IRELAND <sup>2</sup>	240	170	41.2%	753	629	19.7%
ITALY <sup>3</sup>	1,139	1,702	-33.1%	4,502	5,109	-11.9%
LATVIA	44	123	-64.2%	154	341	-54.8%
LITHUANIA <sup>4</sup>	721	772	-6.6%	1,642	2,323	-29.3%
LUXEMBOURG <sup>4</sup>	55	104	-47.1%	177	251	-29.5%
NETHERLANDS	1,071	1,430	-25.1%	3,373	4,438	-24.0%
POLAND	1,316	2,742	-52.0%	4,258	6,907	-38.4%
PORTUGAL	178	359	-50.4%	718	1,015	-29.3%
ROMANIA	291	551	-47.2%	1,042	1,827	-43.0%
SLOVAKIA	135	376	-64.1%	503	1,017	-50.5%
SLOVENIA <sup>4</sup>	177	184	-3.8%	522	755	-30.9%
SPAIN	921	1,427	-35.5%	4,146	4,989	-16.9%
SWEDEN	504	647	-22.1%	1,346	1,514	-11.1%
<b>EUROPEAN UNION</b>	<b>16,236</b>	<b>26,187</b>	<b>-38.0%</b>	<b>54,168</b>	<b>74,058</b>	<b>-26.9%</b>
<b>EU14</b>	<b>12,678</b>	<b>19,746</b>	<b>-35.8%</b>	<b>42,858</b>	<b>55,985</b>	<b>-23.4%</b>
<b>EU12</b>	<b>3,558</b>	<b>6,441</b>	<b>-44.8%</b>	<b>11,310</b>	<b>18,073</b>	<b>-37.4%</b>
ICELAND	5	15	-66.7%	28	42	-33.3%
NORWAY	374	453	-17.4%	1,156	1,294	-10.7%
SWITZERLAND	220	300	-26.7%	820	938	-12.6%
<b>EFTA</b>	<b>599</b>	<b>768</b>	<b>-22.0%</b>	<b>2,004</b>	<b>2,274</b>	<b>-11.9%</b>
UNITED KINGDOM <sup>4</sup>	2,961	5,243	-43.5%	7,071	10,705	-33.9%
<b>TOTAL (EU + EFTA + UK)</b>	<b>19,796</b>	<b>32,198</b>	<b>-38.5%</b>	<b>63,243</b>	<b>87,037</b>	<b>-27.3%</b>
<b>WESTERN EUROPE (EU14 + EFTA + UK)</b>	<b>16,238</b>	<b>25,757</b>	<b>-37.0%</b>	<b>51,933</b>	<b>68,964</b>	<b>-24.7%</b>

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

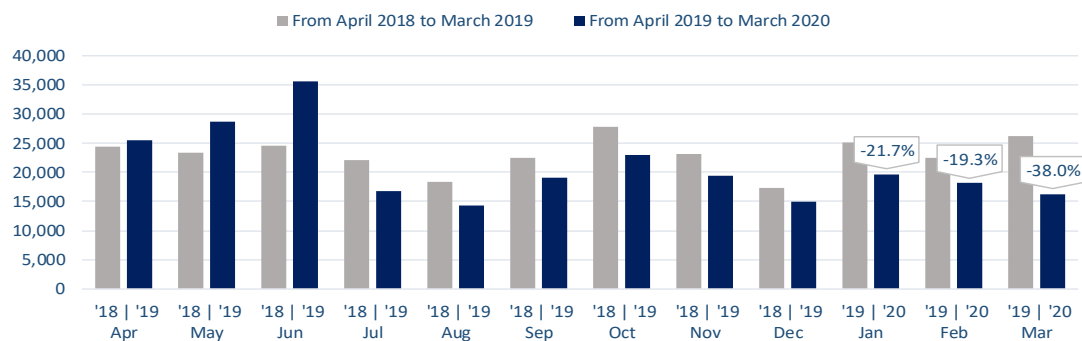
<sup>1</sup> Excluding heavy buses and coaches

<sup>3</sup> ANFIA estimates based on vehicle registration certificates issued by the Italian Ministry of Transport

<sup>2</sup> HCV ≥17t

<sup>4</sup> Estimates

### New heavy commercial vehicle registrations in the EU - 12 month trend



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**PROVISIONAL**  
**EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY**  
**NEW MEDIUM AND HEAVY COMMERCIAL VEHICLES (MHCV) OVER 3.5T<sup>1</sup>**

