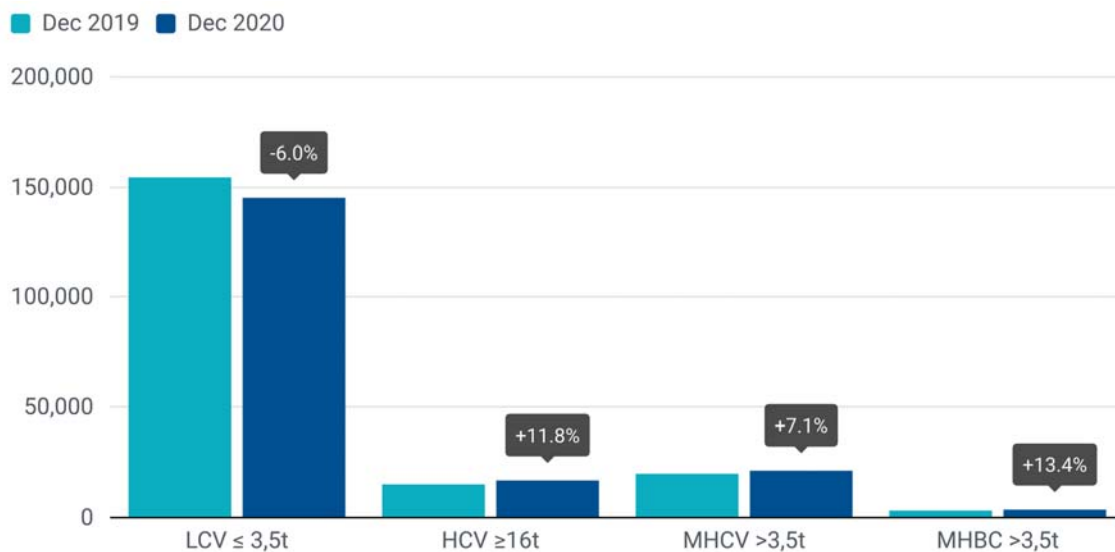


NEW COMMERCIAL VEHICLE REGISTRATIONS EUROPEAN UNION¹ December 2020



Commercial vehicle registrations: -18.9% in 2020; -4.2% in December

Total new commercial vehicles

In December 2020, new commercial vehicle registrations in the European Union slid back by 4.2% to 170,122 units. This reflects the slowdown in demand for vans, which accounted for over 85% of all registrations, as the heavy-truck and bus segments actually performed better than the year before. Mixed results were posted in the key EU markets last month. Registrations increased in Germany (+4.7%) and Spain (+2.3%), while the Italian (-9.4%) and French (-2.1%) markets contracted.

Overall in 2020, the EU commercial vehicle market shrank by 18.9% to reach 1.7 million units. Despite positive results in September and November, the impact of the COVID lockdowns during the first half of the year continued to weigh on the full-year performance. All EU markets posted double-digit declines in 2020, with the exception of Denmark. Of the four major markets Spain was the hardest hit (-26.1%), followed by France (-16.9%), Italy (-15.1%) and Germany (-14.8%).

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

Last month, demand for light commercial vehicles in the EU weakened, down 6.0% compared to December 2019. Performances were mixed in the four big markets. In Italy and France registrations fell by 10.4% and 2.3% respectively, while Germany (+2.5%) and Spain (+1.6%) recorded modest gains.

Looking at full-year 2020 results, registrations of new vans across the European Union contracted by 17.6%, totalling 1.4 million units. Spain suffered the sharpest overall drop (-26.5%) last year, while losses were more limited in France (-16.1%), Italy (-15.0%) and Germany (-12.2%).

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

During the month of December, 16,839 new heavy commercial vehicles were registered across the EU, a year-on-year rise of 11.8%. Central European markets provided a strong boost to this growth; Poland, one of the leading markets, saw a 48.4% increase in heavy-truck registrations in December 2020. Among the largest Western European markets, Germany also made a sizeable contribution (+27.4%), followed by Spain (+8.3%) and France (+2.6%).

Despite positive results in the last two months of the year, **2020 ended negatively** for the heavy-truck segment, with registrations plummeting by 27.3% to 198,352 over the full year. Double-digit drops were recorded by all EU markets in 2020, with three of the four key markets posting losses of over 20%: Germany (-26.0%), France (-25.8%) and Spain (-22.1%).

