













THE AUTOMOBILE INDUSTRY

POCKET GUIDE 2022/2023



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FOREWORD

Taking decisions that are soundly rooted in facts is even more essential than usual in today's turbulent times. That is why the European Automobile Manufacturers' Association (ACEA) strives to be the prime provider of reliable data on our sector, enabling informed decisions on the future of mobility and Europe's industrial base. We do this in many ways, including by publishing an annual snapshot of the state of our industry, which you will find in the pages of this 'Automobile Industry Pocket Guide'.

What picture does the Pocket Guide paint this year? Firstly, it depicts a vibrant, innovative industry. With its massive yearly investment of €59 billion, the auto sector remains the EU's top investor in R&D, accounting for one third of the region's total spending.

Thanks to this, our industry is leading the transition towards zero-emission mobility. No better testament to that than the fact that the market share of battery electric cars almost doubled to around 10% in 2021. We are committed to accelerating this trend across all vehicle segments – and indeed we must do so rapidly to ensure that Europe's climate targets are met. If we are to succeed, it is urgent that the framework conditions for going electric on a massive scale are also now put in place, including a dense network of charging infrastructure and access to the necessary raw materials.

What is more, over the past 15 years CO2 emissions from car production have been slashed by almost a half, and energy consumption cut by a quarter.

Of course, we are not only investing heavily in clean mobility – in parallel we are pushing for safe and smart mobility for all. Indeed, the latest data show that the EU is consolidating its position as the world leader in road safety, with a year-on-year drop in EU road fatalities of over 17%. However, we will not rest until Vision Zero is achieved – and the advanced driver assistant systems which now come as standard in all new vehicles will bring us further towards this goal.

The rising average age of the cars (12 years), trucks (14), vans (12) and buses (13) on EU roads is however a worrying trend. If we want to bring the cleanest and safest new vehicles into circulation, we absolutely must ensure that mobility remains affordable for all European citizens.

When it comes to the production and sales of vehicles in the EU, the picture is far from rosy unfortunately. Indeed, vehicle production took another hit in 2021 (-8%), as supply shortages continue to hurt the industry. As a result of this slowdown in production, sales of new vehicles also continued their decline, as supply struggled to follow demand. Indeed, EU car sales fell to 9.7 million units in 2021 – 3.3 million less than the pre-COVID crisis levels.

In light of the EU's retracting global share of vehicle output (15%) and of the world market (14%), urgent action is needed to retain a solid position on the international stage. This should start with decisive steps to make Europe's supply chain much more resilient.

As this Pocket Guide shows, the auto sector is an economic powerhouse for Europe – providing

employment for 12.7 million people, bringing in an annual trade surplus of €79.5 billion (+5%), and generating €375 billion in taxation for governments in major EU markets.

As we navigate through the uncertain times ahead, we must ensure that this strategic industry remains a strong competitive player, ready and able to pursue the goals of zero-emission and zero-fatality mobility.



We must ensure that the auto sector remains a competitive player ready to pursue the goals of zero-emission and zero-fatality mobility.



Sigrid de Vries
ACEA Director General

KEY FIGURES



EMPLOYMENT

Manufacture of motor vehicles (EU)	2.6 million people = 8.5% of EU employment in manufacturing	2019
Total (EU manufacturing, services and construction)	12.7 million people = 6.6% of total EU employment	2019



PRODUCTION

Motor vehicles (world)	79.1 million units	2021
Motor vehicles (EU)	12.1 million units = 15.3% of global motor vehicle production	2021
Passenger cars (world)	61.6 million units	2021
Passenger cars (EU)	9.9 million units = 16.1% of global passenger car production	2021



REGISTRATIONS

Motor vehicles (world)	83.9 million units	2021
Motor vehicles (EU)	11.6 million units = 13.8% of global motor vehicle registrations	2021
Passenger cars (world)	66.1 million units	2021
Passenger cars (EU)	9.7 million units = 14.7% of global passenger car registrations	2021
Petrol (EU)	40.0% market share	2021
Diesel (EU)	19.6% market share	2021
Electrically-chargeable cars (EU)	18.0% market share	2021
Electrically-chargeable vans (EU)	3.0% market share	2021
Electrically-chargeable trucks (EU)	0.5% market share	2021
Electrically-chargeable buses (EU)	10.6% market share	2021



TRADE

Motor vehicle exports (extra-EU)	€140.0 billion	2021
Motor vehicle imports (extra-EU)	€60.5 billion	2021
Trade balance (extra-EU)	€79.5 billion	2021



VEHICLES IN USE

Motor vehicles (EU)	282.0 million units	2020
Passenger cars (EU)	246.3 million units	2020
Motorisation rate (EU)	641 vehicles per 1,000 inhabitants	2020
Average age of cars (EU)	11.8 years	2020
Average age of vans (EU)	11.9 years	2020
Average age of trucks (EU)	14.1 years	2020
Average age of buses (EU)	12.8 years	2020



ROAD SAFETY

Road fatalities per million inhabitants (EU)	42 people	2020
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ENVIRONMENT

Average CO2 emissions (EU)	108.2g CO2/km	2020
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INNOVATION

Automotive R&D investment (EU)	€58.8 billion	2020
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TAXATION

Fiscal income from motor vehicles (EU14)	€374.6 billion	2021
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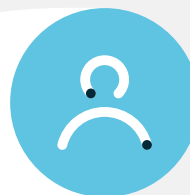


The data in this publication are presented as interactive maps, charts and tables on www.acea.auto/figures, where they are periodically updated throughout the year.



EMPLOYMENT

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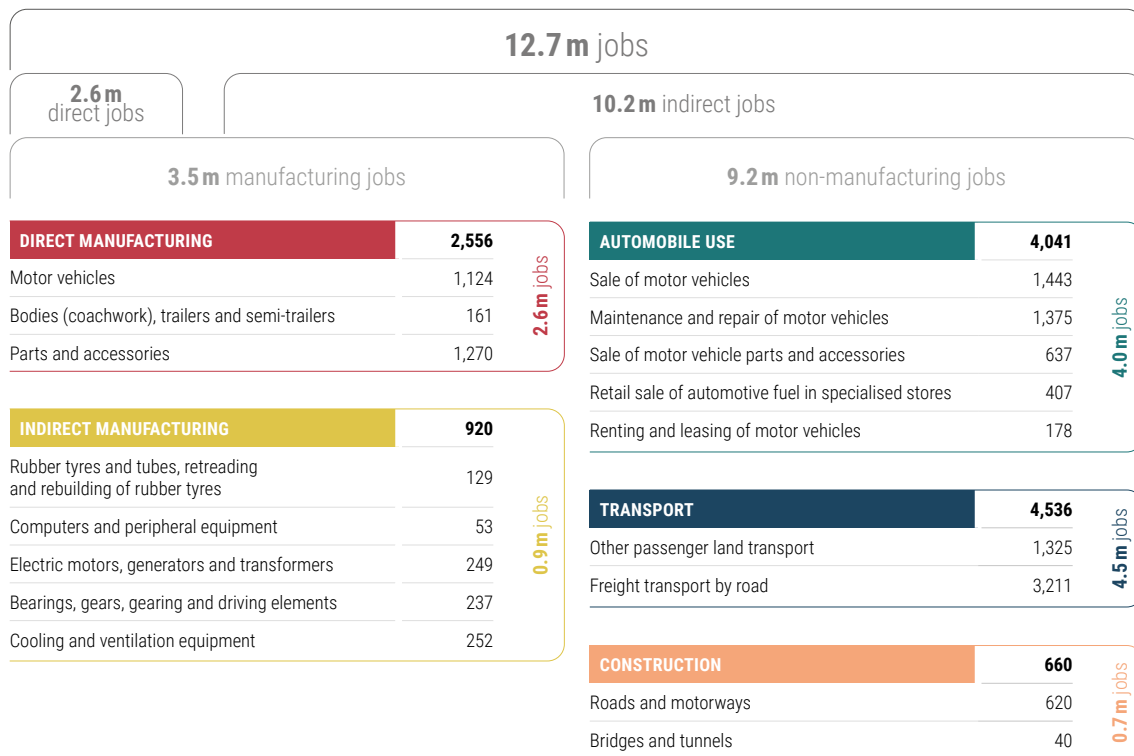




The auto industry
provides direct
and indirect jobs
for 12.7 million
Europeans

EU AUTOMOTIVE SECTOR: DIRECT AND INDIRECT EMPLOYMENT

In thousands / 2019



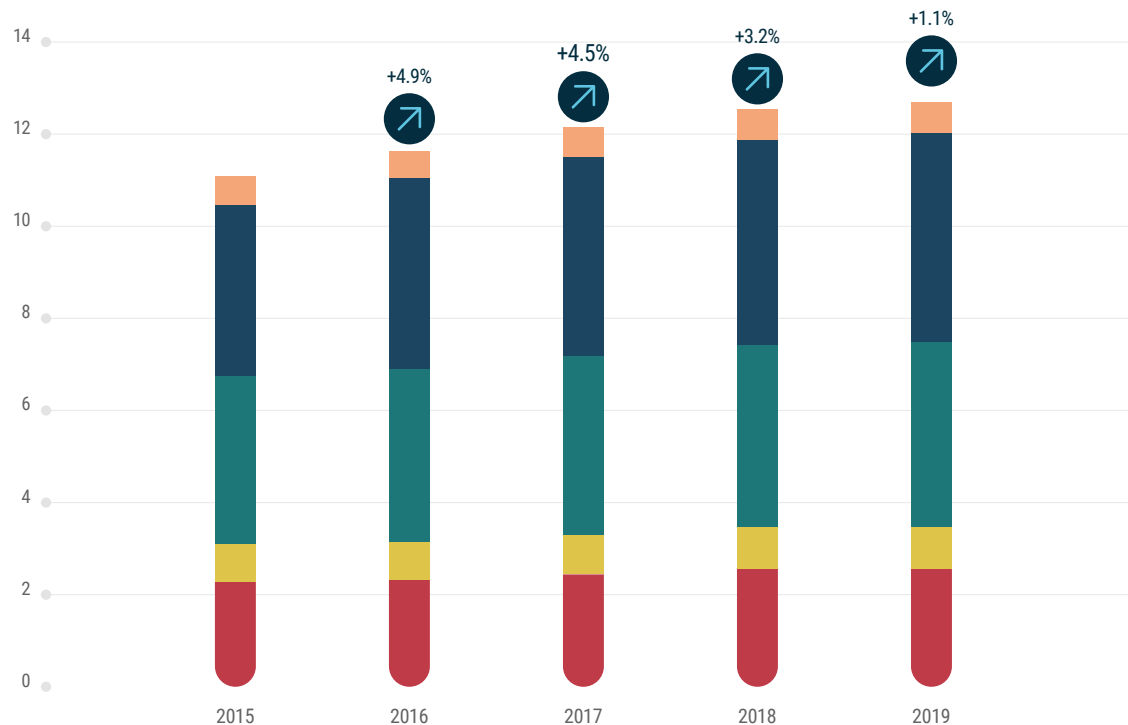
SOURCE: EUROSTAT



EMPLOYMENT IN THE EU AUTOMOTIVE SECTOR

In million jobs / 2015 – 2019

● Direct manufacturing ● Indirect manufacturing ● Automobile use ● Transport ● Construction



SOURCE: EUROSTAT

The automotive sector accounts for almost 7% of all EU jobs



**EU automotive
employment
increased by 14%
over five years**

EMPLOYMENT IN THE EU AUTOMOTIVE SECTOR

2015 – 2019

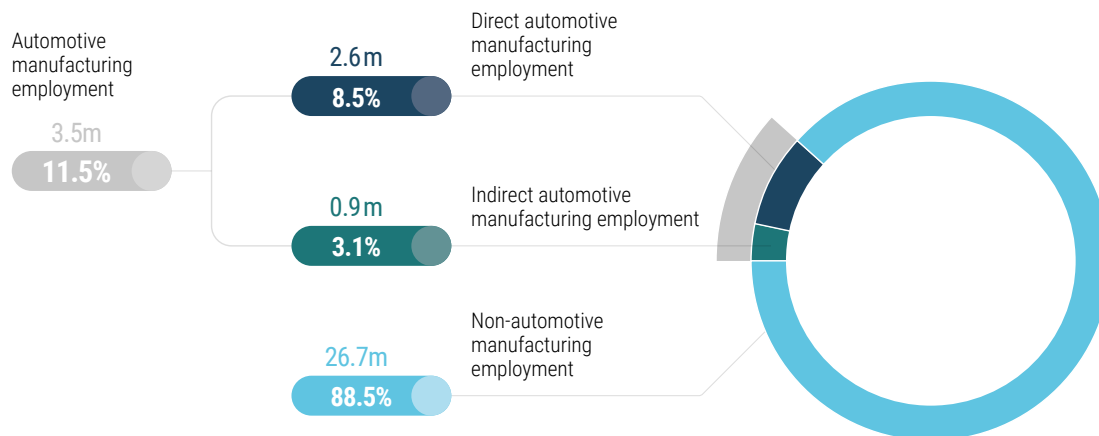
EU automotive employment	2015	2016	2017	2018	2019	% change 19/18
Direct manufacturing	2,282,219	2,325,011	2,440,720	2,571,359	2,555,502	-0.6
Indirect manufacturing	829,749	823,201	878,774	908,747	919,829	+1.2
Automobile use	3,668,769	3,789,494	3,888,807	3,947,518	4,040,957	+2.4
Transport	3,715,235	4,136,627	4,341,044	4,483,090	4,535,599	+1.2
Construction	610,684	578,368	633,423	665,863	660,240	-0.8
TOTAL	11,106,656	11,652,701	12,182,768	12,576,577	12,712,127	+1.1



MANUFACTURING JOBS IN THE EU AUTO SECTOR

% share / 2019

**11.5% of EU
manufacturing
jobs are in the
automotive sector**





**A total of
3.5 million
people work
in automotive
manufacturing
in the EU**

MANUFACTURING JOBS IN THE EU AUTO SECTOR

2019

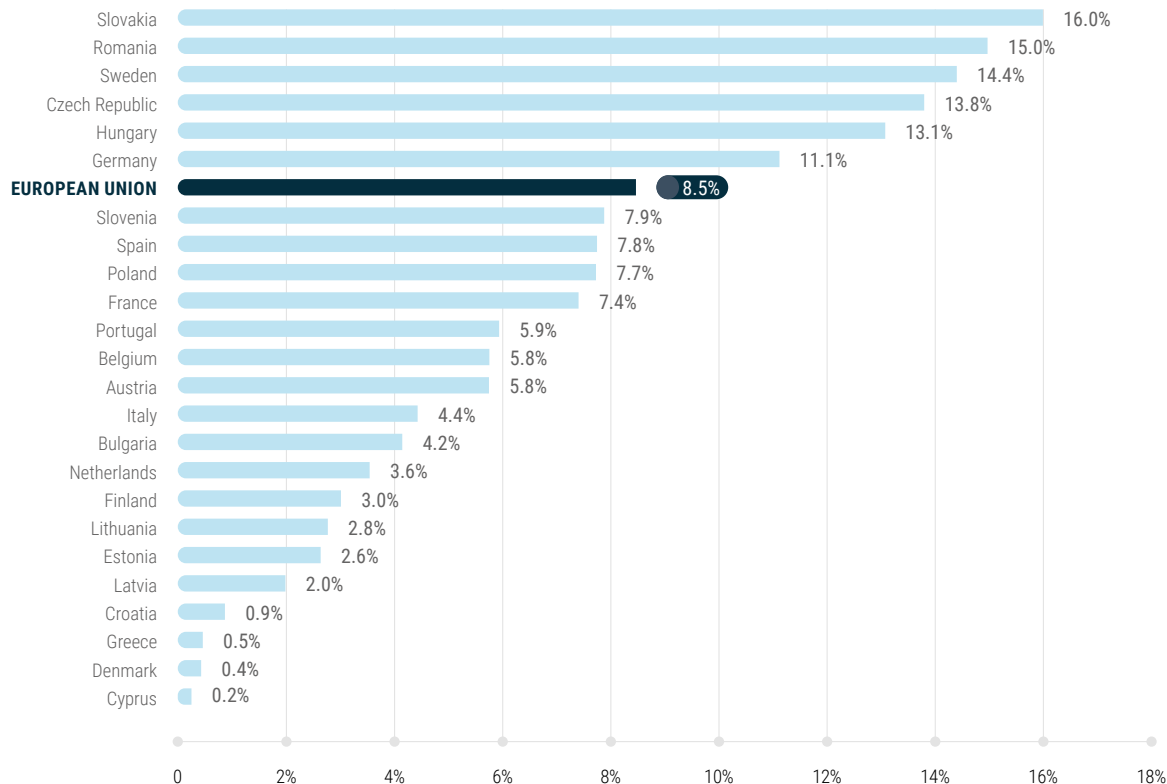
Direct automotive manufacturing employment	2.6 million people = 8.5% of EU employment in manufacturing
Direct & indirect automotive manufacturing employment	3.5 million people = 11.5% of EU employment in manufacturing
Total automotive employment (manufacturing, services and construction)	12.7 million people = 6.6% of total EU employment
EU employment in the manufacturing sector	30.2 million people = 15.8% of total EU employment
EU total employment ¹	191 million people

1. Total employment from 20 to 64 years



EU DIRECT AUTOMOTIVE EMPLOYMENT

Share of total manufacturing, by country / 2019



SOURCE: EUROSTAT

**The auto sector
directly provides
8.5% of all EU
manufacturing
jobs**



EMPLOYMENT

**2.6 million
Europeans
are directly
employed in
automotive
manufacturing**

EU DIRECT AUTOMOTIVE MANUFACTURING EMPLOYMENT

By country / 2019

Austria	39,855	France	232,643	Malta	0
Belgium	30,021	Germany	916,159	Netherlands	26,181
Bulgaria	22,459	Greece	1,662	Poland	224,496
Croatia	2,463	Hungary	103,737	Portugal	44,328
Cyprus	84	Ireland	3,780	Romania	179,841
Czech Republic	181,862	Italy	168,914	Slovakia	81,975
Denmark	1,402	Latvia	2,352	Slovenia	17,379
Estonia	2,936	Lithuania	6,164	Spain	160,291
Finland	10,412	Luxembourg	0	Sweden	94,106

EUROPEAN UNION 2,555,502



PRODUCTION

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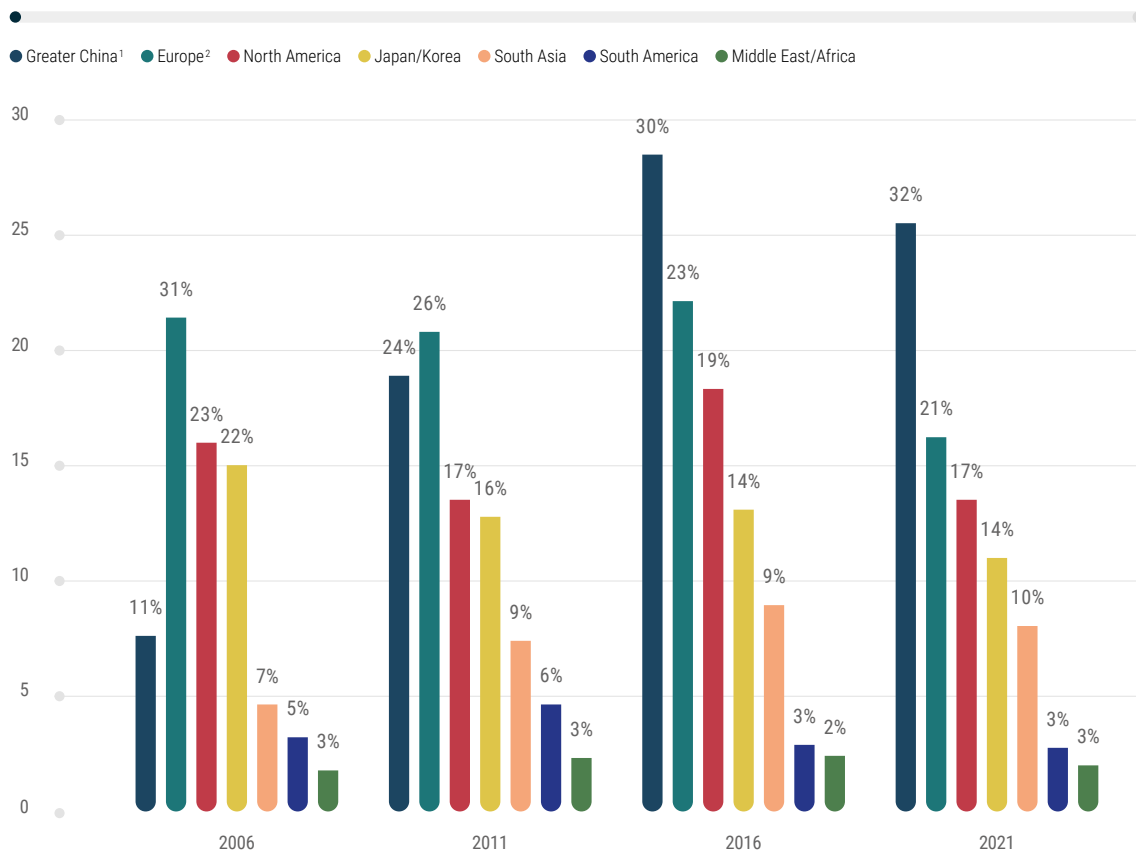
PRODUCTION

**79 million vehicles
were produced
globally in 2021**

1. Includes Hong Kong and Taiwan
2. Includes Turkey and CIS countries

WORLD VEHICLE PRODUCTION

In million units, % share / 2006 – 2021



SOURCE: IHS MARKIT



WORLD VEHICLE PRODUCTION

In thousand units / 2021

	2021	2020	% change 21/20	% share 2021
Europe ¹	16,247	17,070	-4.8	20.5
Greater China ²	25,553	25,533	+0.1	32.3
Japan/Korea	10,990	11,361	-3.3	13.9
Middle East/Africa	1,990	1,809	+10.0	2.5
North America	13,518	13,484	+0.2	17.1
South America	2,729	2,361	+15.6	3.5
South Asia	8,055	6,466	+24.6	10.2
WORLD	79,081	78,084	+1.3	100.0

**World vehicle
production was up
by 1.3% in 2021**

1. Includes Turkey and CIS countries

2. Includes Hong Kong and Taiwan



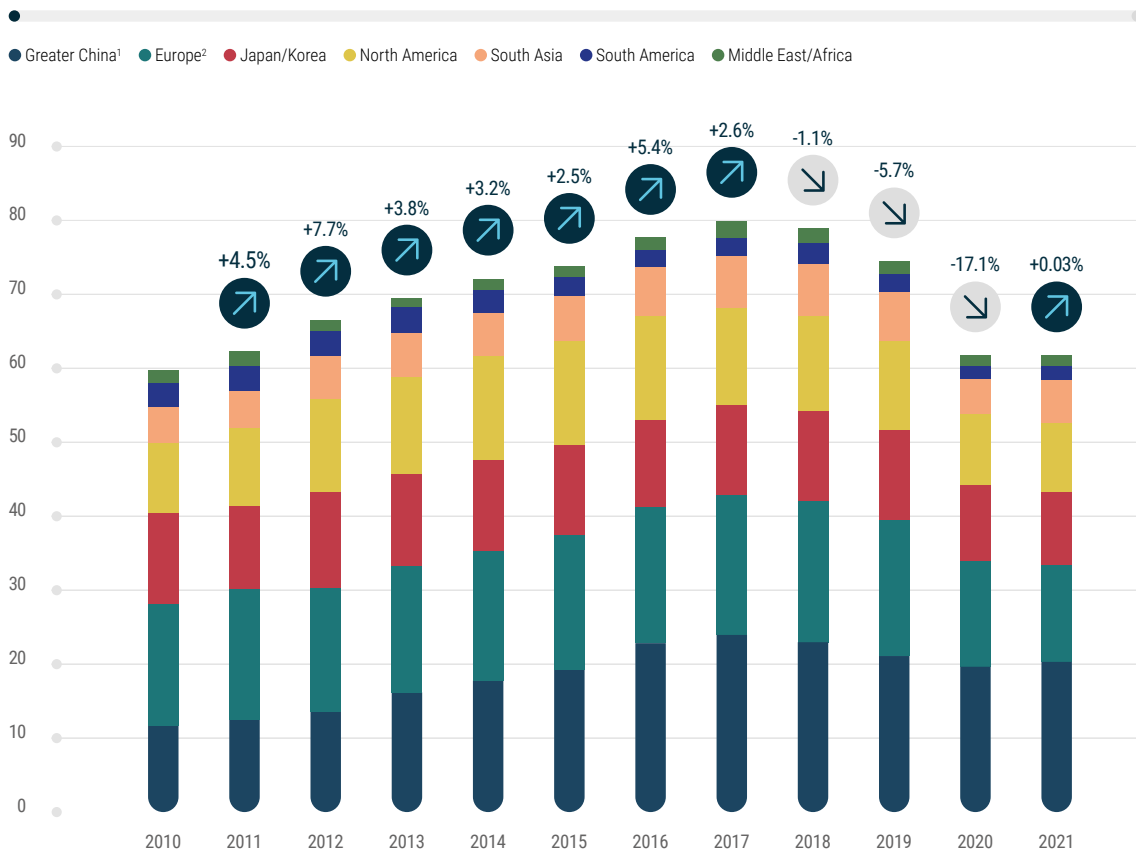
PRODUCTION

Global car production remained stable in 2021, after three years of decline

1. Includes Hong Kong and Taiwan
2. Includes Turkey and CIS countries

WORLD CAR PRODUCTION

In million units, % change / 2010 – 2021



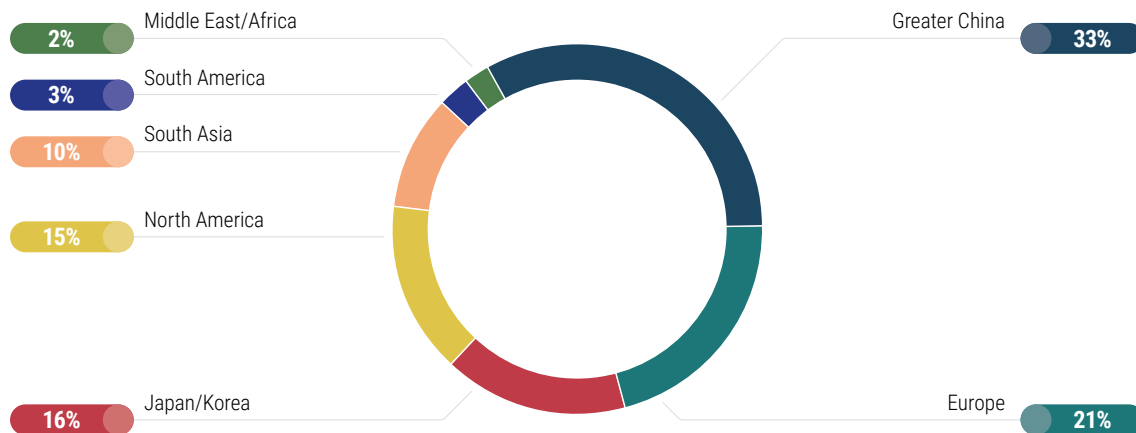
SOURCE: IHS MARKIT



WORLD CAR PRODUCTION

% share / 2021

One fifth of the world's cars are made in Europe





PRODUCTION

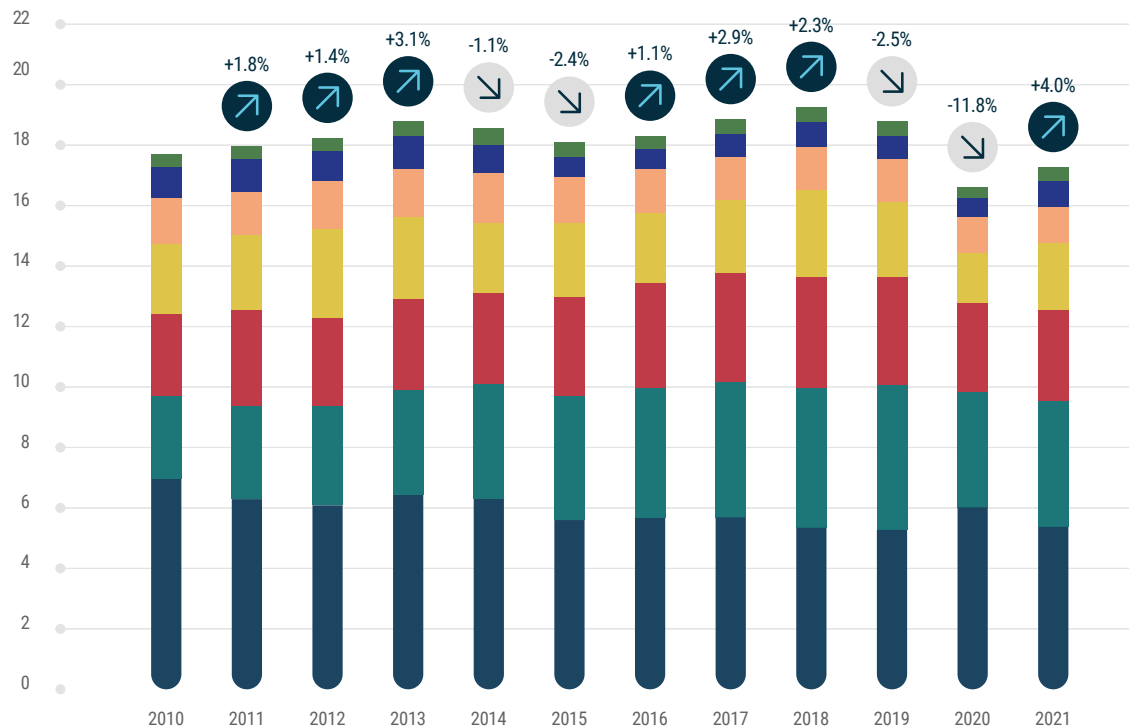
Global
commercial
vehicle
production grew
by 4% in 2021

