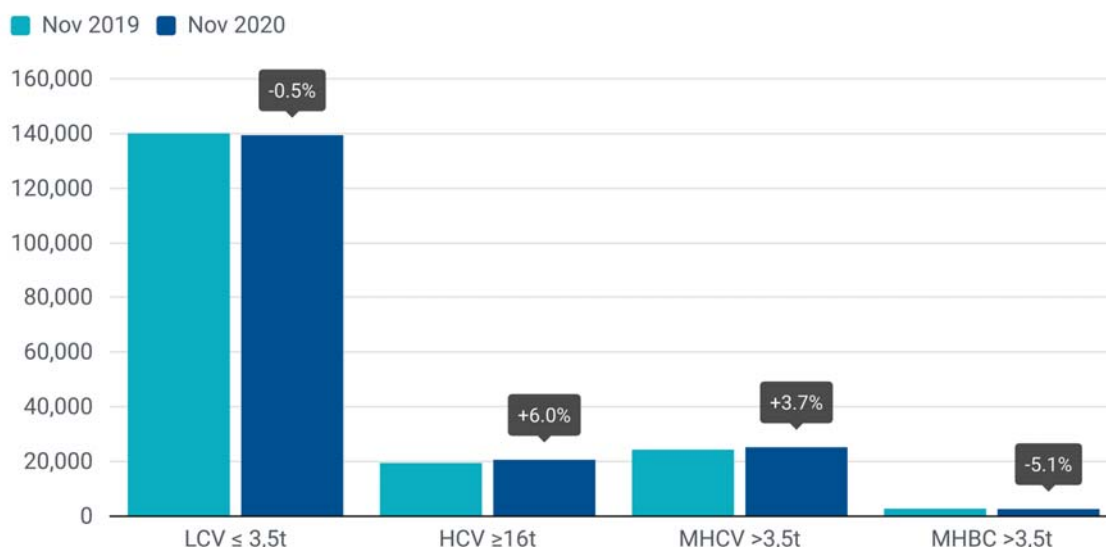


NEW COMMERCIAL VEHICLE REGISTRATIONS EUROPEAN UNION¹ November 2020



Commercial vehicle registrations: -20.3% 11 months into 2020; +0.1% in November

Total new commercial vehicles

In November 2020, the EU market for commercial vehicles posted a very modest increase, with new registrations up 0.1% to 167,315 units. Demand for vans and buses slowed down last month, while the truck segment contributed positively to the region's result. The four biggest markets posted a mixed performance in November, with registrations contracting in Spain (-7.0%) and France (-3.1%), while Italian (+11.7%) and German (+4.3%) markets expanded.

At 1.5 million units **eleven months into the year**, commercial vehicle registrations in the European Union are now down by 20.3%. All EU27 markets – including the four major ones – have recorded double-digit declines so far in 2020, although less steep than in the preceding months: Spain (-28.4%), France (-18.4%), Germany (-16.3%) and Italy (-15.6%).

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

In November, demand for new light commercial vehicles in the EU remained stable (-0.5%) compared to one year ago. Results in the EU's top four markets were mixed: registrations in Italy and Germany were positive, growing by 10.3% and 6.2% respectively, while LCV demand contracted in Spain (-8.1%) and France (-3.8%).

From January to November 2020, new van registrations declined by 18.7% across the European Union, now standing at 1.3 million units. Spain recorded the sharpest drop (-28.8%) so far this year, while losses were less strong in France (-17.6%), Italy (-15.4%) and Germany (-13.4%).

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

Last month, the EU market for heavy trucks improved, with new registrations up by 6.0% to 20,620 units. Central European countries (+28.6%) largely contributed to this result. Among the largest Western European markets however, only Italy (+28.5%) managed to post growth.

So far in 2020, 181,590 new heavy commercial vehicles were registered across the European Union, a decline of 29.6% compared to 2019. Despite last month's positive performance, each of the 27 EU markets recorded double-digit drops so far this year, including Germany (-28.6%), France (-27.9%), Spain (-23.9%) and Italy (-14.2%).

