
2020
2021

The Automobile Industry Pocket Guide



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HONDA
The Power of Dreams

HYUNDAI



PSA
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TOYOTA

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Foreword

I am proud to present you the latest edition of ACEA's Pocket Guide. With the latest data on employment, production, sales, innovation, road safety and trade flows, this publication serves as a handy reference work on one of Europe's most strategic and innovative sectors: the automotive industry.

The automotive ecosystem provides work to 14.6 million Europeans, representing a sizeable 6.7% of total employment in the European Union¹. With 2.7 million people working on the manufacturing of vehicles across 226 factories in the EU, the auto industry accounts for 8.5% of total manufacturing jobs in the region.

More than 18.5 million vehicles were 'made in Europe' in 2019, representing 20% of global vehicle production. 5.6 million of these vehicles were exported around the world, generating a trade surplus of €74 billion for the EU.

There are 313 million vehicles in circulation on Europe's roads today. Apart from ensuring that people and goods can move freely throughout the continent, these vehicles are a significant source of government revenue, bringing in over €440.4 billion in taxes.

Innovation is the core of our sector's DNA. Indeed, the auto industry is by far the biggest spender on R&D in the EU, investing an impressive €60.9 billion. This figure puts us well ahead of the global competition, and helps make the clean and smart mobility transformation a reality. It is not a surprise then to see that EU leads the world when it comes to patents for self-driving vehicles, responsible for a third of global applications.

1. Although the United Kingdom is no longer part of the European Union (as of 1 February 2020), ACEA decided to base this year's edition of the Pocket Guide on the former EU28 aggregate, as data included cover time frames during which the UK was still an EU member state.

We are unfortunately now facing very strong headwinds in the aftermath of the coronavirus crisis, which has hit our sector with an unprecedented force. Unless EU policy makers and national governments urgently step up their political and economic support, for instance with green fleet renewal schemes, last year's car sales total (15.3 million) will be slashed by around 25% in 2020, putting jobs, production and future investments under serious threat.

This Pocket Guide shows that the automobile industry is a key pillar of the European economy. As such, it is vital to the wider recovery of the continent. We stand committed to work with policy makers to ensure that our sector can keep contributing in a strong and green way to the EU's industrial base, as well as to its global innovation leadership.



Eric-Mark Huitema
ACEA Director General

A stylized, handwritten signature in blue ink, appearing to read 'Eric-Mark Huitema'.

COVID-19 impact

The effect of the coronavirus on the European automobile industry is unprecedented. Most vehicle manufacturers have had to shut down their development and production sites for several weeks or even months this year.

Although the exact ramifications of COVID-19 for full-year 2020 results are still unknown, these figures show the impact of the coronavirus on auto production and employment at the peak of the crisis.

- The jobs of more than 1.1 million Europeans working in automobile manufacturing were directly affected by factory shutdowns during the lockdown period.
- EU-wide production losses amounted to more than 2.4 million motor vehicles during the peak crisis months of March, April and May 2020 alone; that is 13% of total production in 2019.

Impact of COVID-19 on the EU automobile industry

MARCH - MAY 2020

	Employees affected ¹	Estimated loss in production ² (number of vehicles)	Average shutdown duration ³ (in working days)
Austria	14,307	26,480	34
Belgium	30,000	33,360	25
Croatia	700	–	29
Czech Republic	45,000	155,060	29
Finland	4,500	11,604	25
France	90,000	278,425	34
Germany	568,518	616,591	30
Hungary	30,000	51,552	22
Italy	69,382	157,933	41
Netherlands	13,500	30,819	25
Poland	17,284	101,957	36
Portugal	20,000	41,525	35
Romania	20,000	68,673	31
Slovakia	20,000	114,632	24
Slovenia	2,890	19,399	27
Spain	60,000	452,155	34
Sweden	67,000	23,464	15
United Kingdom	65,455	262,715	41
TOTAL (EU+UK)	1,138,536	2,446,344	30

1. ACEA based on multiple sources (Marklines, national automobile manufacturers' associations, OEM reporting)

2. ACEA based on Feb IHS Markit Production Forecast

3. Numbers refer to operating days (without weekends) according to latest OEM reporting

Key figures

EMPLOYMENT

Manufacturing of motor vehicles (EU)	2.7 million people = 8.5% of EU employment in manufacturing	2018
Total (EU manufacturing, services and construction)	14.6 million people = 6.7% of total EU employment	2018

PRODUCTION

Motor vehicles (world)	92.8 million units	2019
Motor vehicles (EU)	18.5 million units = 20% of global motor vehicle production	2019
Passenger cars (world)	74.2 million units	2019
Passenger cars (EU)	15.8 million units = 21% of global passenger car production	2019

REGISTRATIONS

Motor vehicles (world)	93.3 million units	2019
Motor vehicles (EU)	17.9 million units = 19% of global motor vehicle registrations/sales	2019
Passenger cars (world)	74.9 million units	2019
Passenger cars (EU)	15.3 million units = 20% of global passenger car registrations/sales	2019
Petrol (EU)	58.9% market share	2019
Diesel (EU)	30.5% market share	2019
Electrically-chargeable (EU)	3.0% market share	2019

TRADE

Motor vehicle exports (extra-EU)	€135.9 billion	2019
Motor vehicle imports (extra-EU)	€62.0 billion	2019
Trade surplus	€73.9 billion	2019

VEHICLES IN USE

Motor vehicles (EU)	312.7 million units	2018
Passenger cars (EU)	271.5 million units	2018
Motorisation rate (EU)	610 vehicles per 1,000 inhabitants	2018
Average age of cars (EU)	10.8 years	2018

ROAD SAFETY

Road fatalities (EU)	48 people per million inhabitants	2019
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ENVIRONMENT

Average CO2 emissions new cars (EU)	123g CO2/km	2019
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INNOVATION

Automotive R&D investment	€60.9 billion	2018
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TAXATION

Fiscal income from motor vehicles	€440.4 billion	2019
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1

THE AUTOMOBILE INDUSTRY
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Employment

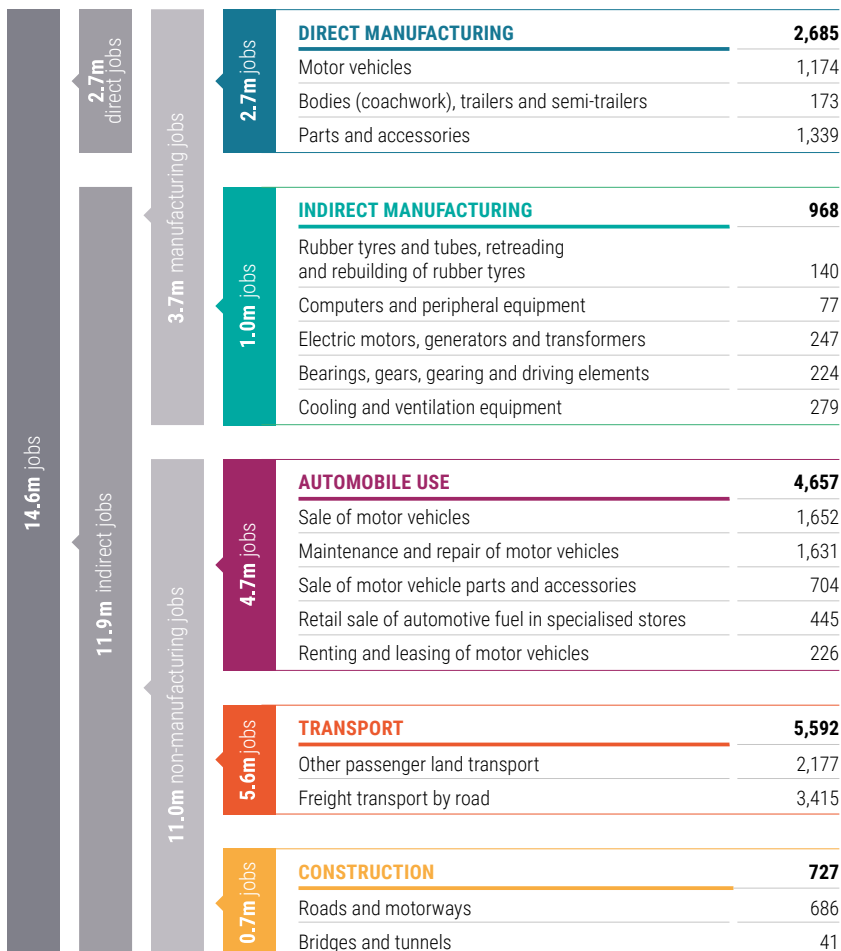


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Automotive sector: direct and indirect employment in the EU

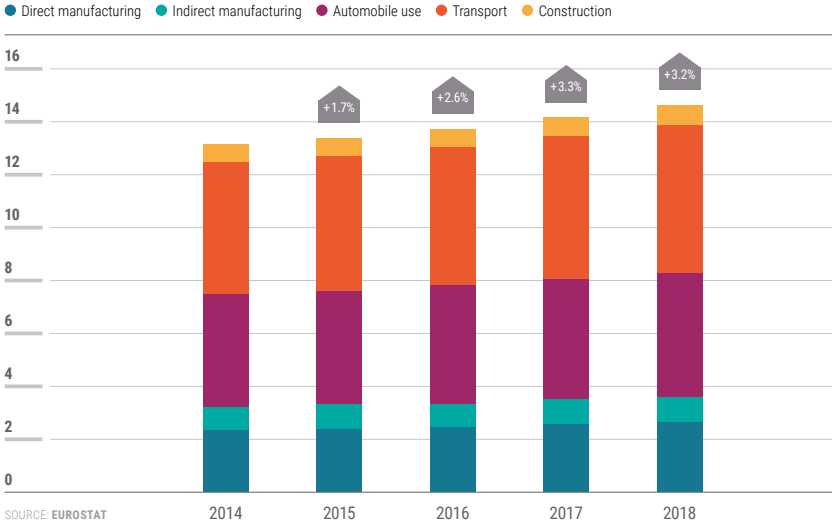
IN THOUSANDS / 2018¹

SOURCE: EUROSTAT

1. Provisional figures

Employment in the EU automotive sector

IN MILLION JOBS / 2014 – 2018



SOURCE: EUROSTAT

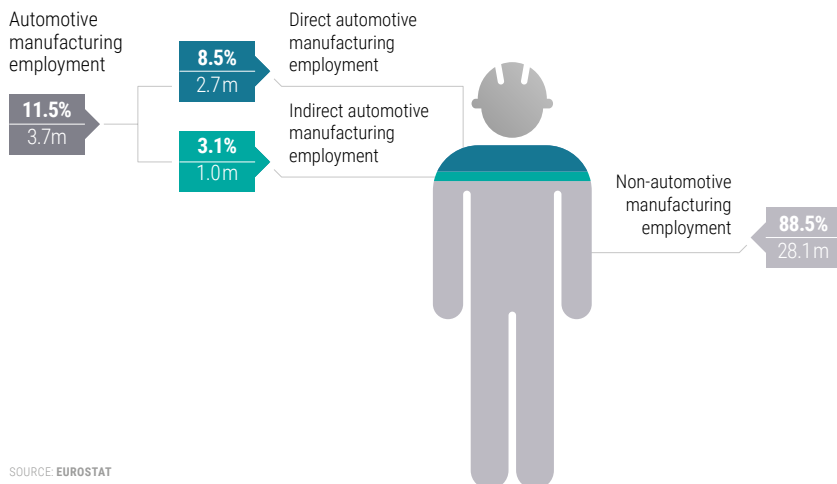
EU automotive employment	2014	2015	2016	2017	2018	% change 18/17
Direct manufacturing	2,369,951	2,441,910	2,491,693	2,597,345	2,685,478	3.4
Indirect manufacturing	892,885	910,004	899,647	958,152	967,925	1.0
Automobile use	4,264,490	4,304,382	4,453,169	4,531,379	4,657,198	2.8
Transport	4,980,618	5,047,587	5,229,789	5,390,441	5,591,549	3.7
Construction	641,931	675,338	650,011	705,199	727,230	3.1
TOTAL	13,149,875	13,379,221	13,724,309	14,182,516	14,629,380	3.2

SOURCE: EUROSTAT

**The automotive sector
accounts for 6.7% of all EU jobs**

EU manufacturing employment

% SHARE / 2018



Direct automotive manufacturing employment

2.7 million people
= 8.5% of EU employment in manufacturing

Direct & indirect automotive manufacturing employment

3.7 million people
= 11.5% of EU employment in manufacturing

Total automotive employment
(manufacturing, services and construction)

14.6 million people
= 6.7% of total EU employment

EU employment in the manufacturing sector

31.7 million people
= 14.5% of total EU employment

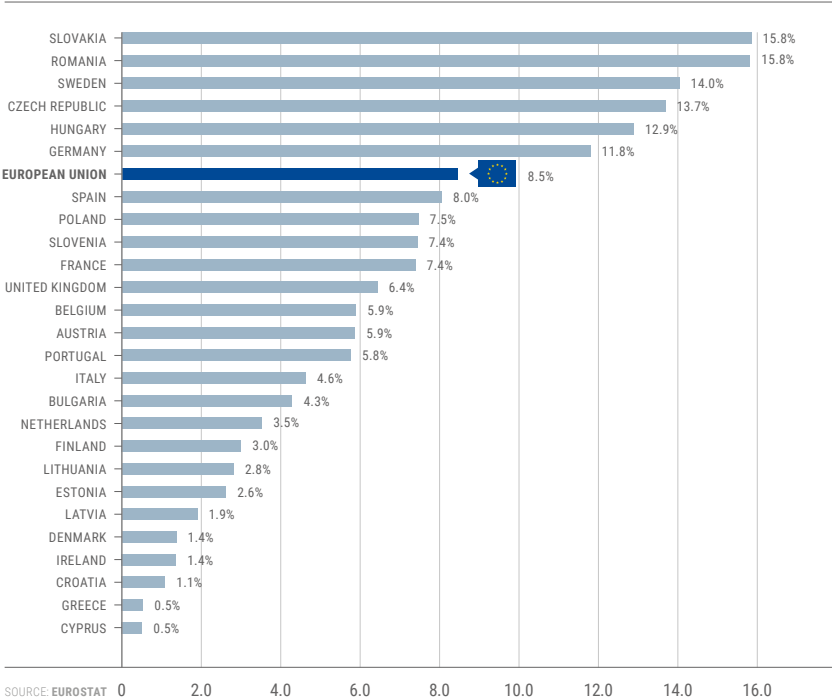
EU total employment

219.4 million people

SOURCE: EUROSTAT

**11.5% of EU manufacturing employment
is in the auto sector**

Share of direct automotive employment in total manufacturing **BY COUNTRY / 2018**



Direct automotive manufacturing employment **BY COUNTRY / 2018**

Austria	39,569	France	229,422	Poland	213,708
Belgium	28,768	Germany	882,046	Portugal	42,358
Bulgaria	23,777	Greece	1,737	Romania	190,848
Croatia	2,919	Hungary	101,865	Slovakia	81,273
Cyprus	168	Ireland	3,000	Slovenia	15,887
Czech Republic	181,415	Italy	176,303	Spain	162,634
Denmark	4,317	Latvia	2,317	Sweden	90,473
Estonia	2,880	Lithuania	6,163	United Kingdom	166,228
Finland	10,199	Netherlands	25,204		

 **EUROPEAN UNION** 2,685,478

SOURCE: EUROSTAT

**The EU automotive sector directly employs
2.7 million people in manufacturing**



2

THE AUTOMOBILE INDUSTRY
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Production



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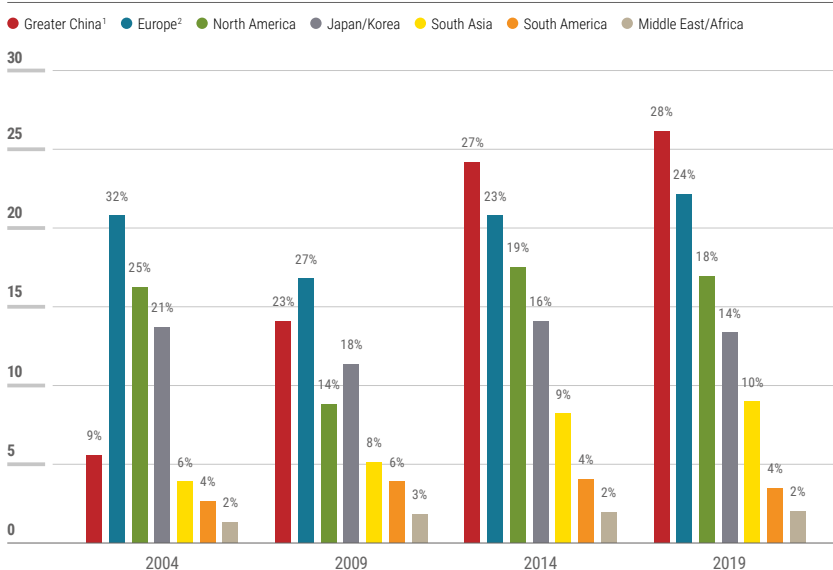
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World motor vehicle production

IN MILLION UNITS, % SHARE / 2004 – 2019



SOURCE: IHS MARKIT, OICA

World motor vehicle production

IN 1,000 UNITS / 2019

	2019	2018	% change 19/18	% share 2019
Europe ²	22,060	23,049	-4.3	23.8
Greater China ¹	26,149	28,297	-7.6	28.2
Japan/Korea	13,323	13,423	-0.8	14.4
Middle East/Africa	1,998	2,556	-21.8	2.2
North America	16,902	17,535	-3.6	18.2
South America	3,421	3,574	-4.3	3.7
South Asia	8,933	9,883	-9.6	9.6
WORLD	92,786	98,316	-5.6	100.0

