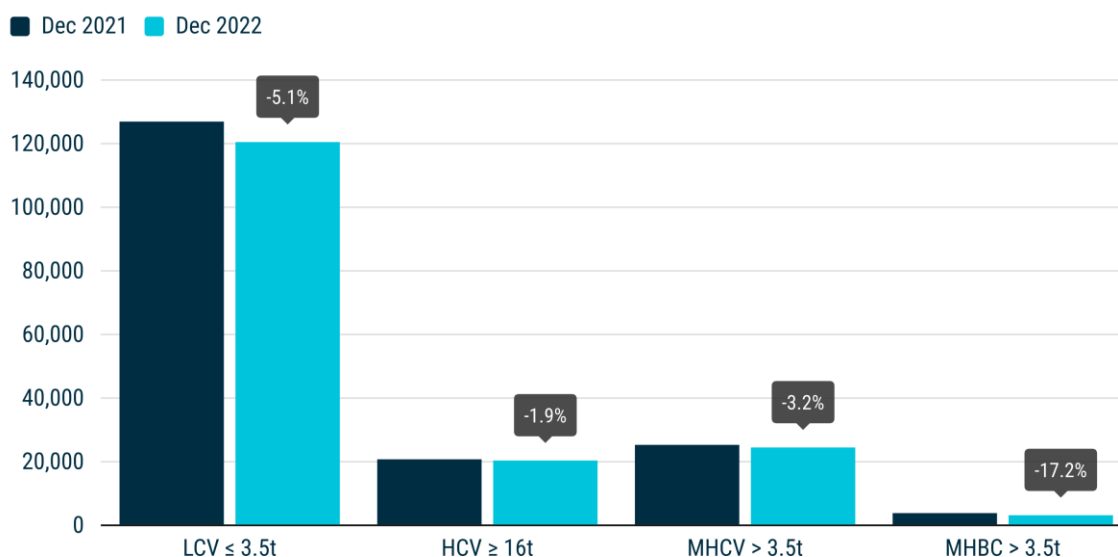


PRESS EMBARGO

8.00am CET (7.00am GMT), 25 January 2023

Commercial vehicle registrations: -14.6% in 2022; -5.1% in December



TOTAL NEW COMMERCIAL VEHICLES

In December 2022, new commercial vehicle registrations in the EU retreated by 5.1%, as component shortages continued to weigh on vehicle availability. All vehicle segments performed worse than in December 2021, contributing to the overall negative result. During the month, the performance of the four major markets was mixed. France and Italy both faced losses (down 14.2% and 8.3% respectively). However, Spain saw a solid improvement (+15.2%), as did Germany (+8.4%).

Overall in 2022, the EU commercial vehicle market contracted by 14.6% to 1.6 million units, with volumes falling below those of the pandemic year of 2020 (1.7 million units). This was primarily caused by the ongoing supply chain issues which affected vehicle availability throughout the year. The region's overall performance was not helped by its four key markets, which all suffered double-digit percentage declines: France (-17.7%), Spain (-16.7%), Germany (-11.0%) and Italy (-10.5%).

NEW LIGHT COMMERCIAL VEHICLES (LCV) UP TO 3.5T²

December registrations of new vans dropped by 5.1%, totalling 120,503 units sold across the European Union. Two of the four largest markets in the region saw substantial gains:

¹ Data for Malta not available

² Including light buses & coaches

Germany (+19.0%) and Spain (+12.4%). By contrast, French and Italian light commercial vehicle sales fell significantly in December (down by 14.6% and 11.5% respectively).

Full-year 2022 results were 18.1% lower than in 2021, with nearly 1.3 million new light commercial vehicles registered in the EU. With the exception of Cyprus (+1.2%), all the region's markets posted declines, including the four major ones: Spain (-21.3%), France (-19.5%), Germany (-13.0%) and Italy (-12.3%).

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

In December, EU registrations of new heavy commercial vehicles contracted by 1.9% year-on-year. The region's negative result was largely driven by the performances of its largest markets. Germany – the leading market for heavy trucks in volume terms – suffered the steepest decline (-18.8%), followed by Poland (-10.4%) and France (-6.7%). On the other hand, Spain and Italy recorded significant gains, up 28.4% and 22.0% respectively.

