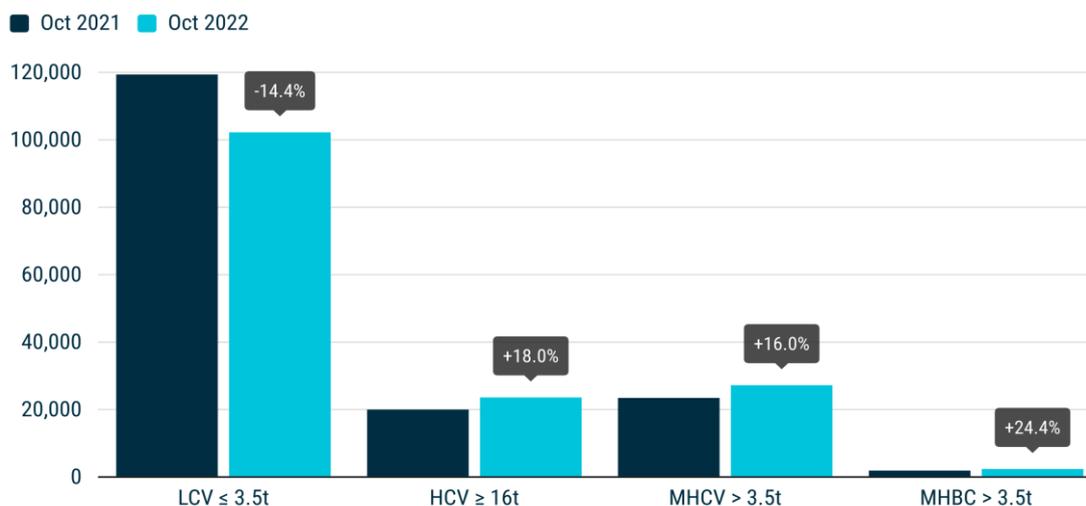


PRESS EMBARGO

8.00am CET (7.00am GMT), 24 November 2022

Commercial vehicle registrations: -16.8% ten months into 2022; -8.9% in October



TOTAL NEW COMMERCIAL VEHICLES

In October 2022, the EU market for new commercial vehicles continued to struggle, declining for the sixteenth month in a row (-8.9%). This was due to the drop in new van registrations, which account for the vast majority of total commercial vehicle sales. By contrast, the truck and bus segments performed better than in October 2021. Looking at the region's four largest markets, Germany saw the sharpest decline in total commercial vehicle sales (-12.4%), followed by France and Italy with more modest losses (-5.3% and -3.9% respectively). Spain, on the other hand, managed to post a slight increase (+1.2%).

Ten months into the year, registrations of new commercial vehicles across the European Union contracted by 16.8% to 1.3 million units. The region's overall performance was dampened by the weak results of its four key markets, all facing double-digit declines: Spain (-20.9%), France (-19.1%), Germany (-15.4%) and Italy (-10.4%).

NEW LIGHT COMMERCIAL VEHICLES (LCV) UP TO 3.5T²

In October, new light commercial vehicle registrations in the EU fell by 14.4%, totalling 102,226 units. All the major EU markets posted declines last month, especially Germany (-16.6%), Italy (-7.3%) and France (-6.7%), while new van sales remained relatively stable in Spain (-0.5%).

¹ Data for Malta not available

² Including light buses & coaches

From January to October 2022, EU light commercial vehicle registrations were down by 20.6%, to 1 million units. Apart from Cyprus (+1.6%) and Slovakia (+0.1%), all the EU markets contributed to the overall decline, including the four largest ones, which all faced double-digit losses: Spain (-25.5%), France (-21.1%), Germany (-18.7%) and Italy (-11.9%).

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

Last month, European Union heavy commercial vehicle registrations showed accelerated growth, with a 18.0% increase to 23,592 units. The four key markets in Western Europe all contributed positively to the region's growth, with Italy recording the strongest gain (+33.7%), followed by France (+7.6%), Spain (+7.3%) and Germany (+1.2%).

So far this year, 211,649 new heavy trucks were registered across the EU, up 5.9% compared to the same period in 2021. With the exception of Germany (-0.6%), all the largest markets in Western Europe posted growth: Spain (+10.6%), Italy (+3.0%) and France (+2.9%).

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

October registrations of new medium and heavy trucks increased by 16.0% across the European Union. Most markets in the region recorded double-digit gains, including Poland (+24.7%) – which is the third largest EU market for trucks – and Italy (+28.5%). The other major markets saw more modest but still solid increases: Spain (+7.3%), France (+3.9%) and Germany (+3.5%).

