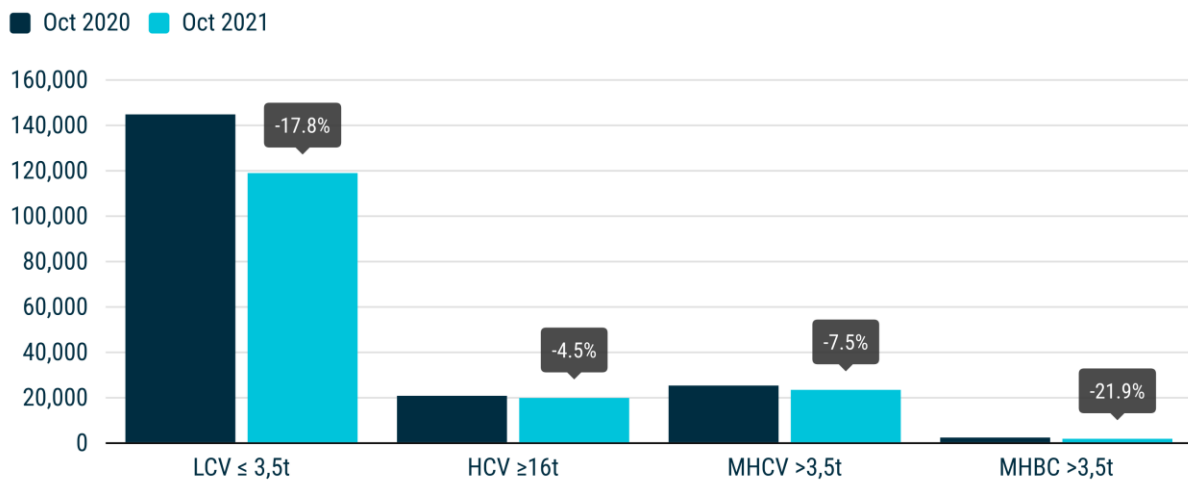


PRESS EMBARGO

8.00am CET (7.00am GMT), 25 November 2021

Commercial vehicle registrations: +14.7% ten months into 2021; -16.4% in October



TOTAL NEW COMMERCIAL VEHICLES

In October 2021, registrations of new commercial vehicles in the EU continued their downward trajectory, posting another double-digit drop (-16.4%). All vehicle segments saw declines, but van and bus sales fell most significantly. The region’s overall performance was not helped by its largest markets, as all four suffered double-digit losses last month: Spain (-32.7%), Germany (-24.3%), France (-23.3%) and Italy (-22.9%).

Ten months into the year, demand for commercial vehicles in the European Union increased, helped by the low base during the first half of 2020. Sales volumes over this period totalled nearly 1.6 million units, a gain of 14.7% compared to the same period last year. So far in 2021, the results of the four big EU markets remained in positive territory: Italy (+22.2%), France (+11.8%), Spain (+4.5%) and Germany (+4.3%).

NEW LIGHT COMMERCIAL VEHICLES (LCV) UP TO 3.5T²

Last month, registrations of new vans fell for the fourth month in a row this year, down by 17.8% to 119,006 units sold across the EU. Each of the region’s major markets

¹ Data for Malta not available

² Including light buses & coaches

recorded sharp declines last month. Spain saw the strongest drop (-36.8%), followed by Germany (-25.2%), France (-24.6%) and Italy (-22.8%).

From January to October 2021, EU sales of light commercial vehicles totalled 1.3 million units, up 14.1% year on year. Despite the declines in recent months, the largest markets all performed well so far, especially Italy (+21.9%) and France (+12.2%), while growth was more moderate in Spain (+3.7%) and Germany (+3.7%).

NEW HEAVY COMMERCIAL VEHICLES (HCV) OF 16T AND OVER³

In October, demand for heavy trucks in the European Union shrank again (-4.5%), with the region posting a mixed bag of results. Most countries in Central Europe recorded gains, including Poland (+22.9%), while registrations in all key Western European markets contracted last month, negatively affecting the EU's overall results.

So far this year, nearly 200,000 new heavy trucks were registered across the EU, an increase of 24.1% compared to the same period in 2020. Thanks to 2020's low base, all major markets managed to remain in positive territory 10 months into the year: Italy (+30.5%), Spain (+18.6%), Germany (+12.3%) and France (+8.3%).