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

In December 2020, demand for new medium and heavy trucks posted solid growth (+7.1%), largely driven by the positive performance of the heavy-duty segment. As for the biggest EU markets, Germany saw the highest percentage growth (+12.3%), followed by Spain (+3.8%) and France (+2.9%) with more modest increases. By contrast, MHCV registrations fell in Italy (-1.8%), although only slightly.

Last year, 247,499 new trucks were registered in total across the EU, a drop of 25.7% compared to 2019. Among the key EU markets, France (-24.1%), Germany (-24.0%) and Spain (-21.7%) posted strong losses, while the contraction was less severe in Italy (-14.0%).

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

December registrations of new buses and coaches in the EU increased by 13.4% compared to the same month in 2019. With the exception of France (-20.9%), all major EU markets gave a significant boost to the overall performance of the region: Italy (+13.4%), Germany (+22.1%) and Spain (+60.9%) in particular.

Overall in 2020, EU demand for buses and coaches contracted by 20.3%, counting 29,147 new registrations in total. Spain (-35.9%), Italy (-24.9%) and France (-10.8%) ended the year in negative territory. Germany was the only major market that managed to post slight growth (+0.4%) last year.

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

	December 2020	December 2019	% change 20/19	Jan-Dec 2020	Jan-Dec 2019	% change 20/19
AUSTRIA	2,886	2,969	-2.8%	36,545	43,425	-15.8%
BELGIUM	6,030	6,178	-2.4%	71,313	81,219	-12.2%
BULGARIA	528	604	-12.6%	5,060	5,985	-15.5%
CROATIA	405	671	-39.6%	6,797	8,982	-24.3%
CYPRUS	128	236	-45.8%	1,577	2,272	-30.6%
CZECH REPUBLIC	1,837	1,684	9.1%	17,141	20,436	-16.1%
DENMARK	3,658	2,822	29.6%	31,122	33,106	-6.0%
ESTONIA	191	227	-15.9%	3,289	4,403	-25.3%
FINLAND	1,340	1,119	19.7%	12,842	14,704	-12.7%
FRANCE	43,165	44,167	-2.3%	401,154	478,375	-16.1%
GERMANY	24,111	23,528	2.5%	267,832	304,965	-12.2%
GREECE	601	676	-11.1%	6,865	7,972	-13.9%
HUNGARY	2,588	2,659	-2.7%	22,043	26,203	-15.9%
IRELAND ³	301	175	72.0%	21,732	25,336	-14.2%
ITALY ⁴	17,900	19,983	-10.4%	159,709	187,864	-15.0%
LATVIA	137	263	-47.9%	2,120	2,703	-21.6%
LITHUANIA	218	311	-29.9%	2,859	4,228	-32.4%
LUXEMBOURG	356	295	20.7%	4,420	5,089	-13.1%
NETHERLANDS	3,572	3,903	-8.5%	60,433	76,251	-20.7%
POLAND	7,926	7,577	4.6%	59,649	69,872	-14.6%
PORTUGAL	3,673	4,539	-19.1%	27,578	38,454	-28.3%
ROMANIA	1,797	1,156	55.4%	13,730	16,985	-19.2%
SLOVAKIA	547	537	1.9%	6,371	8,508	-25.1%
SLOVENIA	714	821	-13.0%	8,033	11,161	-28.0%
SPAIN	16,637	16,378	1.6%	158,198	215,157	-26.5%
SWEDEN	3,992	11,063	-63.9%	31,015	53,816	-42.4%
EUROPEAN UNION	145,238	154,541	-6.0%	1,439,427	1,747,471	-17.6%
EU14⁵	128,222	137,795	-6.9%	1,290,758	1,565,733	-17.6%
EU12⁶	17,016	16,746	1.6%	148,669	181,738	-18.2%
ICELAND	102	114	-10.5%	1,001	1,375	-27.2%
NORWAY	3,593	2,837	26.6%	32,110	37,736	-14.9%
SWITZERLAND	2,904	3,464	-16.2%	28,158	34,690	-18.8%
EFTA	6,599	6,415	2.9%	61,269	73,801	-17.0%
UNITED KINGDOM	27,283	27,551	-1.0%	292,657	365,778	-20.0%
TOTAL (EU + EFTA + UK)	179,120	188,507	-5.0%	1,793,353	2,187,050	-18.0%
WESTERN EUROPE (EU14 + EFTA + UK)	162,104	171,761	-5.6%	1,644,684	2,005,312	-18.0%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Malta not available