In 2022, 256,020 heavy trucks were registered in total across the European Union, a year-on-year increase of 6.5%. Looking at the region's largest markets, only Germany remained in negative territory last year (-0.9%). All the other high-volume EU markets for heavy trucks recorded an improvement: Spain (+13.6%), Poland (+6.6%), Italy (+5.1%) and France (+2.3%).

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

In December, new medium and heavy truck registrations fell by 3.2%, counting 24,470 units sold in the EU. Performances in the Western European largest markets were mixed. Spain recorded the highest percentage gain (+30.2%), followed by Italy (+10.5%). By contrast, Germany faced a significant loss (-18.6%), followed by a more modest fall in France (-7.5%).

2022 registrations of new trucks across the EU grew by 3.5%, thanks to substantial gains registered from August to November. Among the four key markets in Western Europe, Germany and France remained in negative territory last year (down by 3.5% and 1.0% respectively). However, Spain witnessed a solid improvement (+12.7%), followed by Italy with a more modest, but still positive, result (+2.3%).

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

In the last month of 2022, the EU market for new buses and coaches contracted by 17.2%. Looking at the region's four major markets, Spanish bus sales jumped by 60.1%, followed by Italy with a solid improvement of 19.4%. However, this was not enough to offset the double-digit percentage declines recorded in France (-26.3%) and Germany (-25.4%), as these two countries alone account for almost 50% of total new EU bus registrations.

Overall in 2022, EU registrations of new buses and coaches retreated by 5.1%, as the improvements seen in March, May and October last year were not enough to bring the full-year result into positive territory. A similar pattern was observed in the region's key markets, with three out of four suffering falls: Germany (-24.6%), France (-14.2%) and Italy (-6.2%).

³ Excluding heavy buses & coaches

⁴ Excluding medium and heavy buses & coaches

PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 25 January 2023

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

	DECEMBER			JANUARY-DECEMBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria	1,815	2,722	-33.3	22,069	58,806	-62.5
Belgium	4,129	4,694	-12.0	56,102	71,564	-21.6
Bulgaria	363	429	-15.4	4,889	6,659	-26.6
Croatia	424	534	-20.6	6,652	7,958	-16.4
Cyprus	117	107	+9.3	1,962	1,938	+1.2
Czech Republic	1,727	2,386	-27.6	16,908	19,660	-14.0
Denmark	2,136	2,928	-27.0	27,170	31,572	-13.9
Estonia	398	254	+56.7	3,910	4,142	-5.6
Finland	1,061	949	+11.8	11,192	12,894	-13.2
France	32,986	38,631	-14.6	347,069	431,385	-19.5
Germany	25,148	21,125	+19.0	231,290	265,732	-13.0
Greece	763	663	+15.1	9,664	10,426	-7.3
Hungary	1,251	2,213	-43.5	17,652	22,981	-23.2
Ireland ³	347	314	+10.5	23,653	28,742	-17.7
Italy ⁴	14,670	16,577	-11.5	161,094	183,625	-12.3
Latvia	188	140	+34.3	2,407	2,535	-5.0
Lithuania	196	189	+3.7	3,321	3,411	-2.6
Luxembourg	295	350	-15.7	4,004	4,560	-12.2
Netherlands	5,104	4,203	+21.4	59,186	68,405	-13.5
Poland	5,731	7,458	-23.2	62,238	73,926	-15.8
Portugal	3,052	3,281	-7.0	23,541	28,790	-18.2
Romania	1,363	1,492	-8.6	13,583	16,168	-16.0
Slovakia	504	956	-47.3	7,679	8,252	-6.9
Slovenia	493	704	-30.0	7,139	9,687	-26.3
Spain	12,190	10,846	+12.4	119,619	151,905	-21.3
Sweden	4,052	2,789	+45.3	34,516	36,238	-4.8
EUROPEAN UNION	120,503	126,934	-5.1	1,278,509	1,561,961	-18.1
EU14⁵	107,748	110,072	-2.1	1,130,169	1,384,644	-18.4
EU12⁶	12,755	16,862	-24.4	148,340	177,317	-16.3
Iceland	145	80	+81.3	1,599	1,174	+36.2
Norway	3,907	3,393	+15.1	29,484	34,070	-13.5
Switzerland	2,517	2,526	-0.4	25,038	29,375	-14.8
EFTA	6,569	5,999	+9.5	56,121	64,619	-13.2
United Kingdom	21,825	29,404	-25.8	282,139	355,380	-20.6
EU + EFTA + UK	148,897	162,337	-8.3	1,616,769	1,981,960	-18.4
EU14 + EFTA + UK	136,142	145,475	-6.4	1,468,429	1,804,643	-18.6