1. Includes buses
2. Includes Hong Kong and Taiwan
3. Includes Turkey and CIS countries

WORLD COMMERCIAL VEHICLE PRODUCTION¹

In million units, % change / 2010 – 2021

● Greater China² ● North America ● Europe³ ● South Asia ● Japan/Korea ● South America ● Middle East/Africa

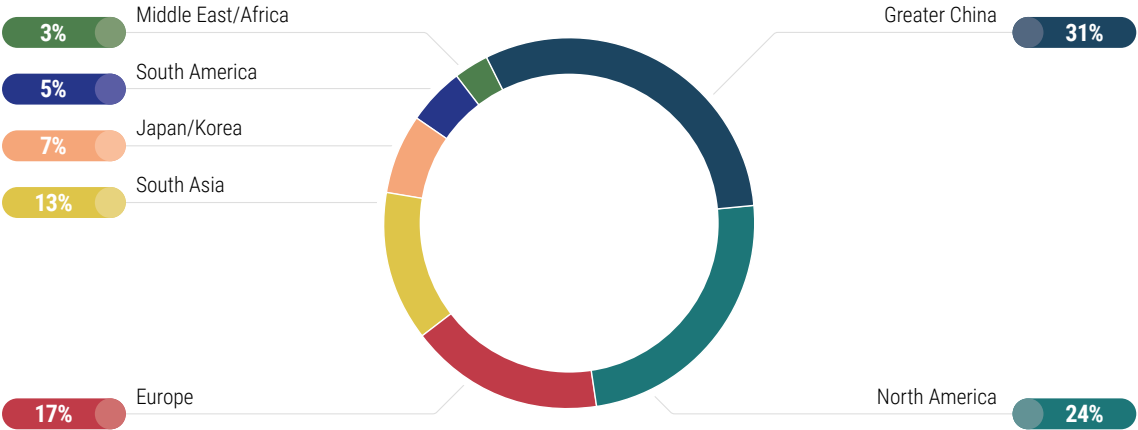


SOURCE: IHS MARKIT



WORLD COMMERCIAL VEHICLE PRODUCTION ¹

% share / 2021



17% of all commercial vehicles are manufactured in Europe

1. Includes buses



PRODUCTION

**12 million
vehicles were
made in Europe
in 2021**

1. Light commercial vehicles up to 3.5t
2. Medium and heavy commercial vehicles over 3.5t
3. Medium and heavy buses over 3.5t

VEHICLE PRODUCTION IN THE EU

By country / 2021

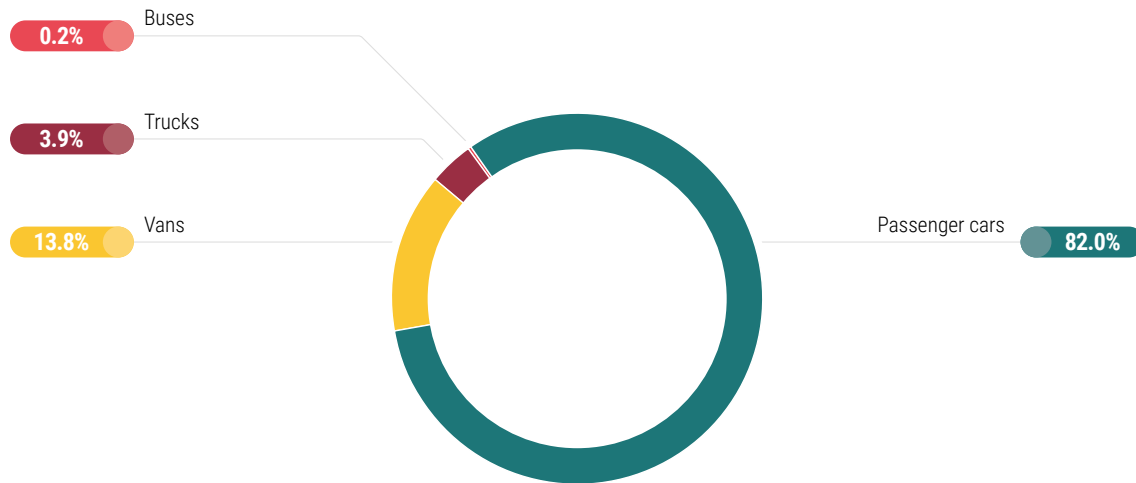
	Cars	Vans ¹	Trucks ²	Buses ³	TOTAL
Austria	123,973	–	15,150	15	139,138
Belgium	228,334	–	31,160	616	260,110
Czech Republic	1,107,361	–	1,096	4,954	1,113,411
Finland	85,369	–	76	–	85,445
France	841,323	489,539	54,462	2,886	1,388,210
Germany	2,889,252	234,334	144,125	4,643	3,272,354
Hungary	413,750	–	–	826	414,576
Italy	432,960	261,590	37,246	581	732,377
Lithuania	–	–	136	17	153
Netherlands	92,737	–	60,099	807	153,643
Poland	194,870	160,710	31,537	6,354	393,471
Portugal	201,305	73,657	3,569	132	278,663
Romania	407,443	–	–	–	407,443
Slovakia	956,857	–	–	9	956,866
Slovenia	95,732	–	–	11	95,743
Spain	1,617,697	459,311	63,000	1,153	2,141,161
Sweden	257,733	–	28,732	6,081	292,546
EUROPEAN UNION	9,946,696	1,679,141	470,388	29,085	12,125,310

SOURCE: IHS MARKIT



VEHICLE PRODUCTION IN THE EU

By type, % share / 2021



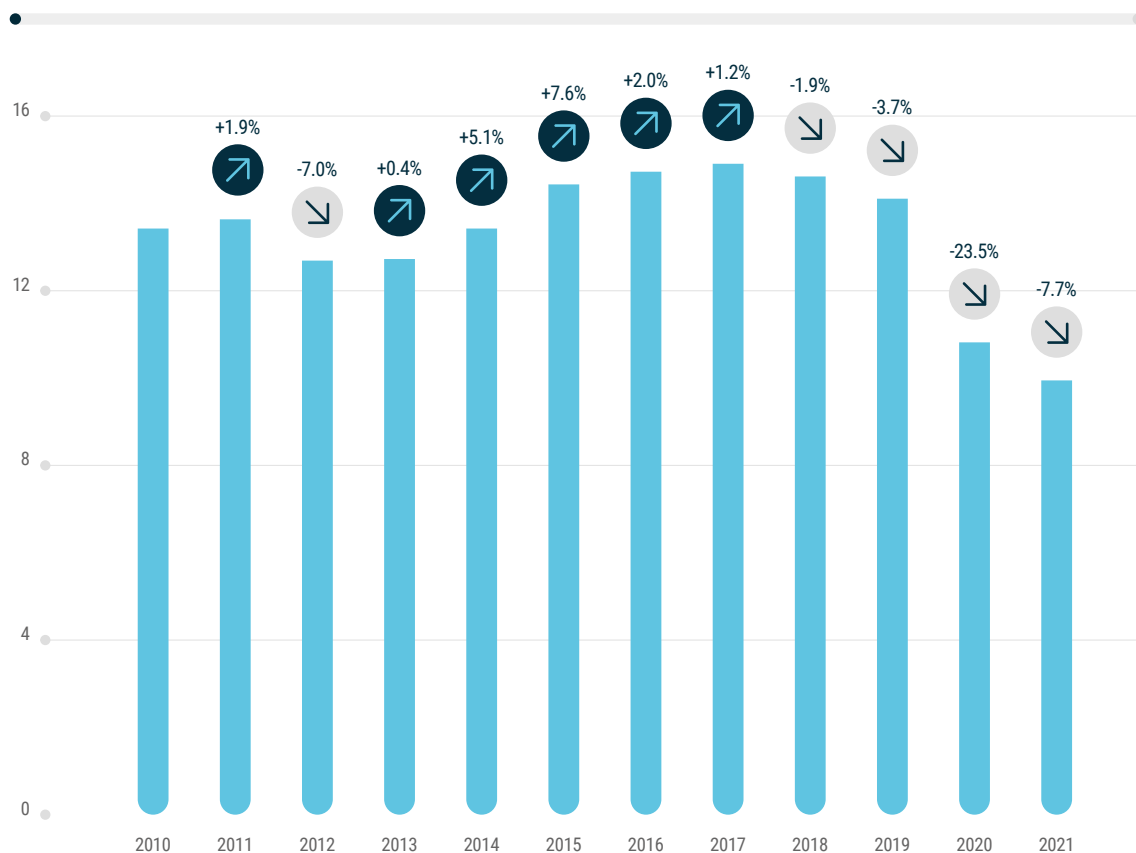
Cars account for 82% of all vehicles manufactured in the EU



EU car production
declined for
the fourth
consecutive year

CAR PRODUCTION IN THE EU

In million units, % change / 2010 – 2021



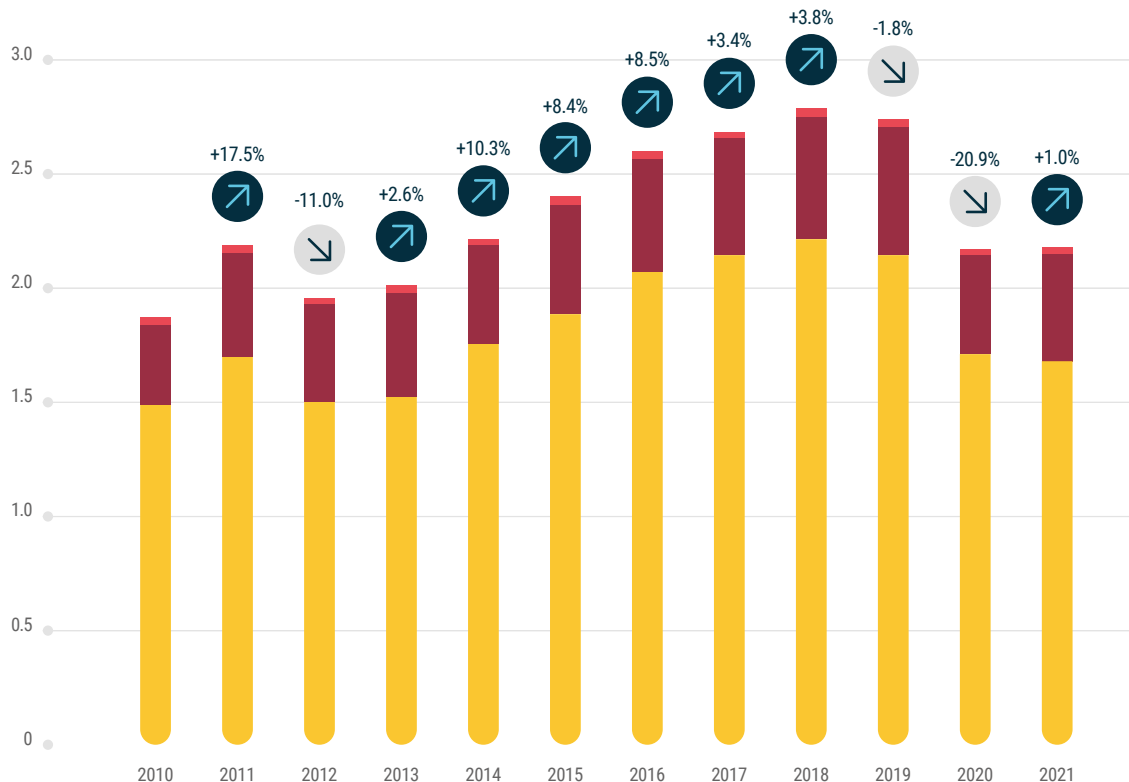
SOURCE: IHS MARKIT



COMMERCIAL VEHICLE PRODUCTION IN THE EU

In million units, % change / 2010 – 2021

Vans¹ Trucks² Buses³



SOURCE: IHS MARKIT

EU commercial vehicle output recovered slightly in 2021, after a sharp drop in 2020

- 1. Light commercial vehicles up to 3.5t
- 2. Medium and heavy commercial vehicles over 3.5t
- 3. Medium and heavy buses over 3.5t



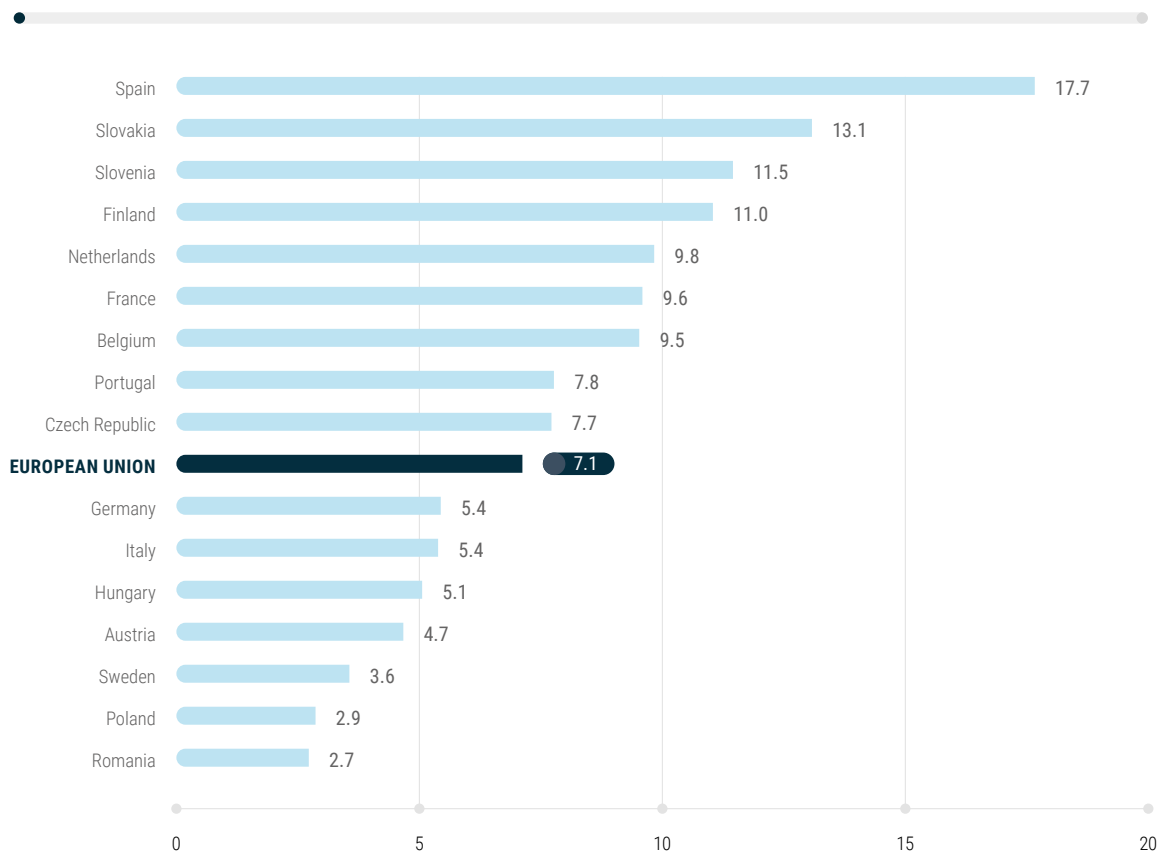
PRODUCTION

The EU auto industry produces an average of 7 vehicles per worker

1. Based on direct automotive manufacturing employment, most recent data available

VEHICLE PRODUCTION PER DIRECT AUTOMOTIVE MANUFACTURING EMPLOYEE

By country / 2019¹

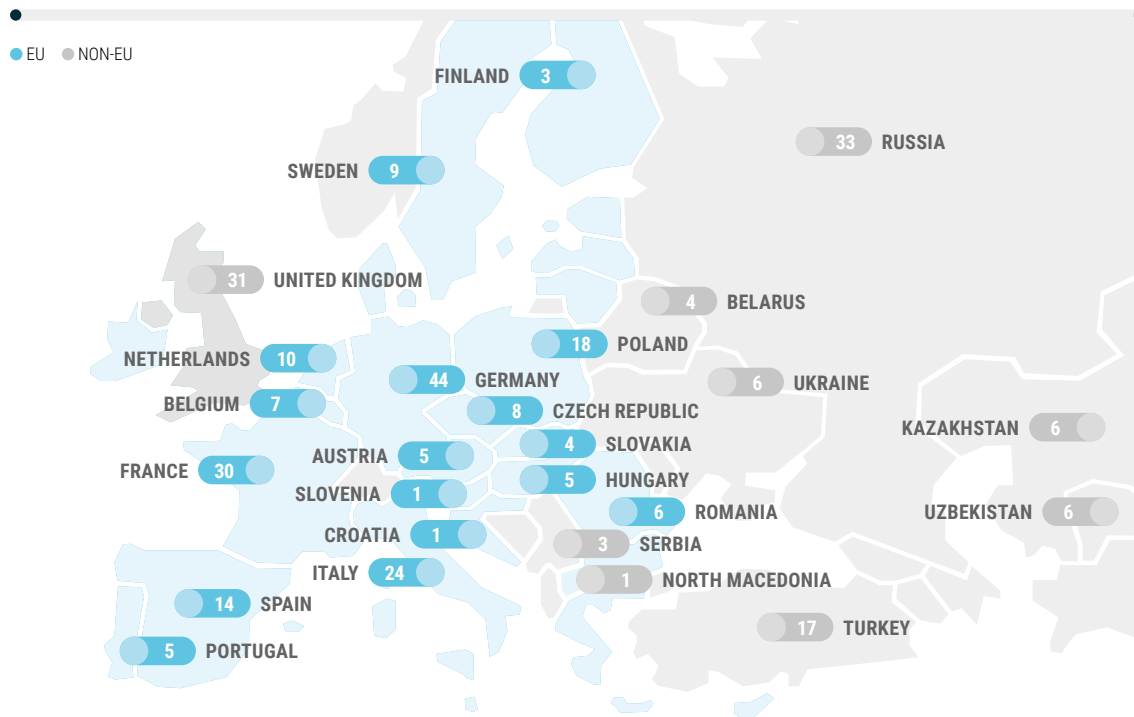


SOURCE: EUROSTAT, IHS MARKIT



AUTOMOBILE ASSEMBLY, BATTERY AND ENGINE PLANTS

2022



	CARS	VANS	TRUCKS	BUSES	ENGINES	BATTERIES	TOTAL
EU	80	24	28	34	50	17	194
EUROPE	134	41	52	66	72	18	301

SOURCE: ACEA

**194 automobile
factories operate
on EU soil**



REGISTRATIONS

THE AUTOMOBILE INDUSTRY
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acea

DRIVING MOBILITY FOR EUROPE



**84,000 vehicles
were sold
worldwide
in 2021**

1. Data for Malta not available

2. Includes Belarus, Bosnia-Herzegovina, Kazakhstan,
North Macedonia, Serbia, Uzbekistan

3. Includes Hong Kong, Taiwan and all the other South
Asian countries

GLOBAL NEW VEHICLE REGISTRATIONS

In thousand units / 2021

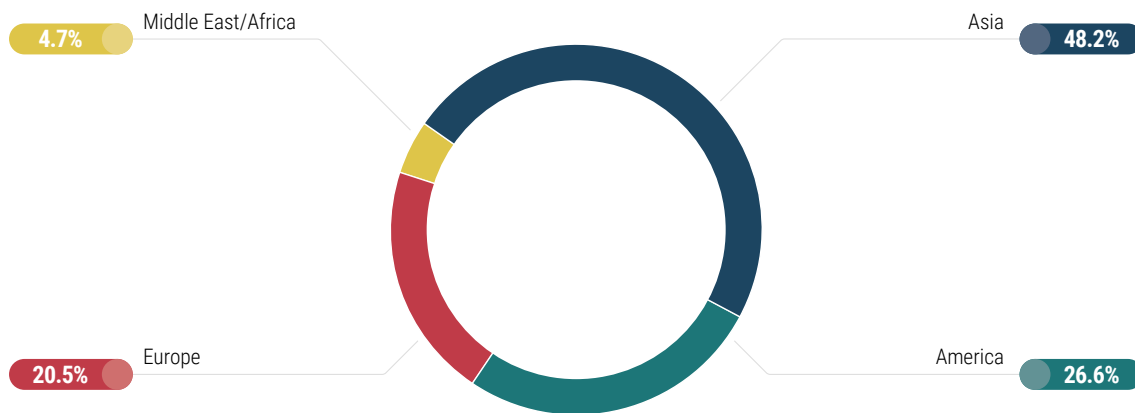
	2021	2020	% change 21/20	% share 2021
EUROPE	17,227	17,150	+0.4	20.5
European Union ¹	11,581	11,656	-0.6	13.8
EFTA	504	461	+9.3	0.6
United Kingdom	2,049	1,969	+4.1	2.4
Russia	1,786	1,690	+5.7	2.1
Turkey	770	794	-2.9	0.9
Ukraine	120	96	+24.2	0.1
Others: Europe ²	417	486	-14.2	0.5
AMERICA	22,308	21,013	+6.2	26.6
North America	18,334	17,631	+4.0	21.9
<i>of which the United States</i>	<i>15,583</i>	<i>15,050</i>	<i>+3.5</i>	<i>18.6</i>
South America	3,974	3,382	+17.5	4.7
<i>of which Brazil</i>	<i>2,118</i>	<i>2,057</i>	<i>+3.0</i>	<i>2.5</i>
ASIA	40,435	39,234	+3.1	48.2
China	25,564	25,548	+0.1	30.5
Japan	4,442	4,596	-3.4	5.3
India	3,821	2,963	+29.0	4.6
South Korea	1,736	1,894	-8.3	2.1
Others: Asia ³	4,871	4,233	+15.1	5.8
MIDDLE EAST/AFRICA	3,916	3,293	+18.9	4.7
WORLD	83,886	80,690	+4.0	100.0