² LCV ≤ 6t

³ Member states before the 2004 enlargement

⁴ Including light buses and coaches

⁵ ANFIA estimates

⁶ Member states having joined the EU since 2004

■ 2019 ■ 2020





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

	December 2020	December 2019	% change 20/19	Jan-Dec 2020	Jan-Dec 2019	% change 20/19
AUSTRIA	365	340	7.4%	5,467	7,677	-28.8%
BELGIUM	498	663	-24.9%	6,125	9,789	-37.4%
BULGARIA	76	96	-20.8%	1,978	3,087	-35.9%
CROATIA	62	76	-18.4%	695	1,150	-39.6%
CYPRUS	1	3	-66.7%	38	48	-20.8%
CZECH REPUBLIC	722	507	42.4%	5,913	8,030	-26.4%
DENMARK	188	216	-13.0%	3,290	4,539	-27.5%
ESTONIA	11	20	-45.0%	446	978	-54.4%
FINLAND	206	154	33.8%	2,317	2,911	-20.4%
FRANCE	3,505	3,417	2.6%	36,737	49,519	-25.8%
GERMANY	3,982	3,125	27.4%	50,323	68,010	-26.0%
GREECE	20	22	-9.1%	353	281	25.6%
HUNGARY	228	263	-13.3%	2,951	4,759	-38.0%
IRELAND ²	16	24	-33.3%	1,587	1,784	-11.0%
ITALY ³	1,580	1,591	-0.7%	16,500	18,983	-13.1%
LATVIA	64	38	68.4%	652	1,043	-37.5%
LITHUANIA ⁴	258	103	150.5%	4,093	7,196	-43.1%
LUXEMBOURG ⁴	75	30	150.0%	795	1,051	-24.4%
NETHERLANDS	448	551	-18.7%	9,111	13,805	-34.0%
POLAND	2,001	1,348	48.4%	18,289	25,418	-28.0%
PORTUGAL	267	273	-2.2%	3,030	4,197	-27.8%
ROMANIA	398	283	40.6%	3,861	6,142	-37.1%
SLOVAKIA	96	129	-25.6%	1,689	3,157	-46.5%
SLOVENIA	108	130	-16.9%	1,220	2,129	-42.7%
SPAIN	1,232	1,138	8.3%	15,932	20,462	-22.1%
SWEDEN	432	528	-18.2%	4,960	6,652	-25.4%
EUROPEAN UNION	16,839	15,068	11.8%	198,352	272,797	-27.3%
EU14	12,814	12,072	6.1%	156,527	209,660	-25.3%
EU12	4,025	2,996	34.3%	41,825	63,137	-33.8%
ICELAND	9	12	-25.0%	104	188	-44.7%
NORWAY	258	260	-0.8%	4,092	5,377	-23.9%
SWITZERLAND	211	170	24.1%	2,890	3,526	-18.0%
EFTA	478	442	8.1%	7,086	9,091	-22.1%
UNITED KINGDOM ⁴	2,702	3,170	-14.8%	27,794	43,356	-35.9%
TOTAL (EU + EFTA + UK)	20,019	18,680	7.2%	233,232	325,244	-28.3%
WESTERN EUROPE (EU14 + EFTA + UK)	15,994	15,684	2.0%	191,407	262,107	-27.0%

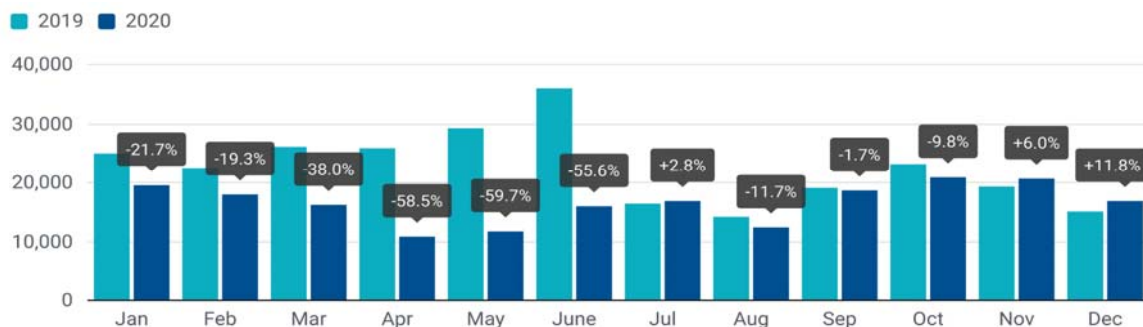
SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