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

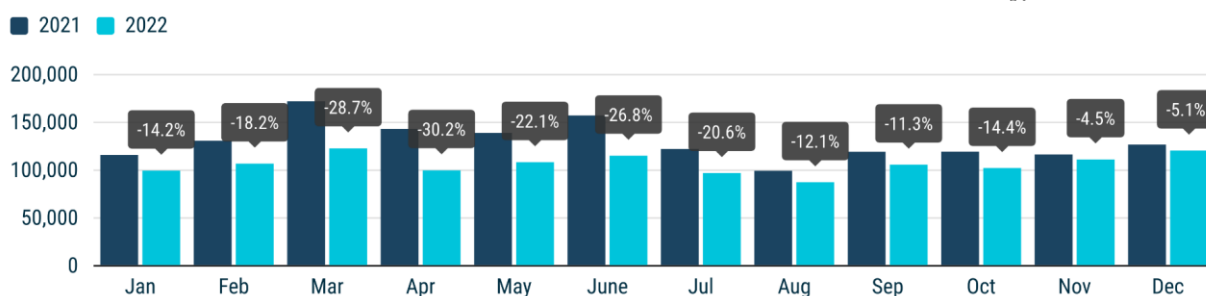
¹ Including light buses and coaches

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 January 2023

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

	DECEMBER			JANUARY-DECEMBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria ²	318	451	-29.5	6,057	6,470	-6.4
Belgium	649	492	+31.9	7,587	6,807	+11.5
Bulgaria	189	217	-12.9	3,563	2,944	+21.0
Croatia	106	63	+68.3	1,266	1,002	+26.3
Cyprus	4	2	+100.0	35	42	-16.7
Czech Republic	848	882	-3.9	7,916	7,437	+6.4
Denmark	388	269	+44.2	4,469	3,914	+14.2
Estonia	66	15	+340.0	913	722	+26.5
Finland	180	196	-8.2	2,420	2,426	-0.2
France	3,348	3,587	-6.7	39,694	38,787	+2.3
Germany	3,814	4,697	-18.8	55,089	55,562	-0.9
Greece	35	46	-23.9	512	367	+39.5
Hungary	445	334	+33.2	5,337	4,094	+30.4
Ireland ³	27	10	+170.0	1,876	1,872	+0.2
Italy ⁴	2,183	1,790	+22.0	21,526	20,472	+5.1
Latvia	62	54	+14.8	1,625	1,305	+24.5
Lithuania	408	636	-35.8	9,840	7,880	+24.9
Luxembourg ⁵	68	69	-1.4	985	937	+5.1
Netherlands	542	561	-3.4	12,120	10,346	+17.1
Poland	3,042	3,394	-10.4	32,161	30,159	+6.6
Portugal	475	270	+75.9	3,479	3,686	-5.6
Romania	522	577	-9.5	6,615	5,594	+18.3
Slovakia	206	183	+12.6	2,895	2,581	+12.2
Slovenia ⁵	142	114	+24.7	2,191	1,777	+23.3
Spain	1,680	1,308	+28.4	20,357	17,927	+13.6
Sweden	618	542	+14.0	5,492	5,304	+3.5
EUROPEAN UNION	20,365	20,759	-1.9	256,020	240,414	+6.5
EU14	14,325	14,288	+0.3	181,663	174,877	+3.9
EU12	6,040	6,471	-6.7	74,357	65,537	+13.5
Iceland	22	13	+69.2	183	140	+30.7
Norway	291	270	+7.8	4,103	4,272	-4.0
Switzerland	249	193	+29.0	2,866	3,010	-4.8
EFTA	562	476	+18.1	7,152	7,422	-3.6
United Kingdom ⁵	2,508	2,465	+1.7	35,503	31,321	+13.4
EU + EFTA + UK	23,435	23,700	-1.1	298,675	279,157	+7.0
EU14 + EFTA + UK	17,395	17,229	+1.0	224,318	213,620	+5.0