SOURCE: ACEA, IHS MARKIT



GLOBAL NEW VEHICLE REGISTRATIONS

% share / 2021



Europe accounts for a fifth of the world's motor vehicle sales



REGISTRATIONS

**66 million
cars were sold
globally in 2021**

1. Data for Malta not available

2. Includes Belarus, Bosnia-Herzegovina, Kazakhstan,
North Macedonia, Serbia, Uzbekistan

3. Based on production type

4. Includes Hong Kong, Taiwan and all the other South
Asian countries

GLOBAL NEW CAR REGISTRATIONS

In thousand units / 2021

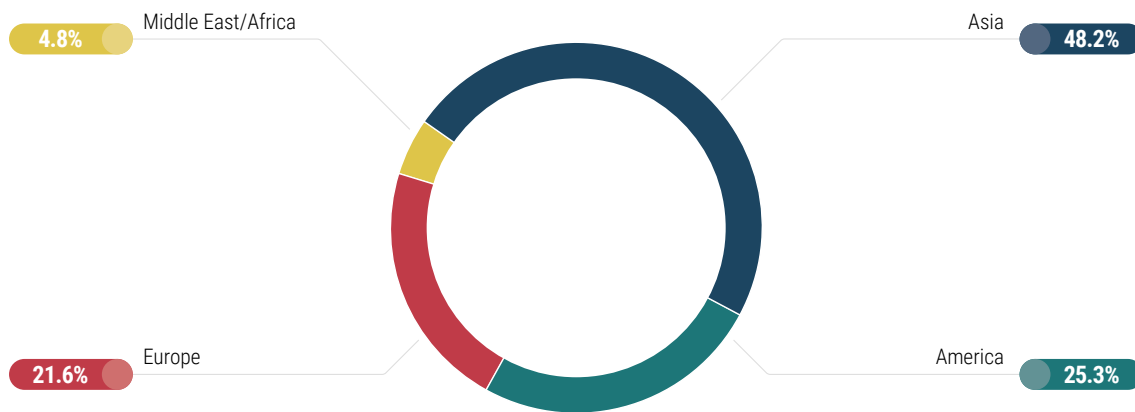
	2021	2020	% change 21/20	% share 2021
EUROPE	14,309	14,534	-1.5	21.6
European Union ¹	9,700	9,939	-2.4	14.7
EFTA	428	388	+10.3	0.6
United Kingdom	1,647	1,631	+1.0	2.5
Russia	1,543	1,496	+3.2	2.3
Turkey	559	606	-7.7	0.8
Ukraine	101	83	+22.1	0.2
Others: Europe ²	331	392	-15.6	0.5
AMERICA	16,759	15,668	+7.0	25.3
North America ³	13,965	13,163	+6.1	21.1
<i>of which the United States</i>	<i>11,858</i>	<i>11,234</i>	<i>+5.6</i>	<i>17.9</i>
South America	2,794	2,505	+11.5	4.2
<i>of which Brazil</i>	<i>1,552</i>	<i>1,612</i>	<i>-3.7</i>	<i>2.3</i>
ASIA	31,892	30,707	+3.9	48.2
China	20,187	19,789	+2.0	30.5
Japan	3,695	3,839	-3.7	5.6
India	2,993	2,362	+26.7	4.5
South Korea	1,506	1,649	-8.6	2.3
Others: Asia ⁴	3,511	3,068	+14.4	5.3
MIDDLE EAST/AFRICA	3,180	2,676	+18.8	4.8
WORLD	66,140	63,586	+4.0	100.0

SOURCE: ACEA, IHS MARKIT



GLOBAL NEW CAR REGISTRATIONS

% share / 2021



22% of all new cars were sold in Europe in 2021



**17.7 million vans,
trucks and buses
were registered
globally in 2021**

1. Includes light, medium and heavy commercial vehicles, and buses

2. Data for Malta not available

3. Includes Belarus, Bosnia-Herzegovina, Kazakhstan, North Macedonia, Serbia, Uzbekistan

4. Based on production type

5. Includes Hong Kong, Taiwan and all the other South Asian countries

GLOBAL NEW COMMERCIAL VEHICLE¹ REGISTRATIONS

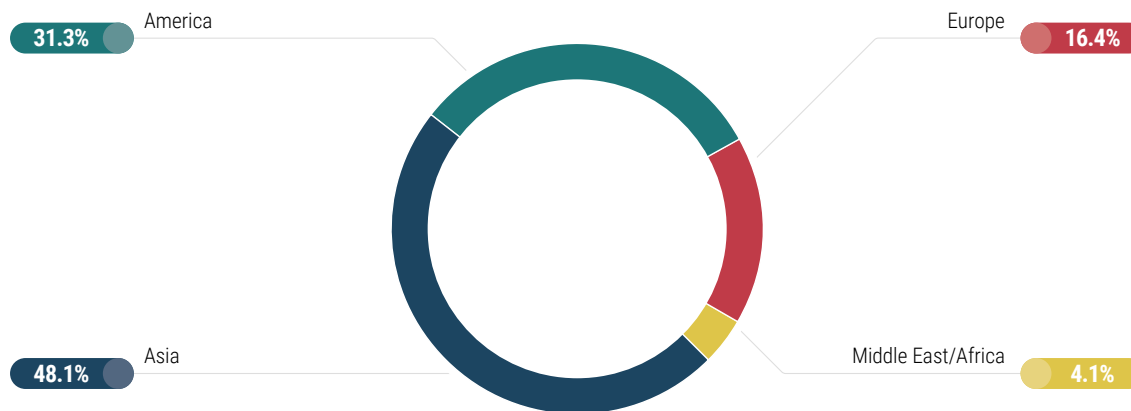
In thousand units / 2021

	2021	2020	% change 21/20	% share 2021
EUROPE	2,917	2,616	+11.5	16.4
European Union ²	1,881	1,716	+9.6	10.6
EFTA	76	73	+4.3	0.4
United Kingdom	402	337	+19.1	2.3
Russia	243	194	+25.4	1.4
Turkey	211	188	+12.5	1.2
Ukraine	18	13	+37.4	0.1
Others: Europe ³	86	94	-8.7	0.5
AMERICA	5,550	5,345	+3.8	31.3
North America ⁴	4,369	4,468	-2.2	24.6
<i>of which the United States</i>	3,725	3,816	-2.4	21.0
South America	1,181	877	+34.6	6.7
<i>of which Brazil</i>	566	446	+27.0	3.2
ASIA	8,543	8,527	+0.2	48.1
China	5,377	5,759	-6.6	30.3
Japan	747	758	-1.3	4.2
India	828	600	+37.9	4.7
South Korea	230	245	-6.1	1.3
Others: Asia ⁵	1,361	1,165	+16.8	7.7
MIDDLE EAST/AFRICA	736	617	+19.2	4.1
WORLD	17,745	17,104	+3.7	100.0

SOURCE: ACEA, IHS MARKIT

GLOBAL NEW COMMERCIAL VEHICLE¹ REGISTRATIONS

% share / 2021



**Europe makes up
16% of global
commercial
vehicle sales**



**The EU represents
a market of 11.6
million motor
vehicles**

1. Data for Malta not available

2. Light commercial vehicles up to 3.5t

3. Medium and heavy commercial vehicles over 3.5t

4. Buses and coaches over 3.5t

VEHICLE REGISTRATIONS IN THE EU¹

By country / 2021

	Cars	Vans ²	Trucks ³	Buses ⁴	TOTAL
Austria	239,803	58,806	6,680	887	306,176
Belgium	383,123	71,562	8,179	945	463,809
Bulgaria	24,537	6,659	3,073	203	34,472
Croatia	44,915	7,958	1,284	119	54,276
Cyprus	10,624	1,938	83	20	12,665
Czech Republic	206,876	19,660	8,679	1,006	236,221
Denmark	185,324	31,588	4,389	636	221,937
Estonia	22,336	4,142	772	269	27,519
Finland	98,481	12,893	3,536	382	115,292
France	1,659,003	431,385	45,030	6,857	2,142,275
Germany	2,622,132	265,732	78,981	6,474	2,973,319
Greece	100,916	10,426	568	454	112,364
Hungary	121,920	22,981	4,476	1,010	150,387
Ireland	104,669	28,741	2,272	444	136,126
Italy	1,457,952	183,093	24,807	3,495	1,669,347
Latvia	14,344	2,530	1,392	209	18,475
Lithuania	31,371	3,363	7,976	137	42,847

SOURCE: ACEA



VEHICLE REGISTRATIONS IN THE EU ¹

By country / 2021

	Cars	Vans ²	Trucks ³	Buses ⁴	TOTAL
Luxembourg	44,372	4,560	1,054	167	50,153
Netherlands	322,831	68,443	11,744	338	403,356
Poland	446,647	73,926	32,684	1,356	554,613
Portugal	146,637	28,790	4,264	586	180,277
Romania	121,208	16,168	5,889	715	143,980
Slovakia	75,700	8,252	2,868	529	87,349
Slovenia	53,988	9,687	1,925	98	65,698
Spain	859,477	151,904	20,801	1,877	1,034,059
Sweden	301,006	36,238	5,910	728	343,882
EUROPEAN UNION	9,700,192	1,561,425	289,316	29,941	11,580,874
Iceland	12,755	1,162	274	30	14,221
Norway	176,276	34,070	6,035	1,083	217,464
Switzerland	238,481	29,375	3,565	646	272,067
EFTA	427,512	64,607	9,874	1,759	503,752
United Kingdom	1,647,181	355,380	42,372	4,097	2,049,030
EU + EFTA + UK	11,774,885	1,981,412	341,562	35,797	14,133,656

SOURCE: ACEA

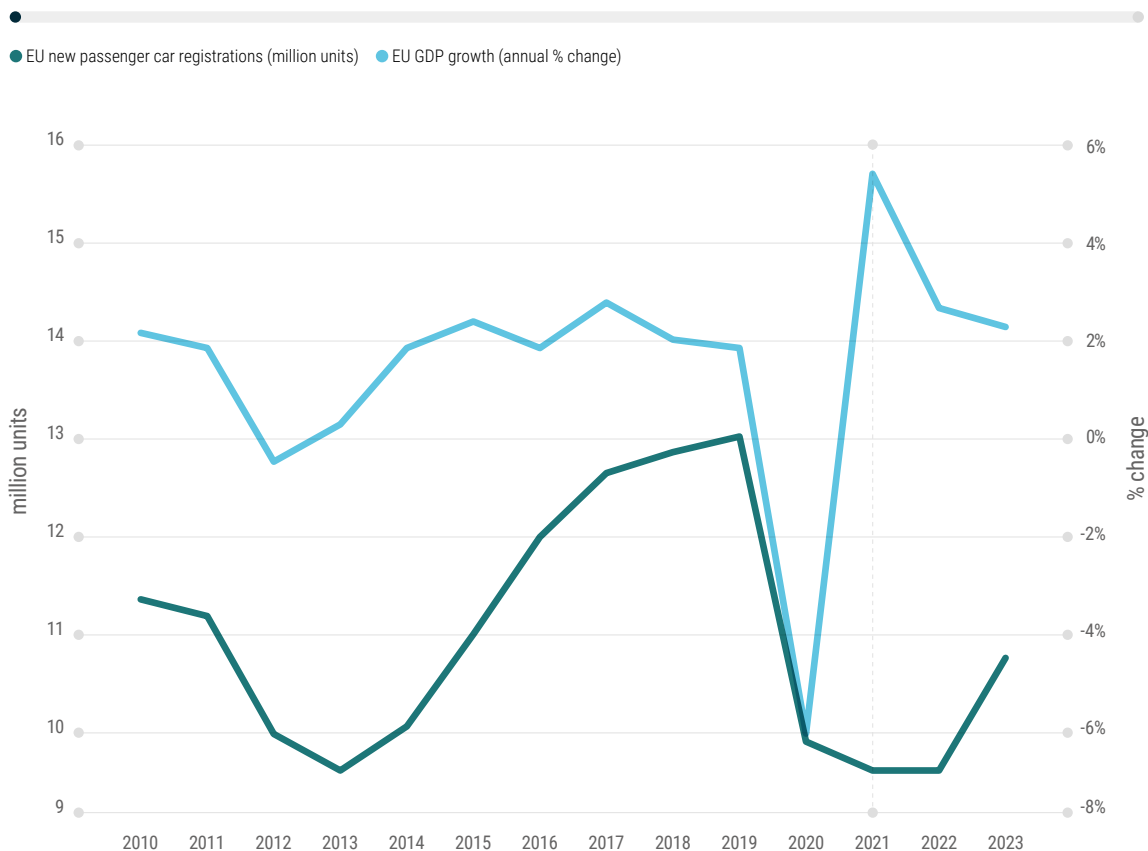
1. Data for Malta not available
2. Light commercial vehicles up to 3.5t
3. Medium and heavy commercial vehicles over 3.5t
4. Buses and coaches over 3.5t



Car sales became
decoupled
from economic
growth in 2021

NEW CAR REGISTRATIONS AND GDP IN THE EU

2010 – 2023



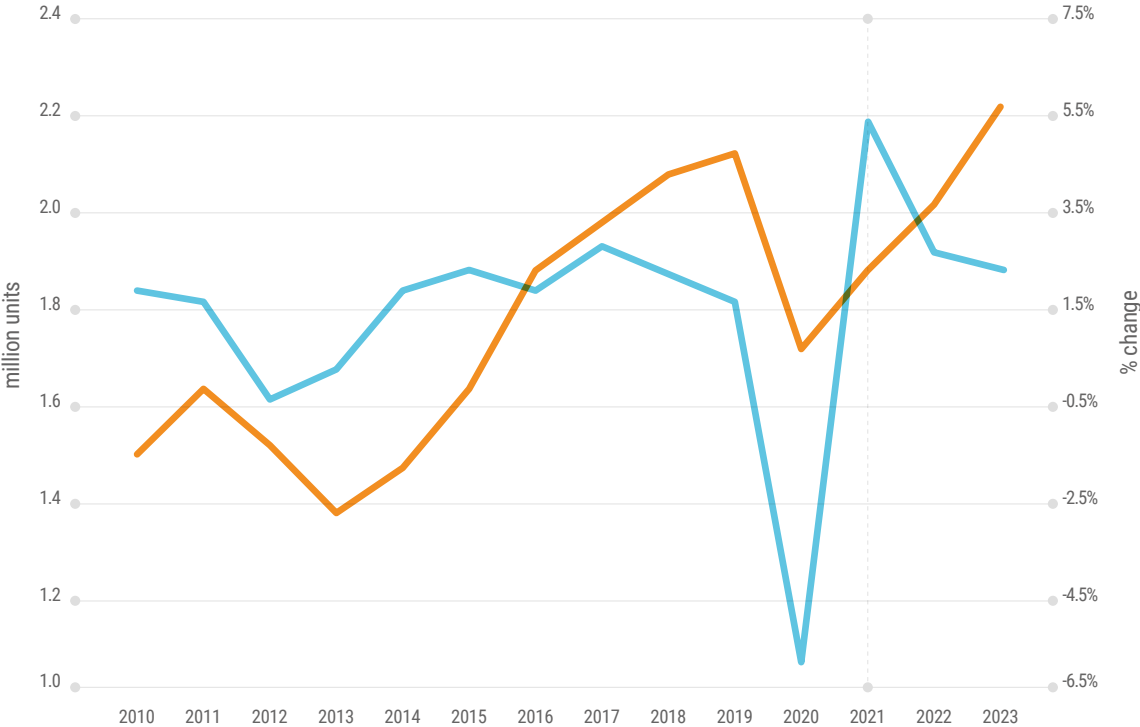
SOURCE: ACEA, DG ECFIN, IHS MARKIT



NEW COMMERCIAL VEHICLE REGISTRATIONS AND GDP IN THE EU

2010 – 2023

● EU new commercial vehicle registrations¹ (million units) ● EU GDP growth (annual % change)



SOURCE: ACEA, DG ECFIN, IHS MARKIT

Commercial vehicle sales mirror economic growth and decline

1. Includes light, medium and heavy commercial vehicles, and buses and coaches

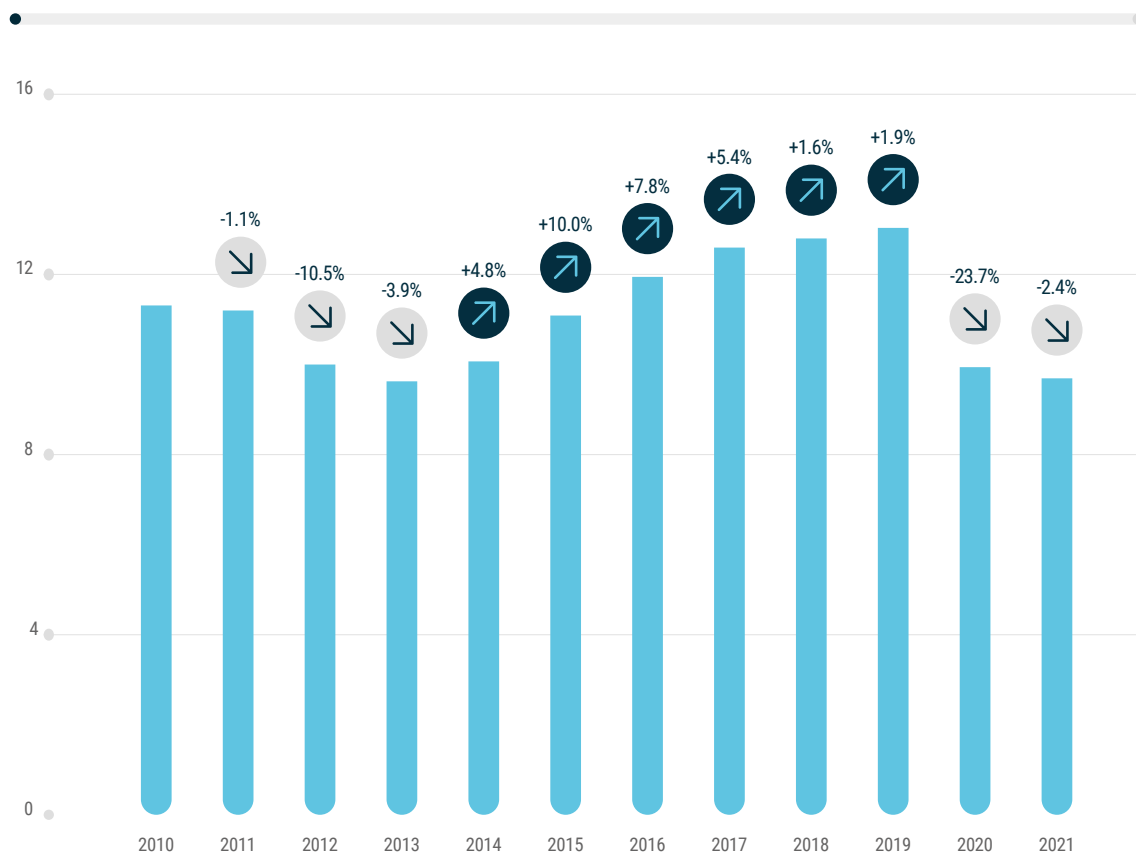


REGISTRATIONS

**EU car sales
fell by a further
2.4% in 2021**

NEW CAR REGISTRATIONS IN THE EU

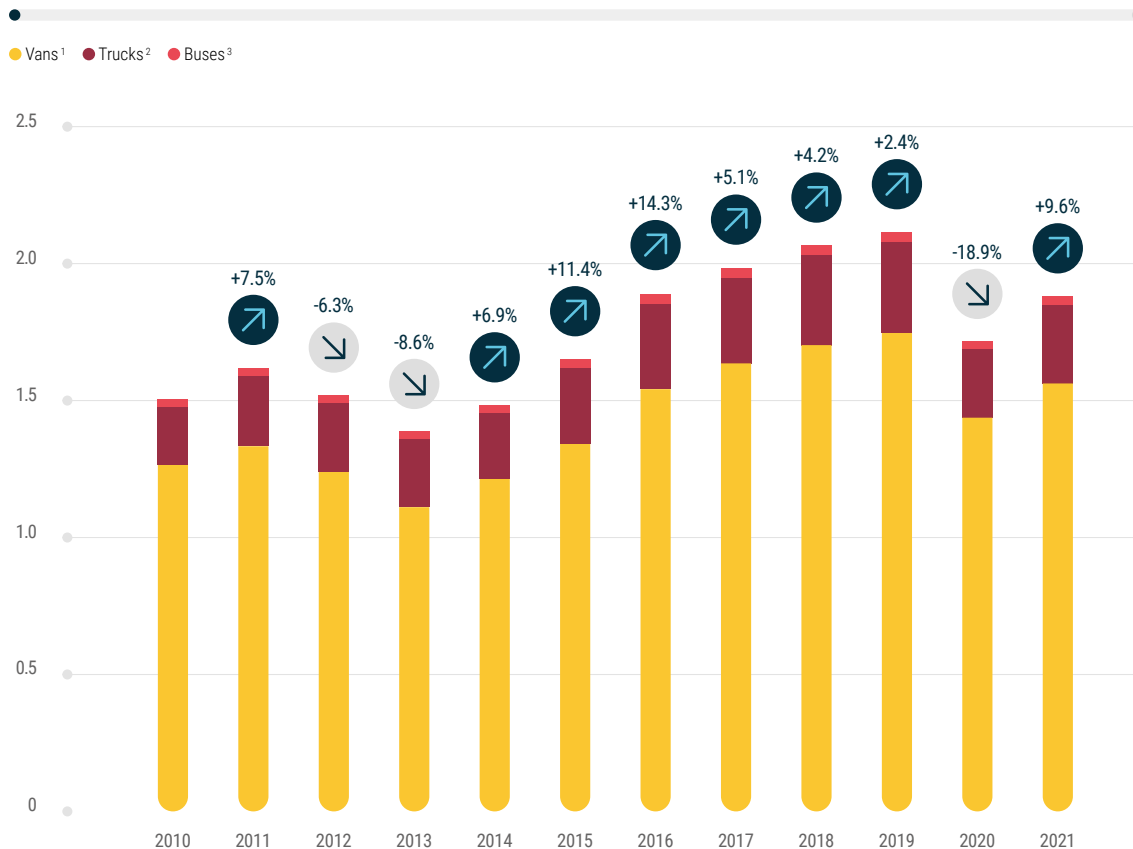
In million units, % change / 2010 – 2021



SOURCE: ACEA

NEW COMMERCIAL VEHICLE REGISTRATIONS IN THE EU

In million units, % change / 2010 – 2021



SOURCE: ACEA

REGISTRATIONS



EU commercial vehicle sales recovered by almost 10% in 2021

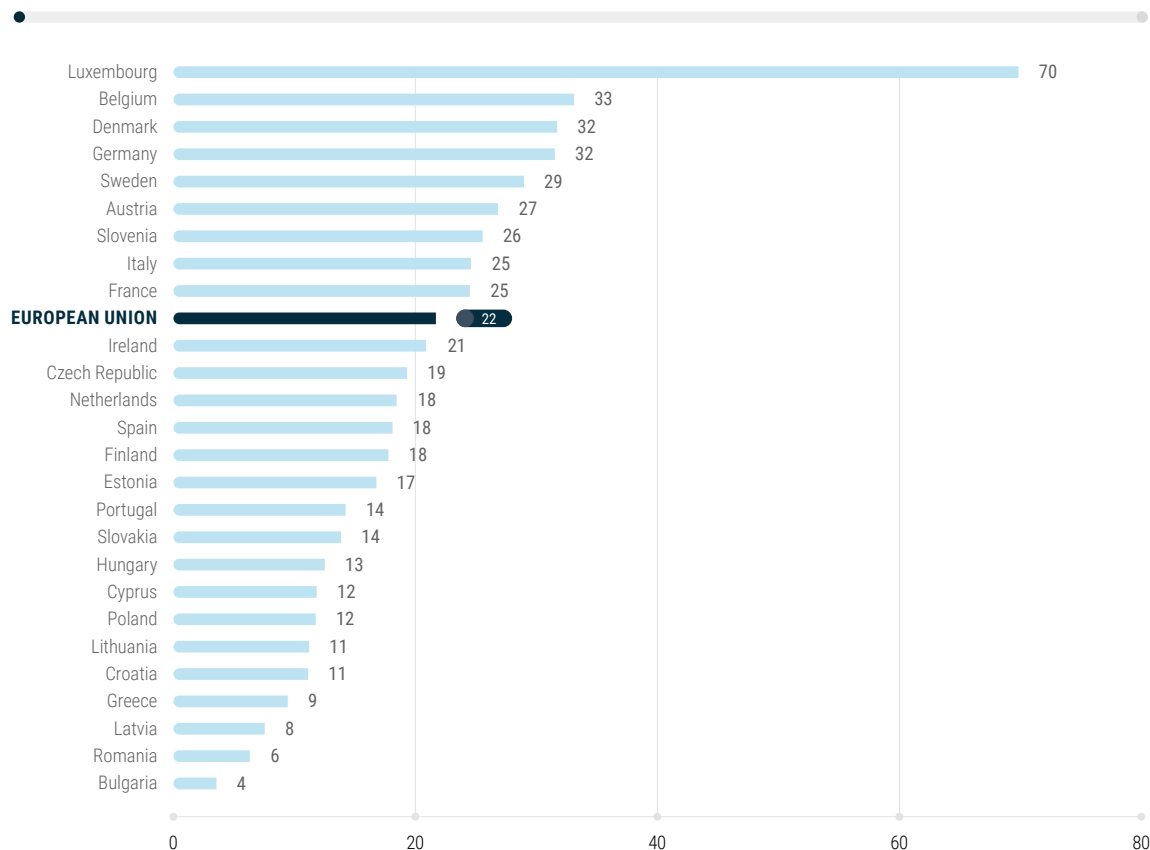
- 1. Light commercial vehicles up to 3.5t
- 2. Commercial vehicles over 3.5t
- 3. Buses and coaches over 3.5t