NEW MEDIUM AND HEAVY COMMERCIAL VEHICLES (MHCV) OVER 3.5T⁴

Last month, EU demand for trucks decreased by 7.5% to reach 23,479 new registrations. Just like in the heavy-truck segment, Central Europe posted positive results in October – especially Poland (+20.1%), which is one of the leading EU truck markets in volume terms. By contrast, the performance of Western Europe's big markets was worse than in October 2020.

From January to October, new truck registrations in the European Union increased by 19.5%, counting 240,369 units sold in total. With the exception of Greece (-9.8%) and Cyprus (-21.1%), all EU markets posted growth over this 10-month period, including the four major ones.

NEW MEDIUM AND HEAVY BUSES & COACHES (MHBC) OVER 3.5T

October sales volumes in the bus segment shrank by 21.9% compared to the year before. The weak results of the largest markets – especially France (-28.4%) and Italy (-48.7%) – dragged down the region's overall performance. Although smaller markets actually saw strong growth last month, this was not sufficient to offset the losses.

Ten months into 2021, new bus registrations across the EU grew by 2.4%, mainly thanks to gains made in earlier months. France, with 5,552 units, the leading market by volume, saw growth of 12.5%. Italy followed with an 8.7% increase in bus registrations, while Spanish (-8.3%) and German (-5.3%) sales contracted during this period.

³ Excluding heavy buses & coaches

⁴ Excluding medium and heavy buses & coaches

PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 25 November 2021

LIGHT COMMERCIAL VEHICLES (LCV) UP TO 3.5T¹
EUROPEAN UNION² + EFTA + UK

	OCTOBER			JANUARY-OCTOBER		
	Units		% change	Units		% change
	2021	2020	21/20	2021	2020	21/20
Austria	8,164	3,013	+171.0	53,310	30,486	+74.9
Belgium	5,754	6,875	-16.3	62,058	59,724	+3.9
Bulgaria	410	552	-25.7	5,709	4,010	+42.4
Croatia	703	559	+25.8	7,005	5,632	+24.4
Cyprus	217	124	+75.0	1,644	1,302	+26.3
Czech Republic	1,457	1,743	-16.4	15,789	13,676	+15.5
Denmark	2,211	2,903	-23.8	26,319	24,581	+7.1
Estonia	259	289	-10.4	3,581	2,809	+27.5
Finland	943	1,214	-22.3	11,036	10,430	+5.8
France	30,149	39,992	-24.6	361,037	321,922	+12.2
Germany	21,130	28,261	-25.2	223,017	215,034	+3.7
Greece	907	610	+48.7	8,920	5,509	+61.9
Hungary	1,689	1,953	-13.5	19,099	17,176	+11.2
Ireland ³	1,270	1,651	-23.1	27,657	20,602	+34.2
Italy ⁴	14,387	18,644	-22.8	150,671	123,575	+21.9
Latvia	205	190	+7.9	2,149	1,778	+20.9
Lithuania	226	280	-19.3	2,914	2,444	+19.2
Luxembourg	313	455	-31.2	3,880	3,712	+4.5
Netherlands	5,688	5,413	+5.1	58,659	51,120	+14.7
Poland	5,212	5,439	-4.2	60,472	45,801	+32.0
Portugal	2,352	2,477	-5.0	22,872	21,104	+8.4
Romania	1,203	1,019	+18.1	13,440	10,696	+25.7
Slovakia	587	490	+19.8	6,652	5,111	+30.2
Slovenia	700	838	-16.5	8,083	6,593	+22.6
Spain	10,469	16,577	-36.8	130,579	125,927	+3.7
Sweden	2,401	3,300	-27.2	31,029	23,892	+29.9
EUROPEAN UNION	119,006	144,861	-17.8	1,317,581	1,154,646	+14.1
EU14⁵	106,138	131,385	-19.2	1,171,044	1,037,618	+12.9
EU12⁶	12,868	13,476	-4.5	146,537	117,028	+25.2
Iceland	84	93	-9.7	969	829	+16.9
Norway	2,284	2,875	-20.6	28,404	25,768	+10.2
Switzerland	2,040	2,389	-14.6	24,456	22,558	+8.4
EFTA	4,408	5,357	-17.7	53,829	49,155	+9.5
United Kingdom	27,420	28,753	-4.6	294,656	236,833	+24.4
EU + EFTA + UK	150,834	178,971	-15.7	1,666,066	1,440,634	+15.6
EU14 + EFTA + UK	137,966	165,495	-16.6	1,519,529	1,323,606	+14.8