Ten months into 2022, the EU market for medium and heavy commercial vehicles grew by 2.7%, counting 247,253 units sold. The four key markets in Western Europe posted mixed results. Germany and France faced declines, down by 3.7% and 0.8% respectively. On the other hand, Spain managed to post growth (+9.9%), followed by Italy with a more modest 0.8% increase.

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

In October 2022, EU registrations of new buses and coaches posted strong growth (+24.4%), after four consecutive months of decline. Central European countries provided a strong boost to this overall increase (+87.1%). Looking at the four major markets, only Germany performed worse than one year ago (-27.7%). By contrast, Spain recorded a double-digit gain (+25.9%), followed by Italy (+6.9%) and France (+5.6%) with more modest but still solid results.

From January to October, the EU market for new buses and coaches contracted by 2.4% to 22,832 units, despite last month's strong rebound. With the exception of Spain (+29.0%), all the region's key markets posted significant declines: Germany (-23.0%), France (-13.3%) and Italy (-8.4%).

³ Excluding heavy buses & coaches

⁴ Excluding medium and heavy buses & coaches

PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 24 November 2022

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

	OCTOBER			JANUARY-OCTOBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria	1,722	8,164	-78.9	18,340	53,310	-65.6
Belgium	4,808	5,755	-16.5	47,338	62,059	-23.7
Bulgaria	447	410	+9.0	4,059	5,709	-28.9
Croatia	578	705	-18.0	5,850	7,007	-16.5
Cyprus	152	217	-30.0	1,671	1,644	+1.6
Czech Republic	1,240	1,457	-14.9	13,751	15,789	-12.9
Denmark	1,863	2,211	-15.7	22,846	26,320	-13.2
Estonia	262	259	+1.2	3,211	3,581	-10.3
Finland	933	943	-1.1	9,185	11,037	-16.8
France	28,144	30,149	-6.7	285,014	361,037	-21.1
Germany	17,625	21,130	-16.6	181,283	223,017	-18.7
Greece	890	900	-1.1	8,070	8,915	-9.5
Hungary	1,162	1,689	-31.2	15,213	19,098	-20.3
Ireland ³	1,447	1,270	+13.9	22,451	27,660	-18.8
Italy ⁴	13,717	14,794	-7.3	133,567	151,619	-11.9
Latvia	179	204	-12.3	1,981	2,154	-8.0
Lithuania	255	228	+11.8	2,879	2,962	-2.8
Luxembourg	389	313	+24.3	3,258	3,880	-16.0
Netherlands	4,390	5,659	-22.4	48,725	58,624	-16.9
Poland	4,996	5,212	-4.1	50,988	60,472	-15.7
Portugal	1,868	2,352	-20.6	18,815	22,872	-17.7
Romania	1,081	1,203	-10.1	11,246	13,440	-16.3
Slovakia	584	587	-0.5	6,661	6,652	+0.1
Slovenia	511	700	-27.0	6,013	8,083	-25.6
Spain	10,411	10,468	-0.5	97,266	130,578	-25.5
Sweden	2,572	2,401	+7.1	27,097	31,029	-12.7
EUROPEAN UNION	102,226	119,380	-14.4	1,046,778	1,318,548	-20.6
EU14⁵	90,779	106,509	-14.8	923,255	1,171,957	-21.2
EU12⁶	11,447	12,871	-11.1	123,523	146,591	-15.7
Iceland	60	93	-35.5	1,388	985	+40.9
Norway	2,305	2,284	+0.9	23,147	28,404	-18.5
Switzerland	1,873	2,060	-9.1	20,157	24,456	-17.6
EFTA	4,238	4,437	-4.5	44,692	53,845	-17.0
United Kingdom	22,386	27,420	-18.4	235,962	294,656	-19.9
EU + EFTA + UK	128,850	151,237	-14.8	1,327,432	1,667,049	-20.4
EU14 + EFTA + UK	117,403	138,366	-15.2	1,203,909	1,520,458	-20.8