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

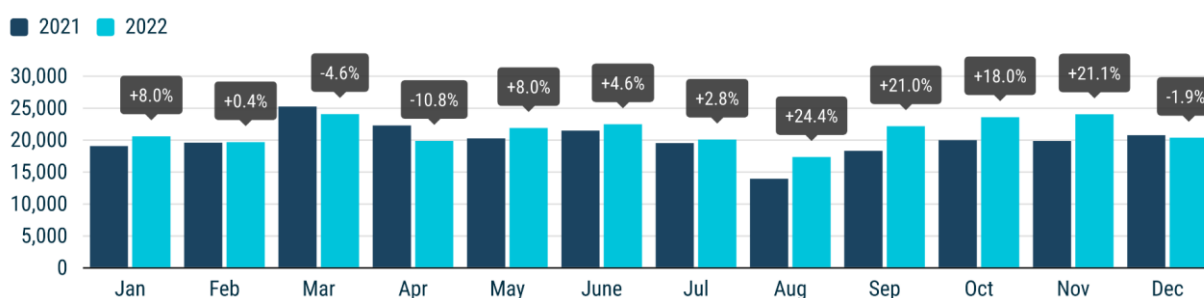
¹ Excluding heavy buses and coaches

² HCV ≥ 15t

³ HCV > 17t

⁴ ANFIA estimates based on vehicle registration certificates issued by the Italian Ministry of Transport

⁵ Estimates



PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 25 January 2023

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

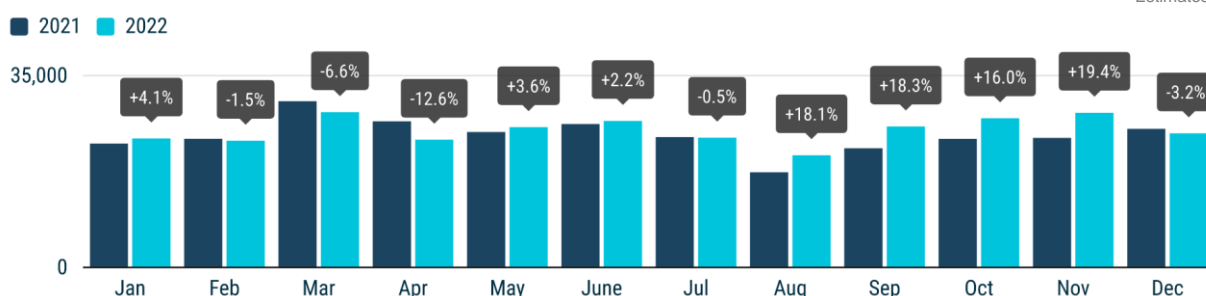
	DECEMBER			JANUARY-DECEMBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria	346	484	-28.5	6,363	6,680	-4.7
Belgium	763	610	+25.1	8,566	8,181	+4.7
Bulgaria	199	226	-11.9	3,705	3,073	+20.6
Croatia	117	98	+19.4	1,477	1,284	+15.0
Cyprus	5	6	-16.7	95	83	+14.5
Czech Republic	962	1,041	-7.6	8,988	8,679	+3.6
Denmark	429	330	+30.0	4,886	4,384	+11.5
Estonia	72	19	+278.9	976	772	+26.4
Finland	285	271	+5.2	3,341	3,536	-5.5
France	3,765	4,072	-7.5	44,567	45,030	-1.0
Germany	5,607	6,887	-18.6	76,218	78,981	-3.5
Greece	46	72	-36.1	676	568	+19.0
Hungary	476	373	+27.6	5,705	4,476	+27.5
Ireland	36	26	+38.5	2,207	2,271	-2.8
Italy ²	2,559	2,315	+10.5	25,341	24,762	+2.3
Latvia	73	64	+14.1	1,672	1,379	+21.2
Lithuania	419	645	-35.0	9,941	7,982	+24.5
Luxembourg	85	80	+6.3	1,088	1,054	+3.2
Netherlands	620	640	-3.1	13,289	11,742	+13.2
Poland	3,421	3,677	-7.0	34,905	32,684	+6.8
Portugal	585	330	+77.3	4,095	4,264	-4.0
Romania	579	584	-0.9	6,870	6,389	+7.5
Slovakia	221	207	+6.8	3,160	2,868	+10.2
Slovenia	152	127	+19.7	2,308	1,925	+19.9
Spain	1,966	1,510	+30.2	23,454	20,805	+12.7
Sweden	682	596	+14.4	6,024	5,910	+1.9
EUROPEAN UNION	24,470	25,290	-3.2	299,917	289,762	+3.5
EU14	17,774	18,223	-2.5	220,115	218,168	+0.9
EU12	6,696	7,067	-5.2	79,802	71,594	+11.5
Iceland	51	20	+155.0	287	275	+4.4
Norway	397	327	+21.4	5,605	6,035	-7.1
Switzerland	368	229	+60.7	3,449	3,565	-3.3
EFTA	816	576	+41.7	9,341	9,875	-5.4
United Kingdom ³	3,239	3,348	-3.3	45,356	42,825	+5.9
EU + EFTA + UK	28,525	29,214	-2.4	354,614	342,462	+3.5
EU14 + EFTA + UK	21,829	22,147	-1.4	274,812	270,868	+1.5