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

In November 2020, demand for new medium and heavy trucks posted a modest upturn (+3.7%), benefiting from the positive performance of the heavy-duty segment (which makes up the bulk of total truck demand). As for the biggest EU markets, Italy recorded the strongest gain (+21.7%), followed by France (+1.3%) which posted a more modest growth. By contrast, MHCV registrations slid 3.0% in Germany and 1.0% in Spain.

Eleven months into the year, registrations of new trucks declined sharply across the European Union including in the four major markets: France (-26.2%), Germany (-26.1%), Spain (-23.3%) and Italy (-15.1%). This contributed to a cumulative retreat of 27.7% to a total of 226,427 trucks registered so far in 2020.

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

In November 2020, new bus and coach registrations in the EU slid back by 5.1% compared to November last year. Although all major Western European markets – Italy (+27.0%), France (+13.4%), Germany (+11.6%) and Spain (+5.8%) – posted positive results, Central European countries (-22.6%) dragged down the overall performance of the region.

From January to November 2020, EU demand for buses and coaches contracted by 23.5%, counting 25,532 new registrations in total. Among the largest EU markets, Spain (-41.3%) and Italy (-27.3%) continued to struggle 11 months into the year, while losses were more limited in France (-9.5%) and Germany (-2.4%).

² Including light buses & coaches.

³ Excluding heavy buses & coaches.

⁴ Excluding medium and heavy buses & coaches.

PRESS RELEASE

PROVISIONAL

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

	November 2020	November 2019	% change 20/19	Jan-Nov 2020	Jan-Nov 2019	% change 20/19
AUSTRIA	3,173	2,940	7.9%	33,659	40,456	-16.8%
BELGIUM	5,558	6,032	-7.9%	65,283	75,040	-13.0%
BULGARIA	522	487	7.2%	4,532	5,381	-15.8%
CROATIA	760	587	29.5%	6,392	8,311	-23.1%
CYPRUS	147	200	-26.5%	1,449	2,036	-28.8%
CZECH REPUBLIC	1,592	1,523	4.5%	15,268	18,752	-18.6%
DENMARK	2,878	3,001	-4.1%	27,464	30,284	-9.3%
ESTONIA	289	288	0.3%	3,098	4,176	-25.8%
FINLAND	1,072	1,030	4.1%	11,502	13,585	-15.3%
FRANCE	36,067	37,493	-3.8%	357,989	434,208	-17.6%
GERMANY	28,687	27,022	6.2%	243,721	281,437	-13.4%
GREECE	755	733	3.0%	6,264	7,296	-14.1%
HUNGARY	2,279	2,307	-1.2%	19,455	23,544	-17.4%
IRELAND ³	830	857	-3.2%	21,433	25,161	-14.8%
ITALY ⁴	18,200	16,493	10.3%	142,002	167,864	-15.4%
LATVIA	205	193	6.2%	1,983	2,440	-18.7%
LITHUANIA	197	223	-11.7%	2,641	3,917	-32.6%
LUXEMBOURG	352	418	-15.8%	4,064	4,794	-15.2%
NETHERLANDS	5,730	6,047	-5.2%	56,861	72,348	-21.4%
POLAND	5,923	5,400	9.7%	51,723	62,295	-17.0%
PORTUGAL	2,801	2,842	-1.4%	23,905	33,915	-29.5%
ROMANIA	1,240	1,109	11.8%	11,933	15,829	-24.6%
SLOVAKIA	713	671	6.3%	5,824	7,971	-26.9%
SLOVENIA	726	1,141	-36.4%	7,319	10,340	-29.2%
SPAIN	15,631	17,003	-8.1%	141,557	198,779	-28.8%
SWEDEN	3,131	4,066	-23.0%	27,023	42,753	-36.8%
EUROPEAN UNION	139,458	140,106	-0.5%	1,294,344	1,592,912	-18.7%
EU14⁵	124,865	125,977	-0.9%	1,162,727	1,427,920	-18.6%
EU12⁶	14,593	14,129	3.3%	131,617	164,992	-20.2%
ICELAND	66	92	-28.3%	899	1,261	-28.7%
NORWAY	2,748	2,554	7.6%	28,517	34,899	-18.3%
SWITZERLAND	2,696	2,998	-10.1%	25,254	31,226	-19.1%
EFTA	5,510	5,644	-2.4%	54,670	67,386	-18.9%
UNITED KINGDOM	28,541	26,238	8.8%	265,374	338,227	-21.5%
TOTAL (EU + EFTA + UK)	173,509	171,988	0.9%	1,614,388	1,998,525	-19.2%
WESTERN EUROPE (EU14 + EFTA + UK)	158,916	157,859	0.7%	1,482,771	1,833,533	-19.1%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Malta not available