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



PROVISIONAL
EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY
NEW MEDIUM AND HEAVY COMMERCIAL VEHICLES (MHCV) OVER 3,5T¹

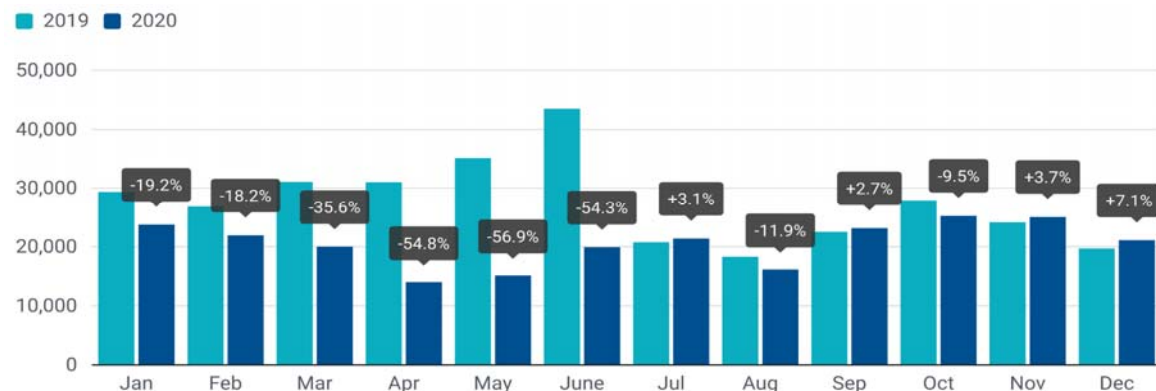
	December 2020	December 2019	% change 20/19	Jan-Dec 2020	Jan-Dec 2019	% change 20/19
AUSTRIA	385	384	0.3%	5,676	8,082	-29.8%
BELGIUM	622	806	-22.8%	7,516	11,514	-34.7%
BULGARIA	82	113	-27.4%	2,055	3,234	-36.5%
CROATIA	86	97	-11.3%	895	1,472	-39.2%
CYPRUS	6	9	-33.3%	99	252	-60.7%
CZECH REPUBLIC	897	727	23.4%	7,355	9,852	-25.3%
DENMARK	239	271	-11.8%	3,727	5,022	-25.8%
ESTONIA	12	22	-45.5%	493	1,034	-52.3%
FINLAND	316	229	38.0%	3,430	4,020	-14.7%
FRANCE	4,082	3,967	2.9%	42,699	56,261	-24.1%
GERMANY	6,010	5,352	12.3%	74,779	98,399	-24.0%
GREECE	25	30	-16.7%	561	428	31.1%
HUNGARY	265	321	-17.4%	3,275	5,276	-37.9%
IRELAND	22	36	-38.9%	1,936	2,214	-12.6%
ITALY ²	1,948	1,983	-1.8%	20,303	23,606	-14.0%
LATVIA	75	40	87.5%	714	1,107	-35.5%
LITHUANIA ³	276	113	144.2%	4,188	7,345	-43.0%
LUXEMBOURG	80	40	100.0%	991	1,202	-17.6%
NETHERLANDS	553	637	-13.2%	10,426	15,374	-32.2%
POLAND	2,306	1,628	41.6%	20,671	28,317	-27.0%
PORTUGAL	336	412	-18.4%	3,585	4,973	-27.9%
ROMANIA	427	308	38.6%	4,112	6,435	-36.1%
SLOVAKIA	127	153	-17.0%	1,943	3,482	-44.2%
SLOVENIA	118	151	-21.9%	1,323	2,290	-42.2%
SPAIN	1,474	1,420	3.8%	19,245	24,573	-21.7%
SWEDEN	497	600	-17.2%	5,502	7,308	-24.7%
EUROPEAN UNION	21,266	19,849	7.1%	247,499	333,072	-25.7%
EU14	16,589	16,167	2.6%	200,376	262,976	-23.8%
EU12	4,677	3,682	27.0%	47,123	70,096	-32.8%
ICELAND	17	23	-26.1%	205	304	-32.6%
NORWAY	321	343	-6.4%	5,993	7,411	-19.1%
SWITZERLAND	265	220	20.5%	3,579	4,291	-16.6%
EFTA	603	586	2.9%	9,777	12,006	-18.6%
UNITED KINGDOM³	3,740	4,630	-19.2%	39,312	59,245	-33.6%
TOTAL (EU + EFTA + UK)	25,609	25,065	2.2%	296,588	404,323	-26.6%
WESTERN EUROPE (EU14 + EFTA + UK)	20,932	21,383	-2.1%	249,465	334,227	-25.4%