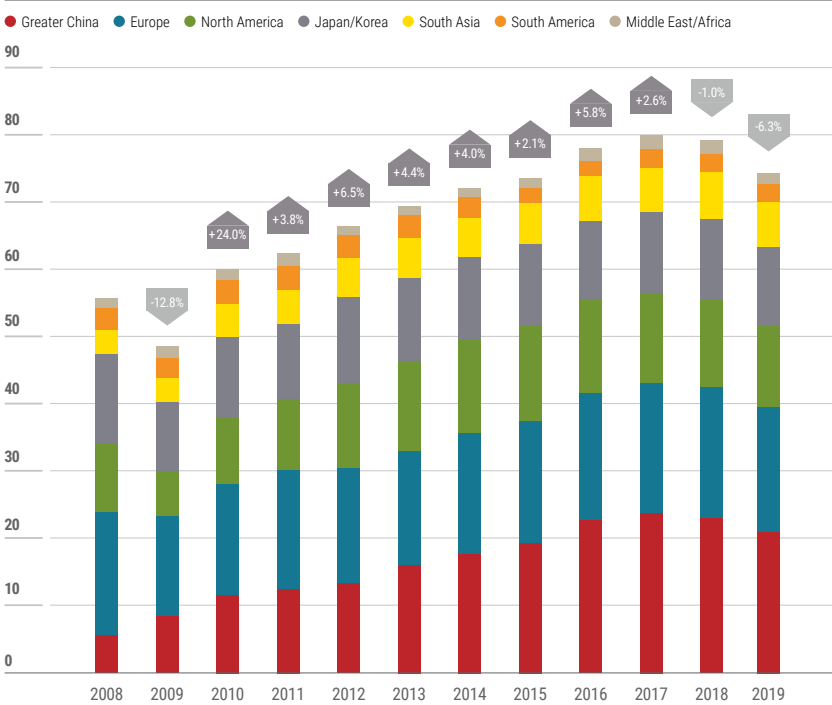
SOURCE: IHS MARKIT, OICA

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

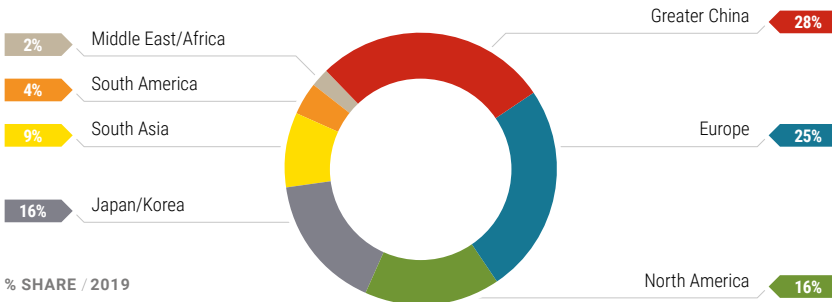
**92.8 million motor vehicles
 were produced globally in 2019**

World passenger car production

IN MILLION UNITS, % CHANGE / 2008 – 2019



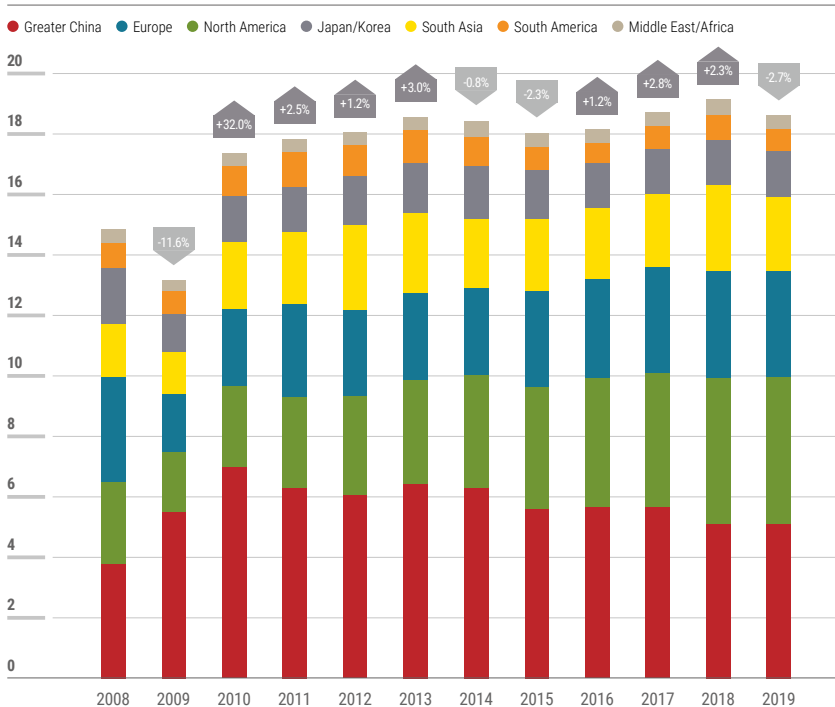
SOURCE: IHS MARKIT, OICA



25% of all passenger cars produced worldwide are made in Europe

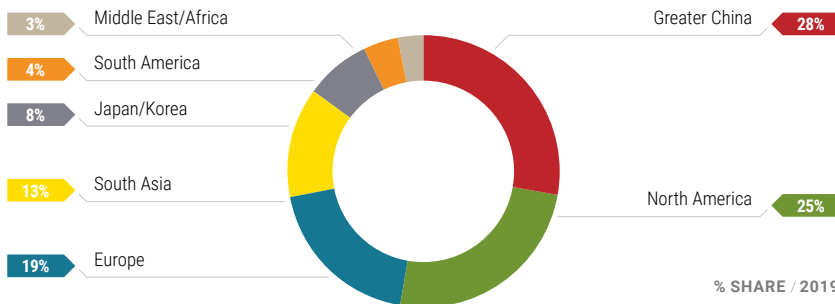
World commercial vehicle production¹

IN MILLION UNITS, % CHANGE / 2008 – 2019



SOURCE: IHS MARKIT, OICA

1. Includes buses



19% of all commercial vehicles are manufactured in Europe

Motor vehicle production in the EU

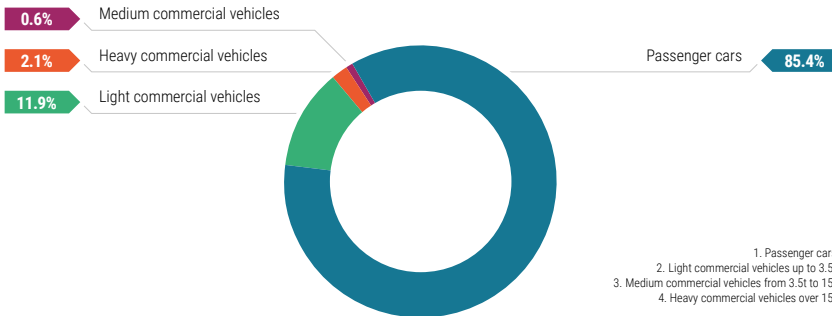
BY COUNTRY / 2019

	PC ¹	LCV ²	MCV ³	HCV ⁴	TOTAL
Austria	158,400	-	9,721	8,680	176,801
Belgium	247,020	-	-	38,434	285,454
Czech Republic	1,427,563	-	67	990	1,428,620
Finland	114,161	-	-	126	114,287
France	1,675,198	563,175	12,661	52,665	2,303,699
Germany	4,661,328	369,203	26,042	107,955	5,164,528
Hungary	498,158	-	-	-	498,158
Italy	542,007	302,820	29,680	5,217	879,724
Lithuania	-	-	-	56	56
Netherlands	176,113	-	-	82,226	258,339
Poland	434,700	186,441	6,923	14,438	642,502
Portugal	282,142	83,399	4,447	-	369,988
Romania	490,412	-	-	-	490,412
Slovakia	1,069,442	-	-	-	1,069,442
Slovenia	199,102	-	-	-	199,102
Spain	2,248,019	640,117	10,054	17,242	2,915,432
Sweden	285,709	-	-	47,600	333,309
United Kingdom	1,303,135	55,963	6,941	11,942	1,377,981
EUROPEAN UNION	15,812,609	2,201,118	106,536	387,571	18,507,834

SOURCE: IHS MARKIT, OICA

EU motor vehicle production by type

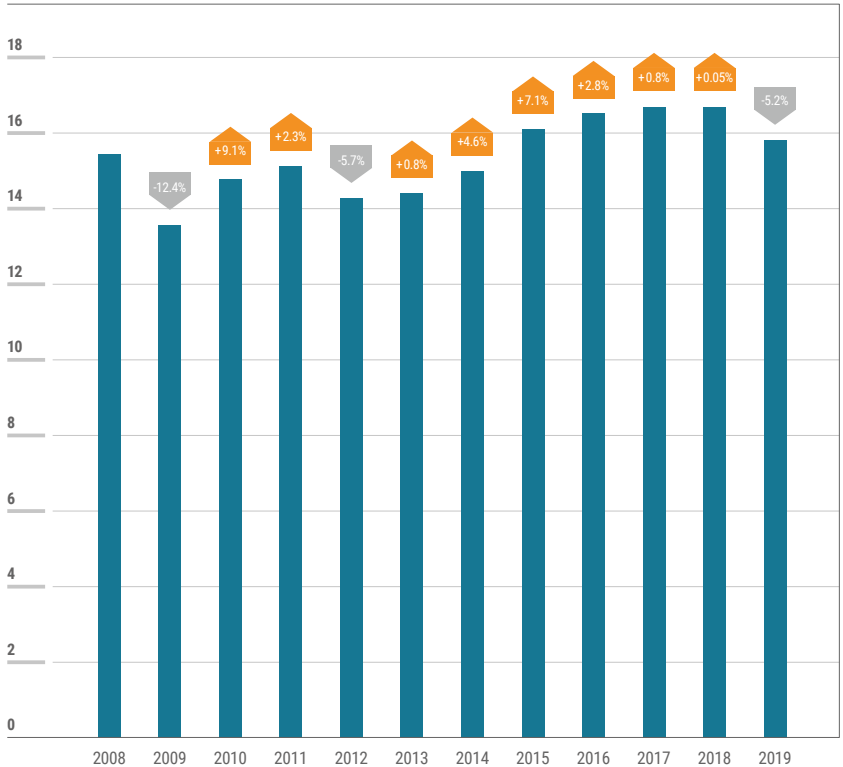
% SHARE / 2019



**18.5 million motor vehicles
were manufactured in the EU in 2019**

Passenger car production in the EU

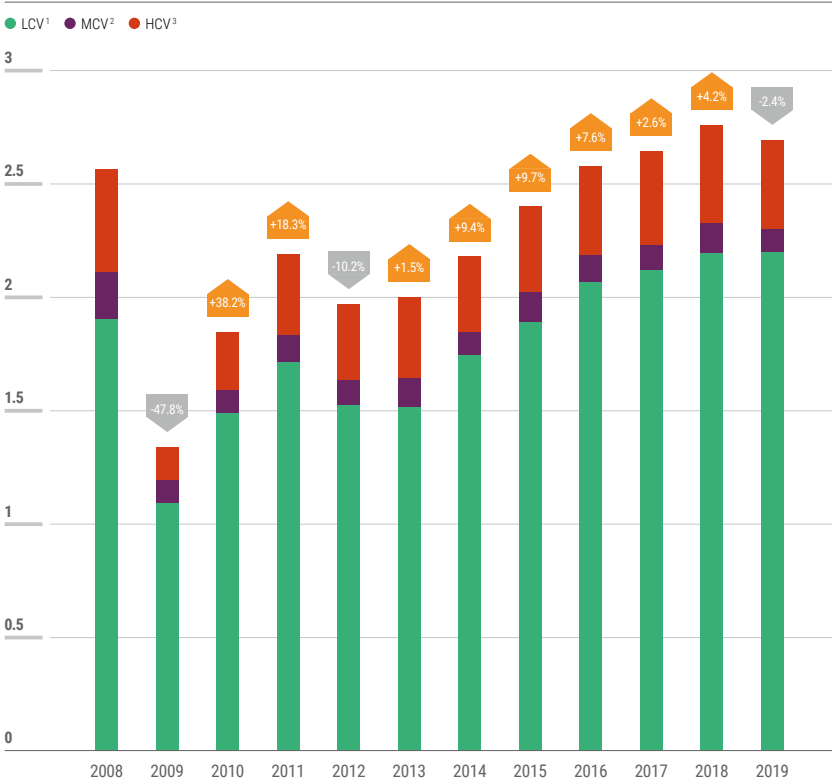
IN MILLION UNITS, % CHANGE / 2008 – 2019



SOURCE: IHS MARKIT, OICA

Commercial vehicle production in the EU

IN MILLION UNITS, % CHANGE / 2008 – 2019

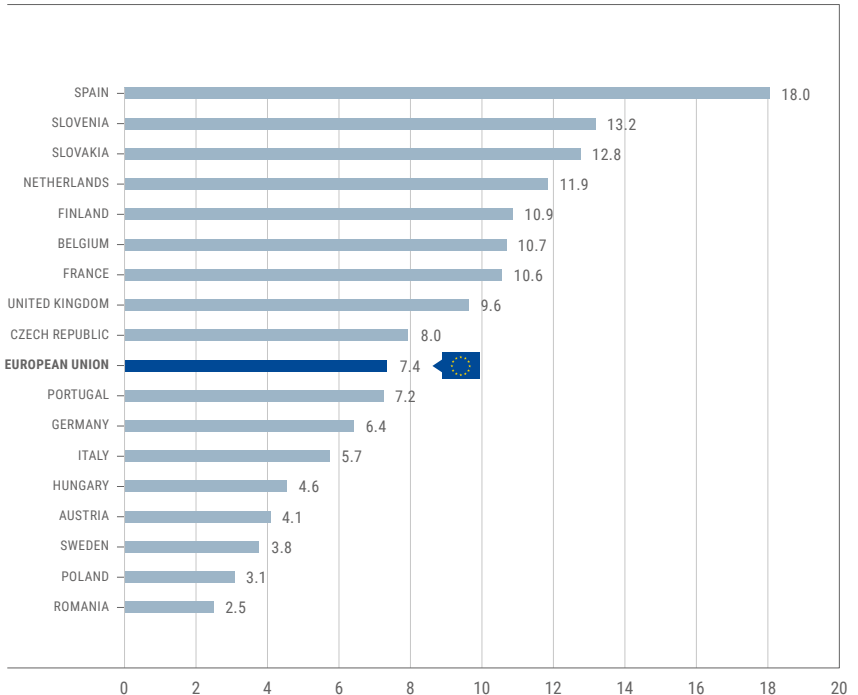


SOURCE: IHS MARKIT, OICA

- 1. Light commercial vehicles up to 3.5t
- 2. Medium commercial vehicles from 3.5t to 15t
- 3. Heavy commercial vehicles over 15t

Some 2.7 million commercial vehicles were produced in the EU in 2019

Motor vehicle production per direct automotive manufacturing employee

BY COUNTRY / 2018¹

SOURCE: EUROSTAT, IHS MARKIT, OICA

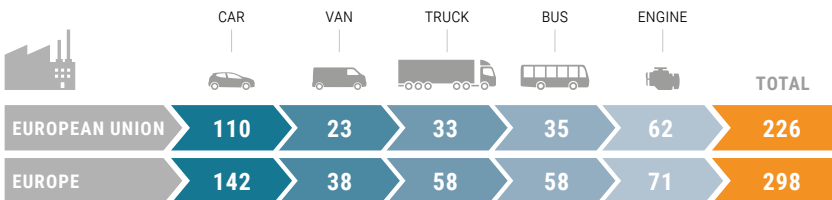
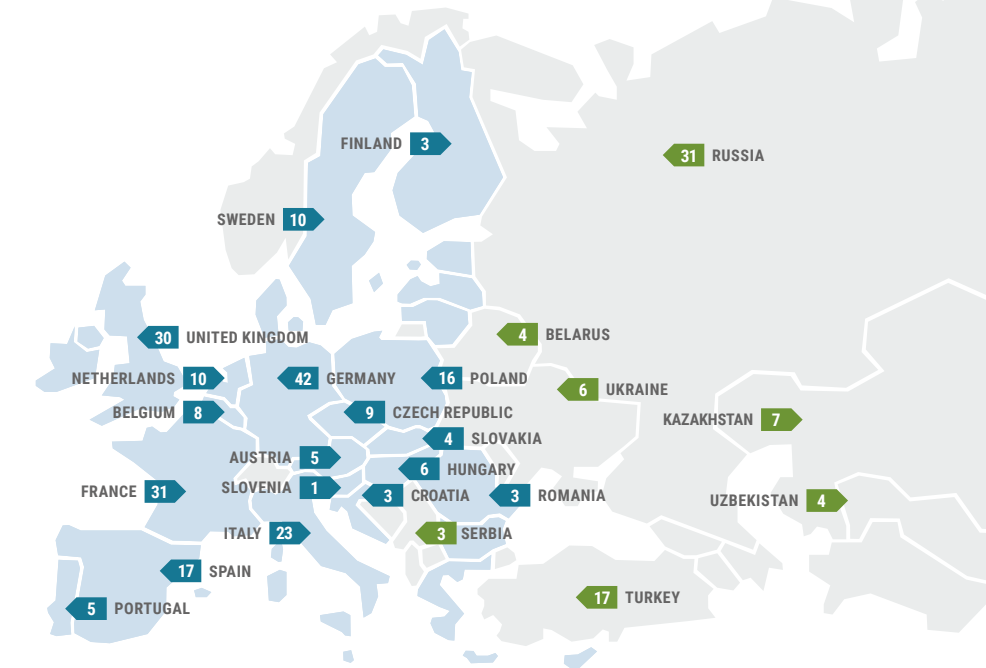
1. Based on total direct manufacturing employment, most recent data available