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

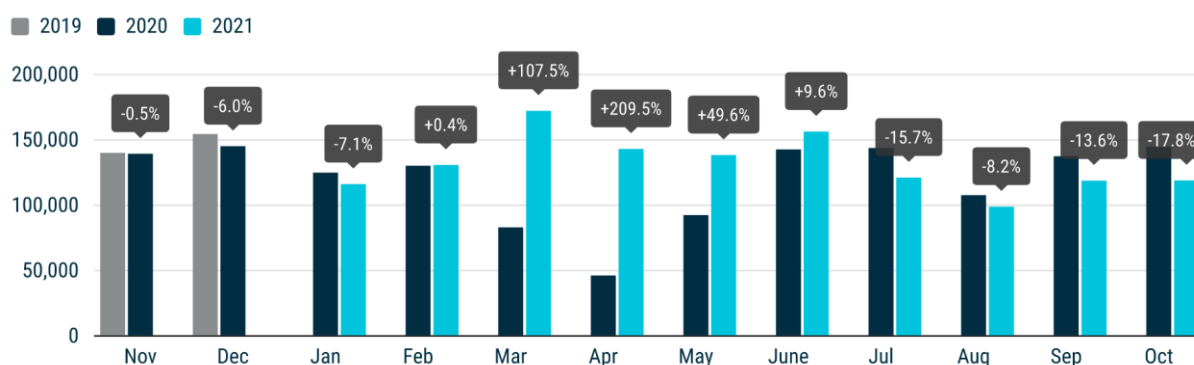
¹ Including light buses and coaches

² Data for Malta not available

³ LCV ≤6t ⁴ ANFIA estimates

⁵ Member states before the 2004 enlargement

⁶ Member states having joined the EU since 2004



PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 25 November 2021

HEAVY COMMERCIAL VEHICLES (HCV) OF 16T AND OVER¹ EUROPEAN UNION + EFTA + UK

	OCTOBER			JANUARY-OCTOBER		
	2021	2020	% change 21/20	2021	2020	% change 21/20
Austria	342	512	-33.2	5,614	4,679	+20.0
Belgium	690	556	+24.1	5,733	5,072	+13.0
Bulgaria	241	260	-7.3	2,478	1,679	+47.6
Croatia	73	53	+37.7	862	564	+52.8
Cyprus	2	2	+0.0	39	36	+8.3
Czech Republic	589	565	+4.2	5,893	4,556	+29.3
Denmark	328	313	+4.8	3,345	2,820	+18.6
Estonia	65	47	+38.3	658	385	+70.9
Finland	193	208	-7.2	2,025	1,916	+5.7
France	3,231	3,656	-11.6	32,011	29,566	+8.3
Germany	4,308	5,093	-15.4	46,561	41,476	+12.3
Greece	20	12	+66.7	295	315	-6.3
Hungary	325	325	+0.0	3,340	2,327	+43.5
Ireland ²	120	92	+30.4	1,759	1,522	+15.6
Italy ³	1,255	1,549	-19.0	17,087	13,093	+30.5
Latvia	136	136	+0.0	1,157	503	+130.0
Lithuania ⁴	573	598	-4.2	6,524	3,289	+98.4
Luxembourg ⁴	86	109	-21.1	770	669	+15.1
Netherlands	832	825	+0.8	8,917	7,977	+11.8
Poland	2,727	2,218	+22.9	24,150	13,836	+74.5
Portugal	421	318	+32.4	3,141	2,501	+25.6
Romania	418	385	+8.6	4,505	3,177	+41.8
Slovakia	218	124	+75.8	2,150	1,380	+55.8
Slovenia	132	124	+6.5	1,490	1,031	+44.5
Spain	2,188	2,309	-5.2	14,846	12,514	+18.6
Sweden	409	474	-13.7	4,372	4,042	+8.2
EUROPEAN UNION	19,922	20,863	-4.5	199,722	160,925	+24.1
EU14	14,423	16,026	-10.0	146,476	128,162	+14.3
EU12	5,499	4,837	+13.7	53,246	32,763	+62.5
Iceland	8	5	+60.0	119	78	+52.6
Norway	429	404	+6.2	3,649	3,496	+4.4
Switzerland	235	233	+0.9	2,583	2,442	+5.8
EFTA	672	642	+4.7	6,351	6,016	+5.6
United Kingdom ⁴	2,441	3,231	-24.5	25,135	21,883	+14.9
EU + EFTA + UK	23,035	24,736	-6.9	231,208	188,824	+22.4
EU14 + EFTA + UK	17,536	19,899	-11.9	177,962	156,061	+14.0