Two cars are sold
for every 100
EU inhabitants
annually

NEW CARS PER 1,000 INHABITANTS

By country, in units / 2021

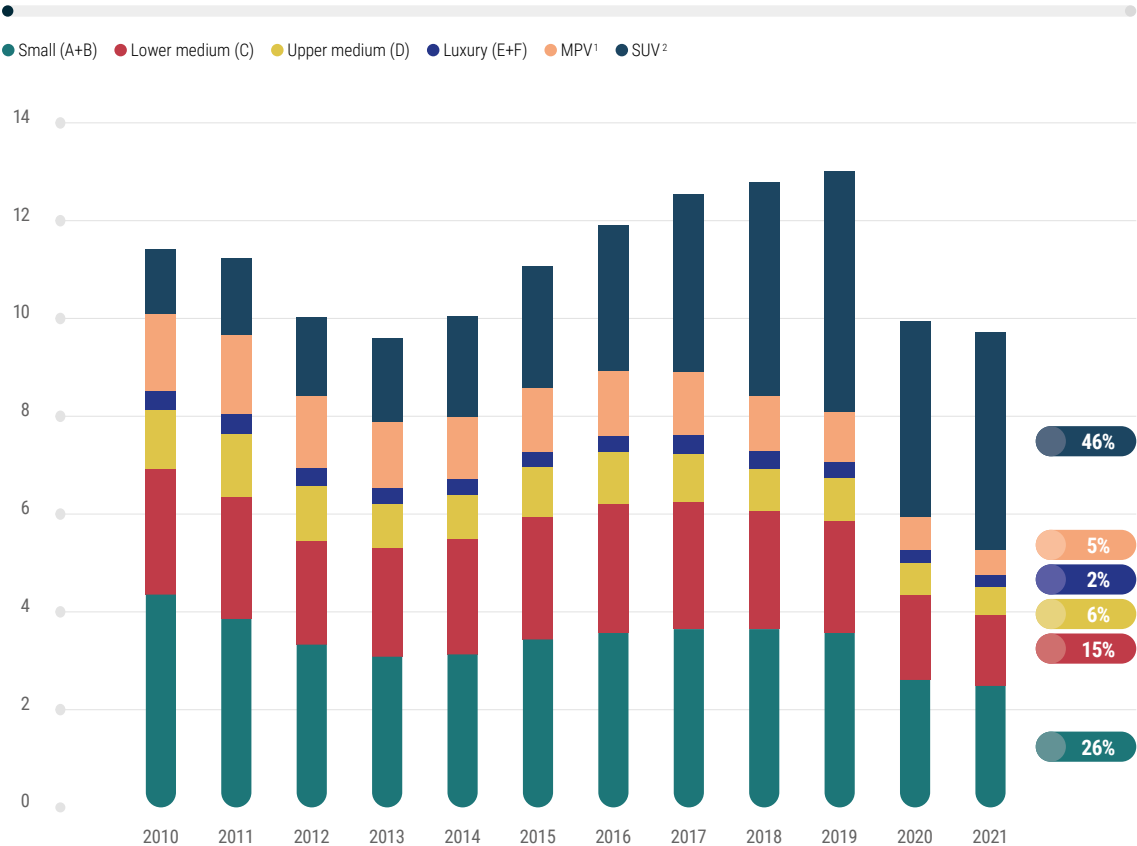


SOURCE: ACEA, EUROSTAT



NEW CARS IN THE EU BY SEGMENT

In million units, % share / 2010 – 2021



SOURCE: IHS MARKIT

Small and medium cars combined account for almost half of EU car sales

1. Multi-purpose vehicles
2. Sport utility vehicles



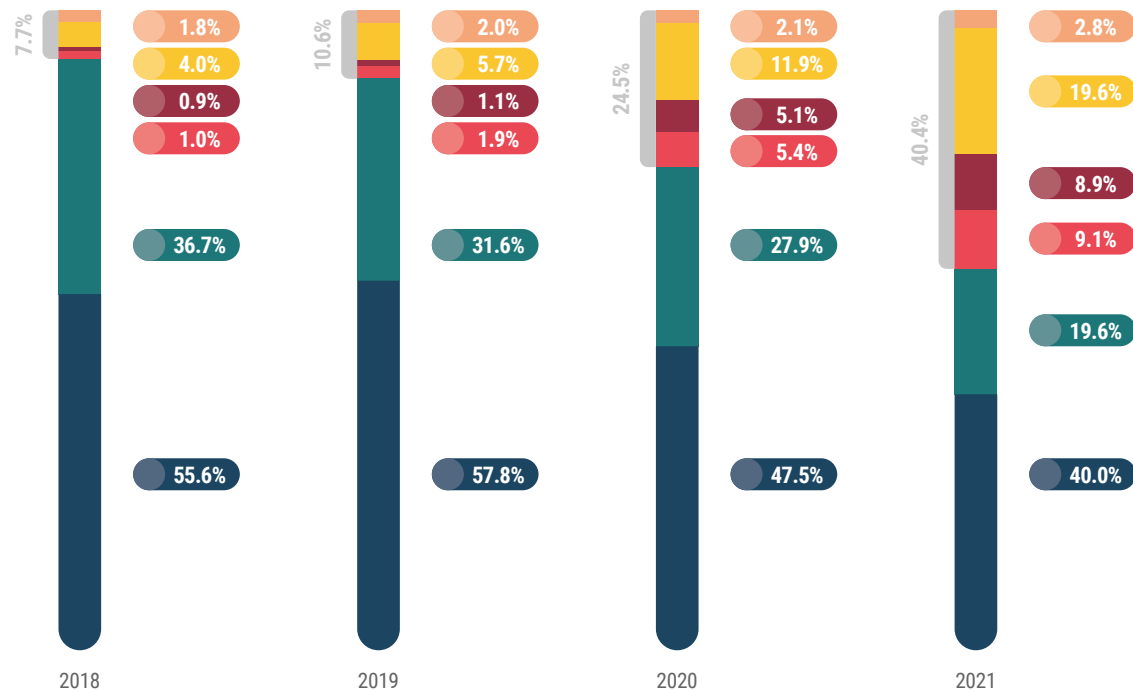
REGISTRATIONS

18% of all new cars sold in the EU in 2021 had a plug

NEW CARS IN THE EU¹ BY FUEL TYPE

Market share / 2018 – 2021

● Petrol ● Diesel ● Battery electric² ● Plug-in hybrid³ ● Hybrid electric⁴ ● Alternative fuels⁵ ● Total alternatively-powered vehicles



1. Data for Bulgaria and Malta not available

2. Includes fuel cell electric vehicles

3. Includes extended-range electric vehicle

4. Includes full and mild hybrids

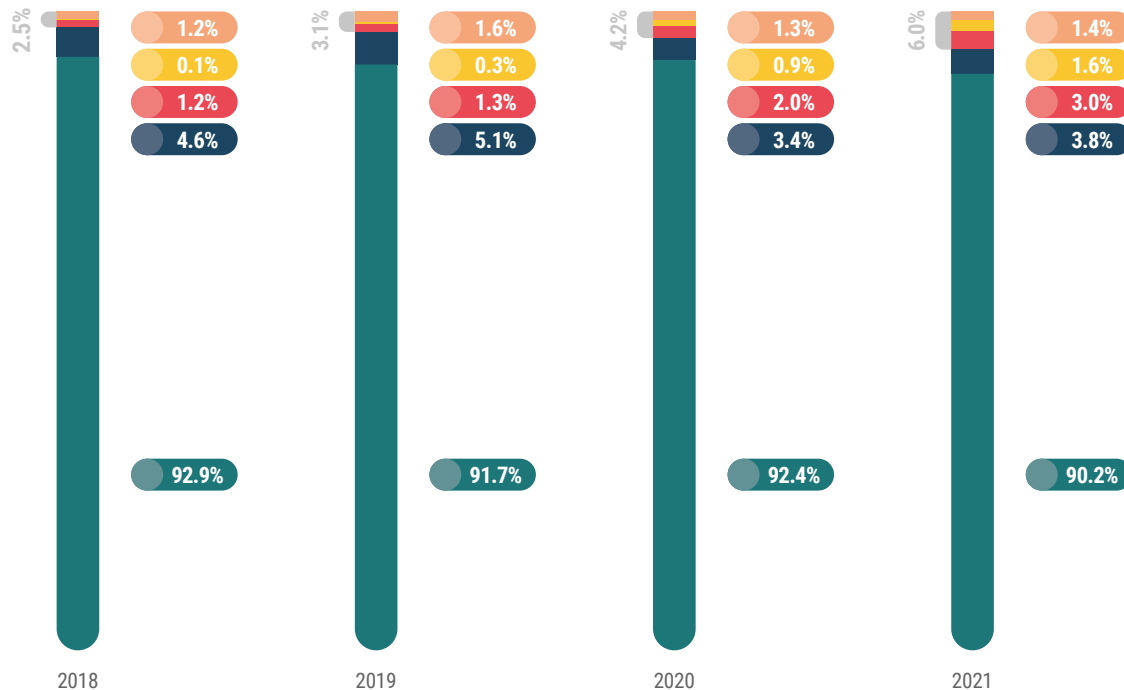
5. Includes natural gas, LPG and ethanol vehicles



NEW VANS¹ IN THE EU² BY FUEL TYPE

Market share / 2018 – 2021

● Diesel ● Petrol ● Electrically-chargeable ● Hybrid electric ● Alternative fuels ● Total alternatively-powered vehicles



SOURCE: ACEA

3% of all new EU vans are electrically-chargeable

1. Light commercial vehicles up to 3.5t

2. Data for Bulgaria, Lithuania and Malta not available



96% of trucks sold in the EU are fuelled by diesel

NEW TRUCKS¹ IN THE EU² BY FUEL TYPE

Market share / 2018 – 2021

● Diesel ● Petrol ● Electrically-chargeable ● Hybrid electric ● Alternative fuels ● Total alternatively-powered vehicles



1. Commercial vehicles over 3.5t

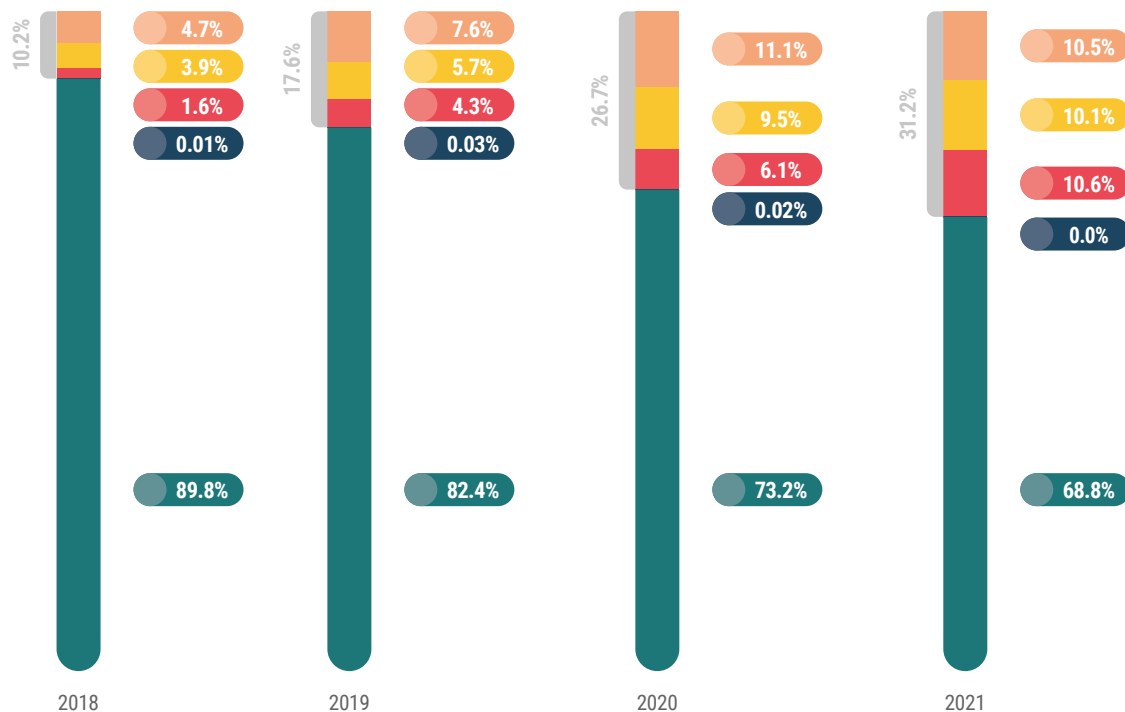
2. Data for Bulgaria, Lithuania and Malta not available



NEW BUSES¹ IN THE EU² BY FUEL TYPE

Market share / 2018 – 2021

● Diesel ● Petrol ● Electrically-chargeable ● Hybrid electric ● Alternative fuels ● Total alternatively-powered vehicles



SOURCE: ACEA

Alternatively-powered buses make up almost a third of the market

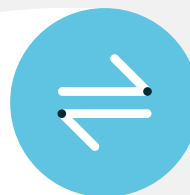
1. Buses and coaches over 3.5t

2. Data for Bulgaria, Lithuania and Malta not available



TRADE

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2022/2023





The auto industry
generates an
annual trade
surplus of €79.5
billion for the EU

EU VEHICLE TRADE

By type, in million € / 2021

Trade in value	Cars ¹	Vans ²	Trucks & buses ³	TOTAL
2021				
Imports	53,344	5,117	2,054	60,514
Exports	126,854	6,699	6,427	139,981
Trade balance	73, 511	1,583	4,373	79,467
2020				
Imports	51,597	4,123	2,302	58,022
Exports	121,144	6,227	6,613	133,985
Trade balance	69,547	2,104	4,311	75,962
% change 21/20				
Imports	+3.4 %	+24.1 %	-10.8 %	+4.3 %
Exports	+4.7 %	+7.6 %	-2.8 %	+4.5 %
Trade balance	+5.7 %	-24.8 %	+1.4 %	+4.6 %

1. Passenger cars

2. Commercial vehicles up to 5t

3. Commercial vehicles over 5t, including buses
and coaches



EU VEHICLE TRADE

By type, in units / 2021

Trade in volume	Cars ¹	Vans ²	Trucks & buses ³	TOTAL
2021				
Imports	3,097,550	329,756	137,436	3,564,742
Exports	5,078,894	481,155	187,014	5,747,063
2020				
Imports	3,057,873	266,814	393,015	3,717,702
Exports	5,102,708	419,958	188,418	5,711,084
% change 21/20				
Imports	+1.3 %	+23.6 %	-65.0 %	-4.1 %
Exports	-0.5 %	+14.6 %	-0.7 %	+0.6 %

The trade surplus generated by the EU auto industry grew by almost 5% in 2021

1. Passenger cars

2. Commercial vehicles up to 5t

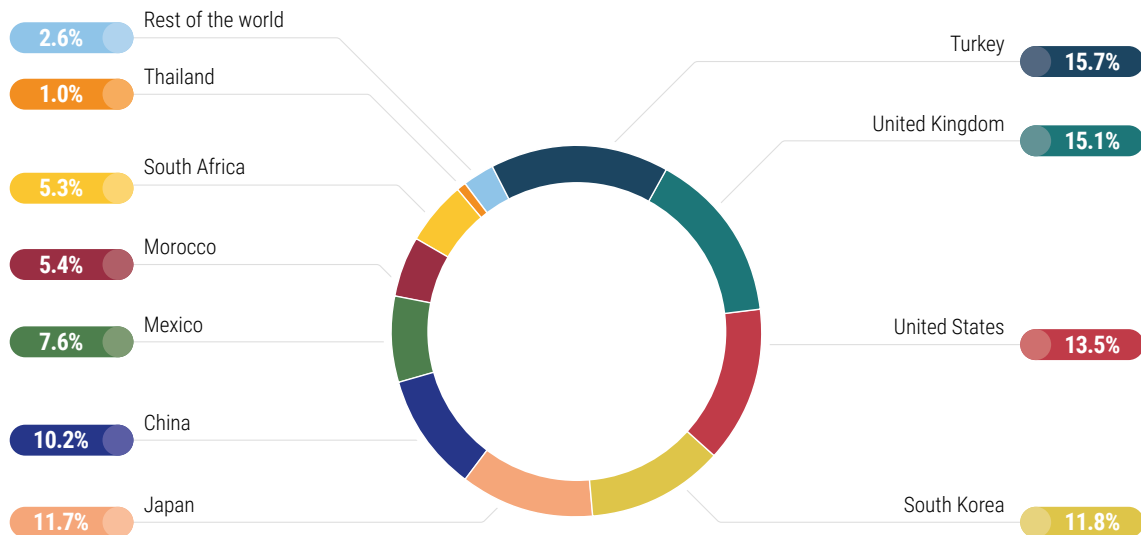
3. Commercial vehicles over 5t, including buses and coaches



The value of EU
vehicle imports
grew by over
4% in 2021

COUNTRIES OF ORIGIN OF EU VEHICLE IMPORTS

Value market share / 2021





MAIN COUNTRIES OF ORIGIN OF EU VEHICLE IMPORTS

By value, in million € / 2021

	2016	2017	2018	2019	2020	2021	% change 21/20	% share 2021
Turkey	10,489	12,237	12,694	13,022	9,775	9,489	-2.9	15.7
United Kingdom	16,780	16,097	15,128	14,111	9,997	9,126	-8.7	15.1
United States	7,246	6,529	5,550	9,510	10,571	8,191	-22.5	13.5
South Korea	3,452	5,200	5,804	6,576	5,519	7,111	+28.8	11.8
Japan	7,857	8,348	8,808	10,737	8,136	7,098	-12.8	11.7
China	229	405	479	864	2,020	6,195	+206.6	10.2
Mexico	2,153	4,622	5,214	5,006	4,141	4,617	+11.5	7.6
Morocco	1,623	1,974	2,357	2,542	2,362	3,270	+38.4	5.4
South Africa	3,332	3,586	4,422	5,669	3,486	3,212	-7.9	5.3
Thailand	858	863	711	782	443	634	+43.0	1.0
WORLD	57,320	63,226	63,833	71,260	58,022	60,514	+4.3	100.0

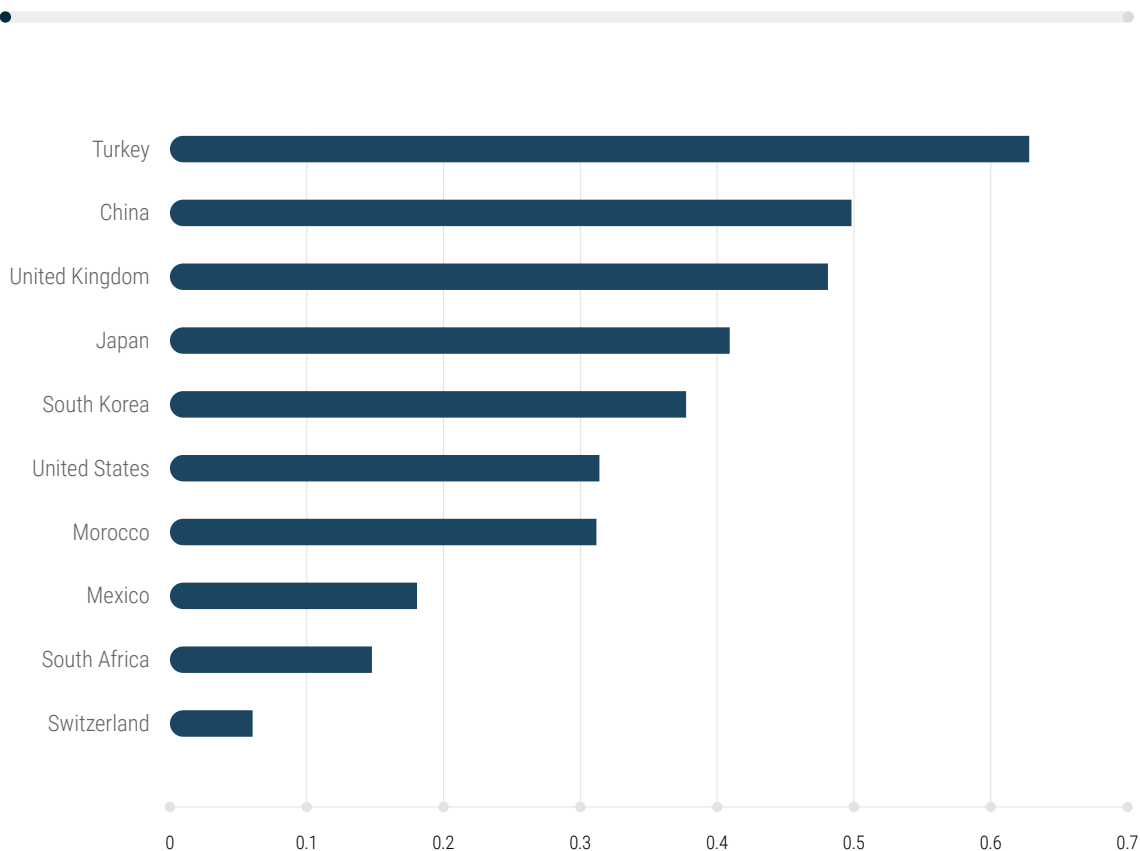
**The EU imported
€60.5 billion
worth of vehicles
in 2021**



**3.6 million
vehicles were
imported into
the EU in 2021**

MAIN COUNTRIES OF ORIGIN OF EU VEHICLE IMPORTS

In million units / 2021



SOURCE: EUROSTAT



MAIN COUNTRIES OF ORIGIN OF EU VEHICLE IMPORTS

In units / 2021

Import volumes
fell by 4% in 2021

	2016	2017	2018	2019	2020	2021	% change 21/20	% share 2021
Turkey	860,478	974,269	971,148	929,834	654,486	628,529	-4.0	17.6
China	73,661	113,658	157,428	154,400	196,476	498,830	+153.9	14.0
United Kingdom	1,225,657	952,151	918,899	955,323	876,226	481,134	-45.1	13.5
Japan	491,779	553,948	583,057	676,032	486,100	409,542	-15.7	11.5
South Korea	295,551	412,882	436,693	443,441	318,931	377,669	+18.4	10.6
United States	258,883	248,460	265,827	355,766	394,643	314,112	-20.4	8.8
Morocco	201,189	246,664	293,959	306,518	258,402	311,850	+20.7	8.7
Mexico	134,875	230,755	265,680	222,463	173,754	180,827	+4.1	5.1
South Africa	174,743	172,252	210,842	267,755	173,578	147,830	-14.8	4.1
Switzerland	67,714	71,508	73,085	65,099	54,168	60,391	+11.5	1.7
WORLD	4,123,915	4,318,539	4,468,412	4,619,698	3,717,702	3,564,742	-4.1	100.0

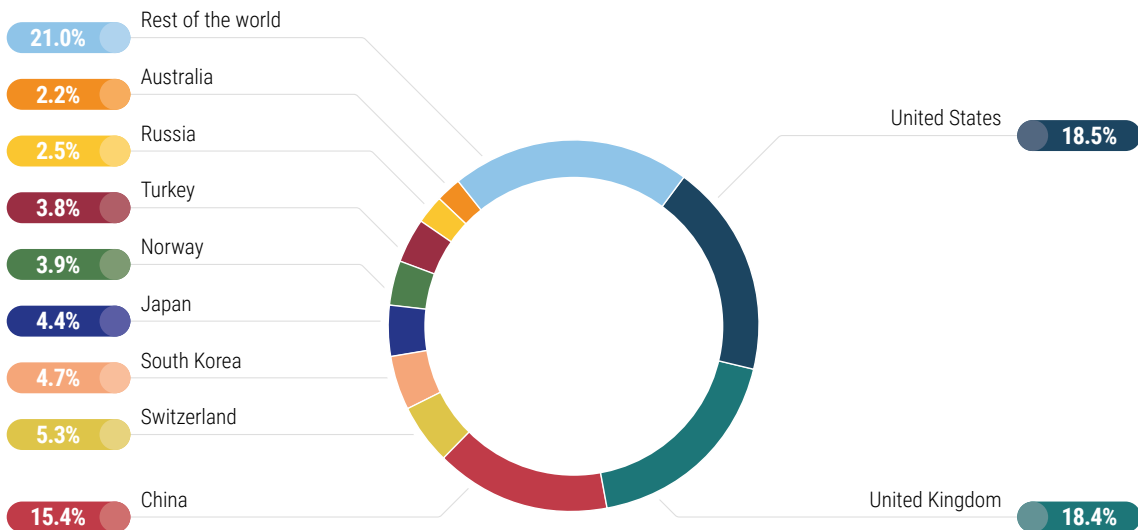
SOURCE: EUROSTAT



The US and the UK are the two most valuable markets for EU vehicle exports

DESTINATIONS FOR EU VEHICLE EXPORTS

Value market share / 2021





MAIN DESTINATIONS FOR EU VEHICLE EXPORTS

By value, in million € / 2021

	2016	2017	2018	2019	2020	2021	% change 21/20	% share 2021
United States	30,473	31,297	29,659	29,195	23,961	25,918	+8.2	18.5
United Kingdom	46,251	42,295	39,993	41,711	32,036	25,724	-19.7	18.4
China	15,742	17,844	18,927	19,369	19,038	21,492	+12.9	15.4
Switzerland	7,807	7,969	7,651	8,088	7,271	7,424	+2.1	5.3
South Korea	5,561	6,034	6,290	5,927	7,067	6,639	-6.1	4.7
Japan	6,445	7,187	7,215	7,073	5,670	6,109	+7.7	4.4
Norway	4,010	4,539	4,343	4,712	4,100	5,397	+31.6	3.9
Turkey	7,980	6,992	4,415	2,949	6,512	5,296	-18.7	3.8
Russia	2,627	2,982	3,205	3,614	2,477	3,503	+41.4	2.5
Australia	4,239	4,284	4,233	3,450	2,458	3,075	+25.1	2.2
WORLD	159,947	162,297	155,933	156,452	133,985	139,981	+4.5	100.0