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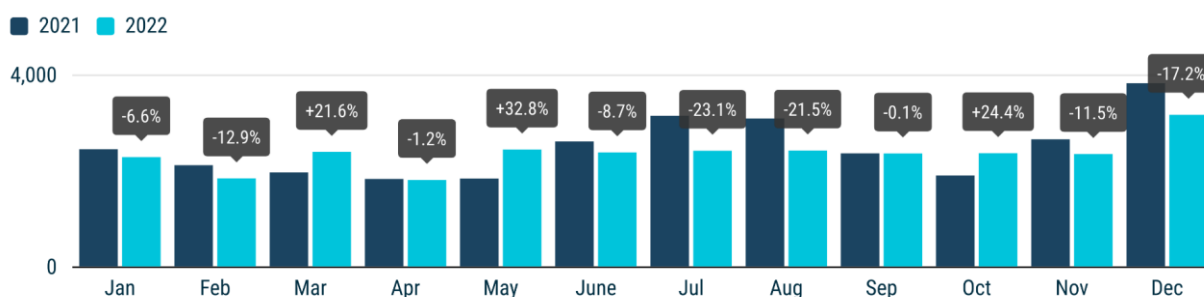
MEDIUM AND HEAVY BUSES & COACHES (MHBC) OVER 3.5T
EUROPEAN UNION + EFTA + UK