	March 2020	March 2019	% change 20/19	Jan-Mar 2020	Jan-Mar 2019	% change 20/19
AUSTRIA	474	988	-52.0%	1,462	2,245	-34.9%
BELGIUM	561	1,129	-50.3%	2,202	3,289	-33.0%
BULGARIA	130	352	-63.1%	647	1,091	-40.7%
CROATIA	62	110	-43.6%	237	365	-35.1%
CYPRUS	4	10	-60.0%	33	165	-80.0%
CZECH REPUBLIC	596	845	-29.5%	1,813	2,388	-24.1%
DENMARK	361	408	-11.5%	1,123	1,302	-13.7%
ESTONIA	39	86	-54.7%	190	336	-43.5%
FINLAND	314	310	1.3%	988	989	-0.1%
FRANCE	2,680	5,290	-49.3%	10,536	14,322	-26.4%
GERMANY	6,755	9,328	-27.6%	19,631	25,529	-23.1%
GREECE	69	55	25.5%	171	126	35.7%
HUNGARY	219	475	-53.9%	856	1,269	-32.5%
IRELAND	275	221	24.4%	865	756	14.4%
ITALY <sup>2</sup>	1,387	2,085	-33.5%	5,393	6,146	-12.3%
LATVIA	55	126	-56.3%	177	352	-49.7%
LITHUANIA <sup>3</sup>	747	784	-4.7%	1,697	2,361	-28.1%
LUXEMBOURG	75	125	-40.0%	248	289	-14.2%
NETHERLANDS	1,214	1,546	-21.5%	3,802	4,838	-21.4%
POLAND	1,504	2,989	-49.7%	4,710	7,453	-36.8%
PORTUGAL	210	406	-48.3%	827	1,224	-32.4%
ROMANIA	307	579	-47.0%	1,078	1,897	-43.2%
SLOVAKIA	149	407	-63.4%	560	1,089	-48.6%
SLOVENIA <sup>3</sup>	187	192	-2.6%	560	793	-29.4%
SPAIN	1,219	1,762	-30.8%	5,105	6,010	-15.1%
SWEDEN	557	700	-20.4%	1,465	1,660	-11.7%
<b>EUROPEAN UNION</b>	<b>20,150</b>	<b>31,308</b>	<b>-35.6%</b>	<b>66,376</b>	<b>88,284</b>	<b>-24.8%</b>
<b>EU14</b>	<b>16,151</b>	<b>24,353</b>	<b>-33.7%</b>	<b>53,818</b>	<b>68,725</b>	<b>-21.7%</b>
<b>EU12</b>	<b>3,999</b>	<b>6,955</b>	<b>-42.5%</b>	<b>12,558</b>	<b>19,559</b>	<b>-35.8%</b>
ICELAND	9	25	-64.0%	45	80	-43.8%
NORWAY	472	615	-23.3%	1,444	1,648	-12.4%
SWITZERLAND	340	395	-13.9%	976	1,093	-10.7%
<b>EFTA</b>	<b>821</b>	<b>1,035</b>	<b>-20.7%</b>	<b>2,465</b>	<b>2,821</b>	<b>-12.6%</b>
UNITED KINGDOM <sup>3</sup>	3,828	7,348	-47.9%	9,684	14,535	-33.4%
<b>TOTAL (EU + EFTA + UK)</b>	<b>24,799</b>	<b>39,691</b>	<b>-37.5%</b>	<b>78,525</b>	<b>105,640</b>	<b>-25.7%</b>
<b>WESTERN EUROPE (EU14 + EFTA + UK)</b>	<b>20,800</b>	<b>32,736</b>	<b>-36.5%</b>	<b>65,967</b>	<b>86,081</b>	<b>-23.4%</b>

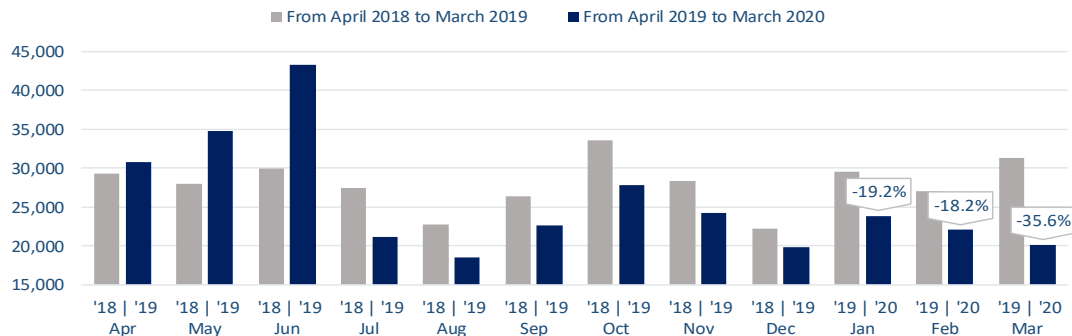
SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