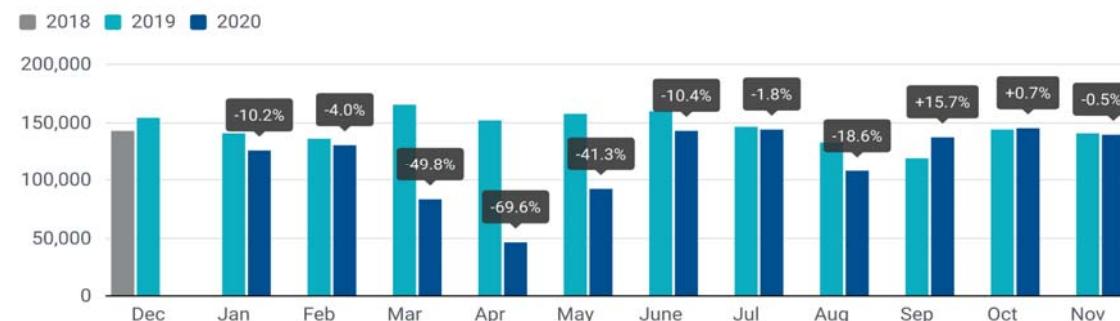
³ LCV ≤6t

⁵ Member states before the 2004 enlargement

² Including light buses and coaches

⁴ ANFIA estimates

⁶ Member states having joined the EU since 2004



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This information is available on the ACEA website: <http://www.acea.be>

Next press release on commercial vehicles to be issued on Tuesday 26 January 2021

PRESS RELEASE

PROVISIONAL

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

	November 2020	November 2019	% change 20/19	Jan-Nov 2020	Jan-Nov 2019	% change 20/19
AUSTRIA	423	396	6.8%	5,102	7,337	-30.5%
BELGIUM	555	704	-21.2%	5,627	9,126	-38.3%
BULGARIA	223	170	31.2%	1,902	2,991	-36.4%
CROATIA	69	59	16.9%	633	1,074	-41.1%
CYPRUS	1	4	-75.0%	37	45	-17.8%
CZECH REPUBLIC	635	542	17.2%	5,191	7,523	-31.0%
DENMARK	281	316	-11.1%	3,102	4,323	-28.2%
ESTONIA	50	57	-12.3%	435	958	-54.6%
FINLAND	195	197	-1.0%	2,111	2,757	-23.4%
FRANCE	3,666	3,671	-0.1%	33,232	46,102	-27.9%
GERMANY	4,865	4,881	-0.3%	46,341	64,885	-28.6%
GREECE	18	26	-30.8%	333	259	28.6%
HUNGARY	396	305	29.8%	2,723	4,496	-39.4%
IRELAND ²	49	45	8.9%	1,571	1,760	-10.7%
ITALY ³	1,830	1,424	28.5%	14,930	17,391	-14.2%
LATVIA	85	75	13.3%	588	1,005	-41.5%
LITHUANIA ⁴	546	286	90.9%	3,835	7,093	-45.9%
LUXEMBOURG ⁴	50	62	-19.4%	719	1,021	-29.6%
NETHERLANDS	684	789	-13.3%	8,663	13,254	-34.6%
POLAND	2,451	1,683	45.6%	16,288	24,070	-32.3%
PORTUGAL	262	216	21.3%	2,763	3,924	-29.6%
ROMANIA	286	374	-23.5%	3,463	5,859	-40.9%
SLOVAKIA	213	201	6.0%	1,593	3,028	-47.4%
SLOVENIA	116	188	-38.3%	1,182	2,100	-43.7%
SPAIN	2,185	2,206	-1.0%	14,698	19,324	-23.9%
SWEDEN	486	583	-16.6%	4,528	6,124	-26.1%
EUROPEAN UNION	20,620	19,460	6.0%	181,590	257,829	-29.6%
EU14	15,549	15,516	0.2%	143,720	197,587	-27.3%
EU12	5,071	3,944	28.6%	37,870	60,242	-37.1%
ICELAND	13	14	-7.1%	95	176	-46.0%
NORWAY	338	467	-27.6%	3,834	5,117	-25.1%
SWITZERLAND	237	248	-4.4%	2,679	3,356	-20.2%
EFTA	588	729	-19.3%	6,608	8,649	-23.6%
UNITED KINGDOM⁴	3,268	3,673	-11.0%	24,982	40,186	-37.8%
TOTAL (EU + EFTA + UK)	24,476	23,862	2.6%	213,180	306,664	-30.5%
WESTERN EUROPE (EU14 + EFTA + UK)	19,405	19,918	-2.6%	175,310	246,422	-28.9%