**The EU auto industry produces an average of
7.4 vehicles per worker**

Automobile assembly and engine production plants in Europe

2019

● EU ● NON-EU



SOURCE: ACEA

There are 226 automobile assembly and production plants in the EU



3

THE AUTOMOBILE INDUSTRY
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Registrations



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New motor vehicle registrations

IN THOUSAND UNITS / 2019

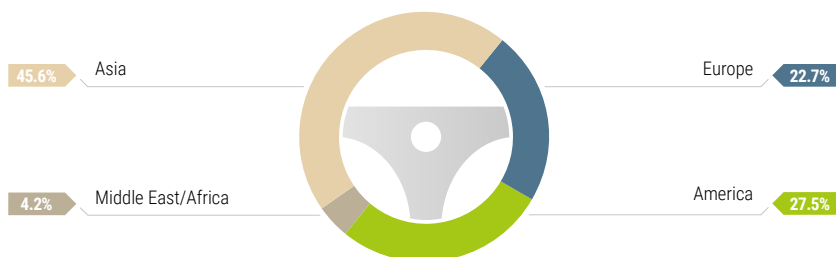
	2019	2018	% change 19/18	% share 2019
EUROPE	21,136	21,070	0.3	22.7
European Union ¹	17,885	17,643	1.4	19.2
EFTA	555	551	0.6	0.6
Russia	1,828	1,901	-3.9	2.0
Turkey	491	643	-23.6	0.5
Ukraine	103	90	13.8	0.1
Others: Europe ²	274	242	13.5	0.3
AMERICA	25,659	26,216	-2.1	27.5
North America	20,967	21,355	-1.8	22.5
<i>of which the United States</i>	<i>17,641</i>	<i>17,857</i>	<i>-1.2</i>	<i>18.9</i>
South America	4,692	4,861	-3.5	5.0
<i>of which Brazil</i>	<i>2,784</i>	<i>2,550</i>	<i>9.2</i>	<i>3.0</i>
ASIA	42,559	45,731	-6.9	45.6
China	26,271	28,546	-8.0	28.2
Japan	5,188	5,258	-1.3	5.6
India	3,877	4,455	-13.0	4.2
South Korea	1,784	1,820	-2.0	1.9
Others: Asia ³	5,439	5,652	-3.8	5.8
MIDDLE EAST/AFRICA	3,931	4,356	-9.8	4.2
WORLD	93,285	97,374	-4.2	100.0

SOURCE: ACEA, IHS MARKIT

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



**Europe accounts for almost 23%
of the world's motor vehicle sales**

New passenger car registrations

IN THOUSAND UNITS / 2019

	2019	2018	% change 19/18	% share 2019
EUROPE	18,141	18,062	0.4	24.2
European Union ¹	15,340	15,159	1.2	20.5
EFTA	466	466	0.0	0.6
Russia	1,638	1,683	-2.7	2.2
Turkey	387	486	-20.4	0.5
Ukraine	90	77	17.6	0.1
Others: Europe ²	219	191	15.0	0.3
AMERICA	19,596	20,421	-4.0	26.1
North America ³	16,036	16,667	-3.8	21.4
<i>of which the United States</i>	<i>13,464</i>	<i>13,910</i>	<i>-3.2</i>	<i>18.0</i>
South America	3,559	3,754	-5.2	4.7
<i>of which Brazil</i>	<i>2,262</i>	<i>2,090</i>	<i>8.3</i>	<i>3.0</i>
ASIA	33,958	36,645	-7.3	45.3
China	21,163	23,220	-8.9	28.2
Japan	4,296	4,376	-1.8	5.7
India	3,074	3,464	-11.3	4.1
South Korea	1,488	1,519	-2.0	2.0
Others: Asia ⁴	3,937	4,065	-3.2	5.3
MIDDLE EAST/AFRICA	3,252	3,677	-11.6	4.3
WORLD	74,946	78,805	-4.9	100.0

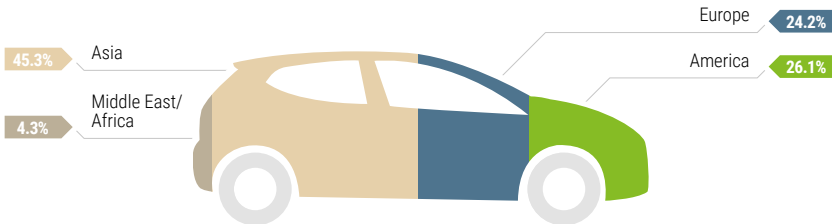
SOURCE: ACEA, IHS MARKIT

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



75 million passenger cars were registered worldwide in 2019

New commercial vehicle¹ registrations

IN THOUSAND UNITS / 2019

	2019	2018	% change 19/18	% share 2019
EUROPE	2,995	3,008	-0.4	16.3
European Union ²	2,545	2,484	2.5	13.9
EFTA	89	85	4.2	0.5
Russia	190	218	-13.0	1.0
Turkey	104	157	-33.7	0.6
Ukraine	12	13	-8.3	0.1
Others: Europe	55	51	8.0	0.3
AMERICA	6,063	5,795	4.6	33.1
North America ³	4,931	4,688	5.2	26.9
of which the United States	4,177	3,947	5.8	22.8
South America	1,133	1,106	2.4	6.2
of which Brazil	522	460	13.5	2.8
ASIA	8,601	9,087	-5.3	46.9
China	5,107	5,326	-4.1	27.8
Japan	892	882	1.1	4.9
India	803	990	-18.9	4.4
South Korea	296	301	-1.7	1.6
Others: Asia	1,503	1,587	-5.3	8.2
MIDDLE EAST/AFRICA	679	679	0.0	3.7
WORLD	18,339	18,569	-1.2	100.0

SOURCE: ACEA, IHS MARKIT

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

2. Data for Malta not available


3. Based on production type



**18.3 million vans, trucks and buses
were registered globally in 2019**

Motor vehicle registrations in the EU¹

BY COUNTRY / 2019

	PC ²	LCV ³	CV ⁴	BC ⁵	TOTAL
AUSTRIA	329,363	43,425	8,082	1,163	382,033
BELGIUM	550,003	81,219	11,531	1,310	644,063
BULGARIA	35,371	5,985	-	-	41,356
CROATIA	62,975	8,982	1,472	278	73,707
CYPRUS	12,220	2,274	120	-	14,614
CZECH REPUBLIC	249,915	20,436	9,852	1,220	281,423
DENMARK	225,594	33,108	5,024	535	264,261
ESTONIA	26,589	4,403	1,034	200	32,226
FINLAND	114,199	14,702	4,020	593	133,514
FRANCE	2,214,279	478,375	56,261	6,780	2,755,695
GERMANY	3,607,258	304,965	98,399	6,437	4,017,059
GREECE	114,110	7,972	428	364	122,874
HUNGARY	157,900	26,203	5,276	705	190,084
IRELAND	117,100	25,350	2,209	445	145,104
ITALY	1,916,320	187,725	23,622	4,249	2,131,916
LATVIA	18,235	2,703	1,110	98	22,146
LITHUANIA	46,461	4,355	7,327	515	58,658
LUXEMBOURG	55,008	5,089	1,202	273	61,572
NETHERLANDS	446,114	76,395	15,448	935	538,892
POLAND	555,598	69,872	28,317	2,471	656,258
PORTUGAL	223,799	38,454	4,975	601	267,829
ROMANIA	161,562	16,985	6,435	1,952	186,934
SLOVAKIA	101,568	8,508	3,482	305	113,863
SLOVENIA	73,211	13,407	2,265	202	89,085
SPAIN	1,258,260	215,164	24,575	3,261	1,501,260
SWEDEN	356,036	53,816	7,308	1,318	418,478
UNITED KINGDOM	2,311,140	365,778	57,230	5,874	2,740,022
 EUROPEAN UNION	15,340,188	2,115,650	387,004	42,084	17,884,926
ICELAND	11,717	1,383	304	79	13,483
NORWAY	142,381	37,736	7,411	2,296	189,824
SWITZERLAND	311,466	34,555	4,291	961	351,273
EFTA	465,564	73,674	12,006	3,336	554,580
EU + EFTA	15,805,752	2,189,324	399,010	45,420	18,439,506

SOURCE: ACEA

1. Data for Malta not available

2. Passenger cars

3. Light commercial vehicles up to 3.5t

4. Commercial vehicles over 3.5t (trucks)

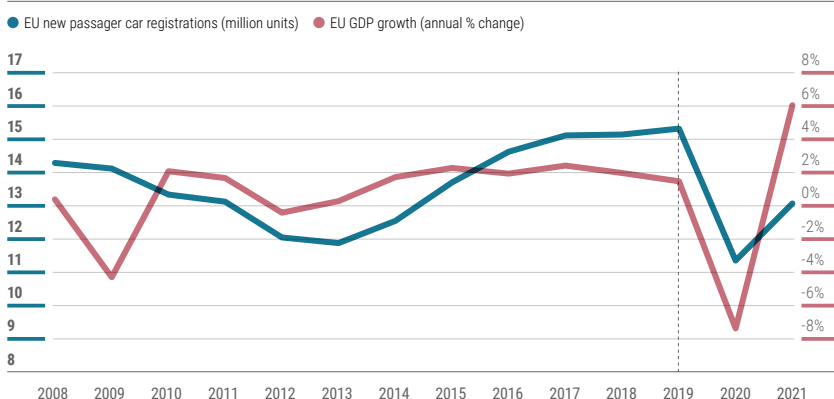
5. Buses and coaches over 3.5t

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

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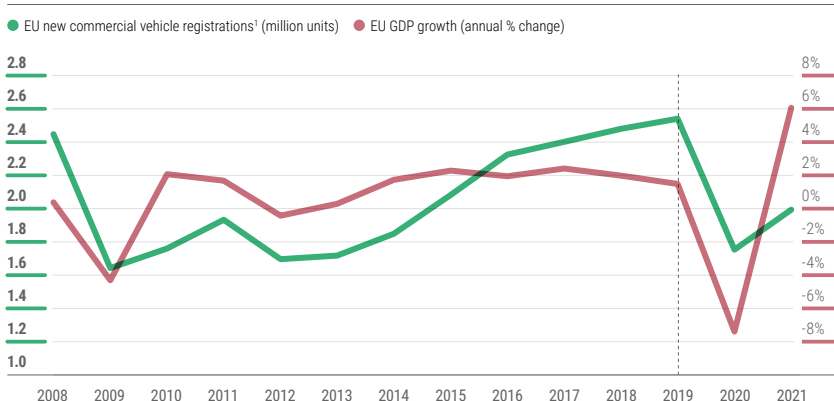
New passenger car registrations and annual GDP growth in the EU

2008 – 2021

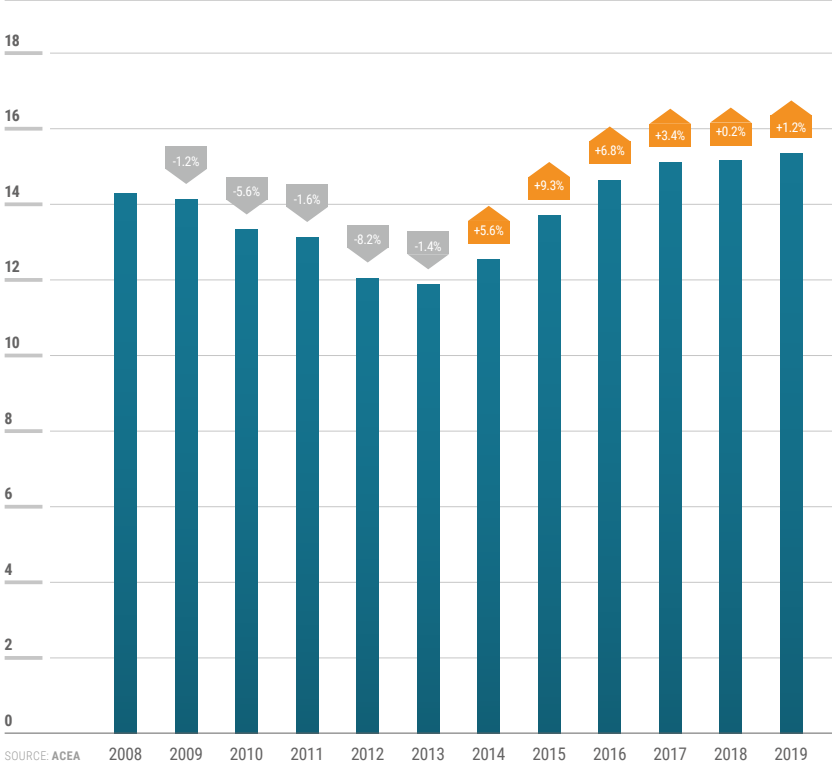


New commercial vehicle registrations and annual GDP growth in the EU

2008 – 2021



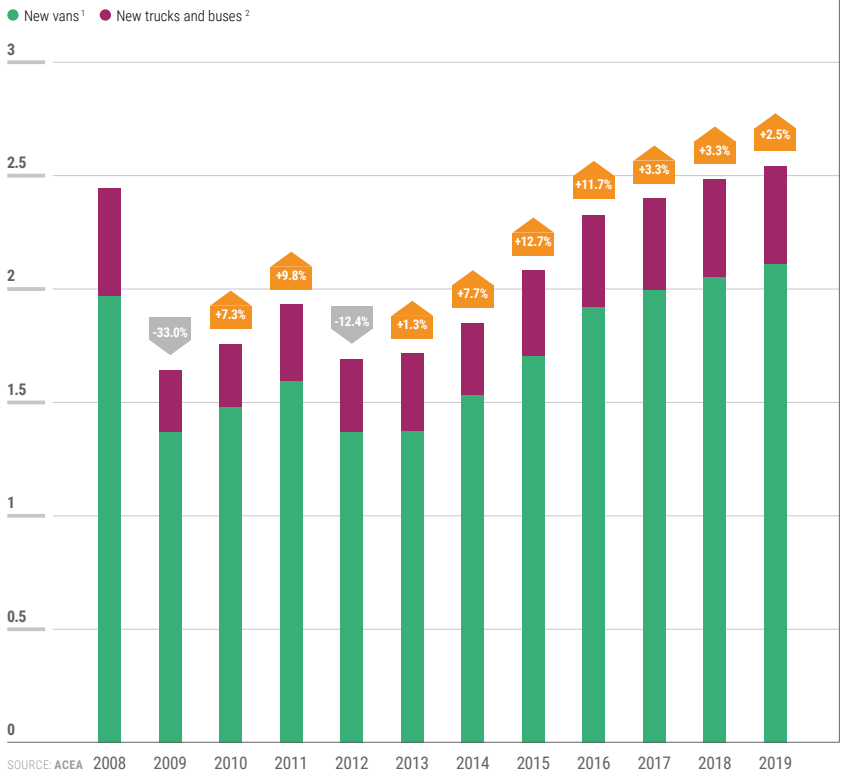
New passenger car registrations in the EU IN MILLION UNITS, % CHANGE / 2008 - 2019



15.3 million cars were sold across the EU in 2019

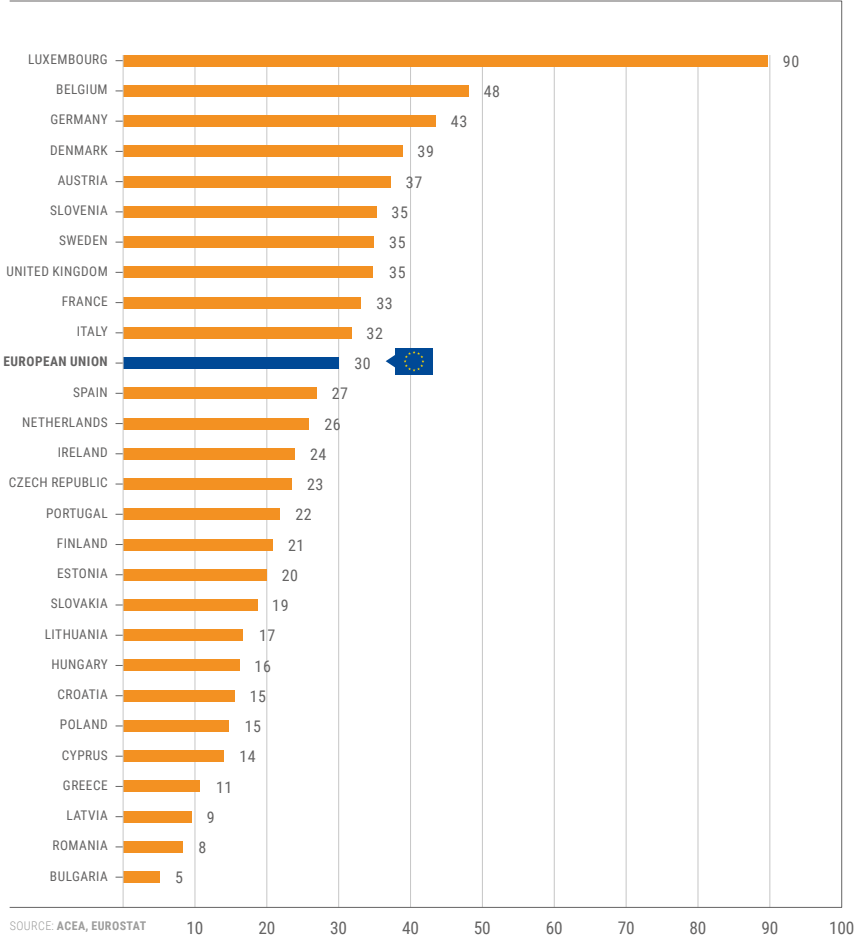
New commercial vehicle registrations in the EU