<sup>1</sup> Excluding buses and coaches over 3.5t

<sup>2</sup> ANFIA estimates based on vehicle registration certificates issued by the Italian Ministry of Transport

<sup>3</sup> Estimates

## New medium and heavy commercial vehicle registrations in the EU - 12 month trend



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**PROVISIONAL**  
**EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY**  
**NEW MEDIUM AND HEAVY BUSES & COACHES (MHBC) OVER 3.5T**

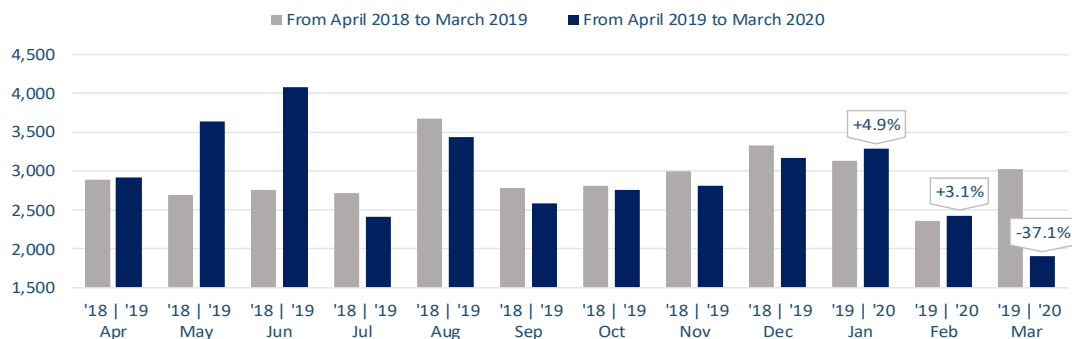
	March 2020	March 2019	% change 20/19	Jan-Mar 2020	Jan-Mar 2019	% change 20/19
AUSTRIA	73	65	12.3%	224	238	-5.9%
BELGIUM	37	84	-56.0%	226	275	-17.8%
BULGARIA	19	68	-72.1%	55	91	-39.6%
CROATIA	4	18	-77.8%	26	47	-44.7%
CYPRUS	4	3	33.3%	8	7	14.3%
CZECH REPUBLIC	63	111	-43.2%	226	194	16.5%
DENMARK	33	83	-60.2%	108	164	-34.1%
ESTONIA	27	3	800.0%	72	14	414.3%
FINLAND	10	13	-23.1%	61	81	-24.7%
FRANCE	255	424	-39.9%	1,392	1,303	6.8%
GERMANY	485	434	11.8%	1,608	1,430	12.4%
GREECE	19	29	-34.5%	113	114	-0.9%
HUNGARY	26	203	-87.2%	222	227	-2.2%
IRELAND	33	47	-29.8%	120	128	-6.3%
ITALY <sup>1</sup>	320	356	-10.1%	1,153	1,053	9.5%
LATVIA	1	2	-50.0%	20	31	-35.5%
LITHUANIA <sup>2</sup>	51	55	-7.3%	115	136	-15.4%
LUXEMBOURG	15	27	-44.4%	100	79	26.6%
NETHERLANDS	62	75	-17.3%	228	171	33.3%
POLAND	116	185	-37.3%	392	532	-26.3%
PORTUGAL	36	55	-34.5%	196	228	-14.0%
ROMANIA	60	277	-78.3%	186	774	-76.0%
SLOVAKIA	9	20	-55.0%	65	52	25.0%
SLOVENIA <sup>2</sup>	6	11	-45.5%	21	29	-27.6%
SPAIN	97	311	-68.8%	592	942	-37.2%
SWEDEN	44	71	-38.0%	108	175	-38.3%
<b>EUROPEAN UNION</b>	<b>1,905</b>	<b>3,030</b>	<b>-37.1%</b>	<b>7,637</b>	<b>8,515</b>	<b>-10.3%</b>
<b>EU14</b>	<b>1,519</b>	<b>2,074</b>	<b>-26.8%</b>	<b>6,229</b>	<b>6,381</b>	<b>-2.4%</b>
<b>EU12</b>	<b>386</b>	<b>956</b>	<b>-59.6%</b>	<b>1,408</b>	<b>2,134</b>	<b>-34.0%</b>
ICELAND	0	7	-100.0%	7	29	-75.9%
NORWAY	48	69	-30.4%	167	153	9.2%
SWITZERLAND	26	30	-13.3%	115	96	19.8%
<b>EFTA</b>	<b>74</b>	<b>106</b>	<b>-30.2%</b>	<b>289</b>	<b>278</b>	<b>4.0%</b>
UNITED KINGDOM <sup>2</sup>	159	764	-79.2%	942	1,453	-35.2%
<b>TOTAL (EU + EFTA + UK)</b>	<b>2,138</b>	<b>3,900</b>	<b>-45.2%</b>	<b>8,868</b>	<b>10,246</b>	<b>-13.4%</b>
<b>WESTERN EUROPE (EU14 + EFTA + UK)</b>	<b>1,752</b>	<b>2,944</b>	<b>-40.5%</b>	<b>7,460</b>	<b>8,112</b>	<b>-8.0%</b>

