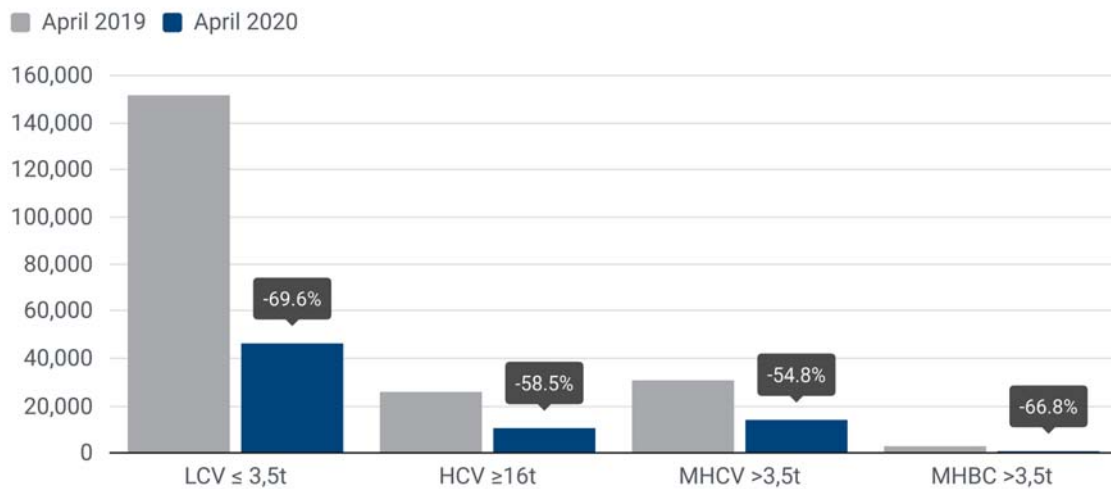


NEW COMMERCIAL VEHICLE REGISTRATIONS EUROPEAN UNION¹ April 2020



Commercial vehicle registrations: -34.5% four months into 2020; -67.0% in April

Total new commercial vehicles

In April 2020, commercial vehicle registrations in the European Union declined by 67.0%, as most of Europe was under lockdown for the entire month. The fallout of the COVID-19 pandemic affected all 27 EU markets and every vehicle segment. Spain (-87.8%), Italy (-85.5%) and France (-82.4%) saw the biggest losses in April, as they were also among the countries with the most restrictive containment measures in place.

Four months into the year, EU demand for new commercial vehicles contracted by 34.5%, largely due to the impact of the coronavirus on March and April results. The region's four major markets posted double-digit percentage drops so far this year: Spain (-46.6%), France (-41.6%), Italy (-41.4%) and Germany (-22.5%).

¹ 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 3.5t²

April results showed a sharp decline in registrations of light commercial vehicles across the EU. Demand for new vans fell by 69.6% to 46,264 units, or less than a third of the number of vans sold in April 2019. Double-digit declines were recorded in all EU markets last month, including the four major ones. Spain (-91.0%) and Italy (-89.9%) posted the biggest drops in van registrations.

From January to April, van demand in the European Union contracted by 35.1%. Light commercial vehicle registrations nearly halved in Spain (-49.1%), Italy (-44.5%) and France (-42.2%). Among the largest markets, Germany saw the least severe drop (-21.2%) so far this year.

New heavy commercial vehicles (HCV) of 16t and over³

During the fourth month of 2020, new heavy truck registrations fell by 58.5%, marking the tenth consecutive month of decline in the EU. The Central European countries were severely hit (-71.2%) by lockdown measures last month – including Poland (-71.7%), which traditionally is one of the leading markets for this vehicle type in the region. Looking at the major Western European markets, France recorded the biggest contraction (-72.3%) in April.

So far in 2020, 64,456 heavy trucks were registered across the European Union, or 35.4% less than the year before. Demand declined by 39.8% in France, followed by Germany (-30.8%), Italy (-25.7%) and Spain (-23.6%).

New medium and heavy commercial vehicles (MHCV) over 3.5t⁴

In April 2020, EU registrations of medium and heavy commercial vehicles showed a trend similar to that of the heavy-truck segment. Demand for trucks shrank by 54.8% compared to April 2019, counting 14,112 units in total. With the exception of Greece, each of the 27 EU markets posted significant losses last month: France (-72.5%), Italy (-61.7%), Spain (-49.9%) and Germany (-39.3%).