IN MILLION UNITS, % CHANGE / 2008 – 2019



1. Light commercial vehicles up to 3.5t
2. Commercial vehicles, buses and coaches over 3.5t

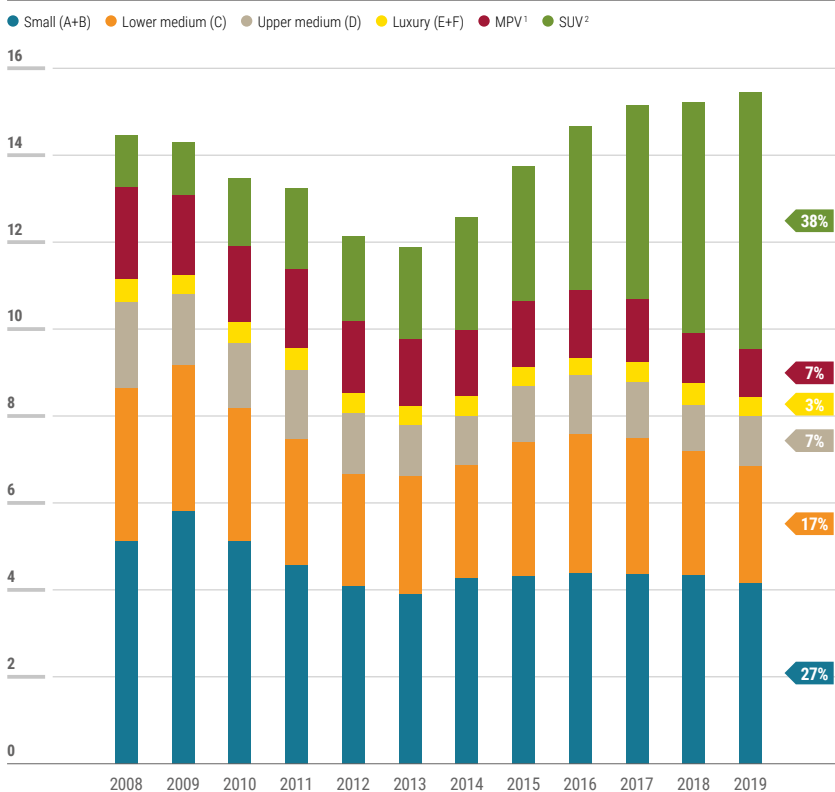
New passenger car registrations per 1,000 inhabitants BY COUNTRY, IN UNITS / 2019



**30 new cars were registered per
1,000 inhabitants in the EU in 2019**

New passenger cars by segment in the EU

IN MILLION UNITS, % SHARE / 2008 – 2019



SOURCE: IHS MARKIT

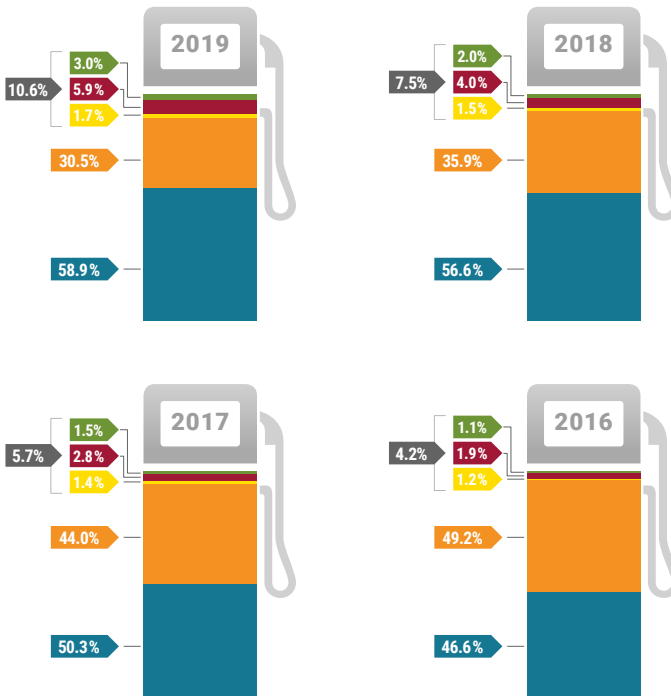
1. Multi-purpose vehicles
2. Sport utility vehicles

**Small and medium cars account for
over half of total EU car sales**

New passenger cars by fuel type in the EU¹

% SHARE / 2016 - 2019

● Petrol ● Diesel
● Electrically-chargeable² ● Hybrid³ ● Alternative fuels⁴ ● Total alternatively-powered



SOURCE: ACEA

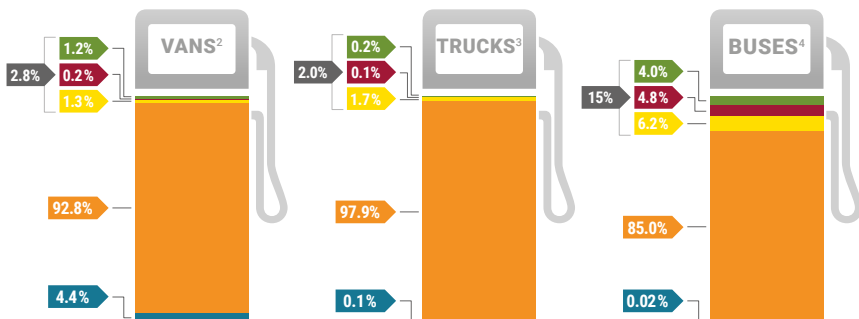
1. Data for Croatia, Cyprus, Luxembourg and Malta not available
2. Includes battery electric vehicles, fuel-cell electric vehicles, extended-range and plug-in hybrid electric vehicles
3. Includes full and mild hybrids
4. Includes LPG, natural gas and ethanol vehicles

**More than half of all new cars
in the EU run on petrol (58.9%)**

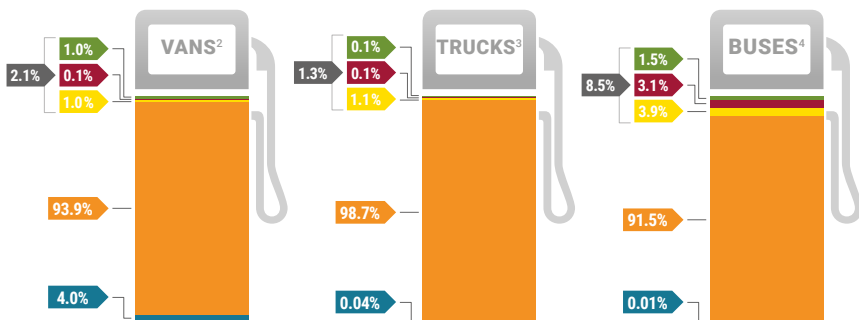
New commercial vehicles and buses by fuel type in the EU¹

% SHARE / 2019

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



% SHARE / 2018



SOURCE: ACEA

1. Data for Bulgaria, Croatia, Malta and Lithuania not available

2. Light commercial vehicles up to 3.5t

3. Commercial vehicles over 3.5t

4. Buses and coaches over 3.5t

**The vast majority of commercial vehicles
are fuelled by diesel**



THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2020/2021

Trade



ACEA

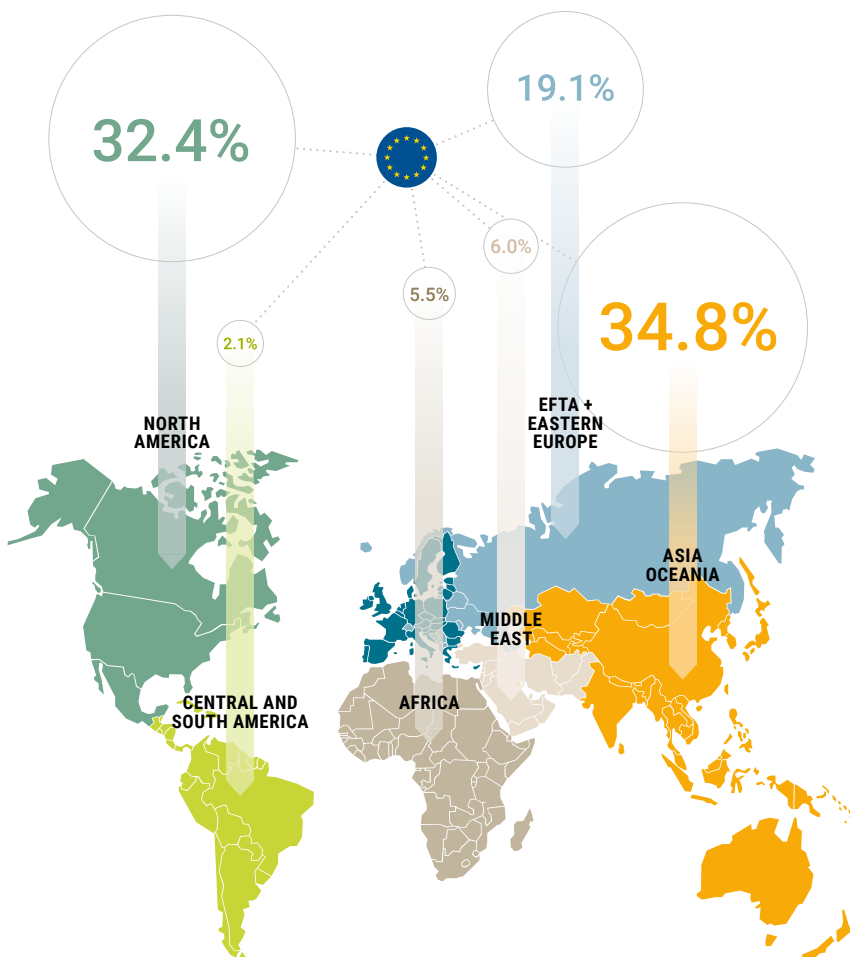
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Manufacturers
Association

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EU exports of motor vehicles

VALUE MARKET SHARE / 2019



SOURCE: EUROSTAT

EU motor vehicle trade

BY TYPE, IN MILLION € / 2019

Trade in value	PC ¹	LCV ²	CV & BC ³	TOTAL
2019				
Imports	53,222	6,326	2,489	62,037
Exports	124,614	3,990	7,333	135,937
Trade balance	71,392	-2,336	4,844	73,900
2018				
Imports	46,026	6,006	2,045	54,077
Exports	127,568	4,149	6,630	138,347
Trade balance	81,541	-1,857	4,585	84,270
% change 19/18				
Imports	15.6%	5.3%	21.7%	14.7%
Exports	-2.3%	-3.8%	10.6%	-1.7%
Trade balance	-12.4%	25.8%	5.6%	-12.3%

SOURCE: EUROSTAT

EU motor vehicle trade

BY TYPE, IN UNITS / 2019

Trade in volume	PC ¹	LCV ²	CV & BC ³	TOTAL
2019				
Imports	3,617,517	427,711	119,246	4,164,474
Exports	5,000,566	374,918	235,247	5,610,731
2018				
Imports	3,651,012	458,779	93,693	4,203,484
Exports	5,369,240	357,558	296,318	6,023,116
% change 19/18				
Imports	-0.9%	-6.8%	27.3%	-0.9%
Exports	-6.9%	4.9%	-20.6%	-6.8%

SOURCE: EUROSTAT

1. Passenger cars

2. Light commercial vehicles up to 5t

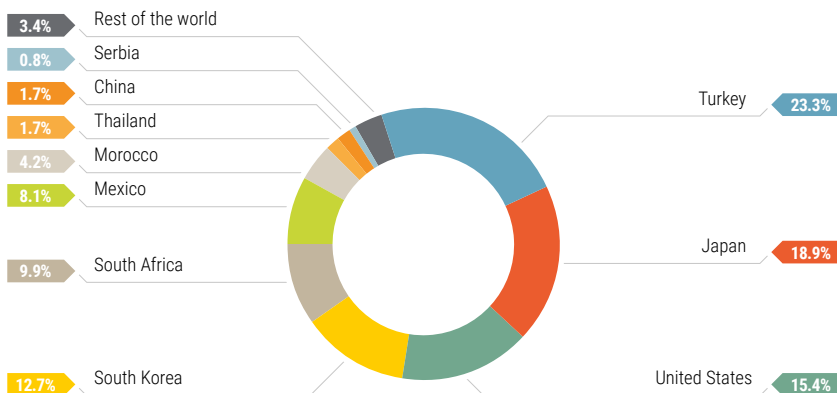
3. Commercial vehicles over 5t, including buses and coaches

**The automobile industry generates
an annual trade surplus of €74 billion for the EU**

WWW.ACEA.BE

Countries of origin of EU motor vehicle imports

VALUE MARKET SHARE / 2019



SOURCE: EUROSTAT

Main countries of origin of EU motor vehicle imports

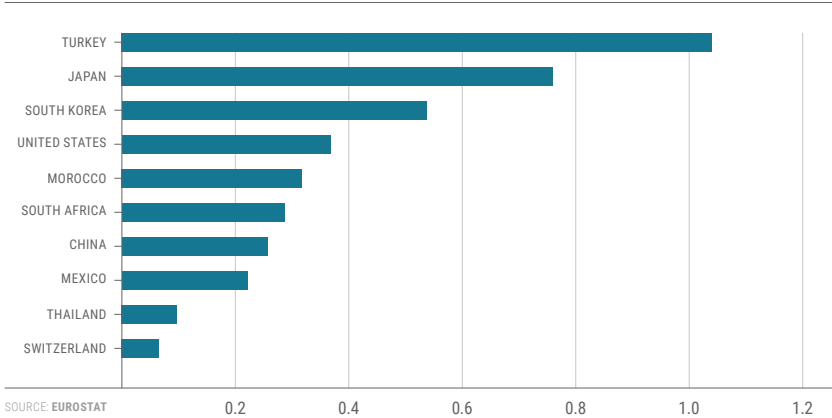
BY VALUE, IN MILLION € / 2019

	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	31,327	39,109	45,932	52,705	54,077	62,037	14.7	100.0
Turkey	7,931	9,872	11,961	13,870	14,331	14,463	0.9	23.3
Japan	6,669	7,738	9,196	9,739	9,924	11,717	18.1	18.9
United States	4,949	7,008	7,302	6,590	5,671	9,528	68.0	15.4
South Korea	4,027	4,354	4,829	6,599	7,195	7,895	9.7	12.7
South Africa	1,609	2,757	3,639	3,901	4,884	6,147	25.9	9.9
Mexico	1,075	1,652	2,224	4,744	5,282	5,006	-5.2	8.1
Morocco	1,363	1,530	1,742	2,108	2,491	2,605	4.6	4.2
Thailand	751	931	1,134	1,139	965	1,048	8.6	1.7
China	192	212	284	465	590	1,034	75.4	1.7
Serbia	1,152	1,049	1,032	854	672	470	-30.1	0.8

SOURCE: EUROSTAT

Main countries of origin of EU motor vehicle imports

IN MILLION UNITS / 2019



Main countries of origin of EU motor vehicle imports

IN UNITS / 2019

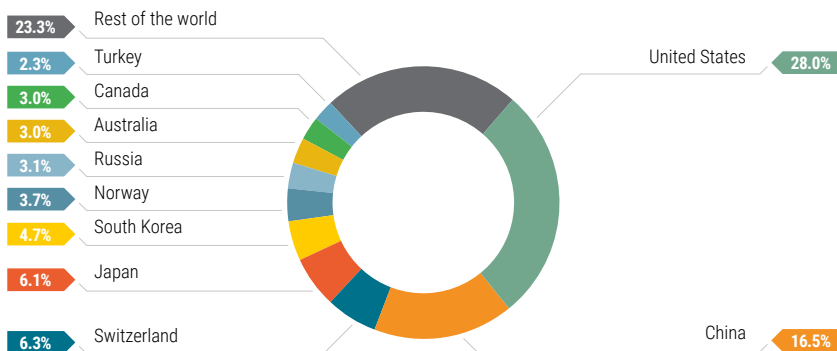
	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	2,629,622	3,034,546	3,405,268	3,903,869	4,203,484	4,164,474	-0.9	100.0
Turkey	708,860	842,209	988,571	1,110,898	1,106,049	1,044,247	-5.6	25.1
Japan	438,278	481,314	580,691	646,682	681,221	762,483	11.9	18.3
South Korea	349,230	376,181	404,076	520,098	541,654	539,048	-0.5	12.9
United States	243,228	251,581	264,169	258,857	280,617	369,042	31.5	8.9
Morocco	168,995	188,370	217,969	264,607	311,305	317,935	2.1	7.6
South Africa	88,170	141,633	188,629	185,920	230,113	286,716	24.6	6.9
China	191,228	214,456	147,371	208,704	389,860	256,842	-34.1	6.2
Mexico	76,142	122,005	138,523	237,580	275,417	222,243	-19.3	5.3
Thailand	68,330	94,917	106,597	106,313	96,069	96,674	0.6	2.3
Switzerland	41,232	48,470	67,805	71,548	73,124	65,114	-11.0	1.6