SOURCE: EUROSTAT

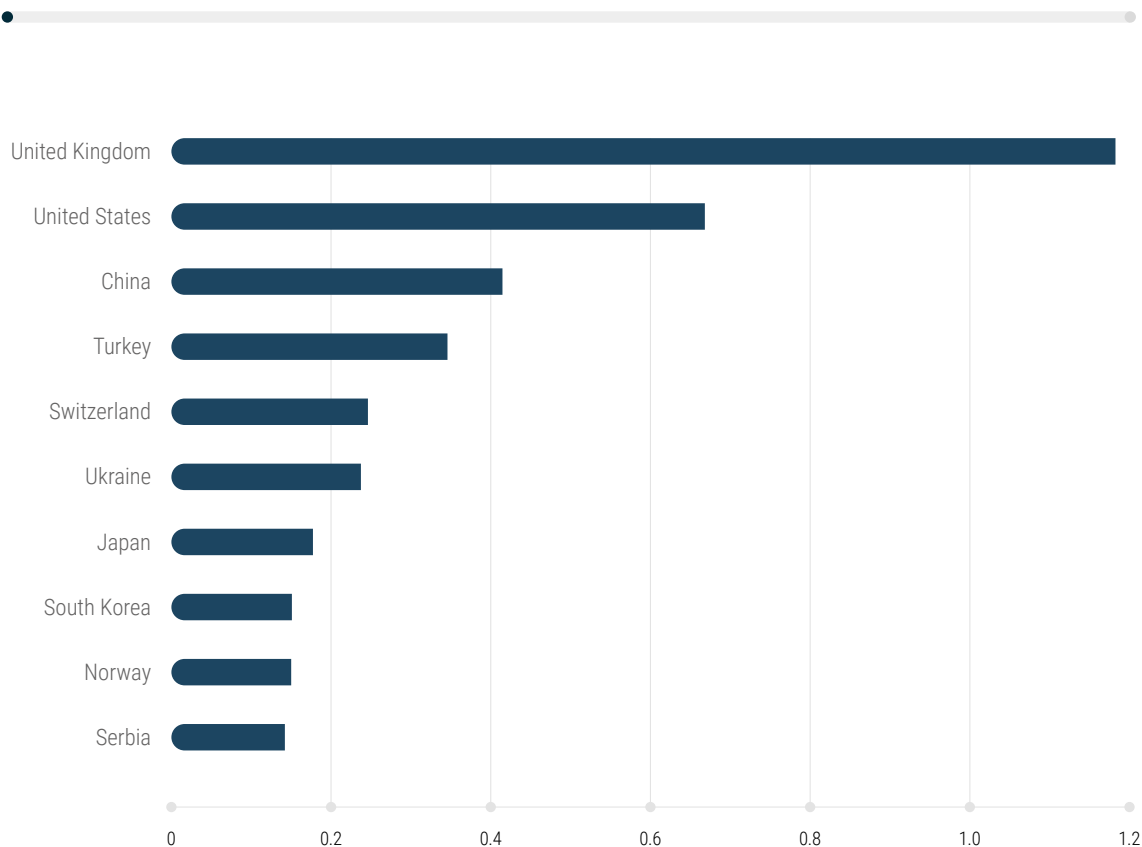
**EU vehicle exports
brought in €140
billion in 2021**



**20% of EU
vehicle exports
go to the UK**

MAIN DESTINATIONS FOR EU VEHICLE EXPORTS

In million units / 2021



SOURCE: EUROSTAT



MAIN DESTINATIONS FOR EU VEHICLE EXPORTS

In units / 2021

	2016	2017	2018	2019	2020	2021	% change 21/20	% share 2021
United Kingdom	2,606,695	2,304,480	2,157,010	2,163,900	1,489,978	1,181,398	-20.7	20.6
United States	969,083	965,929	933,491	827,616	702,599	666,988	-5.1	11.6
China	400,997	472,592	473,201	412,044	405,596	414,534	+2.2	7.2
Turkey	541,079	486,403	282,166	199,699	407,283	346,556	-14.9	6.0
Switzerland	304,267	294,394	283,619	312,820	233,118	245,575	+5.3	4.3
Ukraine	72,540	112,552	109,260	178,979	218,987	236,889	+8.2	4.1
Japan	217,963	240,441	241,704	227,274	171,230	177,389	+3.6	3.1
South Korea	160,014	169,021	169,828	162,494	193,397	150,847	-22.0	2.6
Norway	157,747	164,611	207,255	164,819	125,391	150,388	+19.9	2.6
Serbia	129,506	131,193	155,509	150,696	134,669	142,276	+5.6	2.5
WORLD	7,639,058	7,448,598	7,240,219	6,979,463	5,711,084	5,747,063	+0.6	100.0

SOURCE: EUROSTAT

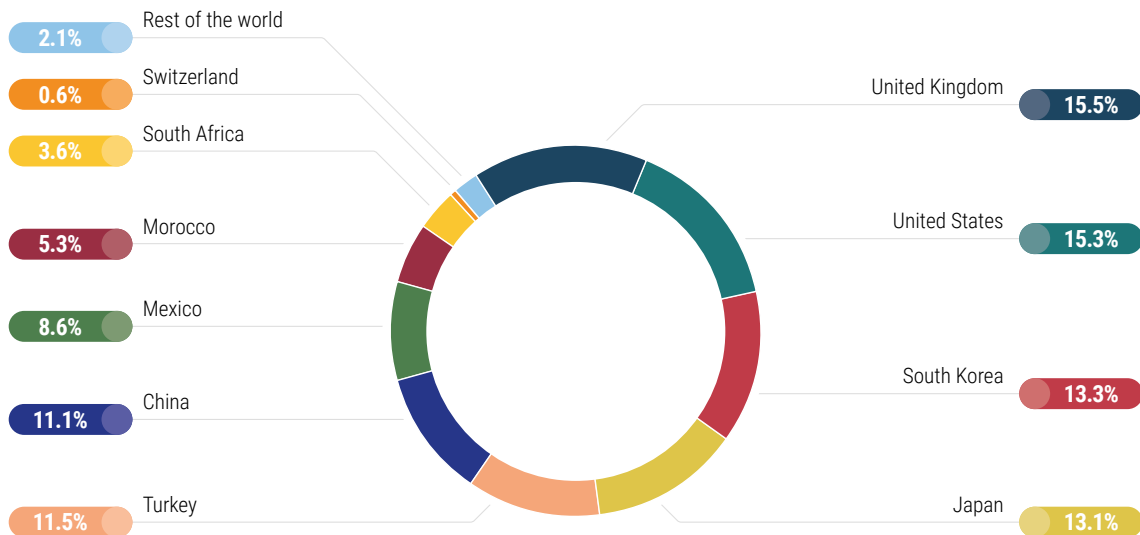
**5.7 million EU
vehicles were
exported globally
in 2021**



The UK and the US
account for the
highest import
value for cars

COUNTRIES OF ORIGIN OF EU CAR IMPORTS

Value market share / 2021





MAIN COUNTRIES OF ORIGIN OF EU CAR IMPORTS

By value, in million € / 2021

	2016	2017	2018	2019	2020	2021	% change 21/20	% share 2021
United Kingdom	15,885	15,214	14,206	13,269	9,314	8,249	-11.4	15.5
United States	7,202	6,380	5,450	9,435	10,480	8,144	-22.3	15.3
South Korea	3,439	5,186	5,789	6,549	5,511	7,105	+28.9	13.3
Japan	7,817	8,319	8,786	10,715	8,112	7,004	-13.7	13.1
Turkey	5,672	7,900	8,147	8,283	6,330	6,138	-3.0	11.5
China	103	329	393	717	1,766	5,905	+234.3	11.1
Mexico	2,141	4,600	5,179	4,962	4,109	4,590	+11.7	8.6
Morocco	1,428	1,773	2,124	2,308	2,191	2,839	+29.6	5.3
South Africa	2,808	2,930	3,631	4,556	2,380	1,918	-19.4	3.6
Switzerland	280	284	297	293	271	325	+19.8	0.6
WORLD	49,681	55,708	56,096	63,080	51,597	53,344	+3.4	100.0

SOURCE: EUROSTAT

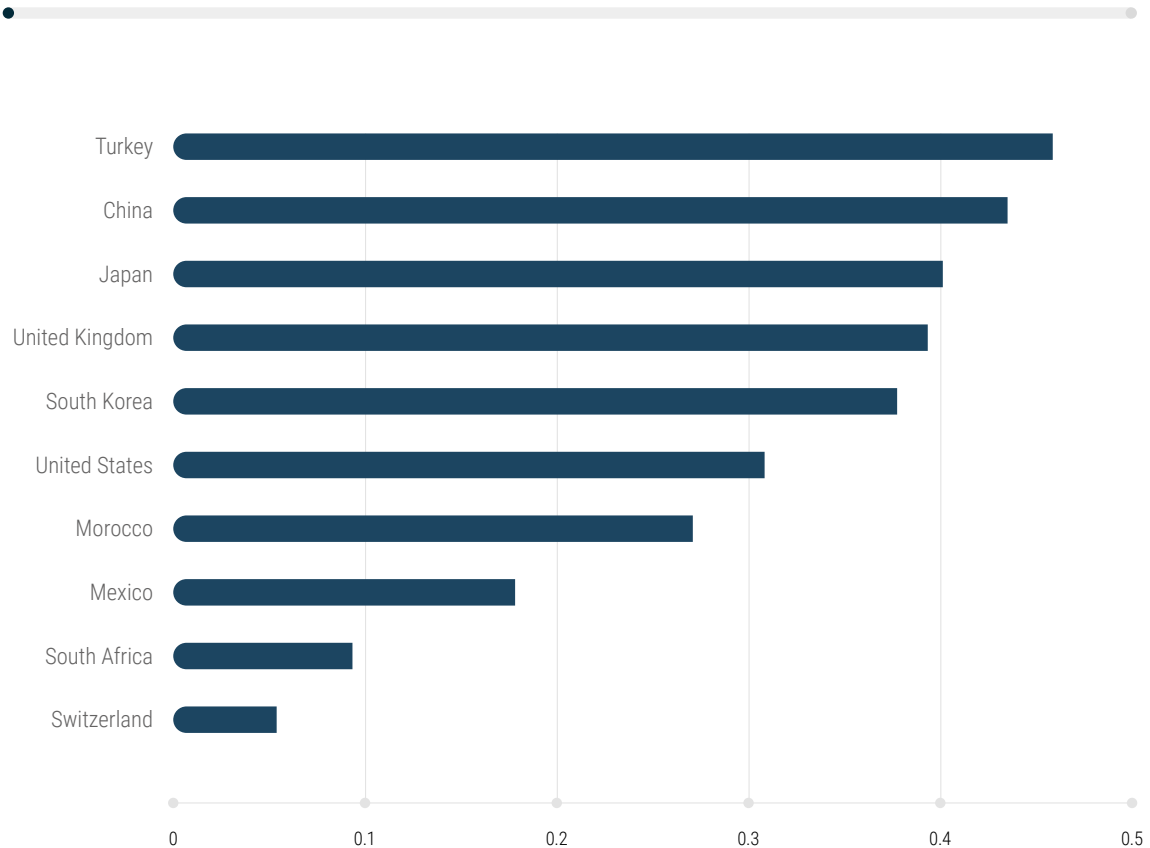
**In 2021,
the value of EU
car imports stood
at €53 billion**



The EU imported
3.1 million cars
in 2021

MAIN COUNTRIES OF ORIGIN OF EU CAR IMPORTS

In million units / 2021



SOURCE: EUROSTAT



MAIN COUNTRIES OF ORIGIN OF EU CAR IMPORTS

In units / 2021

	2016	2017	2018	2019	2020	2021	% change 21/20	% share 2021
Turkey	569,756	718,163	714,895	701,111	494,081	458,769	-7.1	14.8
China	60,954	99,854	133,280	133,465	169,803	435,080	+156.2	14.0
Japan	489,473	552,017	581,385	674,336	484,358	401,276	-17.2	13.0
United Kingdom	1,170,174	901,298	841,402	700,371	507,383	393,410	-22.5	12.7
South Korea	294,623	411,952	435,814	441,870	318,493	377,404	+18.5	12.2
United States	253,205	239,786	256,411	349,089	387,720	308,506	-20.4	10.0
Morocco	179,959	222,965	266,276	280,731	240,488	270,977	+12.7	8.7
Mexico	133,601	228,668	262,147	218,077	170,600	178,267	+4.5	5.8
South Africa	148,521	140,966	172,407	213,198	124,892	93,483	-25.1	3.0
Switzerland	60,965	64,113	65,877	58,514	48,052	53,966	+12.3	1.7
WORLD	3,659,905	3,865,048	3,963,023	3,973,903	3,057,873	3,097,550	+1.3	100.0

SOURCE: EUROSTAT

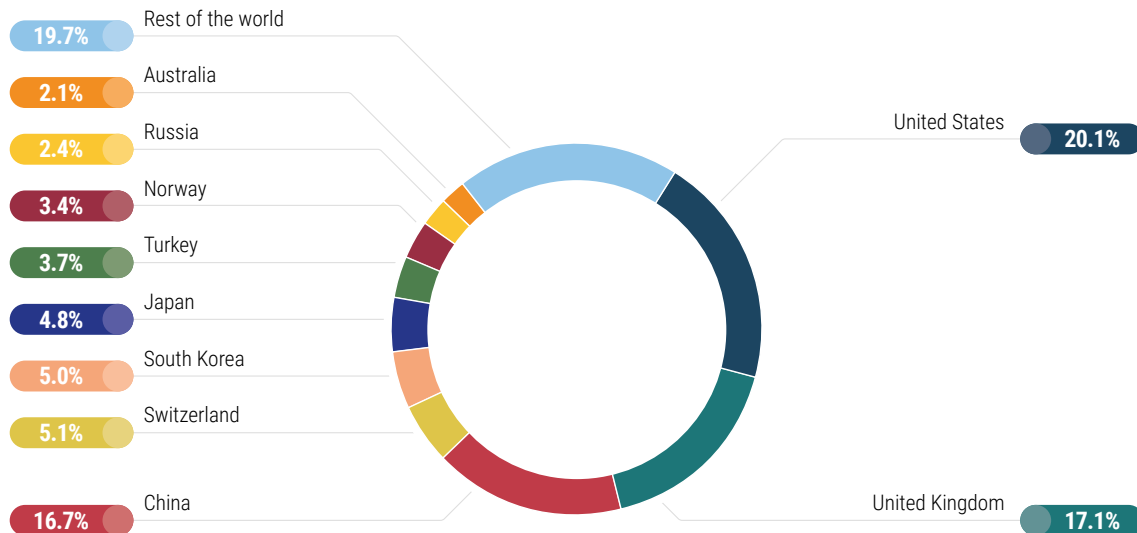
**Car imports
remained stable in
2021**



The US is the most
valuable car
export market

DESTINATIONS FOR EU CAR EXPORTS

Value market share / 2021





MAIN DESTINATIONS FOR EU CAR EXPORTS

By value, in million € / 2021

	2016	2017	2018	2019	2020	2021	% change 21/20	% share 2021
United States	29,915	30,664	29,010	28,727	23,372	25,508	+9.1	20.1
United Kingdom	41,039	37,854	35,516	36,458	28,106	21,727	-22.7	17.1
China	15,522	17,526	18,338	18,632	18,178	21,172	+16.5	16.7
Switzerland	6,872	6,973	6,601	6,990	6,278	6,408	+2.1	5.1
South Korea	5,027	5,508	5,899	5,679	6,829	6,350	-7.0	5.0
Japan	6,425	7,170	7,189	7,040	5,630	6,091	+8.2	4.8
Turkey	7,082	5,990	3,875	2,581	5,953	4,655	-21.8	3.7
Norway	2,995	3,472	3,297	3,196	3,112	4,307	+38.4	3.4
Russia	2,347	2,499	2,780	3,145	2,145	3,026	+41.1	2.4
Australia	3,690	3,586	3,284	2,804	2,074	2,610	+25.9	2.1
WORLD	144,651	147,426	141,008	140,265	121,144	126,854	+4.7	100.0

SOURCE: EUROSTAT

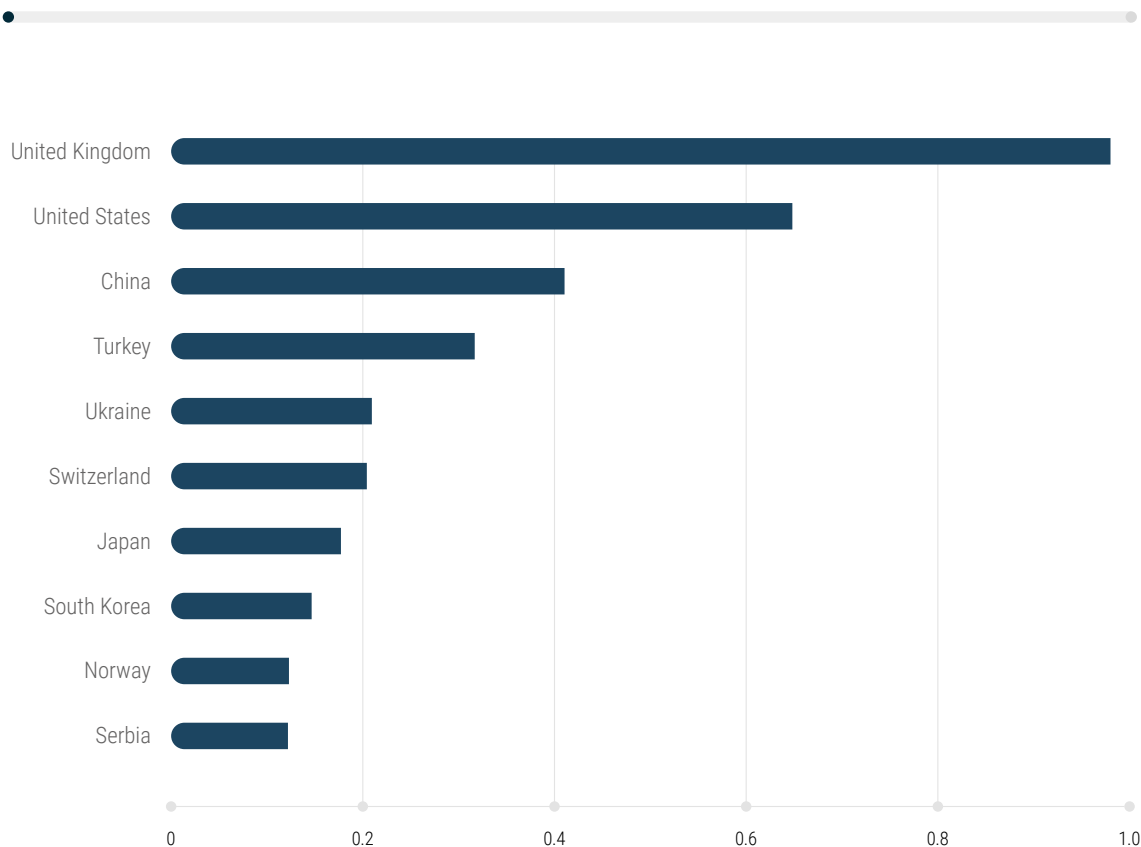
**EU car exports
are worth €127
billion**



One fifth of all
EU car exports
go to the UK

MAIN DESTINATIONS FOR EU CAR EXPORTS

In million units / 2021



SOURCE: EUROSTAT



MAIN DESTINATIONS FOR EU CAR EXPORTS

In units / 2021

	2016	2017	2018	2019	2020	2021	% change 21/20	% share 2021
United Kingdom	2,229,987	2,077,829	1,922,532	1,865,157	1,308,089	980,362	-25.1	19.3
United States	958,389	952,965	919,264	819,653	684,393	648,127	-5.3	12.8
China	397,420	467,684	465,177	402,883	395,340	410,917	+3.9	8.1
Turkey	490,463	430,025	258,328	184,401	379,956	317,128	-16.5	6.2
Ukraine	50,530	88,856	86,061	149,384	195,353	209,733	+7.4	4.1
Switzerland	271,546	265,898	252,446	249,754	205,643	204,444	-0.6	4.0
Japan	217,801	240,269	241,395	227,019	170,777	177,224	+3.8	3.5
South Korea	154,043	163,182	164,978	155,776	187,698	146,515	-21.9	2.9
Norway	129,918	131,917	124,356	111,772	98,677	122,860	+24.5	2.4
Serbia	115,560	117,438	137,970	130,399	122,482	122,001	-0.4	2.4
WORLD	6,811,656	6,768,781	6,444,182	6,154,663	5,102,708	5,078,894	-0.5	100.0

SOURCE: EUROSTAT

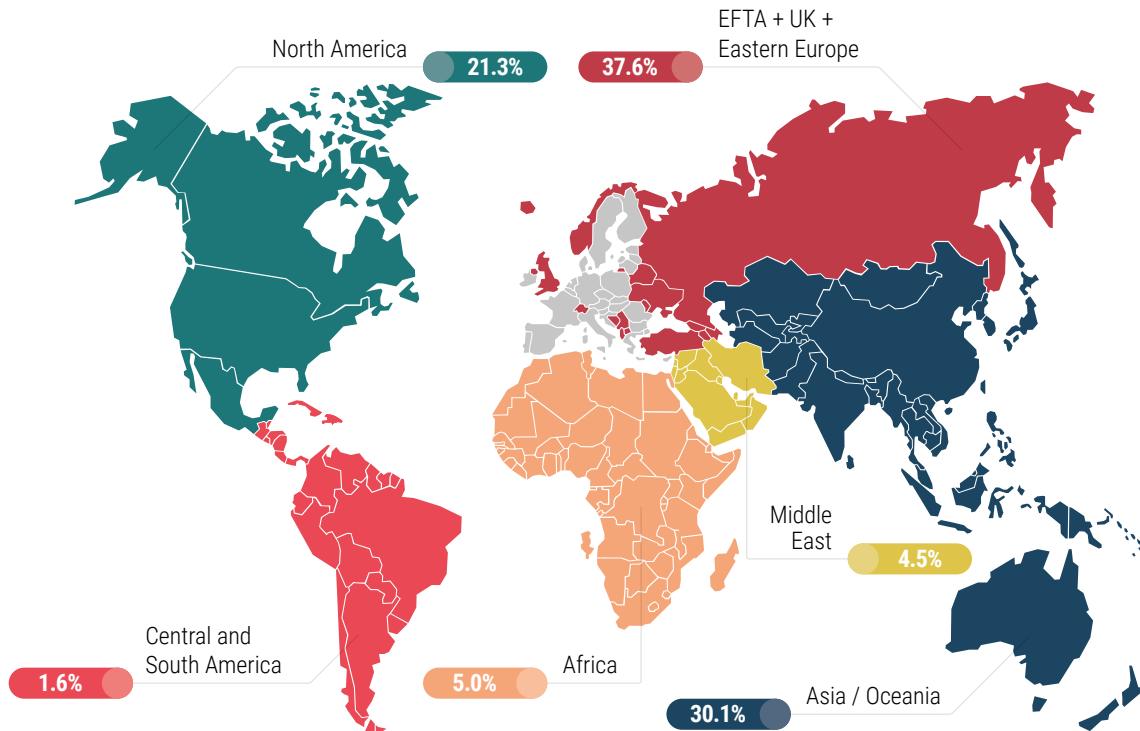
**5.1 million cars
were exported by
the EU in 2021**



The automotive industry puts the EU firmly on the global map

MAIN DESTINATIONS FOR EU VEHICLE EXPORTS

Value market share / 2021





VEHICLES IN USE

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2022/2023

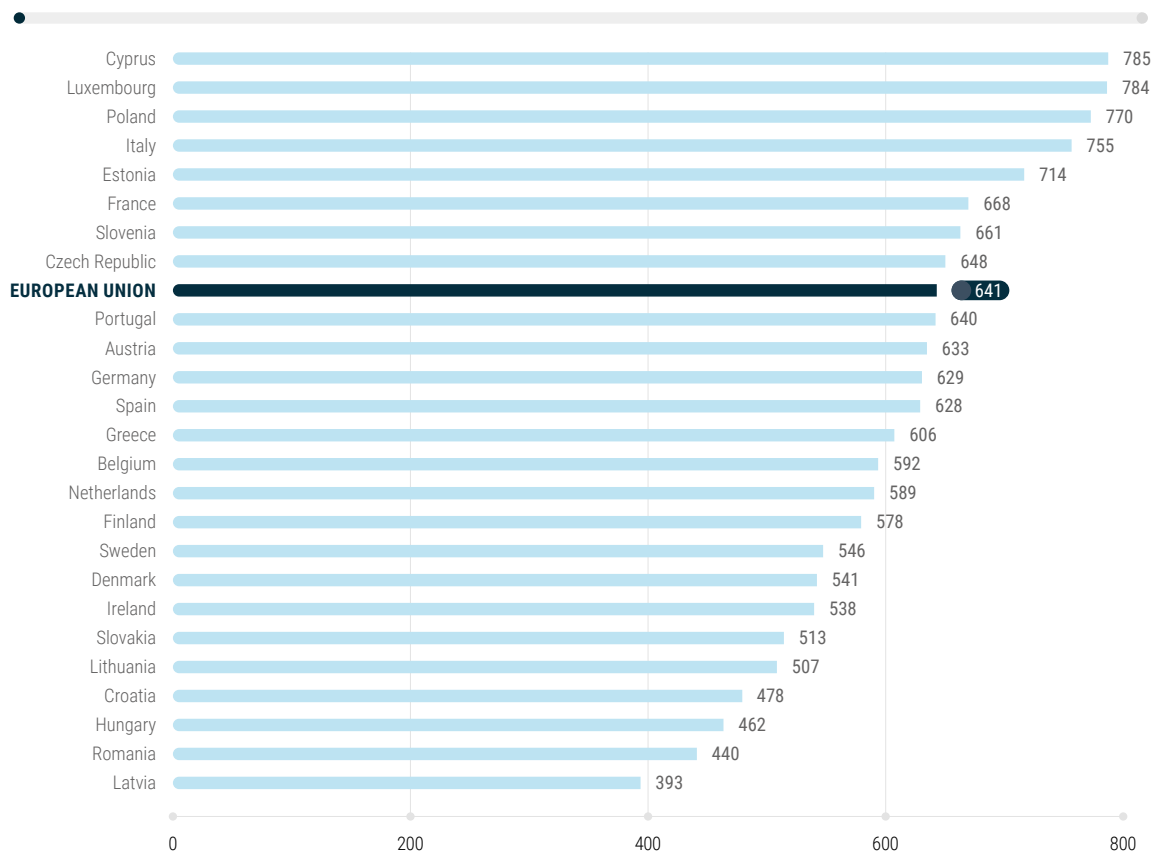




There are
64 vehicles per
100 inhabitants
in the EU

MOTORISATION RATES IN THE EU

Vehicles per 1,000 inhabitants / 2020

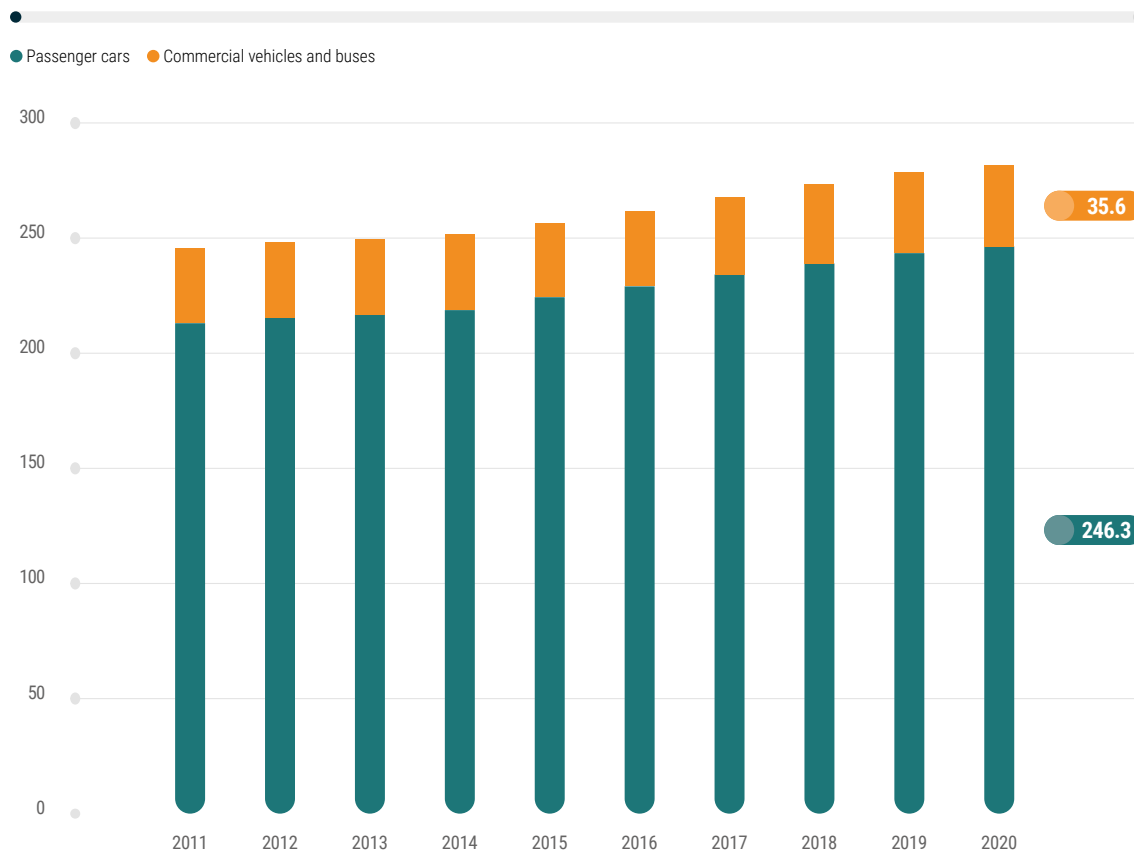


SOURCE: [ACEA VEHICLES IN USE REPORT, JANUARY 2022](#)