Four months into 2020, the European Union counted 79,954 registrations of new trucks, or 33.0% less than last year. France (-39.2%) saw the biggest percentage drop, followed by Germany (-27.3%), Italy (-26.0%) and Spain (-22.7%).

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

Last month, demand for new buses and coaches in the EU plummeted by 66.8% to 993 units registered. Except for Hungary, Sweden and Latvia, all markets in the region recorded strong declines in April, and Spain (-81.6%) in particular.

From January to April, bus and coach registrations contracted by 20.1%, with 8,551 vehicles sold across the European Union in total. Overall demand remained positive in Italy (+1.4%), while France (-8.6%) and Germany (-6.7%) posted modest drops. By contrast, however, new registrations fell by almost half in Spain (-48.0%) so far in 2020.

² Including light buses & coaches

³ Excluding heavy buses & coaches

⁴ Excluding medium and heavy buses & coaches

PROVISIONAL

EU+EFTA¹ NEW REGISTRATION FIGURES BY COUNTRY NEW LIGHT COMMERCIAL VEHICLES (LCV) UP TO 3.5T²

	April 2020	April 2019	% change 20/19	Jan-Apr 2020	Jan-Apr 2019	% change 20/19
AUSTRIA	2,188	4,315	-49.3%	10,260	15,188	-32.4%
BELGIUM	1,369	6,953	-80.3%	20,617	29,145	-29.3%
BULGARIA	255	365	-30.1%	1,613	1,776	-9.2%
CROATIA	287	911	-68.5%	2,202	3,149	-30.1%
CYPRUS	62	173	-64.2%	481	621	-22.5%
CZECH REPUBLIC	1,137	1,610	-29.4%	4,787	6,639	-27.9%
DENMARK	1,813	2,800	-35.3%	9,848	11,474	-14.2%
ESTONIA	198	403	-50.9%	1,224	1,638	-25.3%
FINLAND	970	1,369	-29.1%	4,483	5,298	-15.4%
FRANCE	7,038	43,485	-83.8%	95,296	164,838	-42.2%
GERMANY	13,718	25,854	-46.9%	77,621	98,326	-21.1%
GREECE	367	610	-39.8%	1,944	2,507	-22.5%
HUNGARY	1,408	2,104	-33.1%	7,057	8,349	-15.5%
IRELAND ³	229	1,799	-87.3%	9,512	12,854	-26.0%
ITALY ⁴	1,550	15,397	-89.9%	34,073	61,361	-44.5%
LATVIA	158	234	-32.5%	647	881	-26.6%
LITHUANIA	211	443	-52.4%	1,136	1,674	-32.1%
LUXEMBOURG	153	426	-64.1%	1,272	1,801	-29.4%
NETHERLANDS	3,978	6,282	-36.7%	23,011	29,675	-22.5%
POLAND	2,626	5,910	-55.6%	16,015	22,940	-30.2%
PORTUGAL	948	3,154	-69.9%	7,584	11,880	-36.2%
ROMANIA	668	1,384	-51.7%	4,018	5,781	-30.5%
SLOVAKIA	331	791	-58.2%	1,952	2,576	-24.2%
SLOVENIA	294	842	-65.1%	2,470	4,195	-41.1%
SPAIN	1,823	20,316	-91.0%	38,146	74,902	-49.1%
SWEDEN	2,485	4,061	-38.8%	8,136	14,115	-42.4%
EUROPEAN UNION	46,264	151,991	-69.6%	385,405	593,583	-35.1%
EU14⁵	38,629	136,821	-71.8%	341,803	533,364	-35.9%
EU12⁶	7,635	15,170	-49.7%	43,602	60,219	-27.6%
ICELAND	57	139	-59.0%	360	521	-30.9%
NORWAY	2,150	3,543	-39.3%	10,346	12,462	-17.0%
SWITZERLAND	1,746	2,934	-40.5%	8,707	11,045	-21.2%
EFTA	3,953	6,616	-40.3%	19,413	24,028	-19.2%
UNITED KINGDOM	3,387	24,604	-86.2%	71,294	127,347	-44.0%
TOTAL (EU + EFTA + UK)	53,604	183,211	-70.7%	476,112	744,958	-36.1%
WESTERN EUROPE (EU14 + EFTA + UK)	45,969	168,041	-72.6%	432,510	684,739	-36.8%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Malta not available