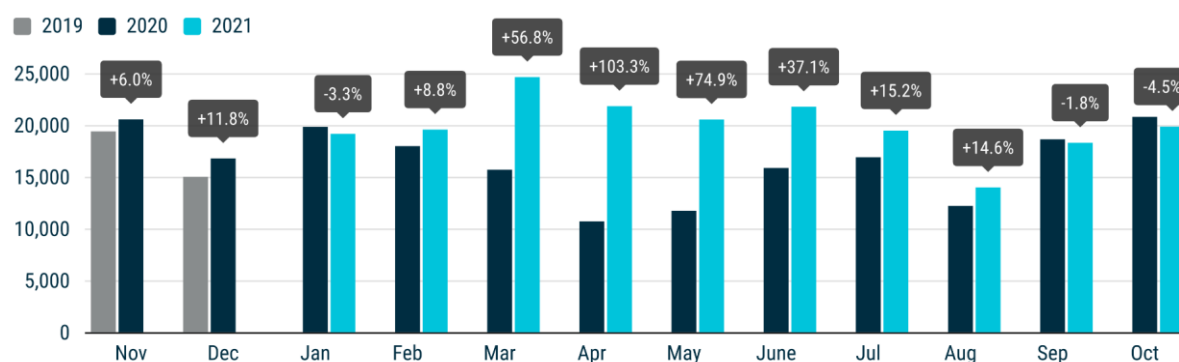
SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Excluding heavy buses and coaches

² HCV ≥17t

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

⁴ Estimates



PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 25 November 2021

MEDIUM AND HEAVY COMMERCIAL VEHICLES (MHCV) OVER 3.5T¹
EUROPEAN UNION + EFTA + UK

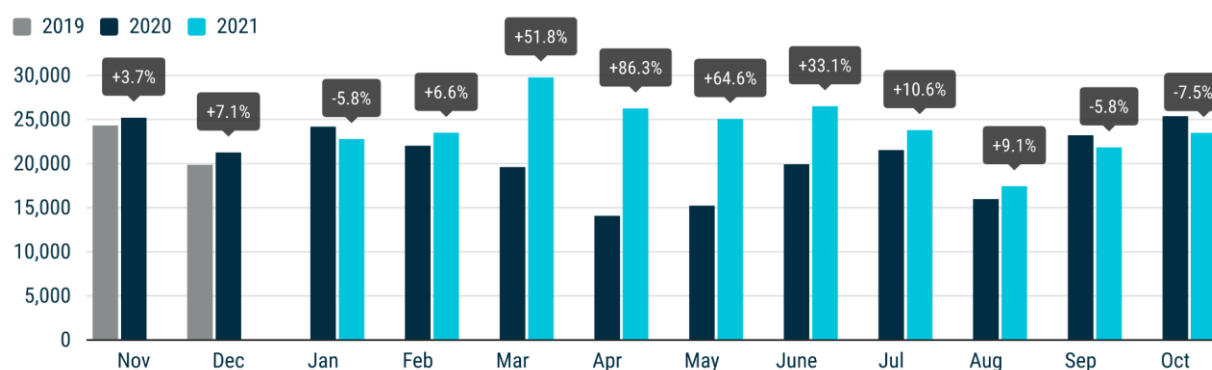
	OCTOBER			JANUARY-OCTOBER		
	Units		% change 21/20	Units		% change 21/20
	2021	2020		2021	2020	
Austria	441	529	-16.6	5,768	4,850	+18.9
Belgium	802	698	+14.9	6,895	6,225	+10.8
Bulgaria	249	267	-6.7	2,570	1,747	+47.1
Croatia	89	69	+29.0	1,086	728	+49.2
Cyprus	5	6	-16.7	71	90	-21.1
Czech Republic	674	677	-0.4	6,897	5,696	+21.1
Denmark	364	348	+4.6	3,709	3,152	+17.7
Estonia	70	49	+42.9	700	424	+65.1
Finland	284	337	-15.7	2,990	2,820	+6.0
France	3,734	4,120	-9.4	37,297	34,368	+8.5
Germany	5,924	7,583	-21.9	65,943	61,607	+7.0
Greece	31	25	+24.0	461	511	-9.8
Hungary	343	350	-2.0	3,669	2,580	+42.2
Ireland	164	141	+16.3	2,122	1,837	+15.5
Italy ²	1,479	1,811	-18.3	20,527	16,188	+26.8
Latvia	140	139	+0.7	1,239	551	+124.9
Lithuania ³	577	604	-4.5	6,606	3,363	+96.4
Luxembourg	95	118	-19.5	897	847	+5.9
Netherlands	946	940	+0.6	10,130	9,183	+10.3
Poland	2,927	2,437	+20.1	26,176	15,609	+67.7
Portugal	458	367	+24.8	3,622	2,927	+23.7
Romania	451	408	+10.5	4,847	3,391	+42.9
Slovakia	235	132	+78.0	2,401	1,582	+51.8
Slovenia	142	128	+10.9	1,614	1,139	+41.7
Spain	2,406	2,572	-6.5	17,258	15,301	+12.8
Sweden	449	522	-14.0	4,874	4,465	+9.2
EUROPEAN UNION	23,479	25,377	-7.5	240,369	201,181	+19.5
EU14	17,577	20,111	-12.6	182,493	164,281	+11.1
EU12	5,902	5,266	+12.1	57,876	36,900	+56.8
Iceland	18	12	+50.0	231	167	+38.3
Norway	541	553	-2.2	5,276	5,234	+0.8
Switzerland	275	303	-9.2	3,051	3,022	+1.0
EFTA	834	868	-3.9	8,558	8,423	+1.6
United Kingdom ³	3,298	4,727	-30.2	34,662	31,187	+11.1
EU + EFTA + UK	27,611	30,972	-10.9	283,589	240,791	+17.8
EU14 + EFTA + UK	21,709	25,706	-15.5	225,713	203,891	+10.7