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



PRESS RELEASE

PROVISIONAL

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

	November 2020	November 2019	% change 20/19	Jan-Nov 2020	Jan-Nov 2019	% change 20/19
AUSTRIA	441	411	7.3%	5,291	7,698	-31.3%
BELGIUM	669	814	-17.8%	6,894	10,708	-35.6%
BULGARIA	226	191	18.3%	1,973	3,121	-36.8%
CROATIA	81	71	14.1%	809	1,375	-41.2%
CYPRUS	3	6	-50.0%	93	243	-61.7%
CZECH REPUBLIC	762	668	14.1%	6,458	9,125	-29.2%
DENMARK	334	367	-9.0%	3,489	4,751	-26.6%
ESTONIA	57	61	-6.6%	481	1,012	-52.5%
FINLAND	294	288	2.1%	3,114	3,791	-17.9%
FRANCE	4,249	4,194	1.3%	38,617	52,294	-26.2%
GERMANY	7,162	7,384	-3.0%	68,769	93,047	-26.1%
GREECE	25	32	-21.9%	536	398	34.7%
HUNGARY	430	344	25.0%	3,012	4,955	-39.2%
IRELAND	77	90	-14.4%	1,914	2,178	-12.1%
ITALY ²	2,167	1,780	21.7%	18,366	21,622	-15.1%
LATVIA	90	80	12.5%	639	1,067	-40.1%
LITHUANIA ³	549	301	82.4%	3,912	7,232	-45.9%
LUXEMBOURG	64	74	-13.5%	911	1,162	-21.6%
NETHERLANDS	795	934	-14.9%	9,978	14,737	-32.3%
POLAND	2,755	1,976	39.4%	18,365	26,689	-31.2%
PORTUGAL	322	270	19.3%	3,249	4,561	-28.8%
ROMANIA	294	416	-29.3%	3,685	6,127	-39.9%
SLOVAKIA	234	231	1.3%	1,816	3,329	-45.4%
SLOVENIA	123	203	-39.4%	1,285	2,255	-43.0%
SPAIN	2,470	2,495	-1.0%	17,766	23,153	-23.3%
SWEDEN	540	643	-16.0%	5,005	6,708	-25.4%
EUROPEAN UNION	25,213	24,324	3.7%	226,427	313,338	-27.7%
EU14	19,609	19,776	-0.8%	183,899	246,808	-25.5%
EU12	5,604	4,548	23.2%	42,528	66,530	-36.1%
ICELAND	19	20	-5.0%	188	281	-33.1%
NORWAY	438	553	-20.8%	5,672	7,068	-19.8%
SWITZERLAND	292	337	-13.4%	3,314	4,071	-18.6%
EFTA	749	910	-17.7%	9,174	11,420	-19.7%
UNITED KINGDOM³	4,472	5,002	-10.6%	35,427	54,615	-35.1%
TOTAL (EU + EFTA + UK)	30,434	30,236	0.7%	271,028	379,373	-28.6%
WESTERN EUROPE (EU14 + EFTA + UK)	24,830	25,688	-3.3%	228,500	312,843	-27.0%