SOURCE: EUROSTAT

4.2 million vehicles were imported to the EU in 2019

Destinations for EU motor vehicle exports

VALUE MARKET SHARE / 2019



SOURCE: EUROSTAT

Main destinations for EU motor vehicle exports

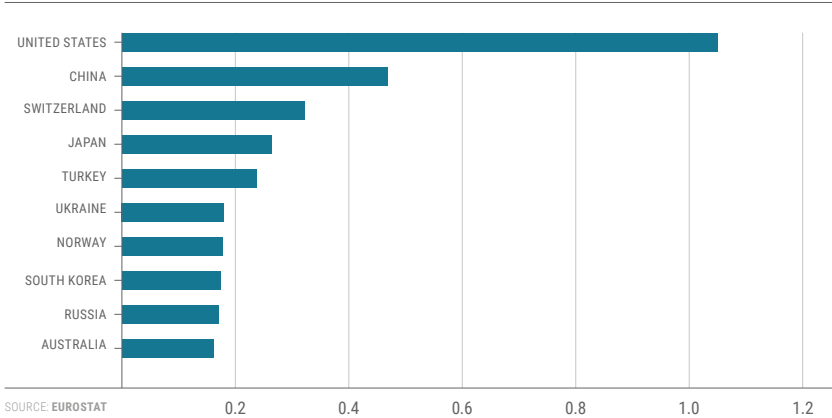
BY VALUE, IN MILLION € / 2019

	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	125,278	139,349	135,207	142,388	138,347	135,937	-1.7	100.0
United States	30,234	41,145	38,298	38,975	37,898	38,104	0.5	28.0
China	23,735	18,137	19,961	22,657	22,901	22,482	-1.8	16.5
Switzerland	7,374	8,648	8,269	8,429	8,094	8,594	6.2	6.3
Japan	6,031	6,507	7,362	8,204	8,434	8,282	-1.8	6.1
South Korea	4,937	7,234	6,325	6,840	7,356	6,379	-13.3	4.7
Norway	4,110	4,294	4,382	4,838	4,808	5,074	5.5	3.7
Russia	5,809	3,892	3,207	3,602	3,813	4,155	9.0	3.1
Australia	3,958	4,980	5,167	5,373	4,929	4,039	-18.1	3.0
Canada	3,188	3,826	4,094	4,508	4,266	4,032	-5.5	3.0
Turkey	5,971	8,577	8,673	7,554	4,840	3,134	-35.2	2.3

SOURCE: EUROSTAT

Main destinations for EU motor vehicle exports

IN MILLION UNITS / 2019



Main destinations for EU motor vehicle exports

IN UNITS / 2019

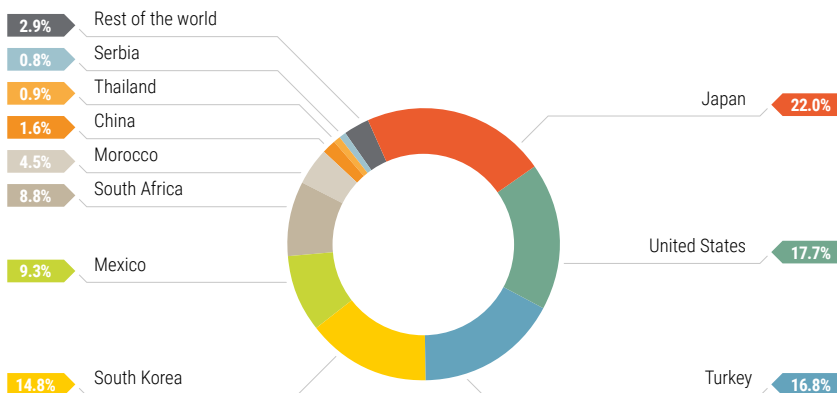
	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	6,063,651	6,084,750	6,254,941	5,983,463	6,023,116	5,610,731	-6.8	100.0
United States	1,010,196	1,271,612	1,200,995	1,190,782	1,171,383	1,053,909	-10.0	18.8
China	613,632	472,698	534,994	580,557	560,916	469,510	-16.3	8.4
Switzerland	301,777	331,908	315,251	303,723	293,217	321,289	9.6	5.7
Japan	237,991	250,839	279,778	282,625	286,451	264,837	-7.5	4.7
Turkey	418,346	592,114	585,255	525,417	315,044	240,200	-23.8	4.3
Ukraine	78,710	44,976	73,924	113,808	110,523	181,510	64.2	3.2
Norway	171,125	176,945	181,191	178,030	228,096	179,908	-21.1	3.2
South Korea	177,603	230,811	182,736	190,653	197,172	175,632	-10.9	3.1
Russia	328,960	191,707	145,352	160,838	185,130	171,857	-7.2	3.1
Australia	183,084	227,920	206,820	210,304	200,267	162,154	-19.0	2.9

SOURCE: EUROSTAT

18.8% of EU vehicle exports go to the United States

Countries of origin of EU passenger car imports

VALUE MARKET SHARE / 2019



SOURCE: EUROSTAT

Main countries of origin of EU passenger car imports

BY VALUE, IN MILLION € / 2019

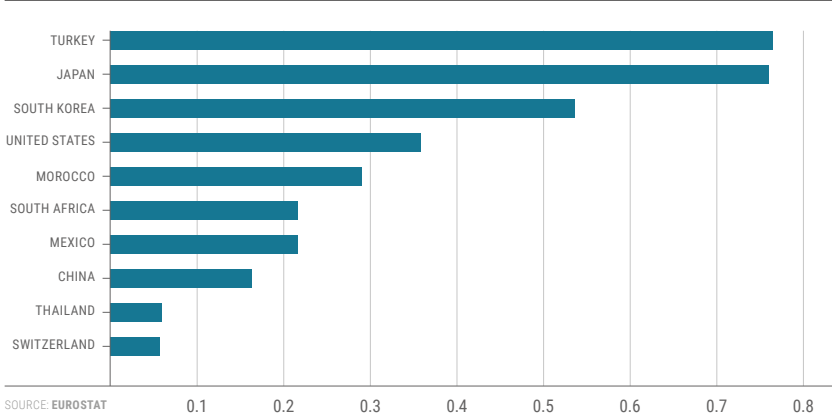
	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	26,216	32,530	38,169	44,831	46,026	53,222	15.6	100.0
Japan	6,654	7,718	9,154	9,709	9,902	11,695	18.1	22.0
United States	4,911	6,964	7,233	6,420	5,539	9,424	70.1	17.7
Turkey	4,374	5,056	6,416	8,579	8,802	8,916	1.3	16.8
South Korea	4,014	4,330	4,812	6,585	7,180	7,866	9.6	14.8
Mexico	1,068	1,642	2,211	4,723	5,248	4,963	-5.4	9.3
South Africa	1,235	2,400	3,104	3,238	4,089	4,676	14.4	8.8
Morocco	1,225	1,369	1,548	1,907	2,257	2,372	5.1	4.5
China	112	104	136	369	482	865	79.4	1.6
Thailand	218	442	472	458	434	465	7.3	0.9
Serbia	1,149	1,035	999	844	655	440	-32.8	0.8

SOURCE: EUROSTAT

The United States accounts for the second highest import value for cars, with a 17.7% share

Main countries of origin of EU passenger car imports

IN MILLION UNITS / 2019



Main countries of origin of EU passenger car imports

IN UNITS / 2019

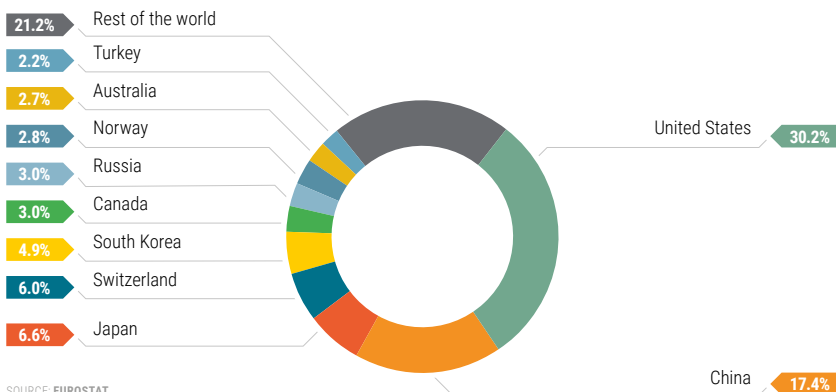
	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	2,223,152	2,463,528	2,858,696	3,326,210	3,651,012	3,617,517	-0.9	100.0
Turkey	474,005	526,500	646,244	789,496	784,937	764,703	-2.6	21.1
Japan	437,238	479,785	578,206	644,698	679,524	760,717	11.9	21.0
South Korea	348,260	374,765	402,956	519,136	540,732	537,341	-0.6	14.9
United States	234,974	243,104	254,979	242,102	267,515	358,044	33.8	9.9
Morocco	152,588	169,823	196,739	240,908	283,622	292,148	3.0	8.1
South Africa	69,223	122,143	161,797	154,025	191,369	218,219	14.0	6.0
Mexico	75,539	121,075	137,249	235,533	271,883	217,856	-19.9	6.0
China	117,886	86,450	70,208	116,668	321,250	164,606	-48.8	4.6
Thailand	32,393	64,238	65,920	64,052	62,109	60,071	-3.3	1.7
Switzerland	35,617	42,314	61,053	64,151	65,914	58,523	-11.2	1.6

SOURCE: EUROSTAT

The EU imported 3.6 million cars in 2019

Destinations for EU passenger car exports

VALUE MARKET SHARE / 2019



SOURCE: EUROSTAT

Main destinations for EU passenger car exports

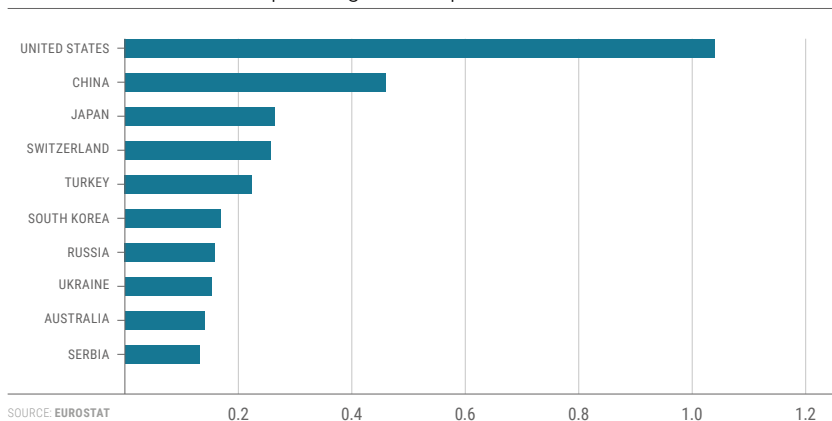
BY VALUE, IN MILLION € / 2019

	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	115,117	129,049	124,850	131,605	127,568	124,614	-2.3	100.0
United States	29,779	40,466	37,721	38,335	37,242	37,631	1.0	30.2
China	23,492	17,948	19,741	22,337	22,311	21,734	-2.6	17.4
Japan	5,999	6,465	7,340	8,185	8,408	8,247	-1.9	6.6
Switzerland	6,393	7,619	7,332	7,432	7,044	7,494	6.4	6.0
South Korea	4,694	6,910	5,791	6,314	6,965	6,131	-12.0	4.9
Canada	3,014	3,640	3,904	4,317	4,018	3,697	-8.0	3.0
Russia	5,207	3,667	2,926	3,120	3,388	3,689	8.9	3.0
Norway	3,183	3,375	3,325	3,744	3,722	3,497	-6.0	2.8
Australia	3,482	4,593	4,603	4,652	3,950	3,373	-14.6	2.7
Turkey	5,147	7,454	7,772	6,544	4,295	2,758	-35.8	2.2

SOURCE: EUROSTAT

Main destinations for EU passenger car exports

IN MILLION UNITS / 2019



Main destinations for EU passenger car exports

IN UNITS / 2019

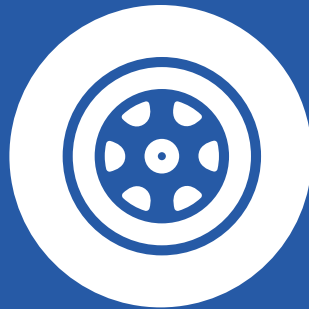
	2014	2015	2016	2017	2018	2019	% change 19/18	% share 2019
WORLD	5,528,952	5,562,996	5,427,673	5,489,098	5,369,240	5,000,566	-6.9	100.0
United States	998,503	1,223,019	1,170,612	1,176,829	1,154,784	1,040,770	-9.9	20.8
China	608,912	469,761	531,325	575,284	543,643	459,623	-15.5	9.2
Japan	237,149	247,832	279,188	282,332	285,434	263,057	-7.8	5.3
Switzerland	272,946	303,103	282,378	275,091	261,982	258,195	-1.4	5.2
Turkey	374,603	531,720	534,169	466,574	290,627	224,240	-22.8	4.5
South Korea	174,614	227,065	176,710	184,805	191,863	168,660	-12.1	3.4
Russia	302,184	181,457	134,420	147,073	174,492	159,020	-8.9	3.2
Ukraine	28,187	28,008	51,774	89,893	87,028	151,592	74.2	3.0
Australia	162,756	206,701	188,595	189,824	168,801	140,179	-17.0	2.8
Serbia	71,021	88,487	115,587	117,464	138,064	132,128	-4.3	2.6

SOURCE: EUROSTAT

5 million cars were exported by the EU in 2019

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Vehicles in use



ACEA

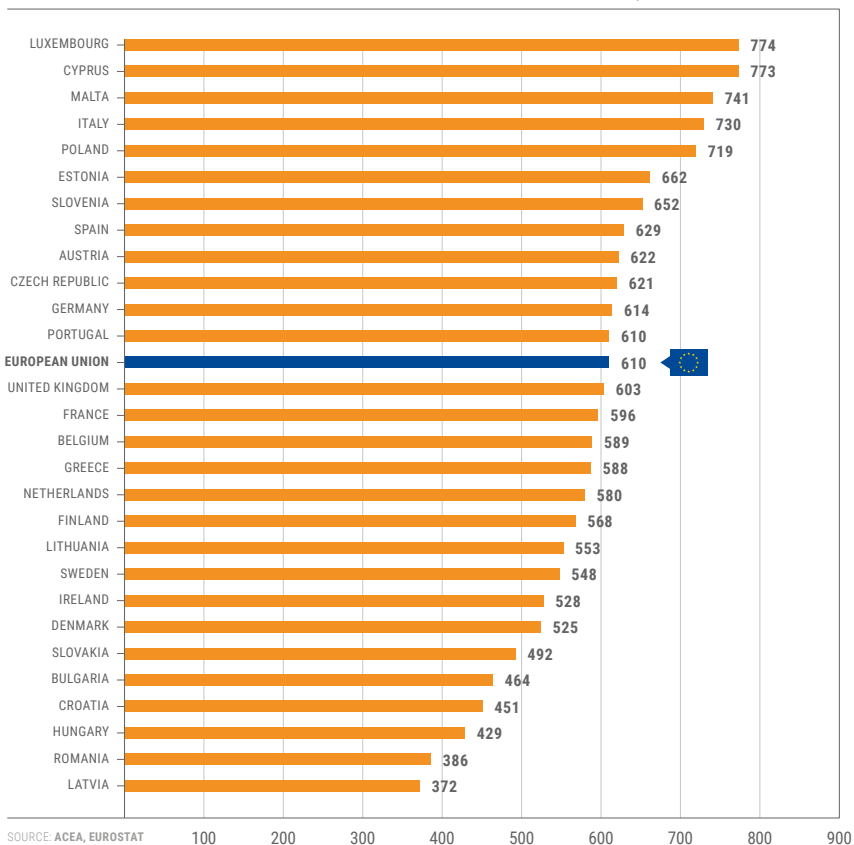
European
Automobile
Manufacturers
Association

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Motorisation rates in the EU