	DECEMBER			JANUARY-DECEMBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria	104	102	+2.0	934	887	+5.3
Belgium	56	34	+64.7	590	945	-37.6
Bulgaria	4	30	-86.7	212	203	+4.4
Croatia	8	1	+700.0	255	119	+114.3
Cyprus	0	1	-100.0	58	20	+190.0
Czech Republic	131	138	-5.1	1,215	1,006	+20.8
Denmark	42	95	-55.8	667	636	+4.9
Estonia	8	34	-76.5	306	269	+13.8
Finland	83	27	+207.4	417	382	+9.2
France	599	813	-26.3	5,883	6,857	-14.2
Germany	838	1,124	-25.4	4,883	6,474	-24.6
Greece	68	72	-5.6	261	454	-42.5
Hungary	111	112	-0.9	691	1,010	-31.6
Ireland	30	27	+11.1	287	444	-35.4
Italy ¹	437	366	+19.4	3,255	3,469	-6.2
Latvia	3	2	+50.0	278	194	+43.3
Lithuania	14	8	+75.0	108	139	-22.3
Luxembourg	0	10	-100.0	301	167	+80.2
Netherlands	2	15	-86.7	237	338	-29.9
Poland	134	141	-5.0	1,156	1,362	-15.1
Portugal	21	114	-81.6	1,405	586	+139.8
Romania	114	61	+86.9	860	715	+20.3
Slovakia	18	191	-90.6	394	529	-25.5
Slovenia	10	5	+100.0	138	98	+40.8
Spain	277	173	+60.1	2,344	1,877	+24.9
Sweden	64	138	-53.6	1,241	728	+70.5
EUROPEAN UNION	3,176	3,834	-17.2	28,376	29,908	-5.1
EU14	2,621	3,110	-15.7	22,705	24,244	-6.3
EU12	555	724	-23.3	5,671	5,664	+0.1
Iceland	0	1	-100.0	25	30	-16.7
Norway	33	29	+13.8	591	1,083	-45.4
Switzerland	64	81	-21.0	391	646	-39.5
EFTA	97	111	-12.6	1,007	1,759	-42.8
United Kingdom ²	295	401	-26.4	4,232	4,136	+2.3
EU + EFTA + UK	3,568	4,346	-17.9	33,615	35,803	-6.1
EU14 + EFTA + UK	3,013	3,622	-16.8	27,944	30,139	-7.3

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 January 2023

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

	DECEMBER			JANUARY-DECEMBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria	2,265	3,308	-31.5	29,366	66,373	-55.8
Belgium	4,948	5,338	-7.3	65,258	80,690	-19.1
Bulgaria	566	685	-17.4	8,806	9,935	-11.4
Croatia	549	633	-13.3	8,384	9,361	-10.4
Cyprus	122	114	+7.0	2,115	2,041	+3.6
Czech Republic	2,820	3,565	-20.9	27,111	29,345	-7.6
Denmark	2,607	3,353	-22.2	32,723	36,592	-10.6
Estonia	478	307	+55.7	5,192	5,183	+0.2
Finland	1,429	1,247	+14.6	14,950	16,812	-11.1
France	37,350	43,516	-14.2	397,519	483,272	-17.7
Germany	31,593	29,136	+8.4	312,391	351,187	-11.0
Greece	877	807	+8.7	10,601	11,448	-7.4
Hungary	1,838	2,698	-31.9	24,048	28,467	-15.5
Ireland	413	367	+12.5	26,147	31,457	-16.9
Italy	17,666	19,258	-8.3	189,690	211,856	-10.5
Latvia	264	206	+28.2	4,357	4,108	+6.1
Lithuania	629	842	-25.3	13,370	11,532	+15.9
Luxembourg	380	440	-13.6	5,393	5,781	-6.7
Netherlands	5,726	4,858	+17.9	72,712	80,485	-9.7
Poland	9,286	11,276	-17.6	98,299	107,972	-9.0
Portugal	3,658	3,725	-1.8	29,041	33,640	-13.7
Romania	2,056	2,137	-3.8	21,313	23,272	-8.4
Slovakia	743	1,354	-45.1	11,233	11,649	-3.6
Slovenia	655	836	-21.7	9,585	11,710	-18.1
Spain	14,433	12,529	+15.2	145,417	174,587	-16.7
Sweden	4,798	3,523	+36.2	41,781	42,876	-2.6
EUROPEAN UNION	148,149	156,058	-5.1	1,606,802	1,881,631	-14.6
EU14	128,143	131,405	-2.5	1,372,989	1,627,056	-15.6
EU12	20,006	24,653	-18.8	233,813	254,575	-8.2
Iceland	196	101	+94.1	1,911	1,479	+29.2
Norway	4,337	3,749	+15.7	35,680	41,188	-13.4
Switzerland	2,949	2,836	+4.0	28,878	33,586	-14.0
EFTA	7,482	6,686	+11.9	66,469	76,253	-12.8
United Kingdom	25,359	33,153	-23.5	331,727	402,341	-17.6
EU + EFTA + UK	180,990	195,897	-7.6	2,004,998	2,360,225	-15.1
EU14 + EFTA + UK	160,984	171,244	-6.0	1,771,185	2,105,650	-15.9

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