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

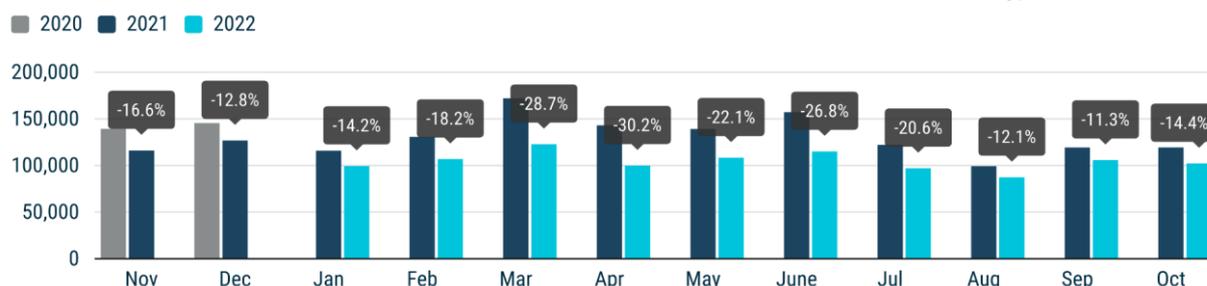
¹ Including light buses and coaches

² Data for Malta not available

³ LCV ≤6t ⁴ ANFIA estimates

⁵ Member states before the 2004 enlargement

⁶ Member states having joined the EU since 2004



PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 24 November 2022

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

	OCTOBER			JANUARY-OCTOBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria ²	552	432	+27.8	5,244	5,614	-6.6
Belgium	705	690	+2.2	6,195	5,733	+8.1
Bulgaria	326	241	+35.3	3,107	2,478	+25.4
Croatia	131	73	+79.5	1,075	862	+24.7
Cyprus	1	2	-50.0	30	39	-23.1
Czech Republic	643	589	+9.2	6,306	5,893	+7.0
Denmark	447	328	+36.3	3,689	3,342	+10.4
Estonia	97	65	+49.2	764	658	+16.1
Finland	230	193	+19.2	2,042	2,025	+0.8
France	3,475	3,231	+7.6	32,951	32,011	+2.9
Germany	4,358	4,308	+1.2	46,289	46,561	-0.6
Greece	36	19	+89.5	455	294	+54.8
Hungary	460	325	+41.5	4,353	3,340	+30.3
Ireland ³	160	120	+33.3	1,748	1,761	-0.7
Italy ⁴	1,665	1,245	+33.7	17,571	17,066	+3.0
Latvia	132	136	-2.9	1,472	1,167	+26.1
Lithuania	1,336	573	+133.2	8,497	6,521	+30.3
Luxembourg ⁵	79	85	-7.1	839	803	+4.5
Netherlands	1,144	830	+37.8	10,373	8,915	+16.4
Poland	3,413	2,727	+25.2	25,555	24,150	+5.8
Portugal	294	421	-30.2	2,729	3,141	-13.1
Romania	631	418	+51.0	5,365	4,575	+17.3
Slovakia	267	218	+22.5	2,388	2,150	+11.1
Slovenia	155	132	+17.4	1,887	1,490	+26.6
Spain	2,347	2,188	+7.3	16,426	14,846	+10.6
Sweden	508	409	+24.2	4,299	4,372	-1.7
EUROPEAN UNION	23,592	19,998	+18.0	211,649	199,807	+5.9
EU14	16,000	14,499	+10.4	150,850	146,484	+3.0
EU12	7,592	5,499	+38.1	60,799	53,323	+14.0
Iceland	17	5	+240.0	122	116	+5.2
Norway	397	429	-7.5	3,406	3,649	-6.7
Switzerland	213	235	-9.4	2,381	2,583	-7.8
EFTA	627	669	-6.3	5,909	6,348	-6.9
United Kingdom ⁵	3,524	2,631	+33.9	28,909	25,510	+13.3
EU + EFTA + UK	27,743	23,298	+19.1	246,467	231,665	+6.4
EU14 + EFTA + UK	20,151	17,799	+13.2	185,668	178,342	+4.1

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Excluding heavy buses and coaches