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 EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 25 November 2021

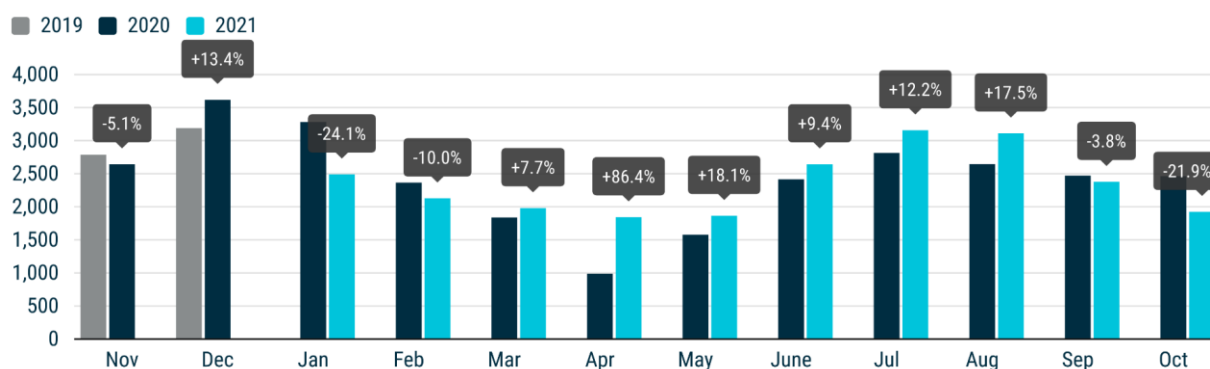
MEDIUM AND HEAVY BUSES & COACHES (MHBC) OVER 3.5T
EUROPEAN UNION + EFTA + UK

	OCTOBER			JANUARY-OCTOBER		
	Units		% change 21/20	Units		% change 21/20
	2021	2020		2021	2020	
Austria	89	48	+85.4	691	645	+7.1
Belgium	48	34	+41.2	876	701	+25.0
Bulgaria	26	5	+420.0	151	157	-3.8
Croatia	12	1	+1,100.0	118	103	+14.6
Cyprus	0	11	-100.0	18	233	-92.3
Czech Republic	40	83	-51.8	831	1,049	-20.8
Denmark	19	5	+280.0	434	252	+72.2
Estonia	15	20	-25.0	213	208	+2.4
Finland	9	10	-10.0	345	252	+36.9
France	449	627	-28.4	5,552	4,937	+12.5
Germany	459	501	-8.4	4,592	4,851	-5.3
Greece	35	30	+16.7	352	262	+34.4
Hungary	31	44	-29.5	861	538	+60.0
Ireland	47	14	+235.7	350	119	+194.1
Italy ¹	184	359	-48.7	2,802	2,578	+8.7
Latvia	3	11	-72.7	206	53	+288.7
Lithuania ²	3	14	-78.6	119	227	-47.6
Luxembourg	19	19	+0.0	151	187	-19.3
Netherlands	5	43	-88.4	317	375	-15.5
Poland	71	147	-51.7	1,127	1,175	-4.1
Portugal	38	42	-9.5	414	363	+14.0
Romania	40	84	-52.4	594	674	-11.9
Slovakia	87	38	+128.9	233	235	-0.9
Slovenia	6	10	-40.0	66	50	+32.0
Spain	157	201	-21.9	1,467	1,599	-8.3
Sweden	32	62	-48.4	548	1,062	-48.4
EUROPEAN UNION	1,924	2,463	-21.9	23,428	22,885	+2.4
EU14	1,590	1,995	-20.3	18,891	18,183	+3.9
EU12	334	468	-28.6	4,537	4,702	-3.5
Iceland	4	1	+300.0	24	13	+84.6
Norway	38	143	-73.4	1,024	1,143	-10.4
Switzerland	61	60	+1.7	462	392	+17.9
EFTA	103	204	-49.5	1,510	1,548	-2.5
United Kingdom ²	349	586	-40.4	3,350	3,970	-15.6
EU + EFTA + UK	2,376	3,253	-27.0	28,288	28,403	-0.4
EU14 + EFTA + UK	2,042	2,785	-26.7	23,751	23,701	+0.2

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

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

² Estimates



PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 25 November 2021