EU VEHICLE FLEET: SIZE AND DISTRIBUTION

In million units / 2011 – 2020



SOURCE: ACEA VEHICLES IN USE REPORT, JANUARY 2022

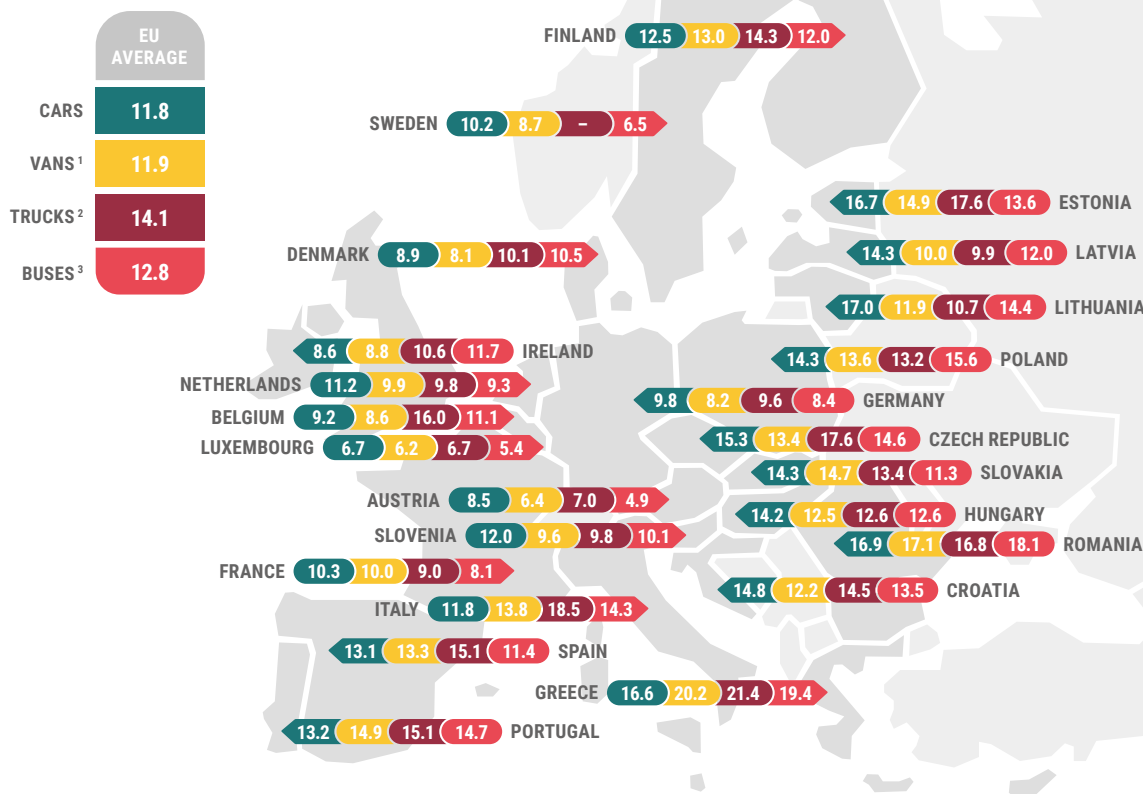
The EU has
a fleet of 282
million vehicles



Trucks in the EU are on average 14 years old

AVERAGE AGE OF EU VEHICLE FLEET

By country, in years / 2020



1. Light commercial vehicles up to 3.5t

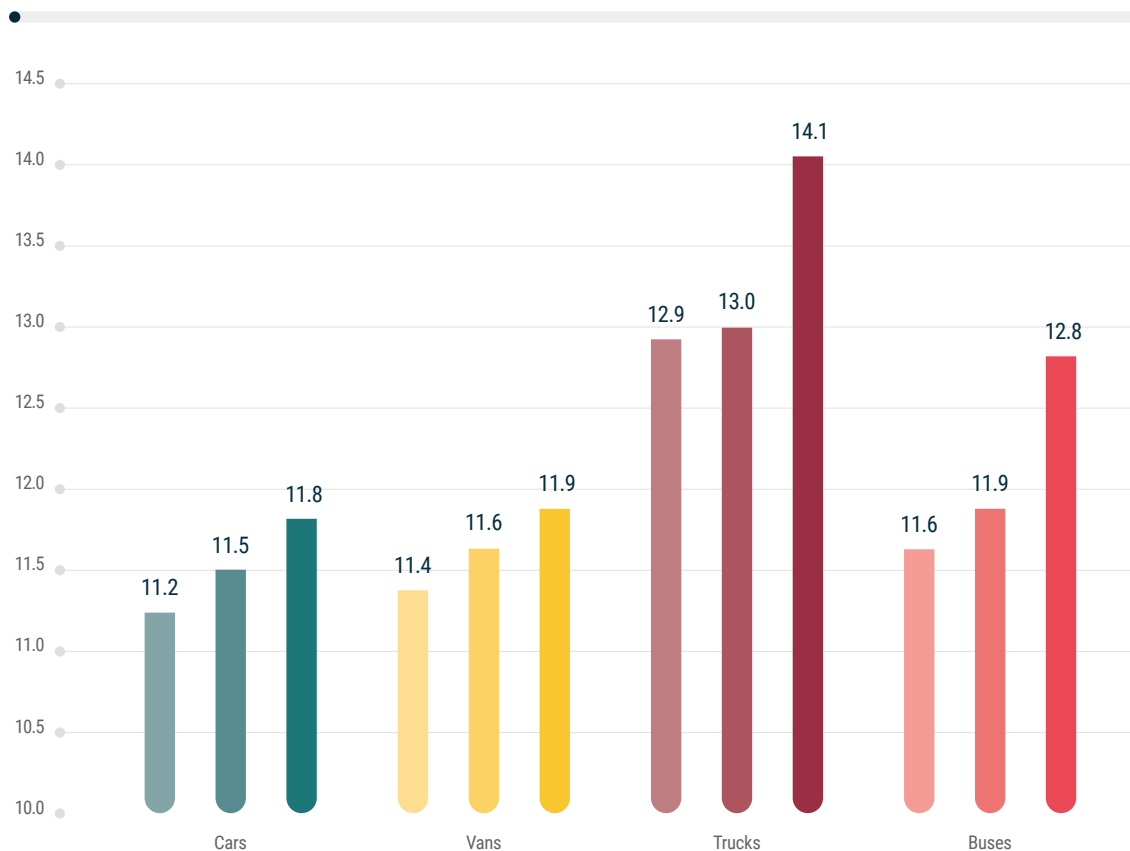
2. Medium and heavy commercial vehicles over 3.5t

3. Buses and coaches over 3.5t



AVERAGE AGE OF EU FLEET

By vehicle type, in years / 2018 – 2020



SOURCE: [ACEA VEHICLES IN USE REPORT, JANUARY 2022](#)

**The average age
of all vehicle
types is rising
in the EU**



**1% of all cars
on EU roads are
electrically-
chargeable**

1. Includes battery and plug-in hybrid electric vehicles

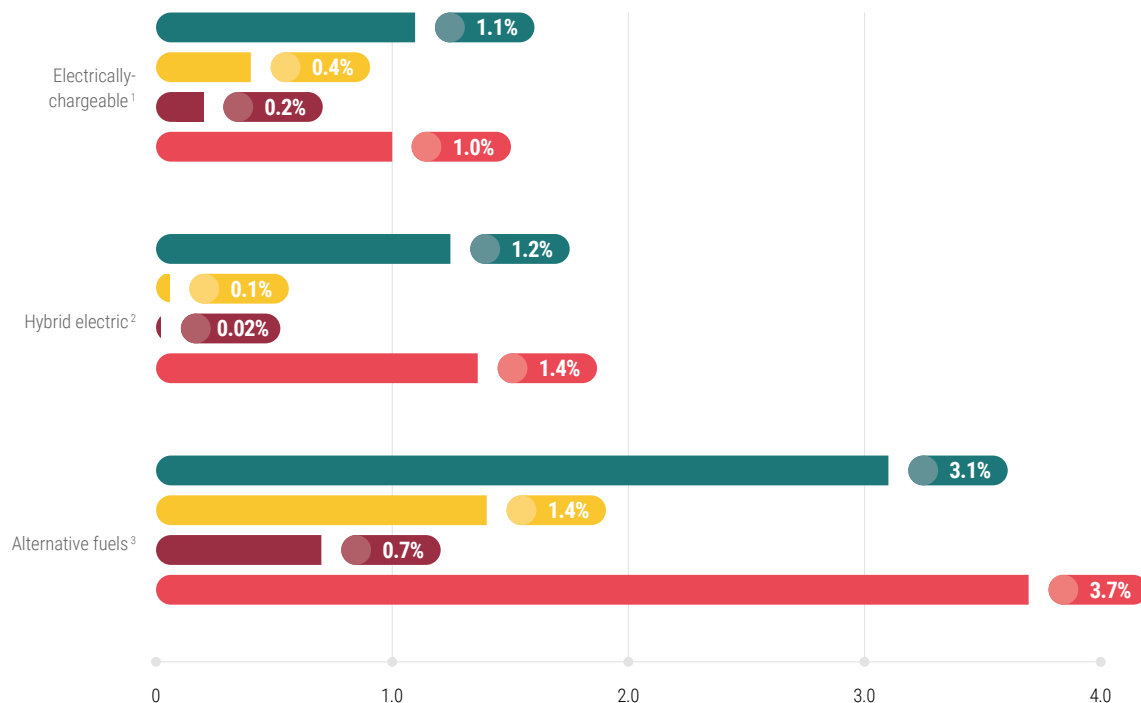
2. Includes full and mild hybrids

3. Includes natural gas and LPG vehicles

SHARE OF ALTERNATIVELY-POWERED VEHICLES IN THE EU FLEET

By segment, % share / 2020

● Cars ● Vans ● Trucks ● Buses



SOURCE: ACEA VEHICLES IN USE REPORT, JANUARY 2022



ROAD SAFETY

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2022/2023

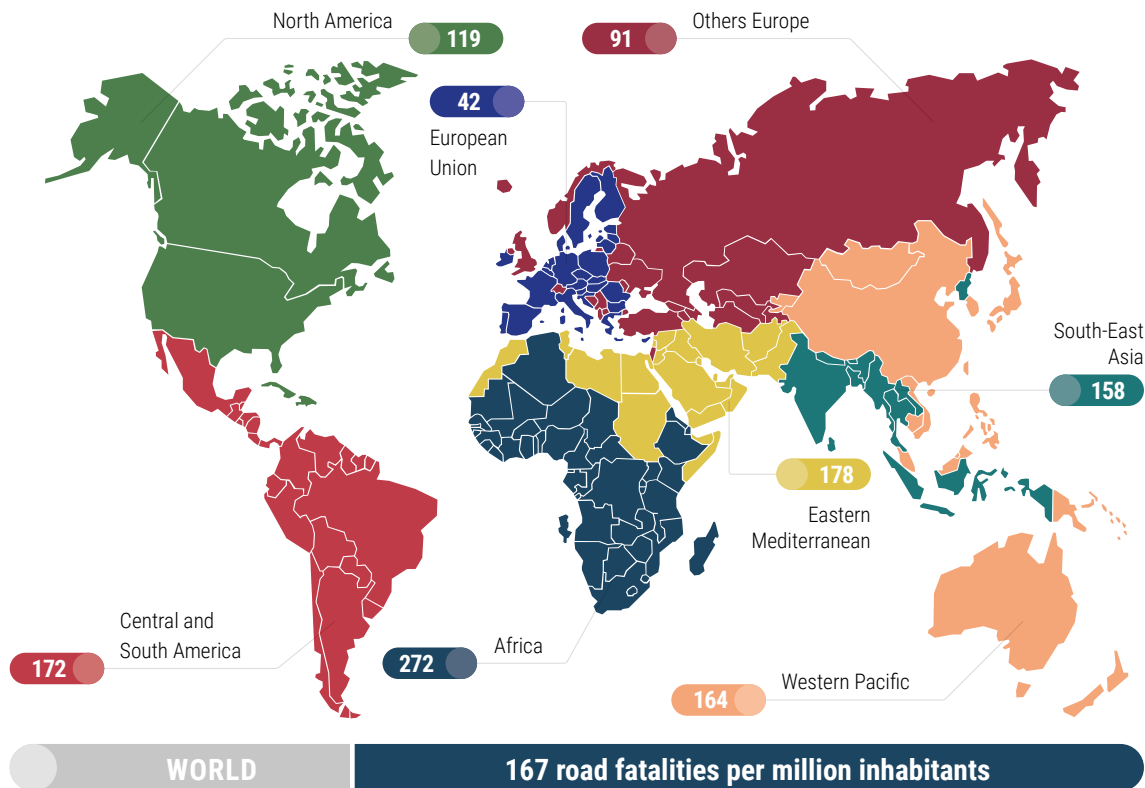


EU roads are
by far the safest
in the world

1. WHO regions

ROAD FATALITIES PER MILLION INHABITANTS

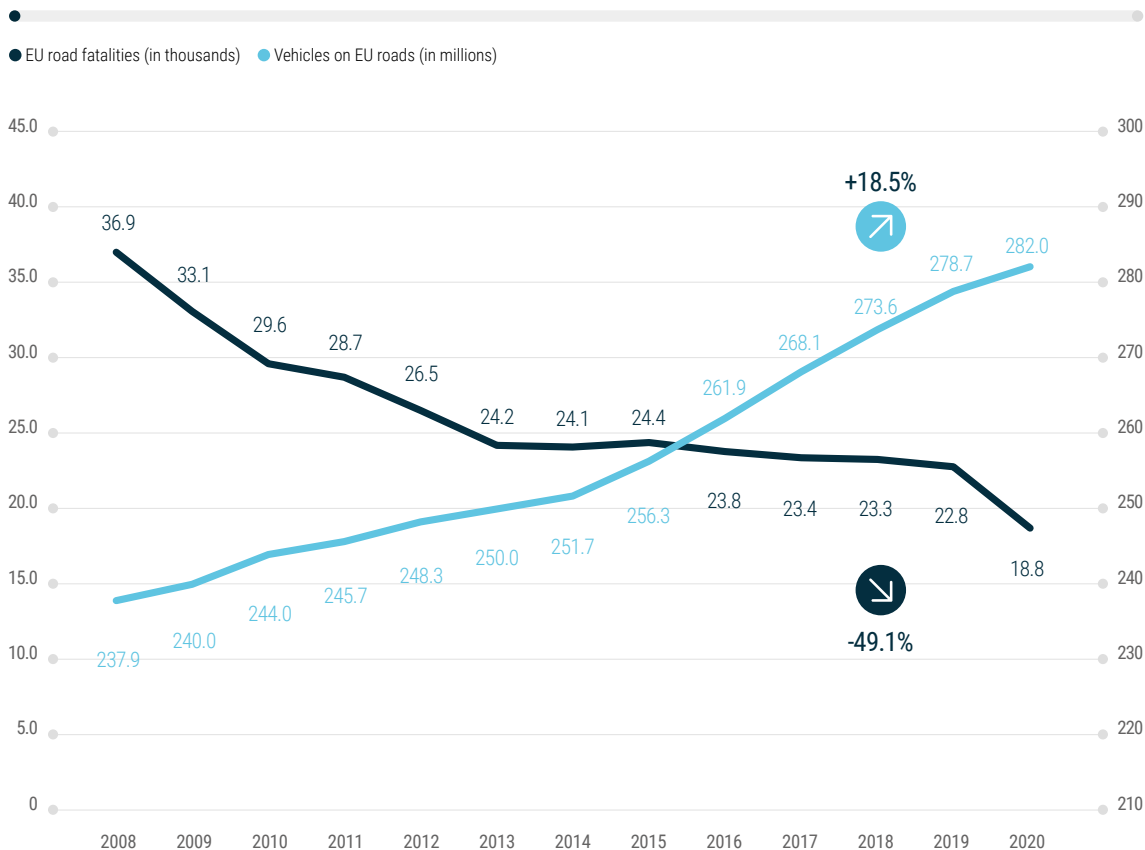
By region¹ / 2019, 2020



SOURCE: CARE (EU ROAD ACCIDENT DATABASE), WHO, GLOBAL HEALTH OBSERVATORY DATA REPOSITORY

NUMBER OF MOTOR VEHICLES AND ROAD FATALITIES IN THE EU

2008 – 2020



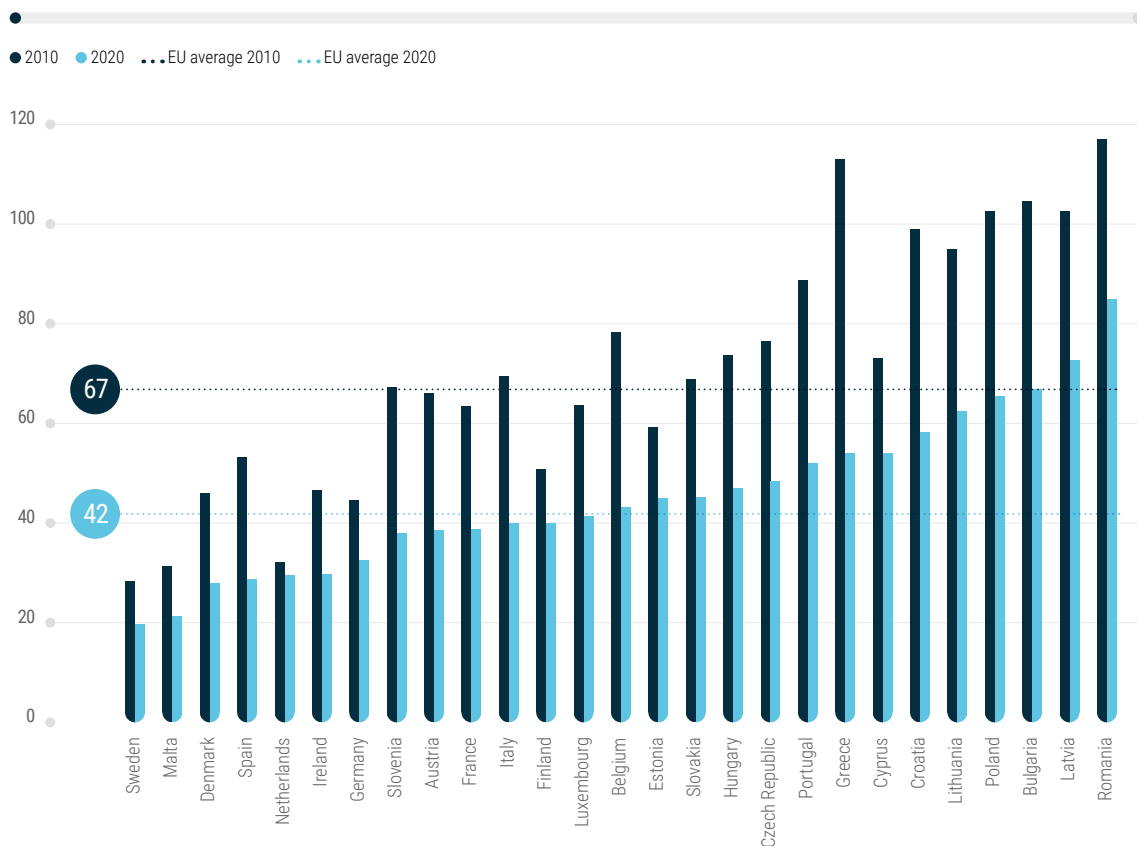
SOURCE: ACEA, CARE (EU ROAD ACCIDENT DATABASE)

While the number of vehicles has risen by 18.5%, road fatalities have fallen by half since 2008

Average road fatalities per million Europeans plummeted by 37% since 2010

ROAD FATALITIES PER MILLION INHABITANTS

By country / 2010, 2020



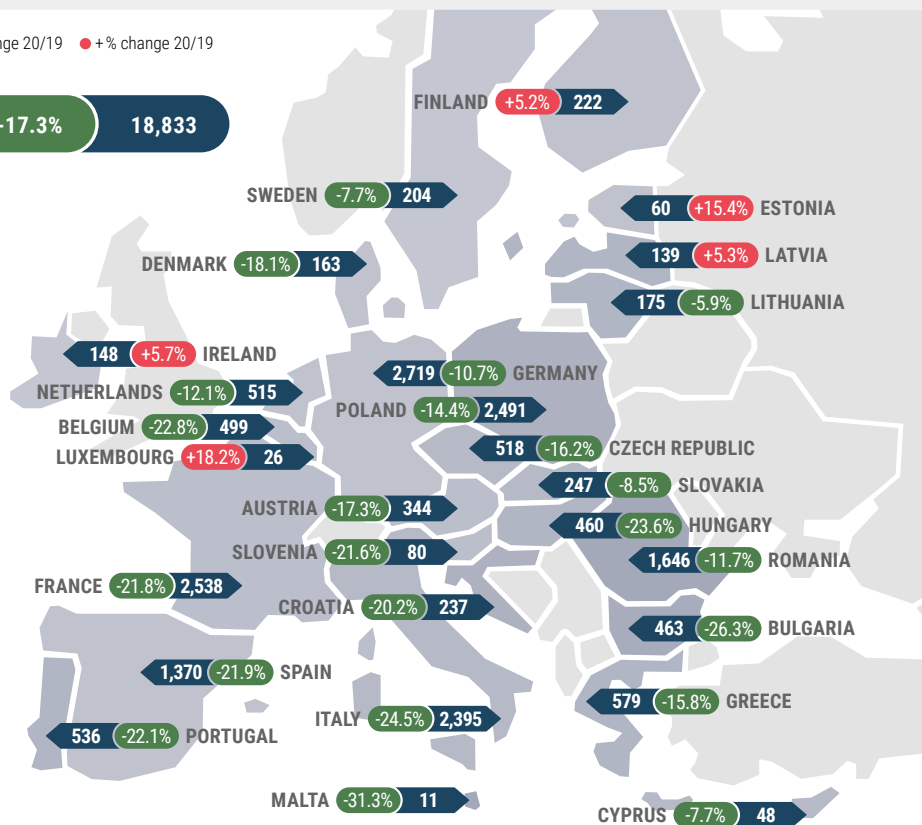
SOURCE: CARE (EU ROAD ACCIDENT DATABASE)

ROAD FATALITIES IN THE EU

By country / 2020

● Road fatalities ● -% change 20/19 ● +% change 20/19

EUROPEAN UNION
-17.3% 18,833



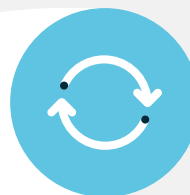
SOURCE: CARE (EU ROAD ACCIDENT DATABASE)