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



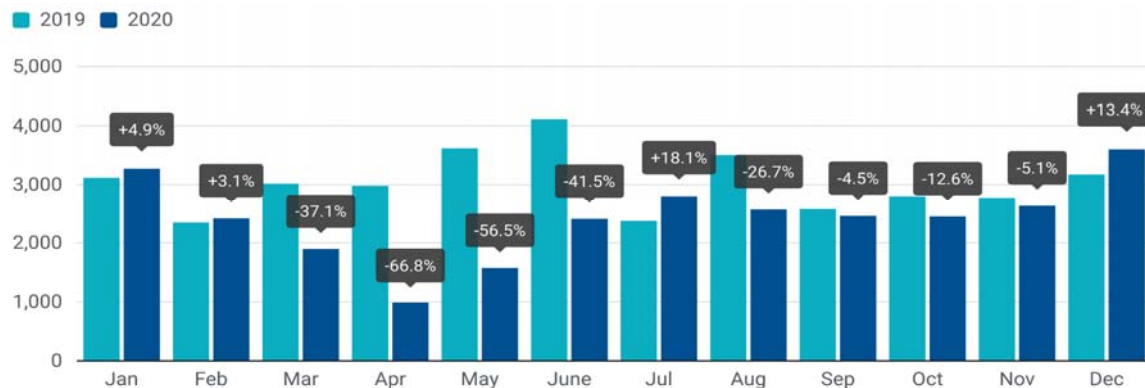
PROVISIONAL EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY NEW MEDIUM AND HEAVY BUSES & COACHES (MHBC) OVER 3.5T

	December 2020	December 2019	% change 20/19	Jan-Dec 2020	Jan-Dec 2019	% change 20/19
AUSTRIA	108	143	-24.5%	872	1,163	-25.0%
BELGIUM	56	60	-6.7%	787	1,310	-39.9%
BULGARIA	6	60	-90.0%	180	387	-53.5%
CROATIA	3	0		106	278	-61.9%
CYPRUS	0	0		244	19	1,184.2%
CZECH REPUBLIC	213	93	129.0%	1,367	1,220	12.0%
DENMARK	9	33	-72.7%	269	535	-49.7%
ESTONIA	2	0		224	200	12.0%
FINLAND	24	79	-69.6%	284	593	-52.1%
FRANCE	586	741	-20.9%	6,050	6,780	-10.8%
GERMANY	888	727	22.1%	6,460	6,437	0.4%
GREECE	26	18	44.4%	307	364	-15.7%
HUNGARY	49	142	-65.5%	629	705	-10.8%
IRELAND	7	13	-46.2%	130	445	-70.8%
ITALY ¹	287	253	13.4%	3,162	4,211	-24.9%
LATVIA	11	5	120.0%	75	96	-21.9%
LITHUANIA ²	53	19	178.9%	315	518	-39.2%
LUXEMBOURG	15	12	25.0%	214	273	-21.6%
NETHERLANDS	256	111	130.6%	643	935	-31.2%
POLAND	143	147	-2.7%	1,486	2,471	-39.9%
PORTUGAL	29	20	45.0%	412	601	-31.4%
ROMANIA	70	139	-49.6%	819	1,951	-58.0%
SLOVAKIA	51	28	82.1%	290	305	-4.9%
SLOVENIA	2	6	-66.7%	58	185	-68.6%
SPAIN	272	169	60.9%	2,090	3,263	-35.9%
SWEDEN	452	172	162.8%	1,674	1,318	27.0%
EUROPEAN UNION	3,618	3,190	13.4%	29,147	36,563	-20.3%
EU14	3,015	2,551	18.2%	23,354	28,228	-17.3%
EU12	603	639	-5.6%	5,793	8,335	-30.5%
ICELAND	0	3	-100.0%	15	79	-81.0%
NORWAY	157	115	36.5%	1,370	2,296	-40.3%
SWITZERLAND	134	56	139.3%	640	647	-1.1%
EFTA	291	174	67.2%	2,025	3,022	-33.0%
UNITED KINGDOM ²	301	712	-57.7%	4,623	6,689	-30.9%
TOTAL (EU + EFTA + UK)	4,210	4,076	3.3%	35,795	46,274	-22.6%
WESTERN EUROPE (EU14 + EFTA + UK)	3,607	3,437	4.9%	30,002	37,939	-20.9%