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



PRESS RELEASE

PROVISIONAL

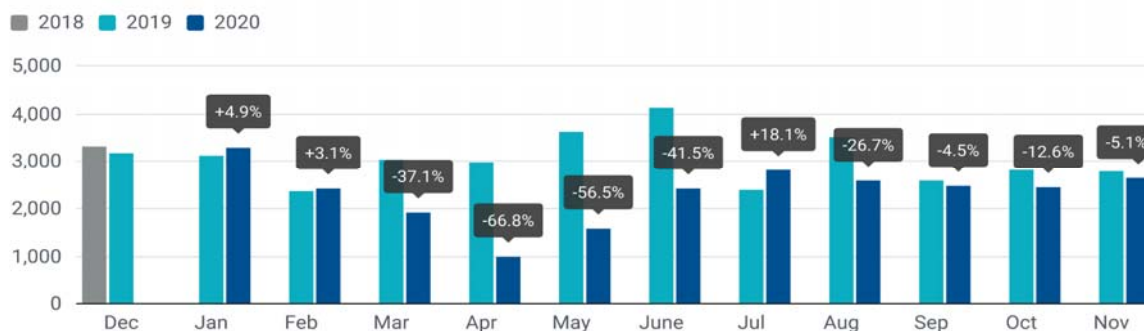
EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY NEW MEDIUM AND HEAVY BUSES & COACHES (MHBC) OVER 3.5T

	November 2020	November 2019	% change 20/19	Jan-Nov 2020	Jan-Nov 2019	% change 20/19
AUSTRIA	119	114	4.4%	764	1,020	-25.1%
BELGIUM	30	62	-51.6%	731	1,250	-41.5%
BULGARIA	17	21	-19.0%	174	327	-46.8%
CROATIA	0	8	-100.0%	103	278	-62.9%
CYPRUS	11	0		244	19	1184.2%
CZECH REPUBLIC	105	107	-1.9%	1,154	1,127	2.4%
DENMARK	7	55	-87.3%	261	502	-48.0%
ESTONIA	14	3	366.7%	222	200	11.0%
FINLAND	8	39	-79.5%	260	514	-49.4%
FRANCE	526	464	13.4%	5,464	6,039	-9.5%
GERMANY	721	646	11.6%	5,572	5,710	-2.4%
GREECE	19	12	58.3%	281	346	-18.8%
HUNGARY	42	162	-74.1%	578	563	2.7%
IRELAND	4	28	-85.7%	123	432	-71.5%
ITALY ¹	296	233	27.0%	2,877	3,958	-27.3%
LATVIA	11	21	-47.6%	64	91	-29.7%
LITHUANIA ²	35	54	-35.2%	262	499	-47.5%
LUXEMBOURG	12	18	-33.3%	199	261	-23.8%
NETHERLANDS	12	209	-94.3%	387	824	-53.0%
POLAND	168	128	31.3%	1,343	2,324	-42.2%
PORTUGAL	20	21	-4.8%	383	581	-34.1%
ROMANIA	75	94	-20.2%	749	1,812	-58.7%
SLOVAKIA	4	30	-86.7%	239	277	-13.7%
SLOVENIA	9	6	50.0%	59	187	-68.4%
SPAIN	219	207	5.8%	1,817	3,094	-41.3%
SWEDEN	160	44	263.6%	1,222	1,146	6.6%
EUROPEAN UNION	2,644	2,786	-5.1%	25,532	33,381	-23.5%
EU14	2,153	2,152	0.05%	20,341	25,677	-20.8%
EU12	491	634	-22.6%	5,191	7,704	-32.6%
ICELAND	2	8	-75.0%	15	76	-80.3%
NORWAY	70	43	62.8%	1,213	2,181	-44.4%
SWITZERLAND	114	76	50.0%	506	591	-14.4%
EFTA	186	127	46.5%	1,734	2,848	-39.1%
UNITED KINGDOM²	345	598	-42.3%	4,282	5,977	-28.4%
TOTAL (EU + EFTA + UK)	3,175	3,511	-9.6%	31,548	42,206	-25.3%
WESTERN EUROPE (EU14 + EFTA + UK)	2,684	2,877	-6.7%	26,357	34,502	-23.6%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