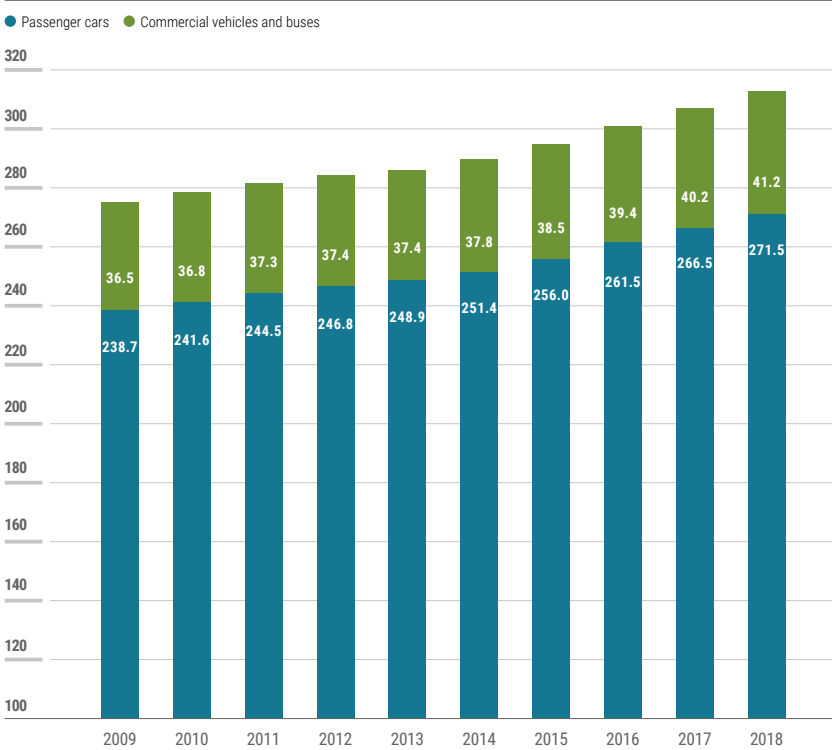
VEHICLES PER 1,000 INHABITANTS / 2018



**The EU counts 610 motor vehicles
per 1,000 inhabitants**

EU vehicle fleet: size and distribution

IN MILLION UNITS / 2009 – 2018



SOURCE: ACEA, EUROSTAT

Cars make up 87% of the EU vehicle fleet

Average age of the EU vehicle fleet

BY COUNTRY, IN YEARS / 2018

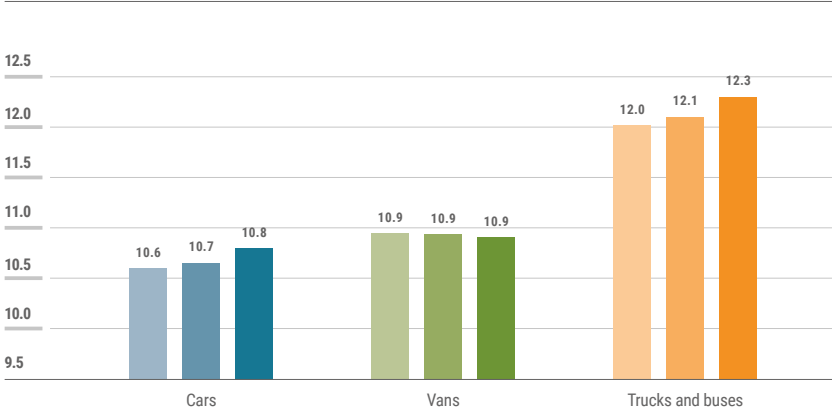


SOURCE: ACEA VEHICLES IN USE REPORT 2019

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 the EU fleet

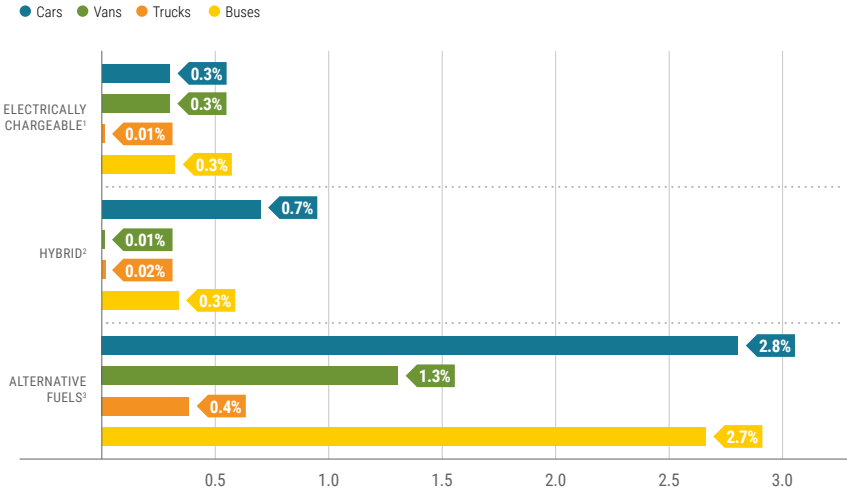
BY VEHICLE TYPE, IN YEARS / 2016 - 2018



SOURCE: ACEA, IHS MARKIT

Share of alternatively-powered vehicles in the EU fleet

BY SEGMENT, %SHARE / 2018



SOURCE: ACEA VEHICLES IN USE REPORT 2019

1. Includes battery and plug-in hybrid electric vehicles
2. Includes full and mild hybrids
3. Includes LPG and natural gas vehicles

**0.3% of all passenger cars on EU roads
are electrically-chargeable**

Road safety



ACEA

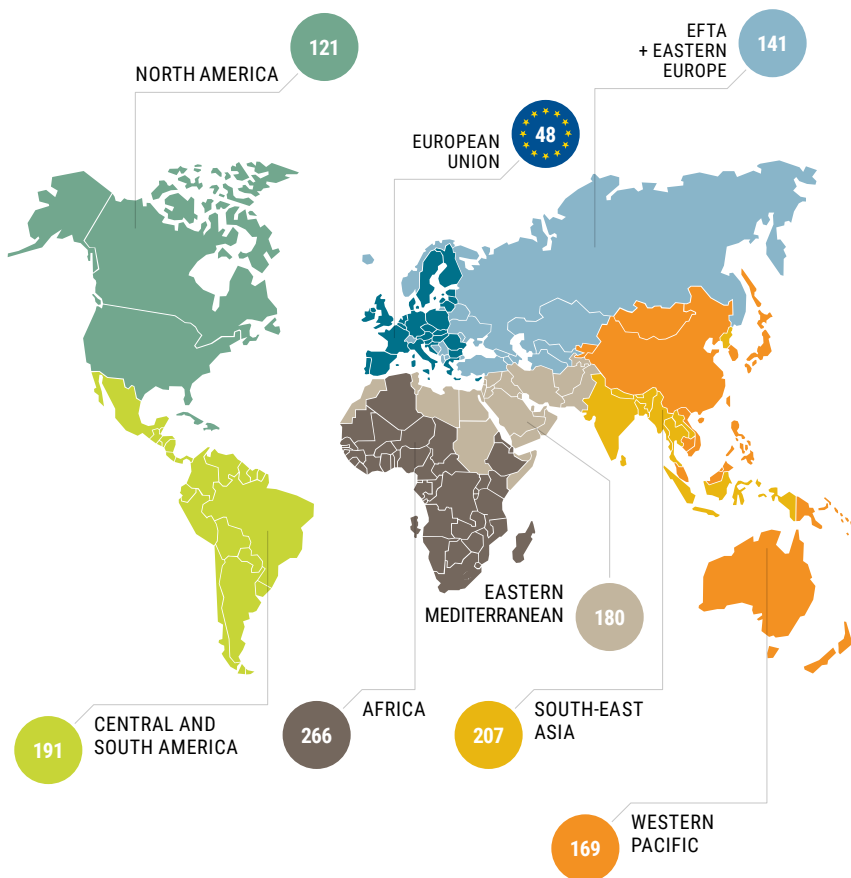
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Road fatalities per million inhabitants

BY REGION¹ / 2016

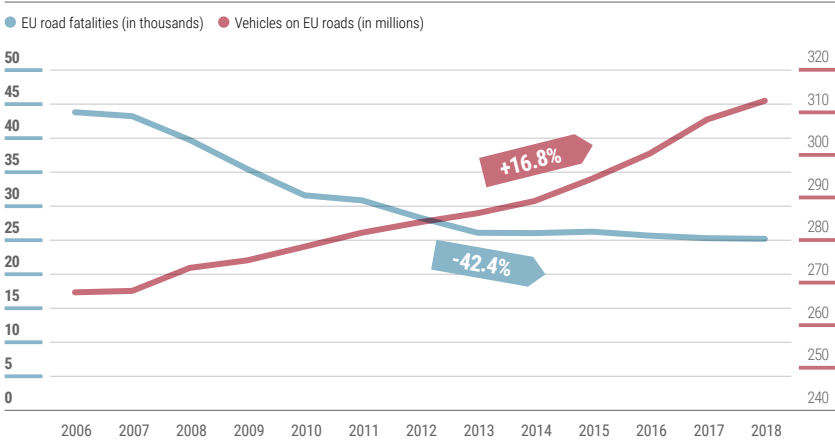
WORLD

182 road fatalities per million inhabitants

SOURCE: CARE (EU ROAD ACCIDENTS DATABASE), WHO (WORLD HEALTH ORGANIZATION)

1. WHO regions

Number of motor vehicles and road fatalities in the EU 2006 – 2018



SOURCE: ACEA, CARE (EU ROAD ACCIDENTS DATABASE)

Number of motor vehicles and road fatalities in the EU 2006 – 2018

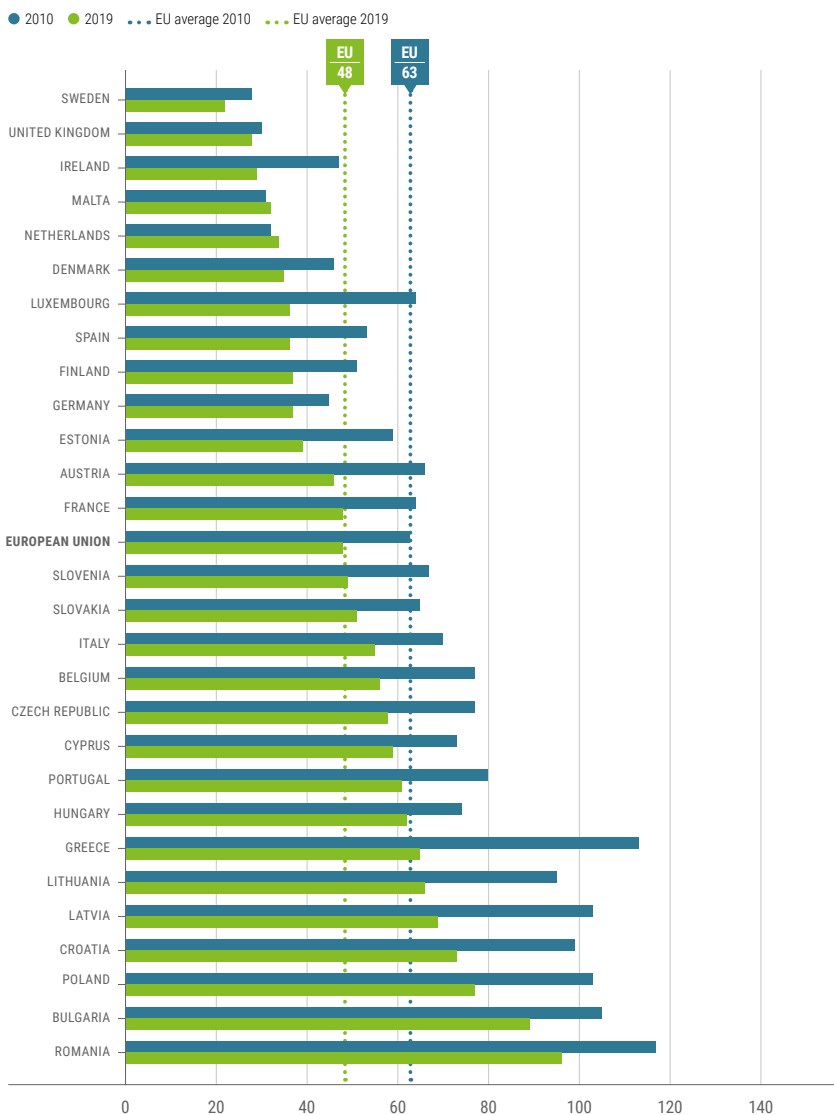
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU road fatalities (in thousands)	43.8	43.2	39.7	35.4	31.6	30.8	28.3	26.1	26.0	26.2	25.7	25.3	25.2
Vehicles on EU roads (in millions)	267.8	268.0	273.5	275.2	278.4	281.7	284.2	286.3	289.1	294.4	300.3	308.3	312.7

SOURCE: ACEA, CARE (EU ROAD ACCIDENTS DATABASE)

While there are 45 million more vehicles on EU roads, fatalities have fallen by 42.4% since 2006

Road fatalities per million inhabitants

BY COUNTRY / 2010, 2019

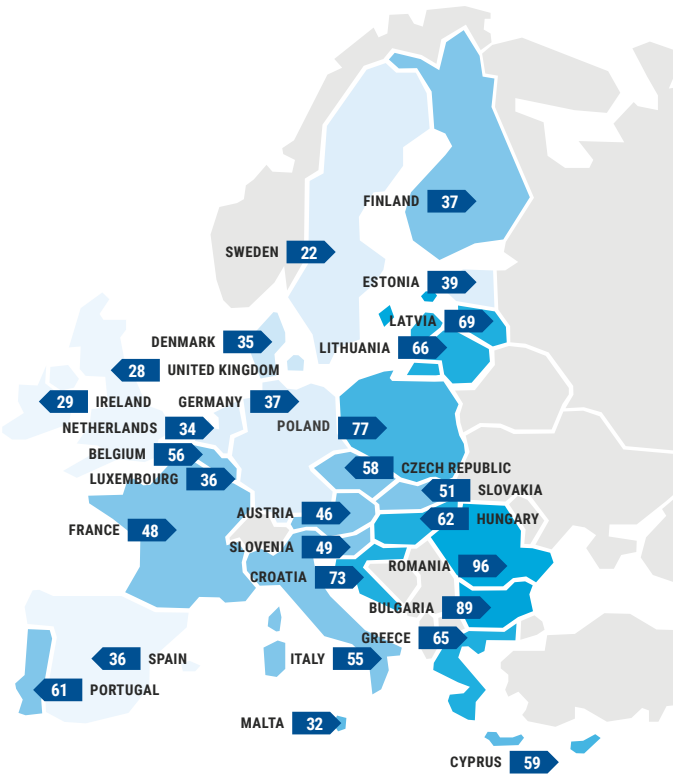


SOURCE: CARE (EU ROAD ACCIDENTS DATABASE)

Road fatality statistics in the EU

BY COUNTRY / 2019

	2019 road fatalities	% change 19 / 18
Austria	416	1.7
Belgium	620	2.6
Bulgaria	628	2.8
Croatia	297	-6.3
Cyprus	52	6.1
Czech Republic	617	-6.2
Denmark	199	13.7
Estonia	52	-22.4
Finland	209	-12.6
France	3,244	-0.1
Germany	3,059	-6.6
Greece	699	-0.1
Hungary	602	-4.9
Ireland	141	0.7
Italy	3,130	-6.1
Latvia	132	-10.8
Lithuania	184	6.4
Luxembourg	22	-38.9
Malta	16	-11.1
Netherlands	661	-2.5
Poland	2,909	1.6
Portugal	614	-9.0
Romania	1,864	-0.2
Slovakia	245	7.0
Slovenia	102	12.1
Spain	1,724	-4.5
Sweden	221	-31.8
United Kingdom	1,926	4.7
EUROPEAN UNION	24,585	-2.5



SOURCE: CARE (EU ROAD ACCIDENTS DATABASE)

Road fatalities declined by 2.5% in the EU in 2019

THE AUTOMOBILE INDUSTRY
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Environment



ENVIRONMENT



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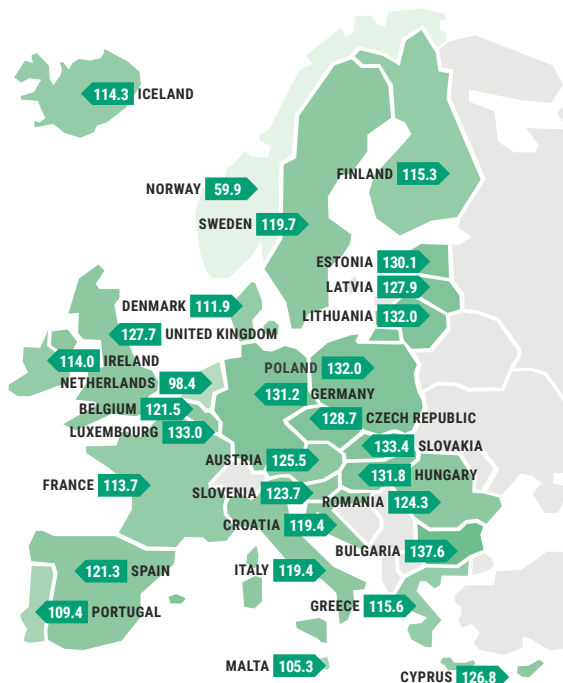
Average CO2 emissions of new passenger cars by country

IN G CO2/KM / 2019

	2019 average emissions	% change 19 / 18
Austria	125.5	2.0
Belgium	121.5	1.6
Bulgaria	137.6	7.8
Croatia	119.4	3.5
Cyprus	126.8	2.7
Czech Republic	128.7	2.1
Denmark	111.9	2.1
Estonia	130.1	-1.7
Finland	115.3	-1.2
France	113.7	1.4
Germany	131.2	1.4
Greece	115.6	3.8
Hungary	131.8	3.0
Ireland	114.0	0.6
Italy	119.4	2.6
Latvia	127.9	-0.8
Lithuania	132.0	2.6
Luxembourg	133.0	1.2
Malta	105.3	-2.2
Netherlands	98.4	-6.8
Poland	132.0	1.7
Portugal	109.4	2.9
Romania	124.3	2.3
Slovakia	133.4	5.1
Slovenia	123.7	2.3
Spain	121.3	2.7
Sweden	119.7	-2.1
United Kingdom	127.7	2.5
EUROPEAN UNION	123.0	1.8
Iceland	114.3	-2.1
Norway	59.9	-
EU28 + IS + NO	122.4	-

SOURCE: EEA

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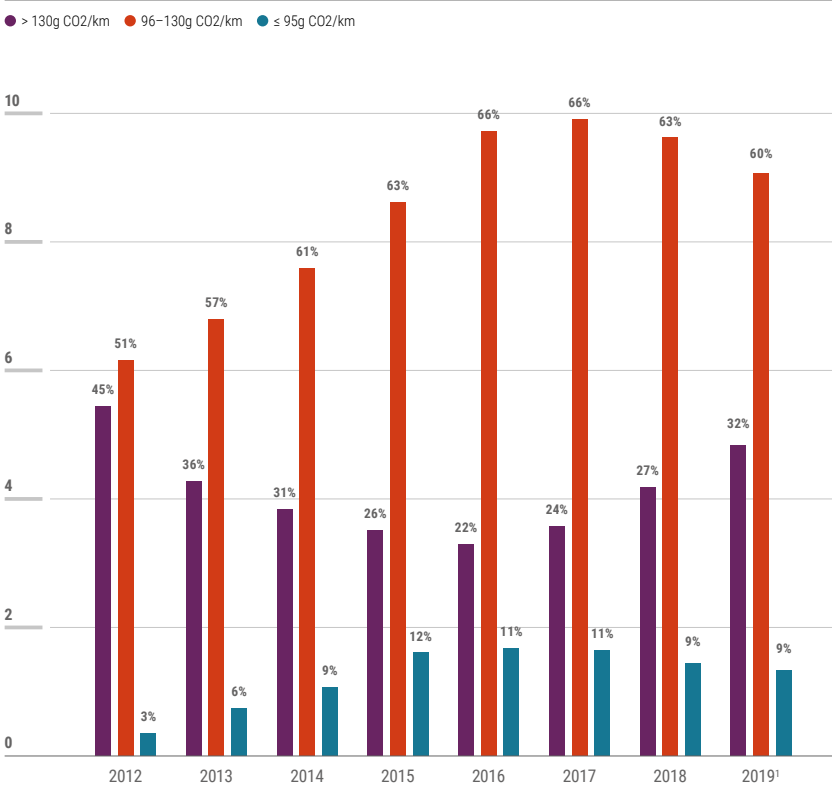