TOTAL NEW COMMERCIAL VEHICLES (CV), BY MARKET
EUROPEAN UNION + EFTA + UK

	OCTOBER			JANUARY-OCTOBER		
	Units		% change 21/20	Units		% change 21/20
	2021	2020		2021	2020	
Austria	8,694	3,590	+142.2	59,769	35,981	+66.1
Belgium	6,604	7,607	-13.2	69,829	66,650	+4.8
Bulgaria	685	824	-16.9	8,430	5,914	+42.5
Croatia	804	629	+27.8	8,209	6,463	+27.0
Cyprus	222	141	+57.4	1,733	1,625	+6.6
Czech Republic	2,171	2,503	-13.3	23,517	20,421	+15.2
Denmark	2,594	3,256	-20.3	30,462	27,985	+8.9
Estonia	344	358	-3.9	4,494	3,441	+30.6
Finland	1,236	1,561	-20.8	14,371	13,502	+6.4
France	34,332	44,739	-23.3	403,886	361,227	+11.8
Germany	27,513	36,345	-24.3	293,552	281,492	+4.3
Greece	973	665	+46.3	9,733	6,282	+54.9
Hungary	2,063	2,347	-12.1	23,629	20,294	+16.4
Ireland	1,481	1,806	-18.0	30,129	22,558	+33.6
Italy	16,050	20,814	-22.9	174,000	142,341	+22.2
Latvia	348	340	+2.4	3,594	2,382	+50.9
Lithuania	806	898	-10.2	9,639	6,034	+59.7
Luxembourg	427	592	-27.9	4,928	4,746	+3.8
Netherlands	6,639	6,396	+3.8	69,106	60,678	+13.9
Poland	8,210	8,023	+2.3	87,775	62,585	+40.2
Portugal	2,848	2,886	-1.3	26,908	24,394	+10.3
Romania	1,694	1,511	+12.1	18,881	14,761	+27.9
Slovakia	909	660	+37.7	9,286	6,928	+34.0
Slovenia	848	976	-13.1	9,763	7,782	+25.5
Spain	13,032	19,350	-32.7	149,304	142,827	+4.5
Sweden	2,882	3,884	-25.8	36,451	29,419	+23.9
EUROPEAN UNION	144,409	172,701	-16.4	1,581,378	1,378,712	+14.7
EU14	125,305	153,491	-18.4	1,372,428	1,220,082	+12.5
EU12	19,104	19,210	-0.6	208,950	158,630	+31.7
Iceland	106	106	+0.0	1,224	1,009	+21.3
Norway	2,863	3,571	-19.8	34,704	32,145	+8.0
Switzerland	2,376	2,752	-13.7	27,969	25,972	+7.7
EFTA	5,345	6,429	-16.9	63,897	59,126	+8.1
United Kingdom	31,067	34,066	-8.8	332,668	271,990	+22.3
EU + EFTA + UK	180,821	213,196	-15.2	1,977,943	1,709,828	+15.7
EU14 + EFTA + UK	161,717	193,986	-16.6	1,768,993	1,551,198	+14.0

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