⁴ ANFIA estimates

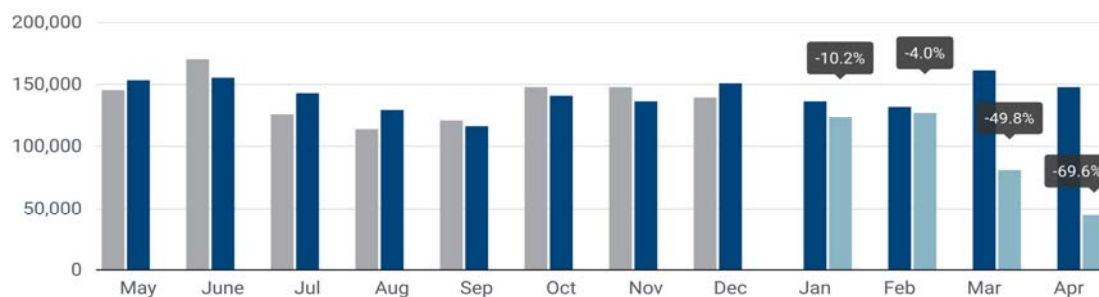
² Including light buses and coaches

⁵ Member states before the 2004 enlargement

³ LCV ≤6t

⁶ Member states having joined the EU since 2004

■ 2018 ■ 2019 ■ 2020



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Next press release on commercial vehicles to be issued on Wednesday 24 June 2020

PROVISIONAL EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY NEW HEAVY COMMERCIAL VEHICLES (HCV) OF 16T AND OVER¹

	April 2020	April 2019	% change 20/19	Jan-Apr 2020	Jan-Apr 2019	% change 20/19
AUSTRIA	459	883	-48.0%	1,876	3,036	-38.2%
BELGIUM	361	899	-59.8%	2,180	3,720	-41.4%
BULGARIA	63	298	-78.9%	687	1,362	-49.6%
CROATIA	41	86	-52.3%	242	412	-41.3%
CYPRUS	1	9	-88.9%	12	20	-40.0%
CZECH REPUBLIC	373	759	-50.9%	1,794	2,760	-35.0%
DENMARK	289	406	-28.8%	1,312	1,601	-18.1%
ESTONIA	36	89	-59.6%	209	412	-49.3%
FINLAND	230	262	-12.2%	906	964	-6.0%
FRANCE	1,314	4,739	-72.3%	10,514	17,465	-39.8%
GERMANY	3,546	6,427	-44.8%	17,163	24,790	-30.8%
GREECE	45	35	28.6%	155	115	34.8%
HUNGARY	129	569	-77.3%	888	1,747	-49.2%
IRELAND ²	68	198	-65.7%	818	827	-1.1%
ITALY ³	736	1,934	-61.9%	5,234	7,043	-25.7%
LATVIA	26	60	-56.7%	180	401	-55.1%
LITHUANIA ⁴	108	873	-87.6%	1,379	3,196	-56.9%
LUXEMBOURG ⁴	21	134	-84.3%	206	385	-46.5%
NETHERLANDS	689	1,450	-52.5%	4,047	5,888	-31.3%
POLAND	747	2,643	-71.7%	5,005	9,550	-47.6%
PORTUGAL	64	282	-77.3%	782	1,297	-39.7%
ROMANIA	150	486	-69.1%	1,192	2,163	-44.9%
SLOVAKIA	68	285	-76.1%	571	1,302	-56.1%
SLOVENIA ⁴	77	165	-53.3%	482	920	-47.6%
SPAIN	678	1,328	-48.9%	4,825	6,317	-23.6%
SWEDEN	451	644	-30.0%	1,797	2,158	-16.7%
EUROPEAN UNION	10,770	25,943	-58.5%	64,456	99,851	-35.4%
EU14	8,951	19,621	-54.4%	51,815	75,606	-31.5%
EU12	1,819	6,322	-71.2%	12,641	24,245	-47.9%
ICELAND	14	16	-12.5%	42	58	-27.6%
NORWAY	411	456	-9.9%	1,567	1,750	-10.5%
SWITZERLAND	224	293	-23.5%	1,044	1,231	-15.2%
EFTA	649	765	-15.2%	2,653	3,039	-12.7%
UNITED KINGDOM ⁴	717	3,710	-80.7%	8,893	14,415	-38.3%
TOTAL (EU + EFTA + UK)	12,136	30,418	-60.1%	76,002	117,305	-35.2%
WESTERN EUROPE (EU14 + EFTA + UK)	10,317	24,096	-57.2%	63,361	93,060	-31.9%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