Average CO2 emissions from new passenger cars by country in g CO2/km in 2019

**The average new car emits 123g CO2/km**

New passenger cars in the EU by emissions classes

IN MILLION UNITS, % SHARE / 2012 – 2019



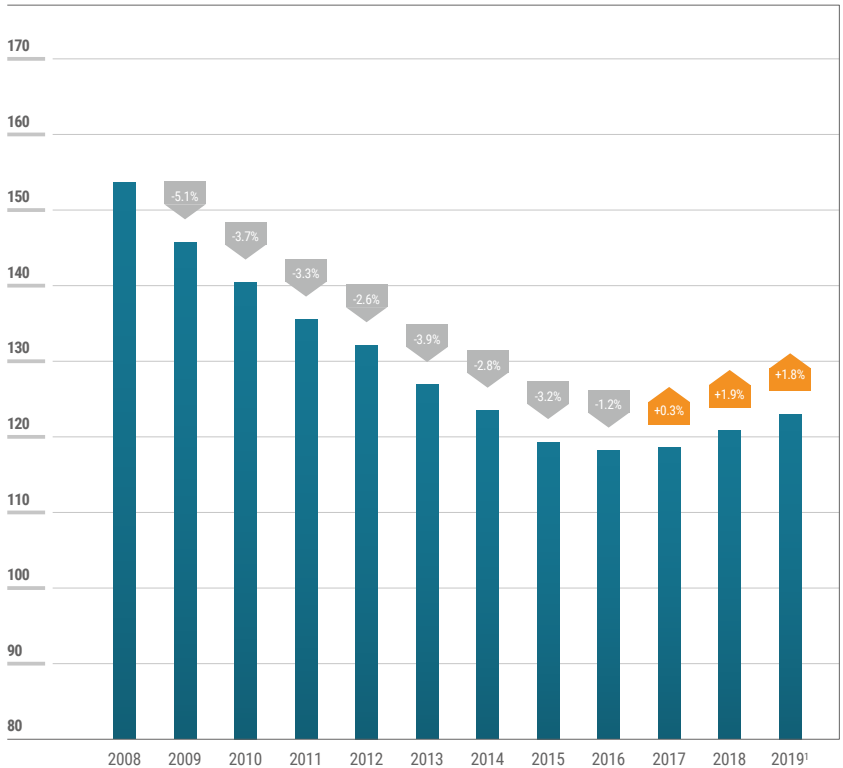
SOURCE: EEA

1. Provisional figures

**Almost 70% of all new cars sold
emit less than 130g CO2/km**

Average CO₂ emissions of new passenger cars in the EU

IN G CO₂/KM, % CHANGE / 2008 – 2019



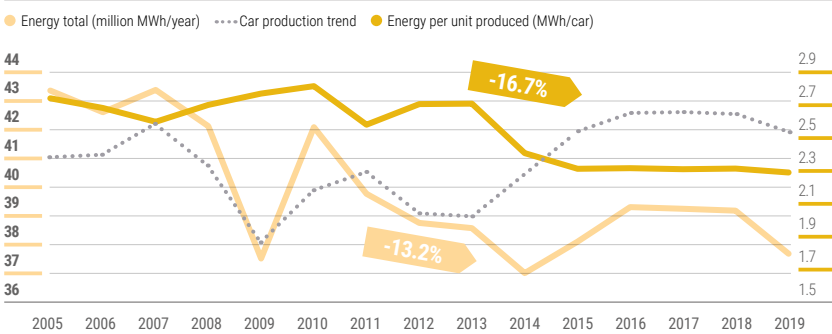
SOURCE: EEA

1. Provisional figures

**CO₂ emissions from new cars
are down by 20% since 2008**

Energy consumption during production

2005 – 2019

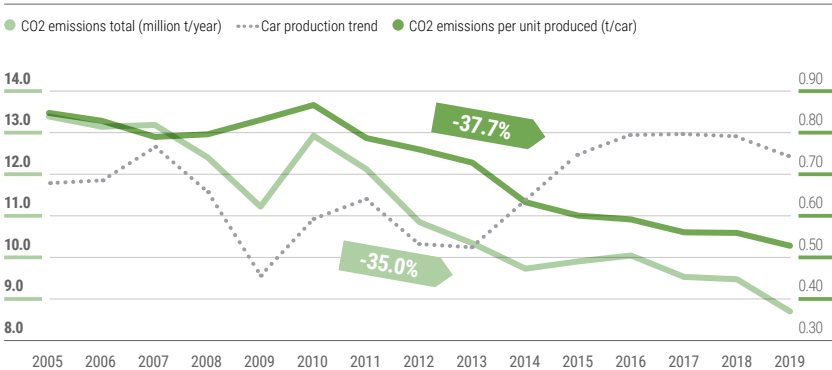


SOURCE: ACEA MEMBERS

As cars have become equipped with ever more features to make them safer, cleaner and smarter, the complexity of vehicle production has increased. This increase in complexity affects energy demand. Nevertheless, manufacturers have been working continuously to improve the **energy efficiency** of production. As a result, energy consumption per car produced has been decreased by 16.7% over the last 15 years.

CO2 emissions from production

2005 – 2019



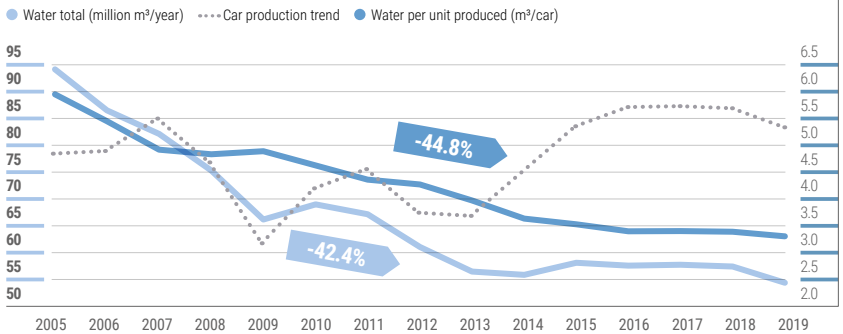
SOURCE: ACEA MEMBERS

The **CO2 emissions** per car produced dropped by 37.7% between 2005 and 2019, while the overall figure went down by 35.0% over the same period, reflecting the industry's efforts to reduce CO2 emissions from production. Even though car production has increased by 4.3% since 2005, manufacturers have been able to decouple CO2 emissions from production growth by increasingly sourcing energy from renewable and/or low-carbon sources.

CO2 emissions per car produced dropped by 38% between 2005 and 2019

Water used in production

2005 – 2019

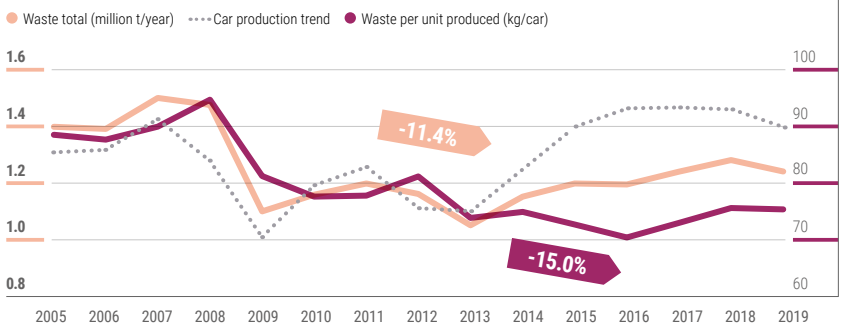


SOURCE: ACEA MEMBERS

Long-term strategies for reducing **water consumption** have made it possible to reduce water use per car produced by 44.8% between 2005 and 2019. This includes the increased application of recirculation technologies for the reuse of water.

Waste from production¹

2005 – 2019



SOURCE: ACEA MEMBERS

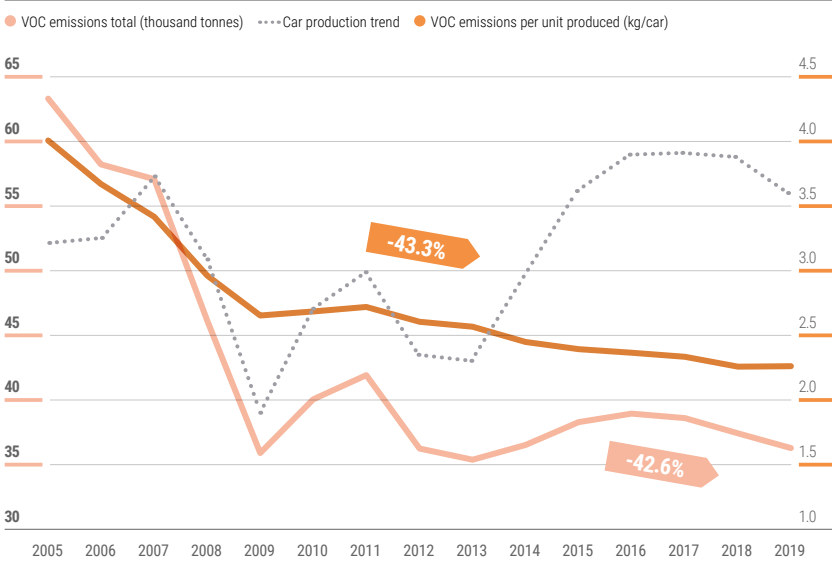
1. Excluding scrap metal and demolition waste

The **waste** generated per unit produced by the manufacturing of passenger cars went down by 15% over 15 years. Waste fluctuations, both in absolute and per unit terms can be explained by the occurrence of singular events, such as a fall in total production during the economic crisis.

**Water consumption per car produced
has been reduced by 45% since 2005**

VOC emissions from production

2005 – 2019



SOURCE: ACEA MEMBERS

Volatile organic compounds (VOC) are organic solvents mainly emitted from paint shops. The graph shows VOC emissions per car produced and the absolute emissions of all car manufacturers combined. With new technologies, such as the replacement of solvent-based paints with solvent-free, water-based equivalents manufacturers have been able to reduce unit emissions by 43.3% over the last 15 years.

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

Innovation

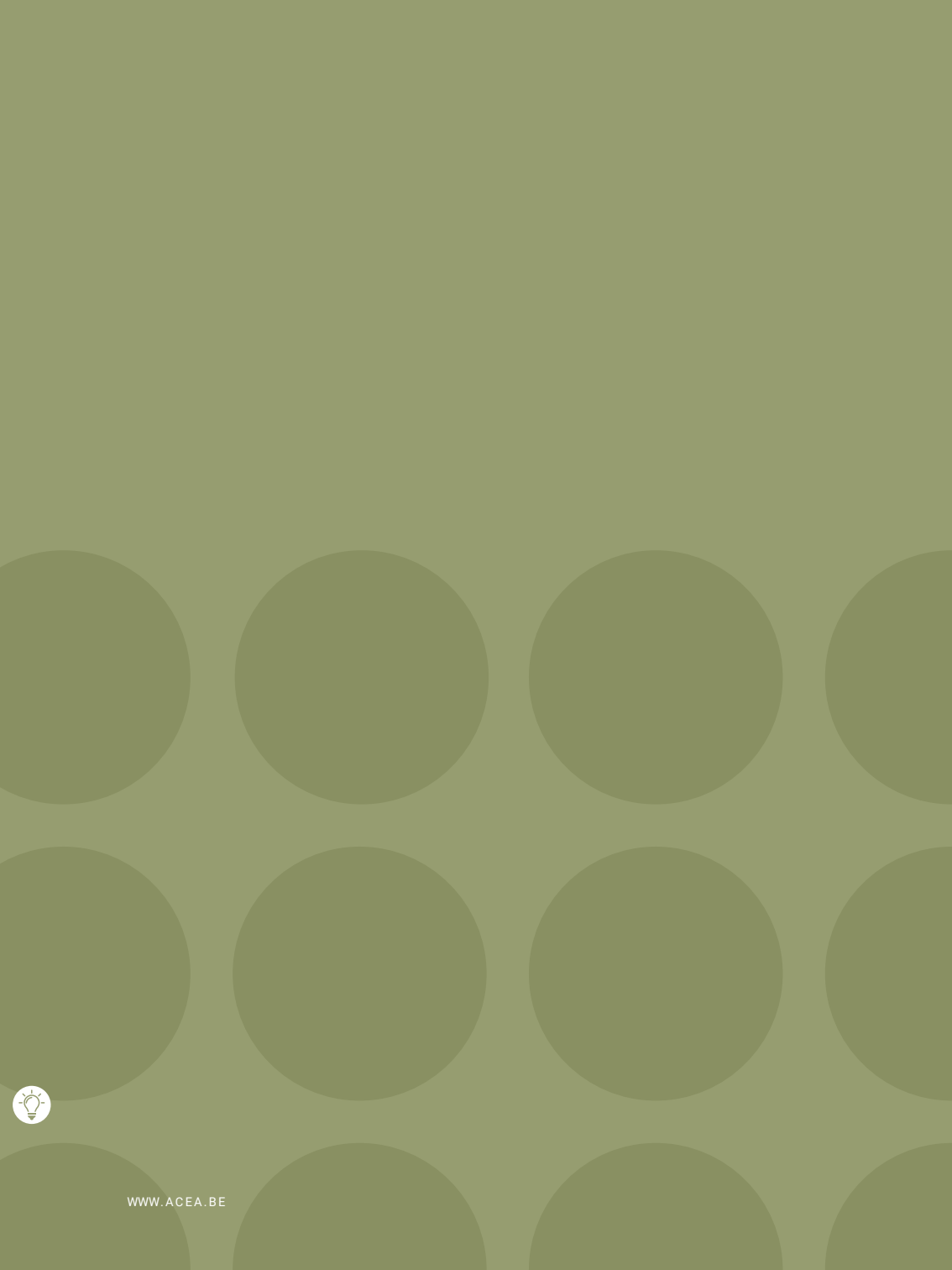


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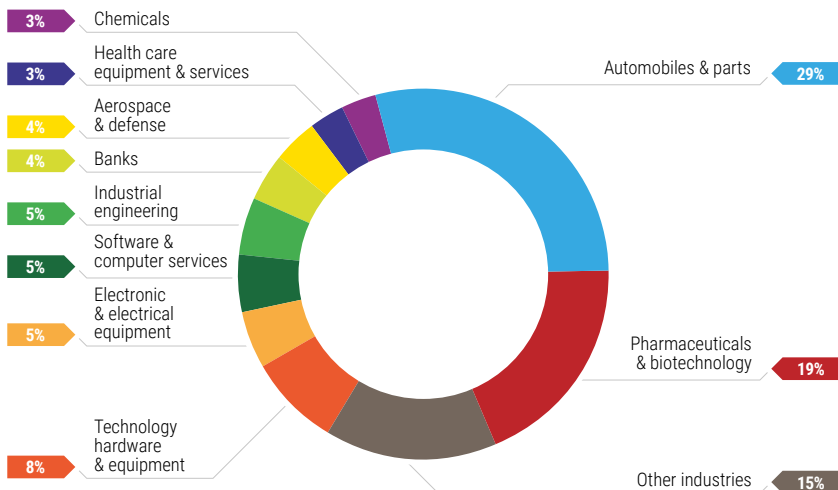
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R&D shares of sectors in the EU

%SHARE / 2018



SOURCE: THE 2019 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

EU R&D investment in the top 10 industrial sectors

IN BILLION € / 2018

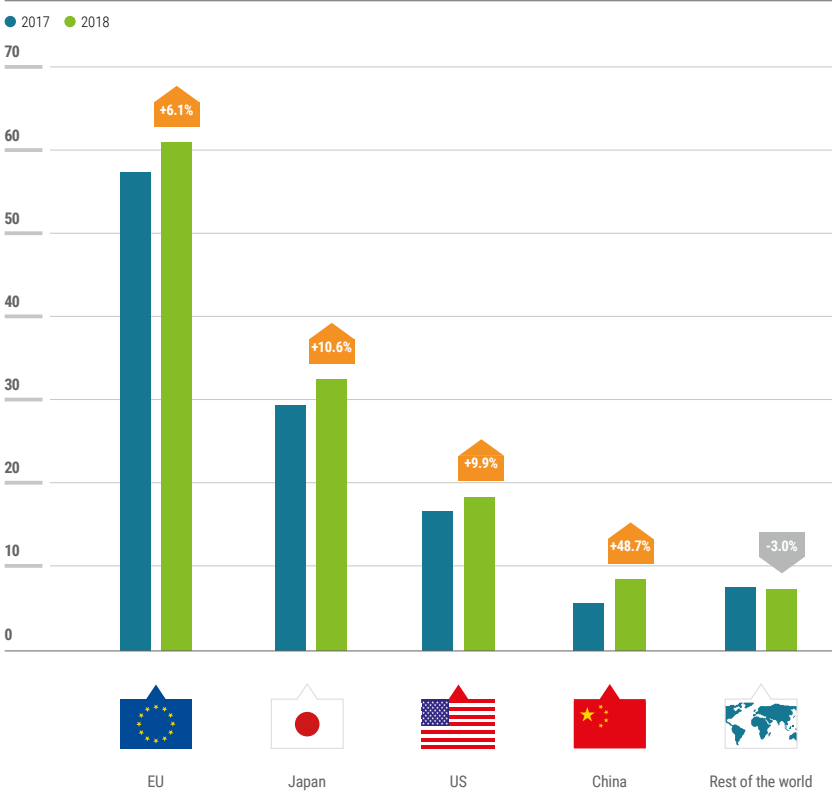
Automobiles & parts	60.9
Pharmaceuticals & biotechnology	39.9
Technology hardware & equipment	15.9
Electronic & electrical equipment	10.9
Software & computer services	10.5
Industrial engineering	9.9
Banks	9.3
Aerospace & defense	9.3
Health care equipment & services	5.5
Chemicals	5.2