EU road fatalities
declined by over
17% in 2020



ENVIRONMENT

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2022/2023



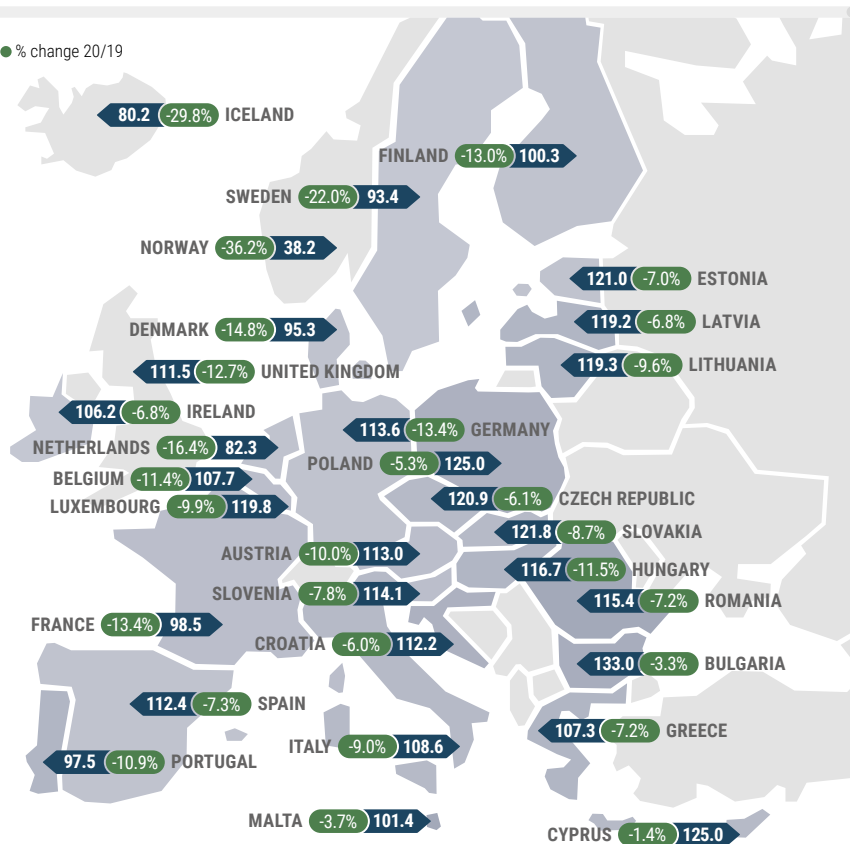
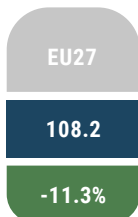


The average
new car in
the EU emits
108g CO₂/km

CO₂ EMISSIONS OF NEW CARS BY COUNTRY

In g CO₂/km / 2020¹

● 2020 average emissions (g CO₂/km) ● % change 20/19



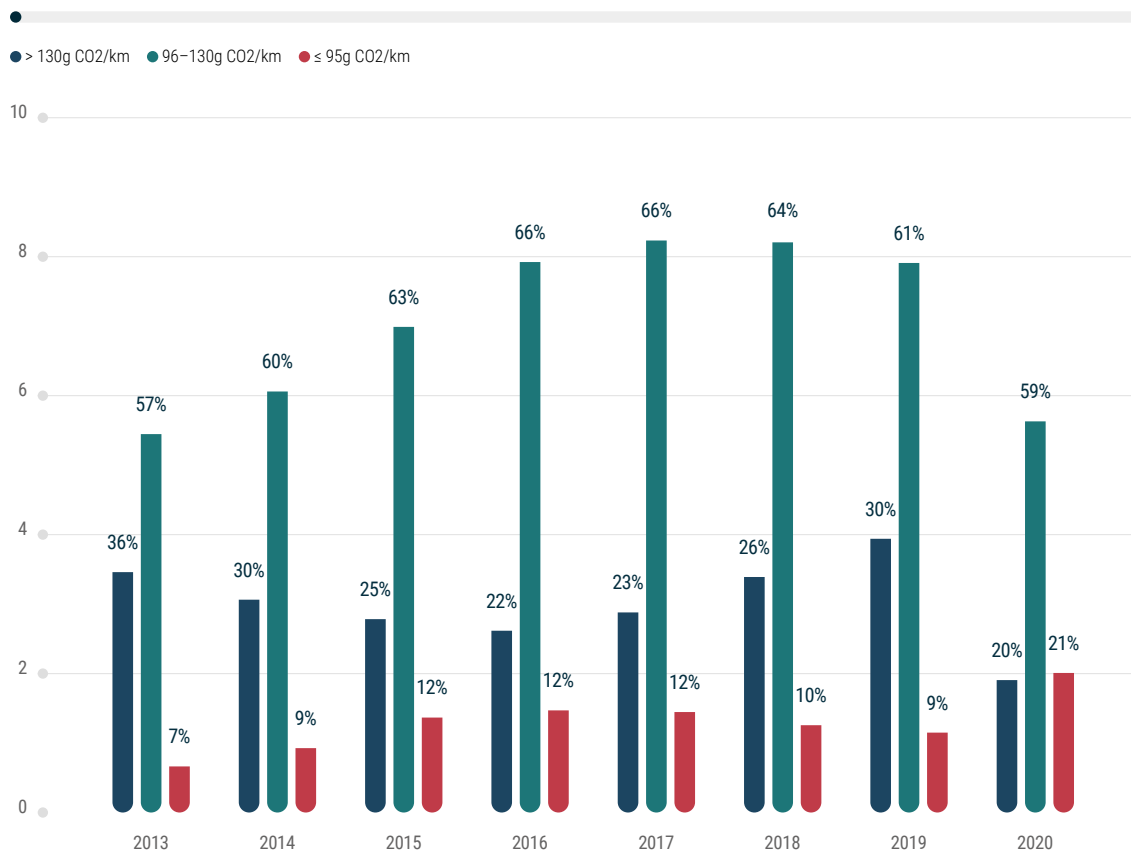
1. Most recent available data at time of print

SOURCE: EEA



NEW CARS BY EMISSIONS CLASSES IN THE EU

In million units, % share / 2013 – 2020¹



SOURCE: EEA

**80% of all
new cars sold in
EU emit less than
130g CO₂/km**

¹. Most recent available data at time of print

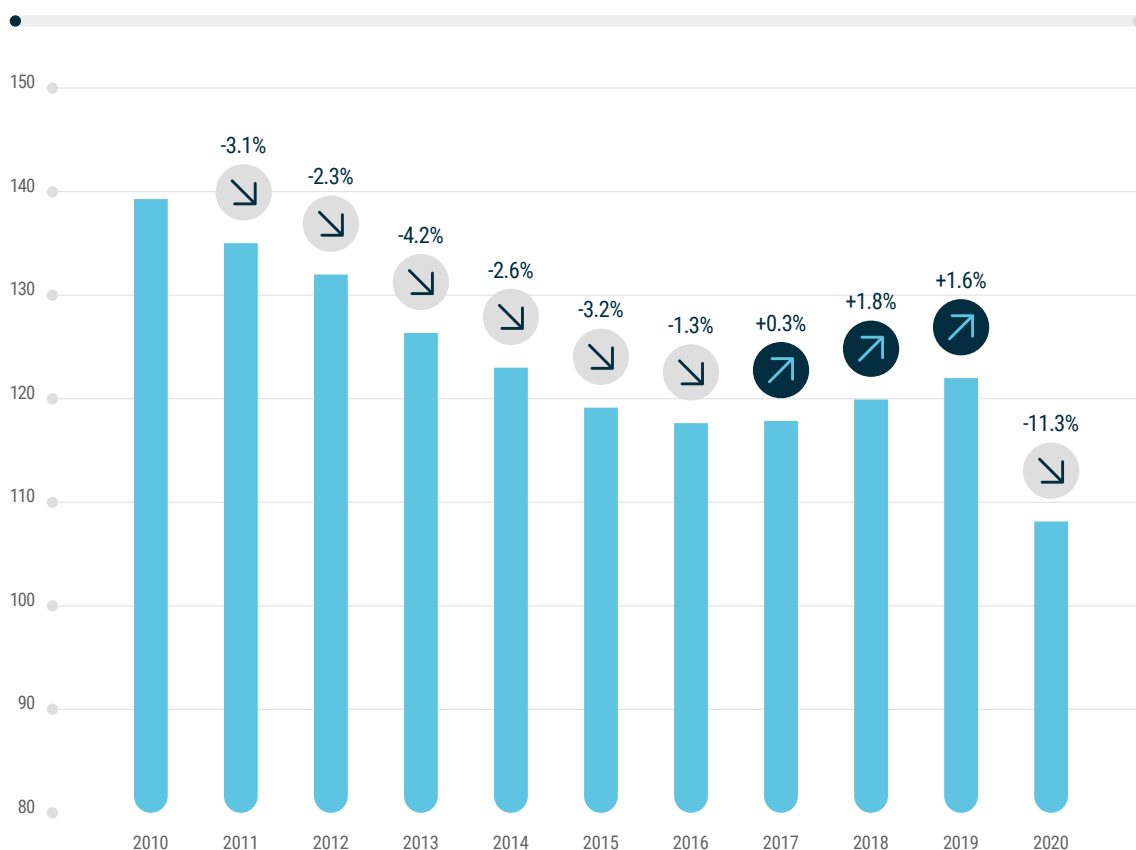


**CO₂ emissions
from new cars are
down by 22.4%
since 2010**

1. Most recent available data at time of print

CO₂ EMISSIONS OF NEW CARS IN THE EU

In g CO₂/km, % change / 2010 – 2020¹

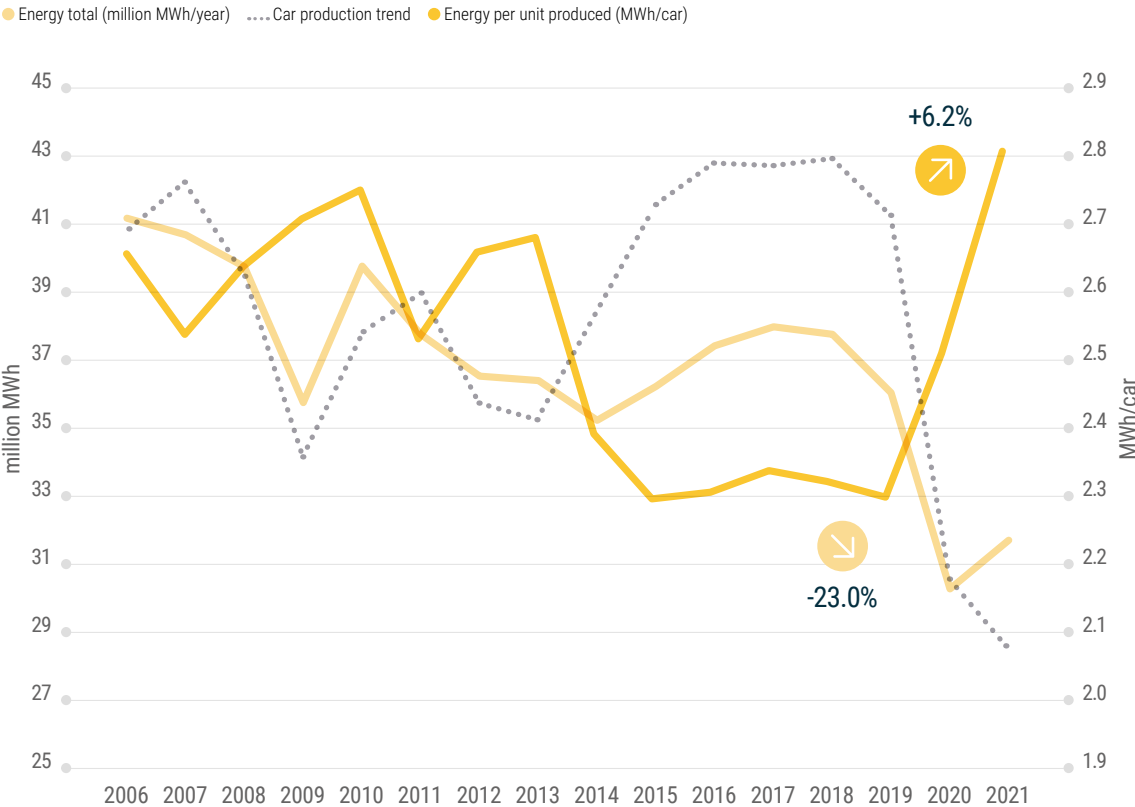


SOURCE: EEA



ENERGY CONSUMPTION DURING CAR PRODUCTION

2006 – 2021



SOURCE: ACEA

Total energy consumption from car production has been cut by almost a quarter over the past 15 years

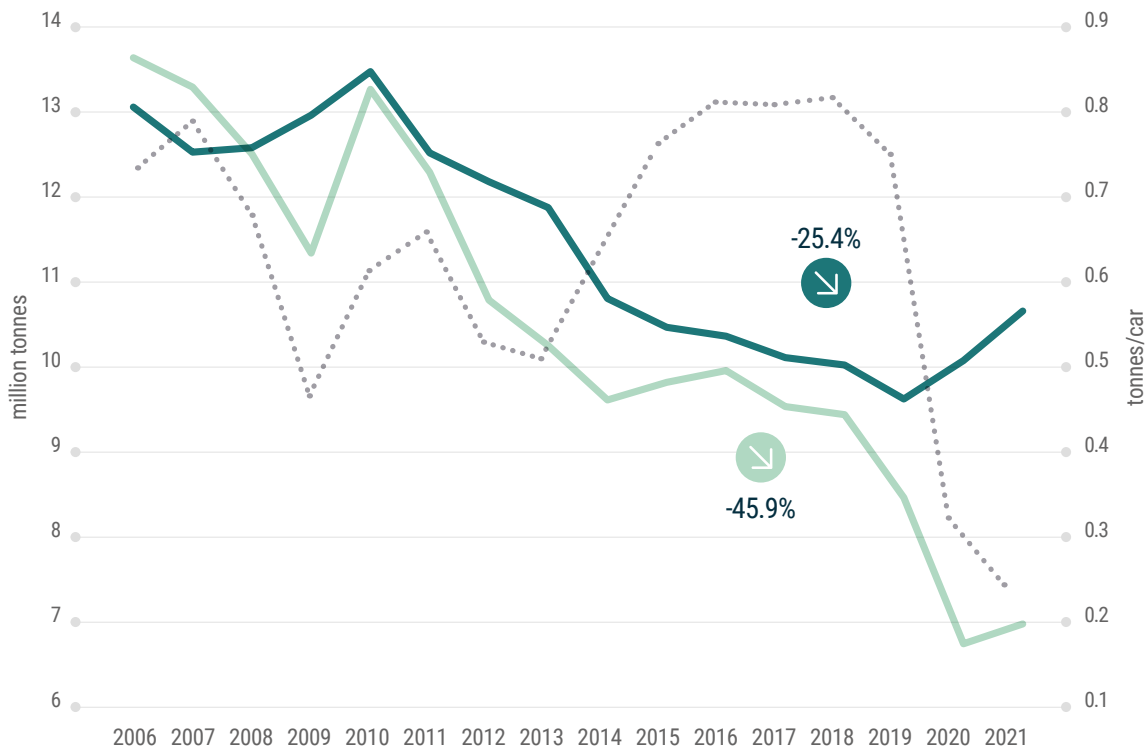


**CO₂ emissions
from car
production have
been slashed by
46% since 2006**

CO₂ EMISSIONS FROM CAR PRODUCTION

2006 – 2021

● CO₂ emissions total (million t/year) Car production trend ● CO₂ emissions per unit produced (t/car)



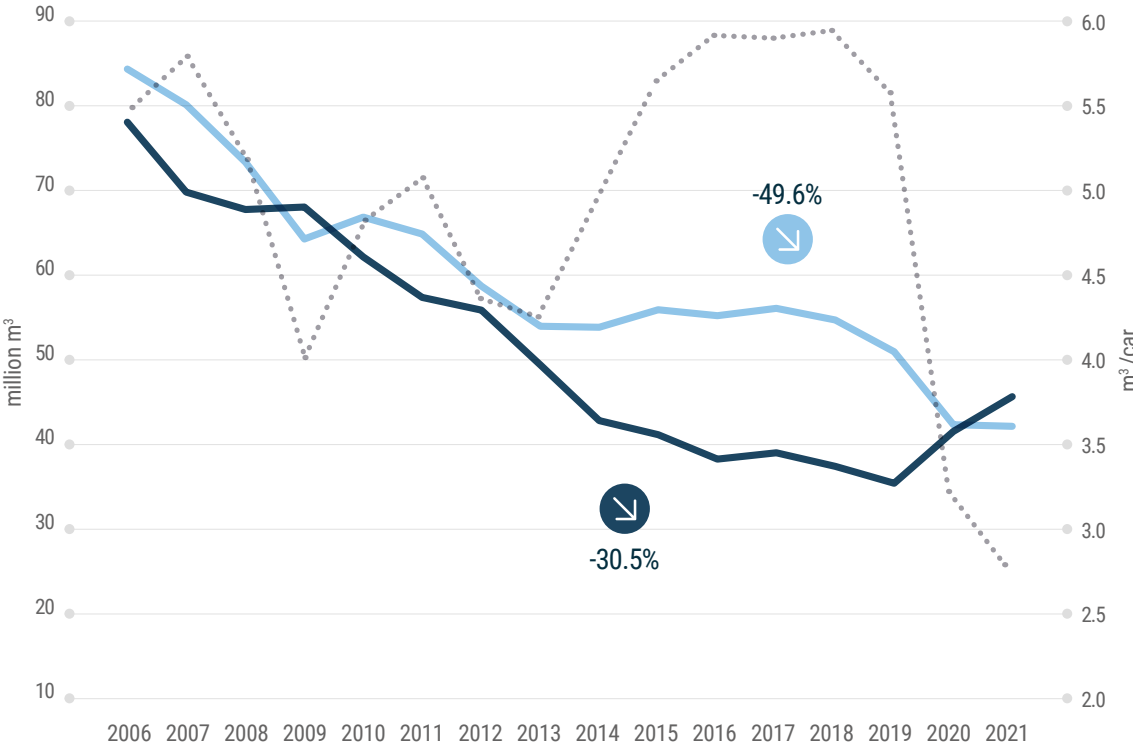
SOURCE: ACEA



WATER USED IN CAR PRODUCTION

2006 – 2021

● Water total (million m³/year) Car production trend ● Water per unit produced (m³/car)



SOURCE: ACEA

The amount of water used to manufacture cars has been halved over the past 15 years



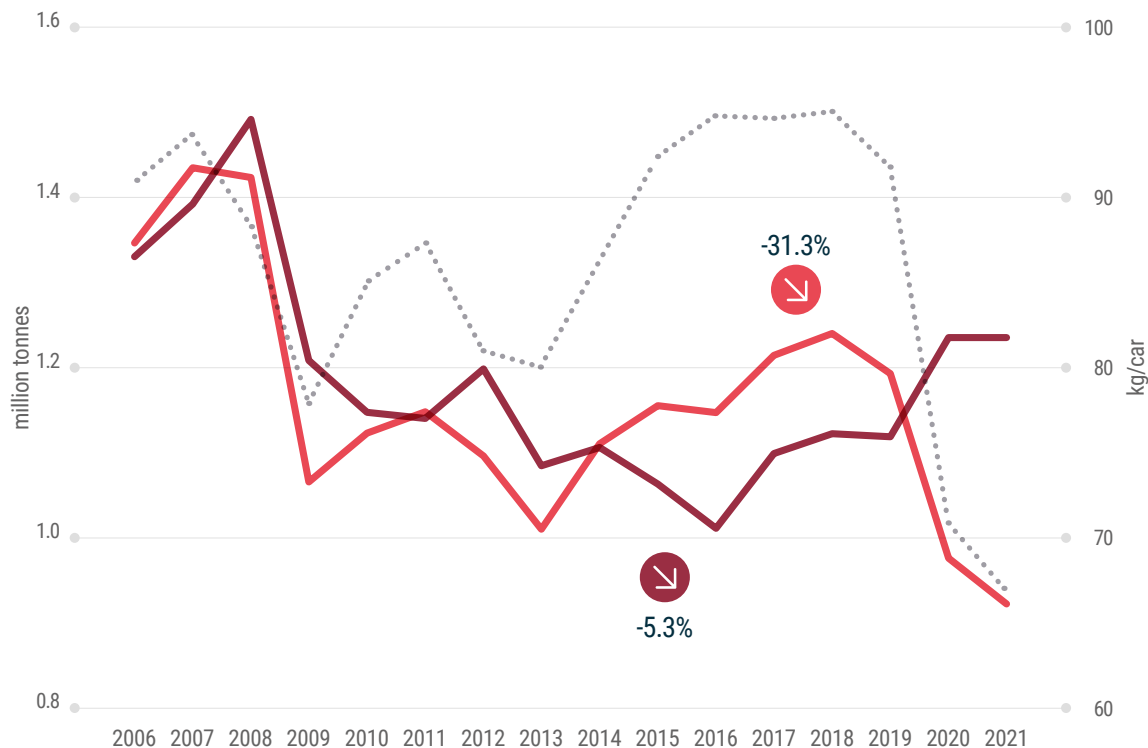
Waste generated by car manufacturing was reduced by almost a third since 2006

1. Excluding scrap metal and demolition waste

WASTE FROM CAR PRODUCTION¹

2006 – 2021

● Waste total (million t/year) Car production trend ● Waste per unit produced (kg/car)

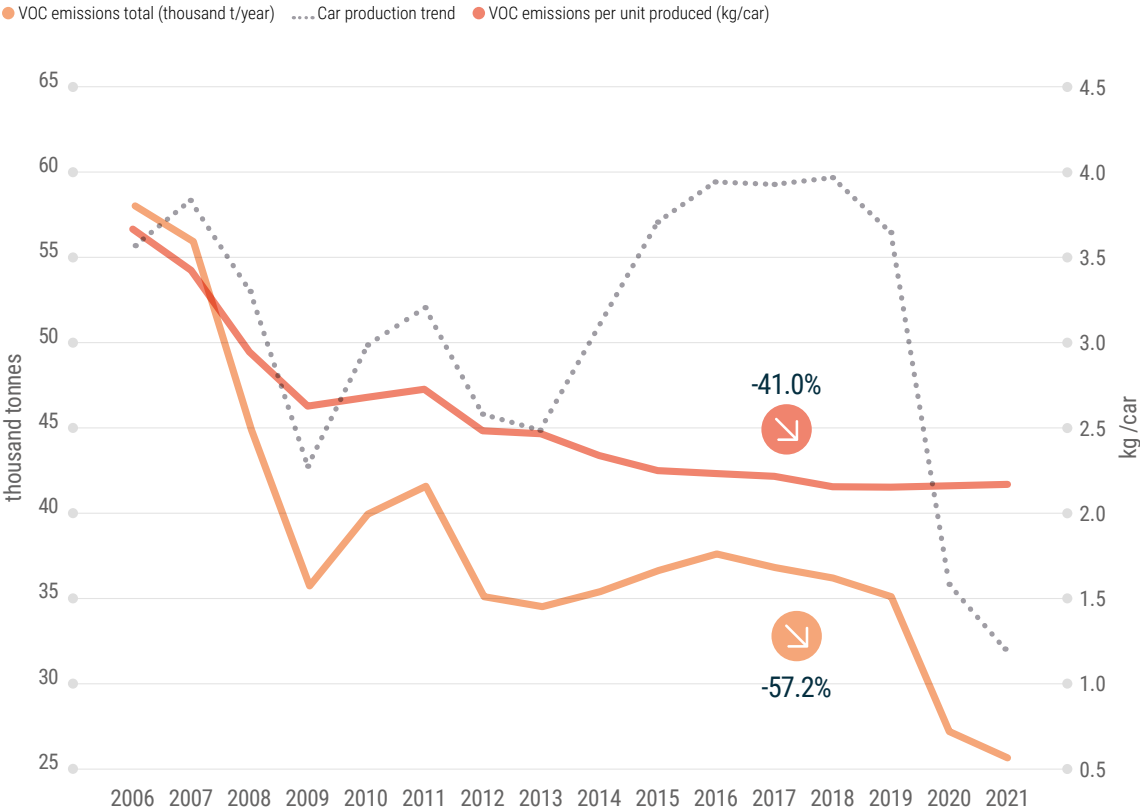


SOURCE: ACEA



VOC¹ EMISSIONS FROM CAR PRODUCTION

2006 – 2021



SOURCE: ACEA

EU manufacturers have significantly reduced the environmental impact of car production over the last 15 years

1. Volatile organic compounds



INNOVATION

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2022/2023

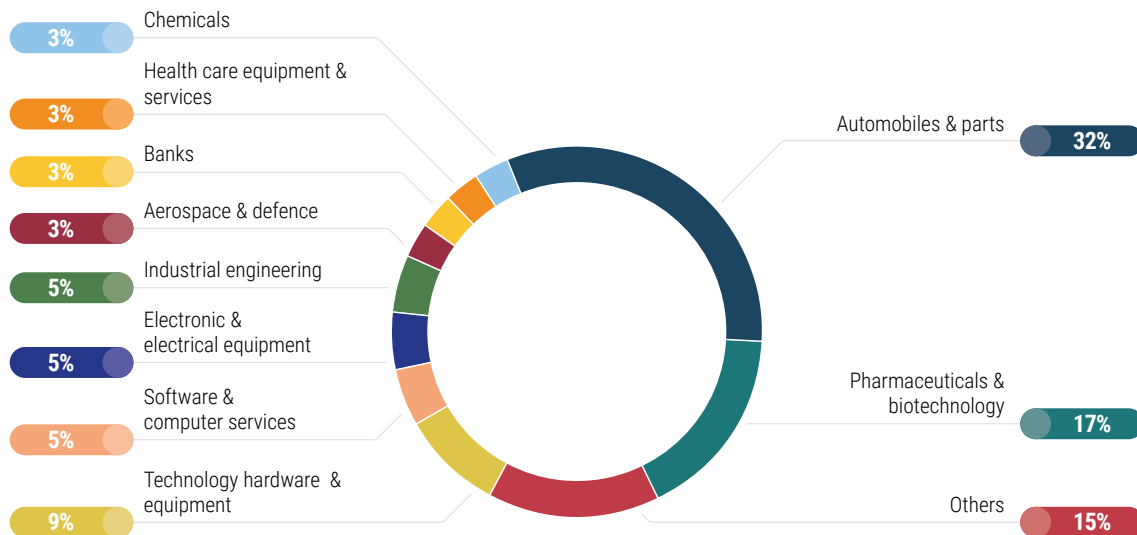




The automotive sector is responsible for 32% of the EU's total R&D spending

R&D SHARE OF SECTORS IN THE EU

% share / 2020





EU R&D INVESTMENT IN THE TOP 10 INDUSTRIAL SECTORS

In billion € / 2020

● Automobiles & parts	58.8
● Pharmaceuticals & biotechnology	31.4
● Technology hardware & equipment	15.9
● Software & computer services	10.3
● Electronic & electrical equipment	9.6
● Industrial engineering	8.8
● Aerospace & defence	6.3
● Banks	5.4
● Health care equipment & services	5.3
● Chemicals	5.1