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

² Estimates



PRESS RELEASE

PROVISIONAL

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

	November 2020	November 2019	% change 20/19	Jan-Nov 2020	Jan-Nov 2019	% change 20/19
AUSTRIA	3,733	3,465	7.7%	39,714	49,174	-19.2%
BELGIUM	6,257	6,908	-9.4%	72,908	86,998	-16.2%
BULGARIA	765	699	9.4%	6,679	8,829	-24.4%
CROATIA	841	666	26.3%	7,304	9,964	-26.7%
CYPRUS	161	206	-21.8%	1,786	2,298	-22.3%
CZECH REPUBLIC	2,459	2,298	7.0%	22,880	29,004	-21.1%
DENMARK	3,219	3,423	-6.0%	31,214	35,537	-12.2%
ESTONIA	360	352	2.3%	3,801	5,388	-29.5%
FINLAND	1,374	1,357	1.3%	14,876	17,890	-16.8%
FRANCE	40,842	42,151	-3.1%	402,070	492,541	-18.4%
GERMANY	36,570	35,052	4.3%	318,062	380,194	-16.3%
GREECE	799	777	2.8%	7,081	8,040	-11.9%
HUNGARY	2,751	2,813	-2.2%	23,045	29,062	-20.7%
IRELAND	911	975	-6.6%	23,470	27,771	-15.5%
ITALY	20,663	18,506	11.7%	163,245	193,444	-15.6%
LATVIA	306	294	4.1%	2,686	3,598	-25.3%
LITHUANIA	781	578	35.1%	6,815	11,648	-41.5%
LUXEMBOURG	428	510	-16.1%	5,174	6,217	-16.8%
NETHERLANDS	6,537	7,190	-9.1%	67,226	87,909	-23.5%
POLAND	8,846	7,504	17.9%	71,431	91,308	-21.8%
PORTUGAL	3,143	3,133	0.3%	27,537	39,057	-29.5%
ROMANIA	1,609	1,619	-0.6%	16,367	23,768	-31.1%
SLOVAKIA	951	932	2.0%	7,879	11,577	-31.9%
SLOVENIA	858	1,350	-36.4%	8,663	12,782	-32.2%
SPAIN	18,320	19,705	-7.0%	161,140	225,026	-28.4%
SWEDEN	3,831	4,753	-19.4%	33,250	50,607	-34.3%
EUROPEAN UNION	167,315	167,216	0.1%	1,546,303	1,939,631	-20.3%
EU14	146,627	147,905	-0.9%	1,366,967	1,700,405	-19.6%
EU12	20,688	19,311	7.1%	179,336	239,226	-25.0%
ICELAND	87	120	-27.5%	1,102	1,618	-31.9%
NORWAY	3,256	3,150	3.4%	35,402	44,148	-19.8%
SWITZERLAND	3,102	3,411	-9.1%	29,074	35,888	-19.0%
EFTA	6,445	6,681	-3.5%	65,578	81,654	-19.7%
UNITED KINGDOM	33,358	31,838	4.8%	305,083	398,819	-23.5%
TOTAL (EU + EFTA + UK)	207,118	205,735	0.7%	1,916,964	2,420,104	-20.8%
WESTERN EUROPE (EU14 + EFTA + UK)	186,430	186,424	0.003%	1,737,628	2,180,878	-20.3%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