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

<sup>1</sup> ANFIA estimates based on vehicle registration certificates issued by the Italian Ministry of Transport

<sup>2</sup> Estimates

**New medium and heavy buses & coaches registrations in the EU - 12 month trend**



# PRESS RELEASE



## PROVISIONAL EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY TOTAL NEW COMMERCIAL VEHICLES

	March 2020	March 2019	% change 20/19	Jan-Mar 2020	Jan-Mar 2019	% change 20/19
AUSTRIA	2,433	5,341	-54.4%	9,758	13,356	-26.9%
BELGIUM	4,984	9,020	-44.7%	21,676	25,756	-15.8%
BULGARIA	514	1,012	-49.2%	2,060	2,593	-20.6%
CROATIA	605	884	-31.6%	2,178	2,650	-17.8%
CYPRUS	82	168	-51.2%	460	620	-25.8%
CZECH REPUBLIC	1,738	2,738	-36.5%	5,689	7,611	-25.3%
DENMARK	3,137	3,847	-18.5%	9,266	10,140	-8.6%
ESTONIA	354	504	-29.8%	1,288	1,585	-18.7%
FINLAND	1,544	1,703	-9.3%	4,561	4,999	-8.8%
FRANCE	19,733	53,486	-63.1%	100,186	136,978	-26.9%
GERMANY	28,120	37,701	-25.4%	85,146	99,431	-14.4%
GREECE	432	701	-38.4%	1,861	2,137	-12.9%
HUNGARY	2,328	2,915	-20.1%	6,727	7,741	-13.1%
IRELAND	1,756	3,310	-46.9%	10,373	11,939	-13.12%
ITALY	6,657	19,627	-66.1%	38,998	53,163	-26.6%
LATVIA	201	356	-43.5%	686	1,030	-33.4%
LITHUANIA	1,126	1,231	-8.5%	2,737	3,728	-26.6%
LUXEMBOURG	336	706	-52.4%	1,467	1,743	-15.8%
NETHERLANDS	7,635	9,261	-17.6%	23,199	28,402	-18.3%
POLAND	5,948	9,606	-38.1%	18,491	25,015	-26.1%
PORTUGAL	1,803	3,651	-50.6%	7,659	10,178	-24.7%
ROMANIA	1,350	2,164	-37.6%	4,614	6,920	-33.3%
SLOVAKIA	611	1,037	-41.1%	2,246	2,926	-23.2%
SLOVENIA	589	1,328	-55.6%	2,757	4,175	-34.0%
SPAIN	8,024	22,534	-64.4%	42,020	61,538	-31.7%
SWEDEN	3,156	4,962	-36.4%	7,224	11,889	-39.2%
<b>EUROPEAN UNION</b>	<b>105,196</b>	<b>199,793</b>	<b>-47.3%</b>	<b>413,327</b>	<b>538,243</b>	<b>-23.2%</b>
EU14	89,750	175,850	-49.0%	363,394	471,649	-23.0%
EU12	15,446	23,943	-35.5%	49,933	66,594	-25.0%
ICELAND	96	188	-48.9%	355	491	-27.7%
NORWAY	3,273	4,156	-21.2%	9,807	10,720	-8.5%
SWITZERLAND	2,648	4,070	-34.9%	8,052	9,300	-13.4%
EFTA	6,017	8,414	-28.5%	18,214	20,511	-11.2%
UNITED KINGDOM	34,234	74,235	-53.9%	78,533	118,731	-33.9%
<b>TOTAL (EU + EFTA + UK)</b>	<b>145,447</b>	<b>282,442</b>	<b>-48.5%</b>	<b>510,074</b>	<b>677,485</b>	<b>-24.7%</b>
<b>WESTERN EUROPE (EU14 + EFTA + UK)</b>	<b>130,001</b>	<b>258,499</b>	<b>-49.7%</b>	<b>460,141</b>	<b>610,891</b>	<b>-24.7%</b>

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

Total new commercial vehicle registrations in the EU - 12 month trend