SOURCE: THE 2019 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

The automotive sector is the EU's number one investor in R&D, responsible for 29% of total spending

R&D investment in the automobile sector by world region

IN BILLION € / % CHANGE

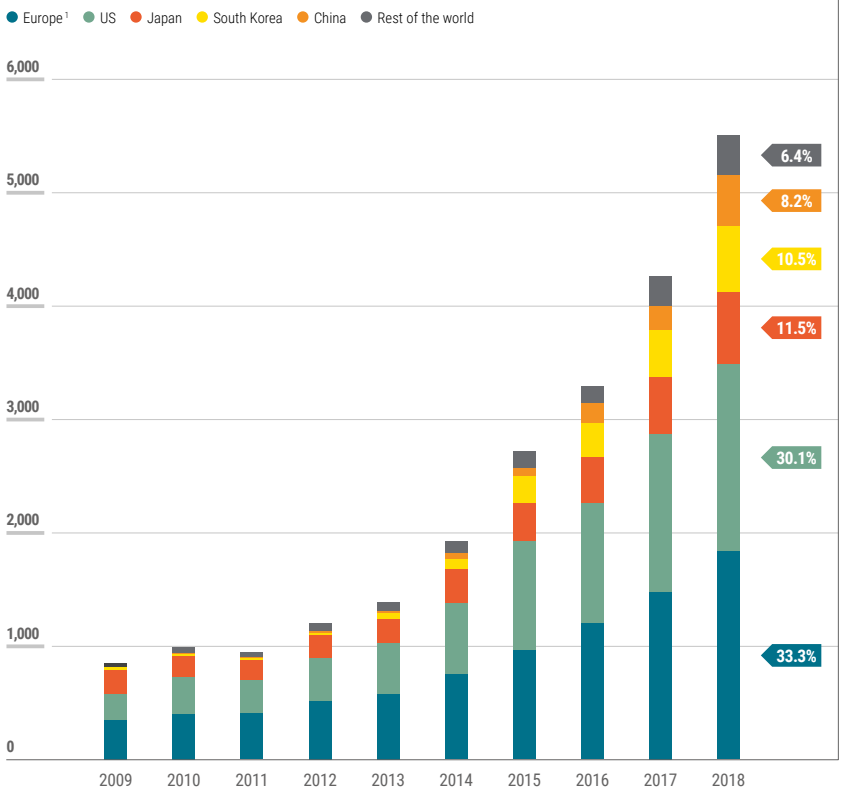


SOURCE: THE 2019 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

**EU investment in automotive R&D
has increased by 6.1% to €60.9 billion annually**

Patent applications related to self-driving vehicles

NUMBER OF PATENTS, % SHARE / 2009 – 2018



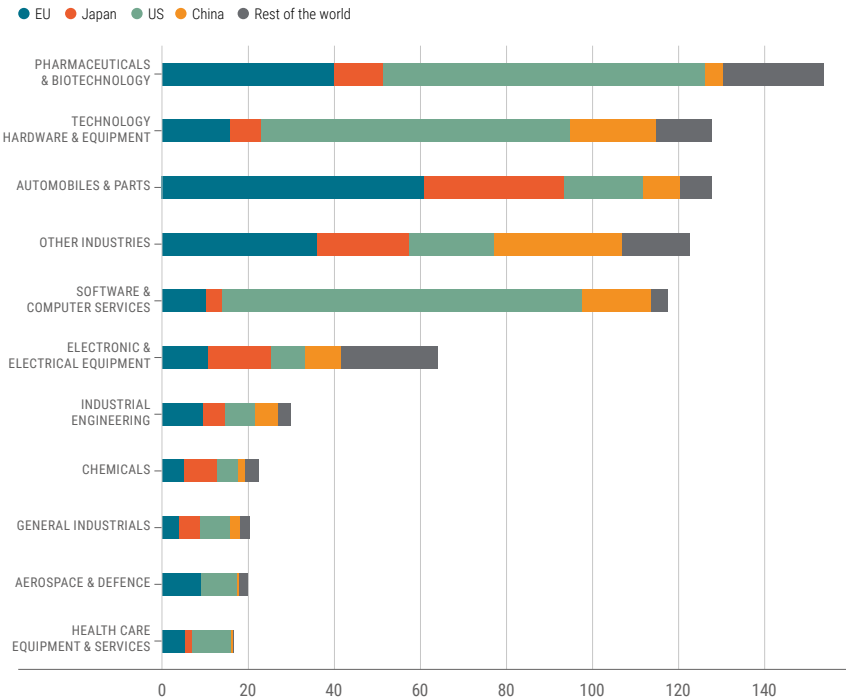
SOURCE: EPO (EUROPEAN PATENT OFFICE)

1. European Patent Convention (EPC)

Europe leads the world in patents for self-driving vehicles

R&D investment by industry and world region

IN BILLION € / 2018



SOURCE: THE 2019 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

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

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Taxation



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
























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TAXATION



Electric vehicles: tax benefits and purchase incentives

2020

		TAX BENEFITS			INCENTIVES
		ACQUISITION	OWNERSHIP	COMPANY CAR	
	AUSTRIA	✓	✓	✓	✓
	BELGIUM	✓	✓	✓	✗
	BULGARIA	✗	✓	✗	✗
	CROATIA	✓	✓	✗	✓
	CYPRUS	✓	✓	✗	✗
	CZECH REPUBLIC	✓	✓	✗	✓
	DENMARK	✓	✓	✓	✗
	ESTONIA	✗	✗	✗	✓
	FINLAND	✓	✓	✗	✓
	FRANCE	✓	✗	✓	✓
	GERMANY	✓	✓	✓	✓
	GREECE	✓	✓	✓	✓
	HUNGARY	✓	✓	✓	✓
	IRELAND	✓	✓	✓	✓
	ITALY	✗	✓	✗	✓
	LATVIA	✓	✓	✓	✗
	LITHUANIA	✗	✗	✗	✗
	LUXEMBOURG	✗	✓	✓	✓
	MALTA	✓	✓	✗	✗
	NETHERLANDS	✓	✓	✓	✓
	POLAND	✓	✗	✗	✓
	PORTUGAL	✓	✓	✓	✓
	ROMANIA	✗	✓	✗	✓
	SLOVAKIA	✓	✓	✗	✓
	SLOVENIA	✓	✗	✗	✓
	SPAIN	✓	✓	✗	✓
	SWEDEN	✗	✓	✓	✓
	UNITED KINGDOM	✓	✓	✓	✓

SOURCE: ACEA TAX GUIDE 2020

**Purchase incentives for electric vehicles
are available in 21 countries**

CO2-based motor vehicle taxation

2020















		TAX MEASURES		
		ACQUISITION	OWNERSHIP	COMPANY CAR
	AUSTRIA	✓	✗	✓
	BELGIUM	✓	✓	✓
	BULGARIA	✗	✗	✗
	CROATIA	✓	✗	✗
	CYPRUS	✓	✓	✗
	CZECH REPUBLIC	✓	✗	✗
	DENMARK	✗	✗	✓
	ESTONIA	✗	✗	✗
	FINLAND	✓	✓	✗
	FRANCE	✓	✓	✓
	GERMANY	✗	✓	✓
	GREECE	✓	✓	✗
	HUNGARY	✗	✗	✗
	IRELAND	✓	✓	✗
	ITALY	✓	✗	✗
	LATVIA	✗	✓	✗
	LITHUANIA	✗	✗	✗
	LUXEMBOURG	✗	✓	✓
	MALTA	✓	✓	✗
	NETHERLANDS	✓	✓	✓
	POLAND	✗	✗	✗
	PORTUGAL	✓	✓	✗
	ROMANIA	✓	✗	✗
	SLOVAKIA	✗	✗	✗
	SLOVENIA	✓	✗	✗
	SPAIN	✓	✗	✓
	SWEDEN	✓	✓	✗
	UNITED KINGDOM	✓	✓	✓

SOURCE: ACEA TAX GUIDE 2020

22 EU member states apply CO2-based taxation

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Fiscal income from motor vehicles in major European markets¹

	 AT	 BE	 DE	 DK	 ES	 FI	 FR
	€ bn 2017	€ bn 2018	€ bn 2018	DKK bn 2018	€ bn 2018	€ bn 2018	€ bn 2018
Purchase or transfer							
1. VAT on vehicle sales servicing, repair & parts	3.1	7.4	31.3	–	5.0	1.7	18.5
2. Sales & registration taxes	0.5	0.5	–	20.7	0.5	1.0	2.3
3. Annual ownership taxes	2.4	1.7	9.0	9.9	2.9	1.2	0.9
4. Fuels & lubricants	5.4	8.8	41.7	17.5	20.8	3.9	42.8
5. Others							
Driving license fees	–	0.02	0.2	–	0.1	–	–
Insurance taxes	0.4	1.0	5.3	1.5	–	0.4	5.1
Tolls	2.1	0.7	5.7	0.5	–	–	12.6
Customs duties	–	–	0.2	–	–	–	–
Other taxes	0.4	0.7	–	–	0.7	–	1.7
TOTAL (national currencies)	14.3	20.7	93.4	50.1	30.0	8.1	83.9
TOTAL (EURO)³	14.3	20.7	93.4	6.7	30.0	8.1	83.9
	 GR	 IE	 IT	 NL	 PT	 SE	 UK
	€ bn 2019	€ bn 2019	€ bn 2018	€ bn 2019	€ bn 2019	SEK bn 2019	£ bn 2018/2019 ²
Purchase or transfer							
1. VAT on vehicle sales servicing, repair & parts	0.3	0.7	18.6	1.2	4.5	25.0	12.5
2. Sales & registration taxes	0.3	1.0	1.8	2.2	0.7	–	–
3. Annual ownership taxes	1.2	0.9	6.8	4.3	0.7	13.9	6.5
4. Fuels & lubricants	5.6	3.5	37.8	10.4	3.5	45.0	28.0
5. Others							
Driving license fees	–	0.02	–	0.3	–	–	–
Insurance taxes	–	0.1	3.9	1.2	–	2.8	–
Tolls	–	–	2.2	0.2	0.2	2.7	–
Customs duties	–	–	–	–	–	–	–
Other taxes	0.1	–	5.3	1.8	–	–	1.5
TOTAL (national currencies)	7.4	6.2	76.3	21.5	9.6	89.4	48.5
TOTAL (EURO)³	7.4	6.2	76.3	21.5	9.6	8.1	54.1

GRAND TOTAL = € 440.4 billion

SOURCE: ACEA TAX GUIDE 2020

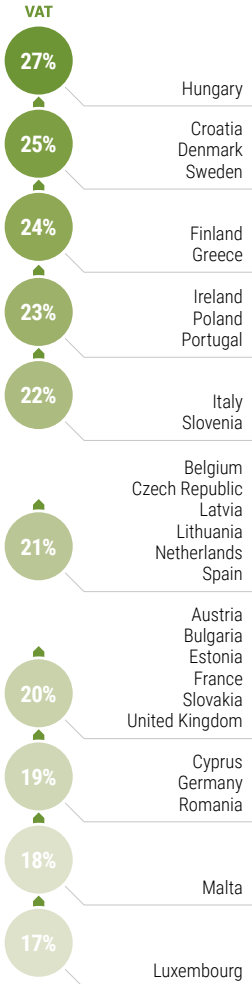
1. Latest available data; only countries for which sourced data is available are listed

2. 2012 estimates for income from VAT and other taxes

3. Euro foreign exchange reference rates at 30 March 2020; source: ECB



**Motor vehicles account for €440.4 billion
in taxes in major European markets**

Share of VAT in net price of cars



SOURCE: ACEA TAX GUIDE 2020

Excise duties on fuels in €/1,000 litres

	UNLEADED PETROL 	DIESEL 
Austria	515	425
Belgium	600	600
Bulgaria	363	330
Croatia	520	413
Cyprus	429	400
Czech Republic	499	425
Denmark	631	429
Estonia	563	493
Finland	702	530
France	683	594
Germany	654	470
Greece	700	410
Hungary	366	338
Ireland	602	495
Italy	728	617
Latvia	509	414
Lithuania	466	372
Luxembourg	472	355
Malta	549	472
Netherlands	800	503
Poland	383	337
Portugal	643	486
Romania	373	342
Slovakia	555	393
Slovenia	547	469
Spain	504	379
Sweden	619	436
United Kingdom	651	651
EU minimum rates	359	330

SOURCE: ACEA TAX GUIDE 2020

Automobiles provide a vital source of government revenue

THE AUTOMOBILE INDUSTRY
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About ACEA



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ACEA represents Europe's car, van, truck and bus makers

Members and partners

The European Automobile Manufacturers' Association (ACEA) is the advocate for the automobile industry in Europe, representing the 16 major manufacturers of passenger cars, vans, trucks and buses with production sites in the EU.

ACEA's members are: BMW Group, CNH Industrial, DAF Trucks, Daimler, Ferrari, Fiat Chrysler Automobiles, Ford of Europe, Honda Motor Europe, Hyundai Motor Europe, Jaguar Land Rover, PSA Group, Renault Group, Toyota Motor Europe, Volkswagen Group, Volvo Cars and Volvo Group.

ACEA has permanent cooperation with the European Council for Automotive R&D (EUCAR), which is the industry body for collaborative research and development.

ACEA works closely with the 29 national automobile manufacturers' associations in Europe, and maintains a dialogue on international issues with automobile associations around the world.

**BMW
GROUP**



**CNH
INDUSTRIAL**

DAF

DAIMLER

Ferrari

FCA
FIAT CHRYSLER AUTOMOBILES



HONDA
The Power of Dreams

HYUNDAI



PSA
GROUPE

**GROUPE
RENAULT**

TOYOTA

VOLKSWAGEN
AKTIENGESELLSCHAFT



ACEA's mission and priority areas

ACEA's mission

- Define and advocate the common interests, policies and positions of the European automobile industry.
- Engage in dialogue with the European institutions and other stakeholders in order to advance understanding of industry issues, and to contribute to effective policy and legislation at both European and global levels.
- Act as a portal for expert knowledge on vehicle-related regulation.
- Communicate the role and importance of the industry, using reliable data and information.
- Monitor activities that affect the automobile industry, cooperating with the other stakeholders involved.
- Undertake strategic reflection on the increasingly global challenges of mobility, sustainability and competitiveness.

Priority fields

Through its member companies, ACEA taps into a wealth of technical, regulatory and practical expertise in the following priority fields:

- Connected and automated driving
- Competitiveness, market and economy
- Environment and sustainability
- International trade
- Research and innovation
- Road safety
- Transport policy

How ACEA works

The ACEA Board of Directors is composed of the CEOs and Presidents of its member companies. Additionally, a Commercial Vehicle Board of Directors addresses the specific issues that face the commercial vehicle manufacturers that ACEA represents for Trucks: Ford Trucks, DAF Trucks, Daimler Trucks, Iveco, MAN Truck & Bus, Scania, and Volvo Group.

The day-to-day work of the ACEA secretariat is overseen by the Director General, who ensures that the Board of Directors' priorities are addressed. Technical expertise and advisory input comes from working groups on topics as diverse as emissions, road and vehicle safety, general transport policy, and regulatory compliance. These specialist working groups are made up of experts from the member companies.



About EUCAR

The European Council for Automotive R&D (EUCAR) is the collaborative research organisation of the major automobile manufacturers in Europe, with the mission to strengthen the competitiveness of the manufacturers through strategic collaborative research and innovation.

EUCAR is committed to help society achieve safer, cleaner, smarter and more efficient transport solutions. Together with its members, EUCAR drives the strategy and assessment of collaborative automotive research and innovation, and establishes common work with the European Commission, Member States and other key stakeholders.

EUCAR collaborative research and innovation activities cover both passenger and commercial vehicles, focused on the following strategic pillars:

- Sustainable Propulsion
- Enabling Technologies and Processes
- Safe and Integrated Mobility
- Commercial Vehicles
- Urban Mobility

EUCAR's members participate in high-quality projects with relevant results for the industry. Projects are mainly financed through the European Union Framework Programmes for research and innovation, matched with industry funding.

The EUCAR project book contains an overview of all the current projects:

<https://www.eucar.be/publications/project-book/>

EUCAR is governed by its Council, composed of the heads of the research and advanced development divisions of the member companies. The EUCAR Chairman is nominated annually from the Council on a rotating basis.

EUCAR's members are: BMW Group, CNH Industrial, DAF Trucks, Fiat Chrysler Automobiles, Ford of Europe, Honda R&D Europe, Hyundai Motor Europe, Jaguar Land Rover, PSA Groupe, Groupe Renault, Toyota Motor Europe, Volkswagen Group, Volvo Cars, and Volvo Group.



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www.acea.be

+32 2 732 55 50

communications@acea.be



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