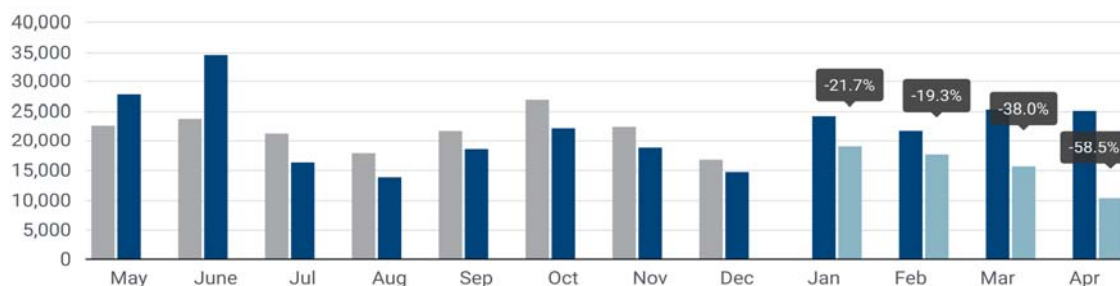
¹ Excluding heavy buses and coaches

³ ANFIA estimates based on vehicle registration certificates issued by the Italian Ministry of Transport

² HCV ≥17t

⁴ Estimates

■ 2018 ■ 2019 ■ 2020



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PROVISIONAL EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY NEW MEDIUM AND HEAVY COMMERCIAL VEHICLES (MHCV) OVER 3.5T¹

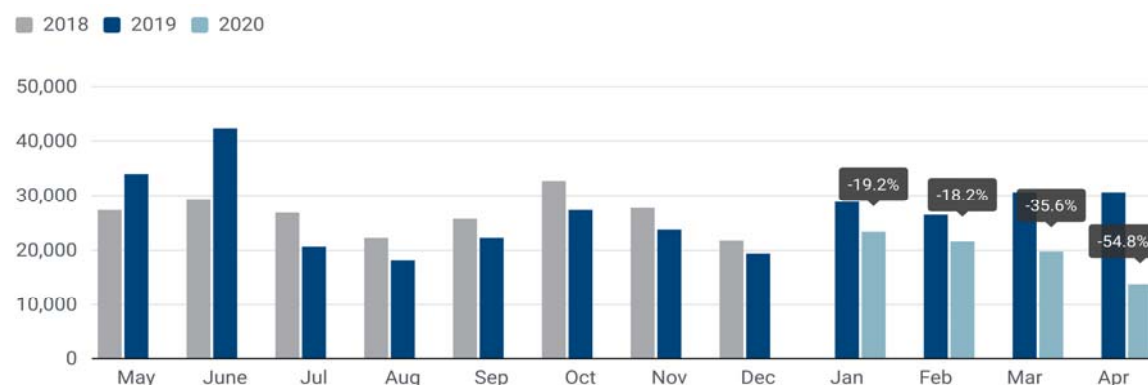
	April 2020	April 2019	% change 20/19	Jan-Apr 2020	Jan-Apr 2019	% change 20/19
AUSTRIA	478	913	-47.6%	1,940	3,158	-38.6%
BELGIUM	454	1,031	-56.0%	2,656	4,320	-38.5%
BULGARIA	65	304	-78.6%	712	1,395	-49.0%
CROATIA	72	115	-37.4%	309	480	-35.6%
CYPRUS	2	14	-85.7%	35	179	-80.4%
CZECH REPUBLIC	465	966	-51.9%	2,278	3,354	-32.1%
DENMARK	331	441	-24.9%	1,454	1,743	-16.6%
ESTONIA	43	95	-54.7%	233	431	-45.9%
FINLAND	287	356	-19.4%	1,275	1,345	-5.2%
FRANCE	1,502	5,465	-72.5%	12,038	19,787	-39.2%
GERMANY	5,500	9,058	-39.3%	25,135	34,587	-27.3%
GREECE	77	52	48.1%	248	178	39.3%
HUNGARY	153	612	-75.0%	1,009	1,881	-46.4%
IRELAND	94	230	-59.1%	956	986	-3.0%
ITALY ²	905	2,365	-61.7%	6,294	8,511	-26.0%
LATVIA	27	64	-57.8%	204	416	-51.0%
LITHUANIA ³	120	886	-86.5%	1,425	3,247	-56.1%
LUXEMBOURG	34	144	-76.4%	282	433	-34.9%
NETHERLANDS	807	1,593	-49.3%	4,594	6,433	-28.6%
POLAND	928	2,826	-67.2%	5,638	10,279	-45.2%
PORTUGAL	90	345	-73.9%	917	1,569	-41.6%
ROMANIA	173	500	-65.4%	1,251	2,257	-44.6%
SLOVAKIA	90	307	-70.7%	650	1,396	-53.4%
SLOVENIA ³	82	182	-54.9%	517	975	-47.0%
SPAIN	848	1,691	-49.9%	5,954	7,701	-22.7%
SWEDEN	485	696	-30.3%	1,950	2,356	-17.2%
EUROPEAN UNION	14,112	31,251	-54.8%	79,954	119,397	-33.0%
EU14	11,892	24,380	-51.2%	65,693	93,107	-29.4%
EU12	2,220	6,871	-67.7%	14,261	26,290	-45.8%
ICELAND	20	21	-4.8%	65	101	-35.6%
NORWAY	594	705	-15.7%	2,038	2,353	-13.4%
SWITZERLAND	272	341	-20.2%	1,248	1,434	-13.0%
EFTA	886	1,067	-17.0%	3,351	3,888	-13.8%
UNITED KINGDOM ³	1,196	5,039	-76.3%	12,577	19,574	-35.7%
TOTAL (EU + EFTA + UK)	16,194	37,357	-56.7%	95,882	142,859	-32.9%
WESTERN EUROPE (EU14 + EFTA + UK)	13,974	30,486	-54.2%	81,621	116,569	-30.0%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Excluding buses and coaches over 3.5t