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

	December 2020	December 2019	% change 20/19	Jan-Dec 2020	Jan-Dec 2019	% change 20/19
AUSTRIA	3,379	3,496	-3.3%	43,093	52,670	-18.2%
BELGIUM	6,708	7,044	-4.8%	79,616	94,043	-15.3%
BULGARIA	616	777	-20.7%	7,295	9,606	-24.1%
CROATIA	494	768	-35.7%	7,798	10,732	-27.3%
CYPRUS	134	245	-45.3%	1,920	2,543	-24.5%
CZECH REPUBLIC	2,947	2,504	17.7%	25,863	31,508	-17.9%
DENMARK	3,906	3,126	25.0%	35,118	38,663	-9.2%
ESTONIA	205	249	-17.7%	4,006	5,637	-28.9%
FINLAND	1,680	1,427	17.7%	16,556	19,317	-14.3%
FRANCE	47,833	48,875	-2.1%	449,903	541,416	-16.9%
GERMANY	31,009	29,607	4.7%	349,071	409,801	-14.8%
GREECE	652	724	-9.9%	7,733	8,764	-11.8%
HUNGARY	2,902	3,122	-7.0%	25,947	32,184	-19.4%
IRELAND	330	224	47.3%	23,798	27,995	-15.0%
ITALY	20,135	22,219	-9.4%	183,174	215,681	-15.1%
LATVIA	223	308	-27.6%	2,909	3,906	-25.5%
LITHUANIA	547	443	23.5%	7,362	12,091	-39.1%
LUXEMBOURG	451	347	30.0%	5,625	6,564	-14.3%
NETHERLANDS	4,381	4,651	-5.8%	71,502	92,560	-22.8%
POLAND	10,375	9,352	10.9%	81,806	100,660	-18.7%
PORTUGAL	4,038	4,971	-18.8%	31,575	44,028	-28.3%
ROMANIA	2,294	1,603	43.1%	18,661	25,371	-26.4%
SLOVAKIA	725	718	1.0%	8,604	12,295	-30.0%
SLOVENIA	834	978	-14.7%	9,414	13,636	-31.0%
SPAIN	18,383	17,967	2.3%	179,533	242,993	-26.1%
SWEDEN	4,941	11,835	-58.3%	38,191	62,442	-38.8%
EUROPEAN UNION	170,122	177,580	-4.2%	1,716,073	2,117,106	-18.9%
EU14	147,826	156,513	-5.6%	1,514,488	1,856,937	-18.4%
EU12	22,296	21,067	5.8%	201,585	260,169	-22.5%
<i>ICELAND</i>	<i>119</i>	<i>140</i>	<i>-15.0%</i>	<i>1,221</i>	<i>1,758</i>	<i>-30.5%</i>
<i>NORWAY</i>	<i>4,071</i>	<i>3,295</i>	<i>23.6%</i>	<i>39,473</i>	<i>47,443</i>	<i>-16.8%</i>
<i>SWITZERLAND</i>	<i>3,303</i>	<i>3,740</i>	<i>-11.7%</i>	<i>32,377</i>	<i>39,628</i>	<i>-18.3%</i>
EFTA	7,493	7,175	4.4%	73,071	88,829	-17.7%
UNITED KINGDOM	31,324	32,893	-4.8%	336,592	431,712	-22.0%
TOTAL (EU + EFTA + UK)	208,939	217,648	-4.0%	2,125,736	2,637,647	-19.4%
WESTERN EUROPE (EU14 + EFTA + UK)	186,643	196,581	-5.1%	1,924,151	2,377,478	-19.1%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