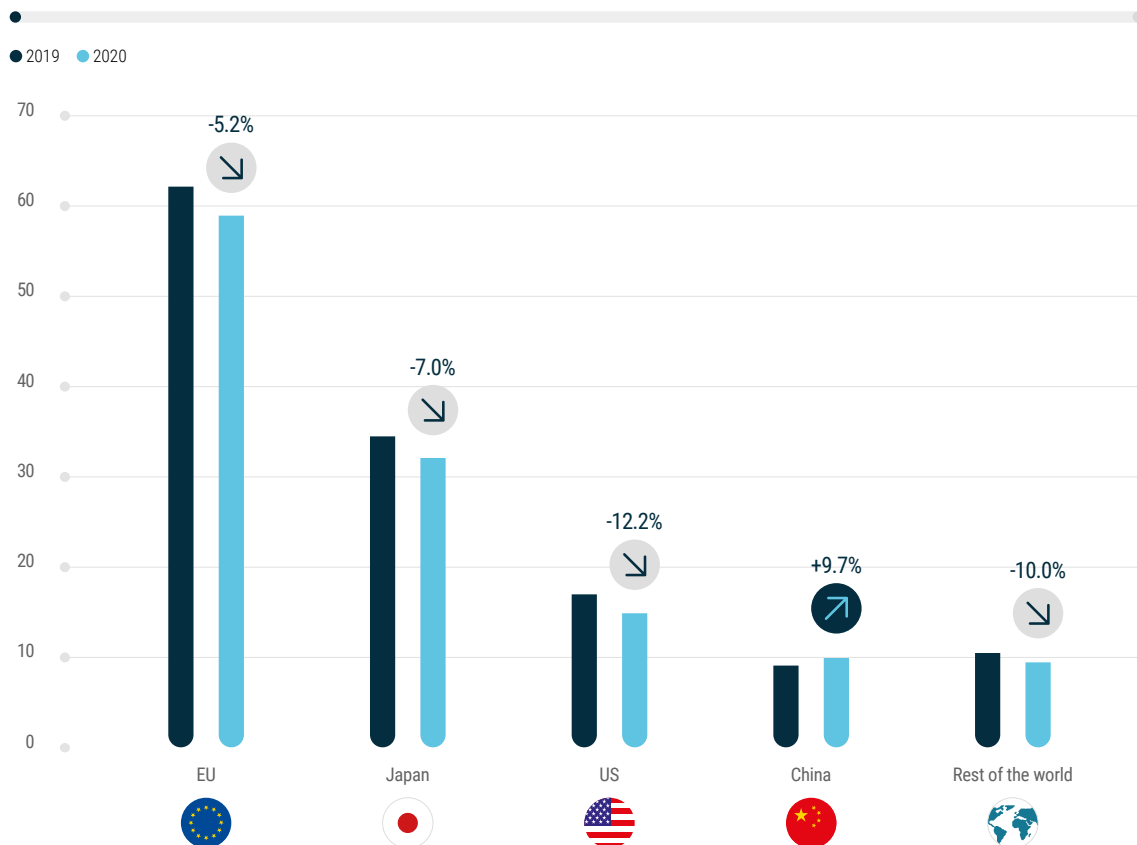
The automotive sector is the EU's number one investor in R&D



EU investment
in R&D stands
at €59 billion
annually

R&D INVESTMENT IN THE AUTOMOBILE SECTOR BY WORLD REGION

In billion €, % change

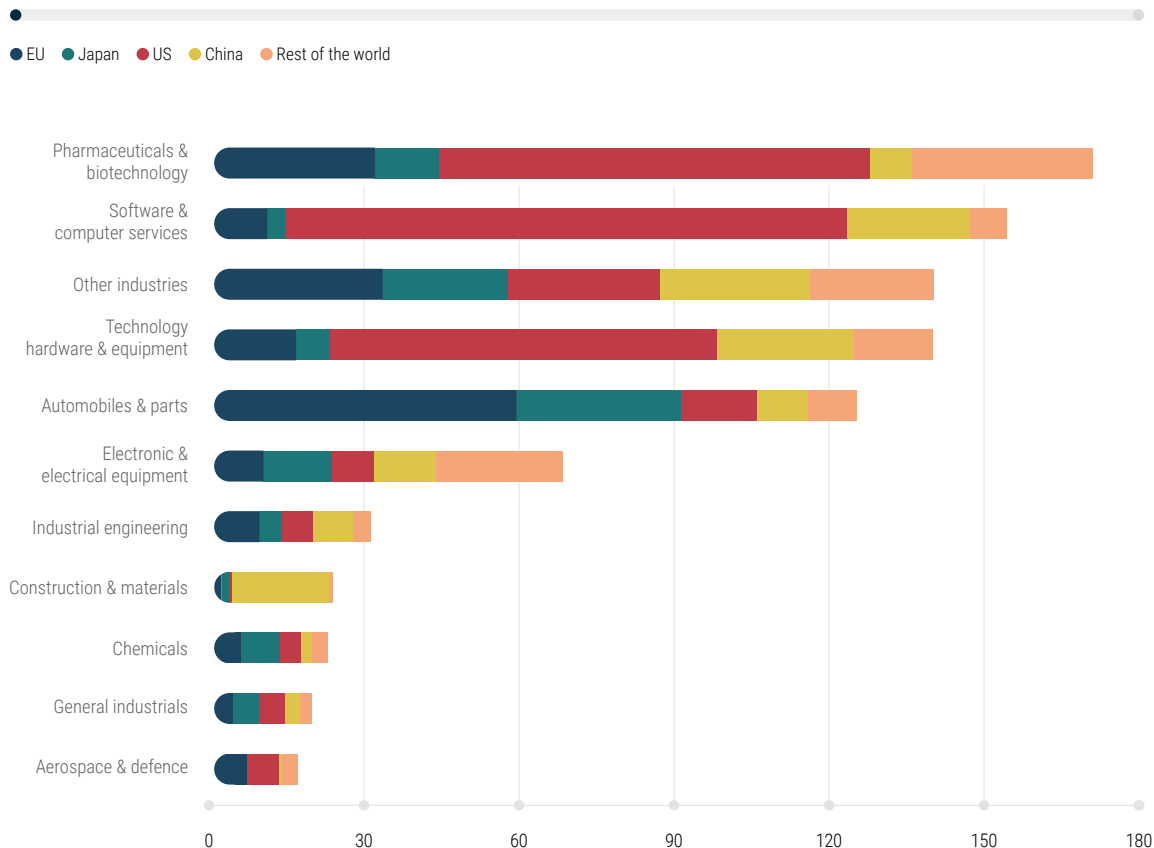


SOURCE: THE 2021 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD



R&D INVESTMENT BY INDUSTRY AND WORLD REGION

In billion € / 2020



SOURCE: THE 2021 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD

The EU is by far the world's largest investor in automotive R&D



TAXATION

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2022/2023


















Purchase incentives for electric vehicles are available in 21 EU countries















ELECTRIC VEHICLES: TAX BENEFITS AND PURCHASE INCENTIVES

2022

		TAX BENEFITS			INCENTIVES
		Acquisition	Ownership	Company car	
	Austria	✓	✓	✓	✓
	Belgium	✓	✓	✓	✓
	Bulgaria	✗	✓	✗	✗
	Croatia	✓	✓	✗	✓
	Cyprus	✓	✗	✗	✓
	Czech Republic	✓	✓	✓	✓
	Denmark	✓	✓	✗	✗
	Estonia	✗	✗	✗	✗
	Finland	✓	✗	✓	✓
	France	✓	✗	✓	✓
	Germany	✗	✓	✓	✓
	Greece	✓	✓	✓	✓
	Hungary	✓	✓	✓	✓

ELECTRIC VEHICLES: TAX BENEFITS AND PURCHASE INCENTIVES

2022














	TAX BENEFITS			INCENTIVES
	Acquisition	Ownership	Company car	
 Ireland	✓	✓	✓	✓
 Italy	✗	✓	✗	✓
 Latvia	✓	✓	✓	✗
 Lithuania	✓	✗	✓	✓
 Luxembourg	✓	✓	✓	✓
 Malta	✓	✓	✗	✗
 Netherlands	✓	✓	✓	✓
 Poland	✓	✓	✗	✓
 Portugal	✓	✓	✓	✓
 Romania	✗	✓	✗	✓
 Slovakia	✓	✓	✗	✗
 Slovenia	✓	✗	✗	✓
 Spain	✓	✓	✓	✓
 Sweden	✗	✓	✓	✓



21 EU member states apply CO2-based vehicle taxation















CO2-BASED VEHICLE TAXATION

2022

		TAX MEASURES		
		Acquisition	Ownership	Company car
	Austria	✓	✓	✓
	Belgium	✓	✓	✓
	Bulgaria	✗	✓	✗
	Croatia	✓	✗	✗
	Cyprus	✓	✓	✗
	Czech Republic	✓	✗	✗
	Denmark	✗	✓	✓
	Estonia	✗	✗	✗
	Finland	✓	✓	✗
	France	✓	✓	✓
	Germany	✗	✓	✗
	Greece	✓	✓	✗
	Hungary	✓	✗	✗

CO2-BASED VEHICLE TAXATION








2022

	TAX MEASURES		
	Acquisition	Ownership	Company car
 Ireland	✓	✓	✓
 Italy	✓	✓	✗
 Latvia	✗	✓	✗
 Lithuania	✗	✗	✗
 Luxembourg	✗	✓	✓
 Malta	✓	✓	✗
 Netherlands	✓	✓	✗
 Poland	✗	✗	✗
 Portugal	✓	✓	✗
 Romania	✗	✗	✗
 Slovakia	✗	✗	✗
 Slovenia	✓	✗	✗
 Spain	✓	✗	✗
 Sweden	✗	✓	✗



**Motor vehicles
account for €375
billion in taxes in
major EU markets**

FISCAL INCOME FROM VEHICLES IN MAJOR EUROPEAN MARKETS¹

	 Austria	 Belgium	 Germany	 Denmark	 Spain	 Finland	 France
	€ bn 2020	€ bn 2020	€ bn 2020	DKK bn 2022 ³	€ bn 2021	€ bn 2020	€ bn 2020
Purchase or transfer							
1. VAT on vehicle sales servicing, repair & parts	2.8	7.6	29.1	–	8.5	1.6	17.6
2. Sales & registration taxes	0.4	0.5	–	18.8	0.4	0.8	2.1
3. Annual ownership taxes	2.7	1.7	9.5	10.6	3.0	1.9	0.9
4. Fuels & lubricants	4.6	7.3	37.7	17.3	20.5	3.9	35.2
5. Others							
Driving license fees	–	0.0	0.2	–	0.1	–	0.01
Insurance taxes	0.4	1.0	5.5	1.5	1.1	0.4	5.4
Tolls	2.1	0.7	7.4	0.6	–	–	10.8
Customs duties	–	–	0.4	–	–	–	–
Other taxes	0.4	0.8	–	–	0.7	–	1.5
TOTAL (national currencies)	13.4	19.6	89.7	48.8	34.1	8.6	73.4
TOTAL (EURO)²	13.4	19.6	89.7	6.6	34.1	8.6	73.4







1. Latest available data; only countries for which sourced data is available are listed

2. Euro foreign exchange reference rates at 19 May 2022; source: ECB

3. Estimates



FISCAL INCOME FROM VEHICLES IN MAJOR EUROPEAN MARKETS¹

	 Greece	 Ireland	 Italy	 Netherlands	 Portugal	 Sweden
	€ bn 2020	€ bn 2019	€ bn 2019	€ bn 2019	€ bn 2021	SEK bn 2020
Purchase or transfer						
1. VAT on vehicle sales servicing, repair & parts	0.3	0.7	18.9	1.2	2.8	25.0
2. Sales & registration taxes	0.3	1.0	1.9	2.2	0.4	–
3. Annual ownership taxes	1.3	0.9	6.7	4.3	0.7	16.0
4. Fuels & lubricants	5.5	3.5	37.3	10.4	2.8	43.3
5. Others						
Driving license fees	–	0.0	–	0.3	–	–
Insurance taxes	0.5	0.1	3.9	1.2	–	2.8
Tolls	–	–	2.2	0.2	0.2	2.8
Customs duties	–	–	–	–	–	–
Other taxes	0.2	–	5.4	1.8	1.5	–
TOTAL (national currencies)	8.1	6.2	76.3	21.5	8.5	89.9
TOTAL (EURO)²	8.1	6.2	76.3	21.5	8.5	8.6

1. Latest available data; only countries for which sourced data is available are listed

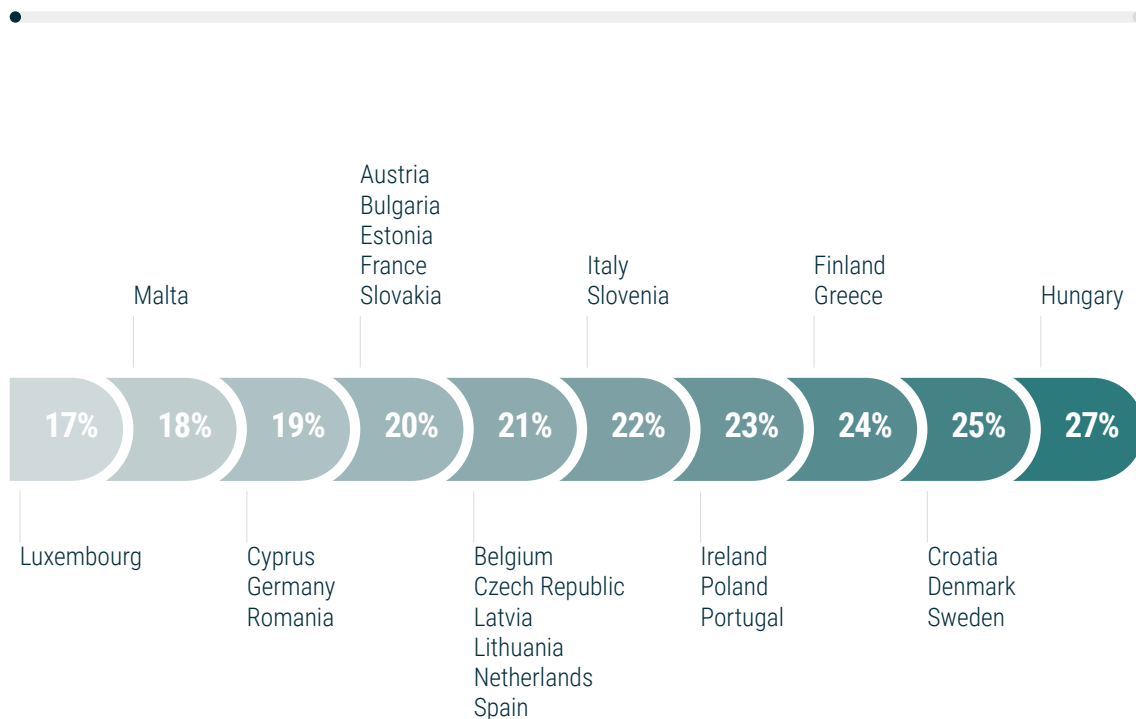
2. Euro foreign exchange reference rates at 19 May 2022; source: ECB



**Automobiles
provide a vital
source of
government
revenue**

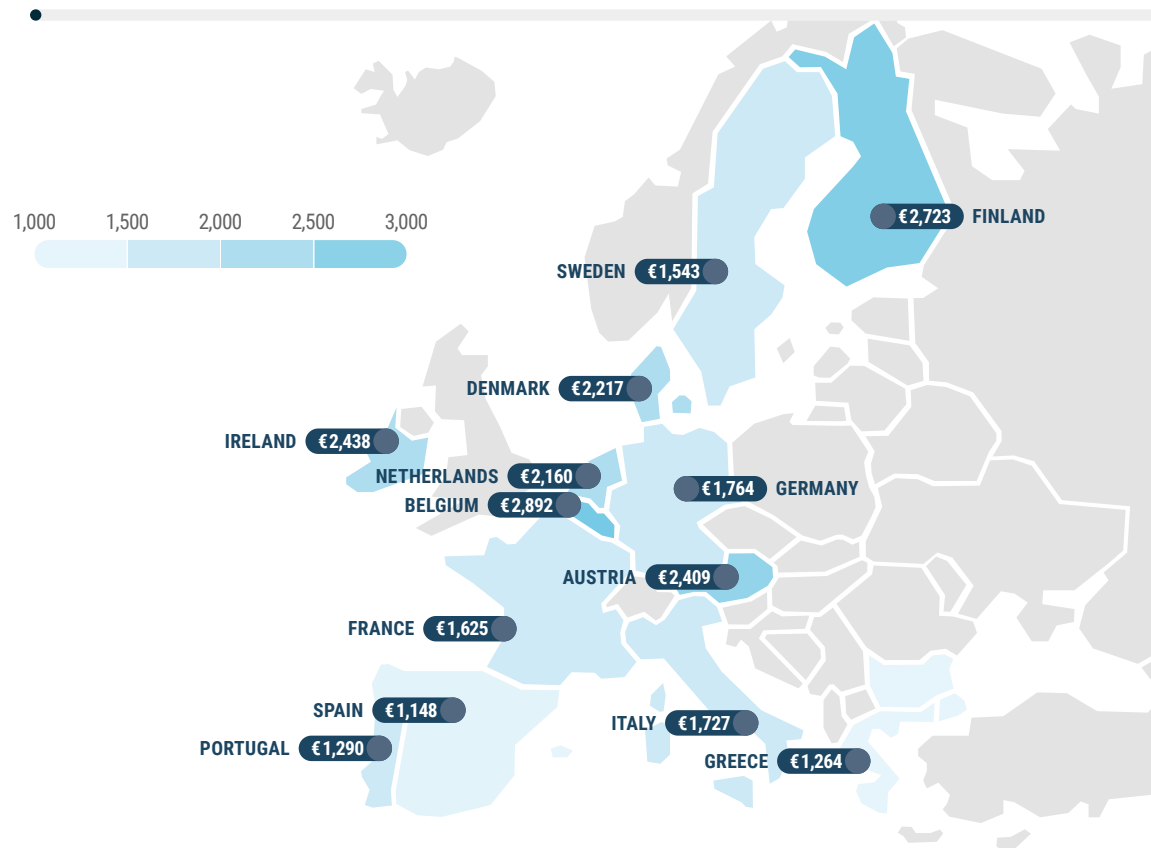
SHARE OF VAT IN NET PRICE OF CARS

% share / 2022



AVERAGE ANNUAL TAX PER VEHICLE IN MAJOR EU MARKETS¹

In € per vehicle / 2021



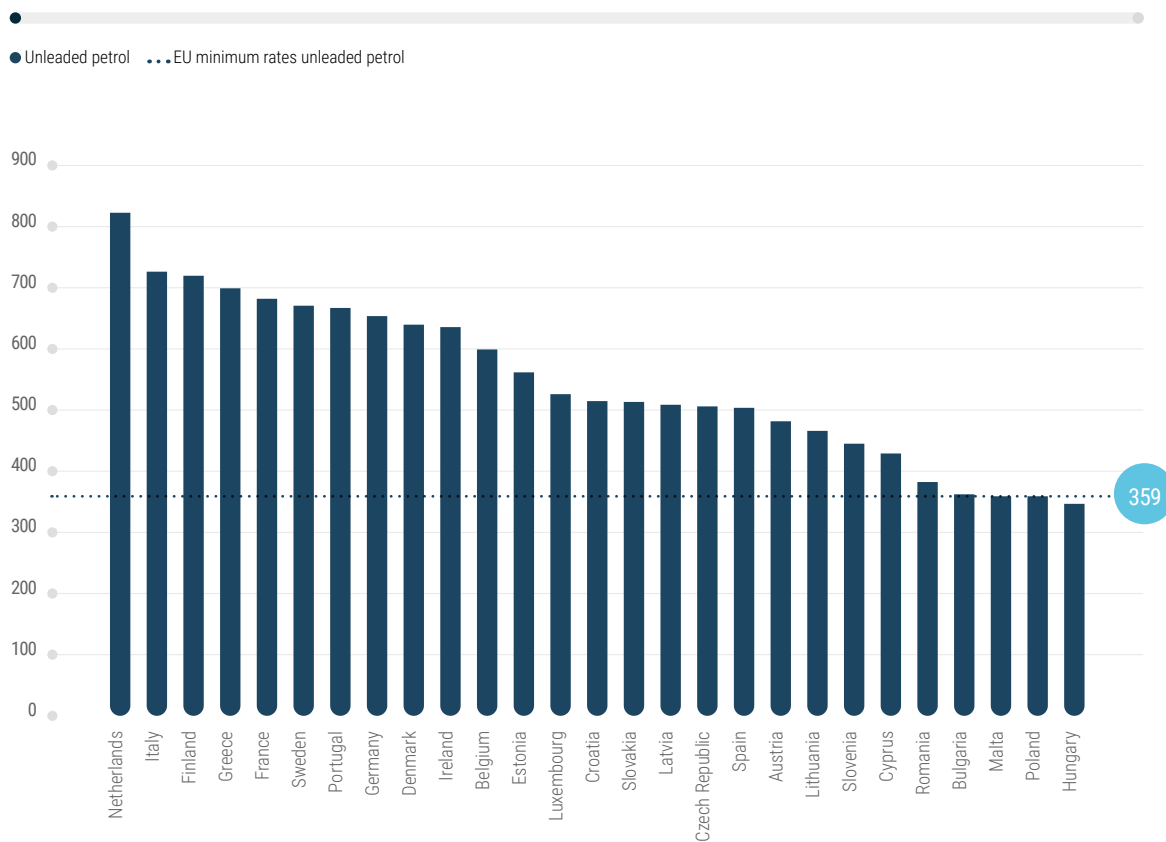
**Collecting €2,890
per vehicle
annually, Belgium
has the highest
tax revenue**



**Hungary has
the lowest
excise duties on
unleaded petrol
in the EU**

EXCISE DUTIES ON UNLEADED PETROL

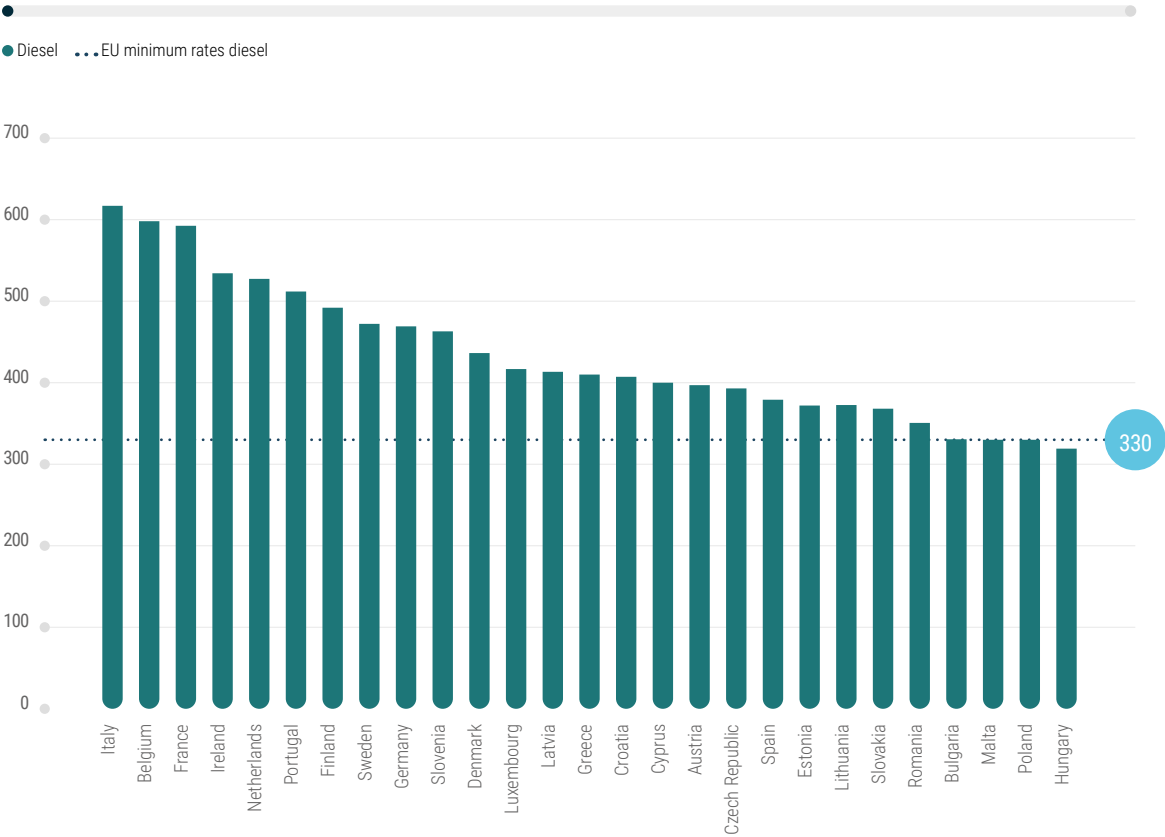
In €/1,000 litres / 2022





EXCISE DUTIES ON DIESEL

In €/1,000 litres / 2022



Italy has the highest excise duties on diesel in the EU

**BMW
GROUP**



**DAIMLER
TRUCK**



HONDA
The Power of Dreams



IVECO • GROUP



**GROUPE
RENAULT**



TOYOTA

VOLKSWAGEN
AKTIENGESELLSCHAFT



V O L V O



ABOUT ACEA

DRIVING MOBILITY FOR EUROPE

The European Automobile Manufacturers' Association, or ACEA, unites Europe's 16 major car, truck, van and bus makers.

We are the voice of the auto industry: a technological world leader and the backbone of the EU economy. Our members keep Europe on the move, providing diverse solutions for moving people and goods from A to B.

Together, we are progressing on the road to zero-emission and zero-fatality transport. We are addressing major technology shifts and the changing mobility needs of Europeans.

ACEA is working towards a new era of mobility, where all Europeans can access affordable transport solutions that are:

- **Green & Clean**
- **Smart & Efficient**
- **Safe & Reliable**

Our aim is to drive Europe's mobility transformation – while at the same time ensuring that the auto industry remains a strong **Global & Competitive** player.

WHAT ACEA DOES

ACEA acts as one with common industry positions that also reflect the overarching interests of European citizens, transport users and operators, and auto industry workers.

We bring our collective expertise to policy makers, sharing a wealth of factual information to enable well-informed decisions.

We foster a societal debate around mobility, and are open to working with all interested parties to advance the common aim of clean, smart and safe mobility.



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