² ANFIA estimates based on vehicle registration certificates issued by the Italian Ministry of Transport

³ Estimates



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

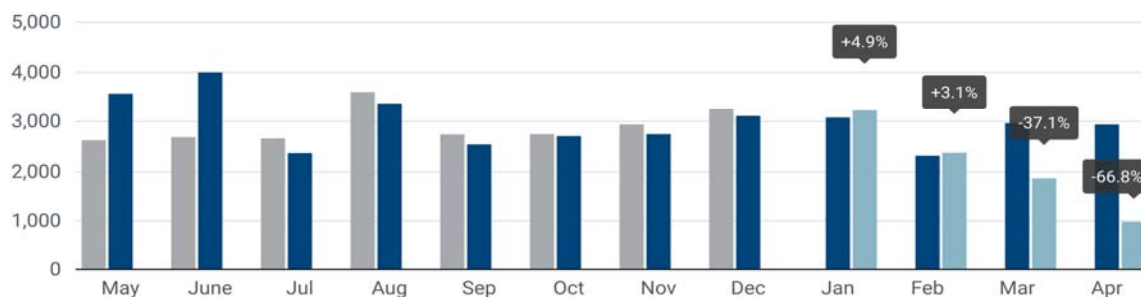
	April 2020	April 2019	% change 20/19	Jan-Apr 2020	Jan-Apr 2019	% change 20/19
AUSTRIA	2	54	-96.3%	226	292	-22.6%
BELGIUM	60	162	-63.0%	286	437	-34.6%
BULGARIA	16	52	-69.2%	71	143	-50.3%
CROATIA	0	71	-100.0%	26	118	-78.0%
CYPRUS	0	5	-100.0%	8	12	-33.3%
CZECH REPUBLIC	34	111	-69.4%	260	305	-14.8%
DENMARK	15	47	-68.1%	123	211	-41.7%
ESTONIA	3	7	-57.1%	75	21	257.1%
FINLAND	6	19	-68.4%	67	100	-33.0%
FRANCE	112	343	-67.3%	1,504	1,646	-8.6%
GERMANY	237	547	-56.7%	1,845	1,977	-6.7%
GREECE	7	40	-82.5%	120	154	-22.1%
HUNGARY	35	10	250.0%	257	237	8.4%
IRELAND	4	74	-94.6%	97	202	-52.0%
ITALY ¹	157	231	-32.0%	1,302	1,284	1.4%
LATVIA	3	3	0.0%	23	34	-32.4%
LITHUANIA ²	5	57	-91.2%	78	193	-59.6%
LUXEMBOURG	3	42	-92.9%	103	121	-14.9%
NETHERLANDS	23	76	-69.7%	251	247	1.6%
POLAND	64	272	-76.5%	456	804	-43.3%
PORTUGAL	16	43	-62.8%	212	271	-21.8%
ROMANIA	21	314	-93.3%	207	284	-27.1%
SLOVAKIA	15	33	-54.5%	80	85	-5.9%
SLOVENIA ²	0	8	-100.0%	19	37	-48.6%
SPAIN	56	305	-81.6%	648	1,247	-48.0%
SWEDEN	99	69	43.5%	207	244	-15.2%
EUROPEAN UNION	993	2,995	-66.8%	8,551	10,706	-20.1%
EU14	797	2,052	-61.2%	6,991	8,433	-17.1%
EU12	196	943	-79.2%	1,560	2,273	-31.4%
ICELAND	0	2	-100.0%	7	31	-77.4%
NORWAY	114	75	52.0%	281	228	23.2%
SWITZERLAND	25	59	-57.6%	140	155	-9.7%
EFTA	139	136	2.2%	428	414	3.4%
UNITED KINGDOM ²	99	491	-79.8%	1,814	1,944	-6.7%
TOTAL (EU + EFTA + UK)	1,231	3,622	-66.0%	10,793	13,064	-17.4%
WESTERN EUROPE (EU14 + EFTA + UK)	1,035	2,679	-61.4%	9,233	10,791	-14.4%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ ANFIA estimates based on vehicle registration certificates issued by the Italian Ministry of Transport

² Estimates

■ 2018 ■ 2019 ■ 2020



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

	April 2020	April 2019	% change 20/19	Jan-Apr 2020	Jan-Apr 2019	% change 20/19
AUSTRIA	2,668	5,282	-49.5%	12,426	18,638	-33.3%
BELGIUM	1,883	8,146	-76.9%	23,559	33,902	-30.5%
BULGARIA	336	721	-53.4%	2,396	3,314	-27.7%
CROATIA	359	1,097	-67.3%	2,537	3,747	-32.3%
CYPRUS	64	192	-66.7%	524	812	-35.5%
CZECH REPUBLIC	1,636	2,687	-39.1%	7,325	10,298	-28.9%
DENMARK	2,159	3,288	-34.3%	11,425	13,428	-14.9%
ESTONIA	244	505	-51.7%	1,532	2,090	-26.7%
FINLAND	1,263	1,744	-27.6%	5,825	6,743	-13.6%
FRANCE	8,652	49,293	-82.4%	108,838	186,271	-41.6%
GERMANY	19,455	35,459	-45.1%	104,601	134,890	-22.5%
GREECE	451	702	-35.8%	2,312	2,839	-18.6%
HUNGARY	1,596	2,726	-41.5%	8,323	10,467	-20.5%
IRELAND	327	2,103	-84.5%	10,565	14,042	-24.8%
ITALY	2,612	17,993	-85.5%	41,669	71,156	-41.4%
LATVIA	188	301	-37.5%	874	1,331	-34.3%
LITHUANIA	336	1,386	-75.8%	2,639	5,114	-48.4%
LUXEMBOURG	190	612	-69.0%	1,657	2,355	-29.6%
NETHERLANDS	4,808	7,951	-39.5%	27,856	36,355	-23.4%
POLAND	3,618	9,008	-59.8%	22,109	34,023	-35.0%
PORTUGAL	1,054	3,542	-70.2%	8,713	13,720	-36.5%
ROMANIA	862	2,198	-60.8%	5,476	8,322	-34.2%
SLOVAKIA	436	1,131	-61.5%	2,682	4,057	-33.9%
SLOVENIA	376	1,032	-63.6%	3,006	5,207	-42.3%
SPAIN	2,727	22,312	-87.8%	44,748	83,850	-46.6%
SWEDEN	3,069	4,826	-36.4%	10,293	16,715	-38.4%
EUROPEAN UNION	61,369	186,237	-67.0%	473,910	723,686	-34.5%
EU14	51,318	163,253	-68.6%	414,487	634,904	-34.7%
EU12	10,051	22,984	-56.3%	59,423	88,782	-33.1%
ICELAND	77	162	-52.5%	432	653	-33.8%
NORWAY	2,858	4,323	-33.9%	12,665	15,043	-15.8%
SWITZERLAND	2,043	3,334	-38.7%	10,095	12,634	-20.1%
EFTA	4,978	7,819	-36.3%	23,192	28,330	-18.1%
UNITED KINGDOM	4,682	30,134	-84.5%	85,685	148,865	-42.4%
TOTAL (EU + EFTA + UK)	71,029	224,190	-68.3%	582,787	900,881	-35.3%
WESTERN EUROPE (EU14 + EFTA + UK)	60,978	201,206	-69.7%	523,364	812,099	-35.6%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