² HCV ≥15t

³ HCV > 17t

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

⁵ Estimates



PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 24 November 2022

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

	OCTOBER			JANUARY-OCTOBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria	596	441	+35.1	5,475	5,768	-5.1
Belgium	793	802	-1.1	6,981	6,897	+1.2
Bulgaria	338	249	+35.7	3,223	2,570	+25.4
Croatia	140	87	+60.9	1,263	1,084	+16.5
Cyprus	3	5	-40.0	83	71	+16.9
Czech Republic	743	674	+10.2	7,170	6,897	+4.0
Denmark	468	364	+28.6	4,032	3,704	+8.9
Estonia	101	70	+44.3	814	700	+16.3
Finland	310	284	+9.2	2,766	2,990	-7.5
France	3,878	3,734	+3.9	36,997	37,297	-0.8
Germany	6,132	5,924	+3.5	63,500	65,943	-3.7
Greece	46	29	+58.6	600	460	+30.4
Hungary	514	343	+49.9	4,643	3,666	+26.7
Ireland	182	164	+11.0	2,054	2,123	-3.3
Italy ²	1,886	1,468	+28.5	20,677	20,505	+0.8
Latvia	138	140	-1.4	1,503	1,227	+22.5
Lithuania	1,343	578	+132.4	8,581	6,610	+29.8
Luxembourg	87	95	-8.4	918	897	+2.3
Netherlands	1,272	944	+34.7	11,359	10,128	+12.2
Poland	3,651	2,927	+24.7	27,628	26,176	+5.5
Portugal	365	458	-20.3	3,173	3,622	-12.4
Romania	655	451	+45.2	5,527	5,347	+3.4
Slovakia	283	235	+20.4	2,620	2,401	+9.1
Slovenia	163	142	+14.8	1,983	1,614	+22.9
Spain	2,582	2,406	+7.3	18,961	17,258	+9.9
Sweden	548	449	+22.0	4,722	4,874	-3.1
EUROPEAN UNION	27,217	23,463	+16.0	247,253	240,829	+2.7
EU14	19,145	17,562	+9.0	182,215	182,466	-0.1
EU12	8,072	5,901	+36.8	65,038	58,363	+11.4
Iceland	19	12	+58.3	194	227	-14.5
Norway	504	541	-6.8	4,679	5,276	-11.3
Switzerland	254	275	-7.6	2,783	3,051	-8.8
EFTA	777	828	-6.2	7,656	8,554	-10.5
United Kingdom ³	4,317	3,565	+21.1	37,152	35,175	+5.6
EU + EFTA + UK	32,311	27,856	+16.0	292,061	284,558	+2.6
EU14 + EFTA + UK	24,239	21,955	+10.4	227,023	226,195	+0.4

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Excluding buses and coaches over 3.5t

² ANFIA estimates based on vehicle registration certificates issued by the Italian Ministry of Transport

³ Estimates



PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 24 November 2022

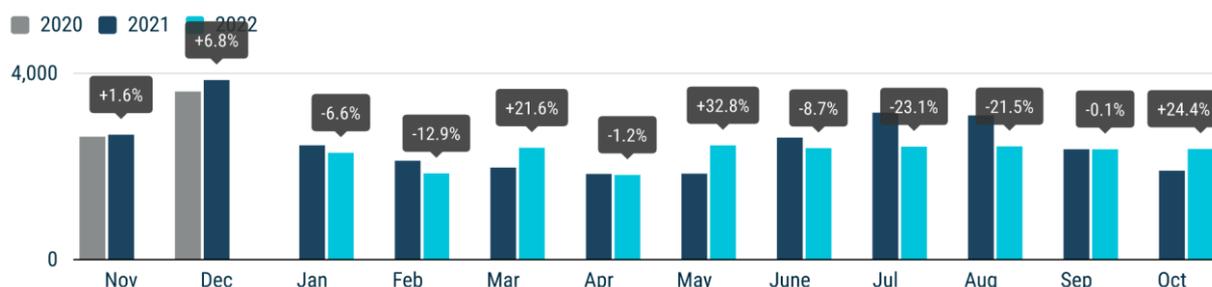
MEDIUM AND HEAVY BUSES & COACHES (MHBC) OVER 3.5T
EUROPEAN UNION + EFTA + UK

	OCTOBER			JANUARY-OCTOBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria	140	89	+57.3	757	691	+9.6
Belgium	24	48	-50.0	515	876	-41.2
Bulgaria	36	26	+38.5	157	151	+4.0
Croatia	46	12	+283.3	210	118	+78.0
Cyprus	1	0		47	19	+147.4
Czech Republic	35	40	-12.5	1,021	831	+22.9
Denmark	32	19	+68.4	564	434	+30.0
Estonia	11	15	-26.7	269	213	+26.3
Finland	56	9	+522.2	306	345	-11.3
France	474	449	+5.6	4,816	5,552	-13.3
Germany	332	459	-27.7	3,536	4,592	-23.0
Greece	11	32	-65.6	174	349	-50.1
Hungary	183	31	+490.3	445	865	-48.6
Ireland	3	47	-93.6	247	350	-29.4
Italy ¹	185	173	+6.9	2,552	2,787	-8.4
Latvia	3	3	+0.0	265	191	+38.7
Lithuania	3	3	+0.0	88	121	-27.3
Luxembourg	25	19	+31.6	290	151	+92.1
Netherlands	4	5	-20.0	232	317	-26.8
Poland	91	71	+28.2	913	1,127	-19.0
Portugal	55	38	+44.7	1,342	414	+224.2
Romania	104	40	+160.0	676	594	+13.8
Slovakia	58	87	-33.3	335	233	+43.8
Slovenia	54	6	+800.0	125	66	+89.4
Spain	199	158	+25.9	1,893	1,468	+29.0
Sweden	212	32	+562.5	1,057	548	+92.9
EUROPEAN UNION	2,377	1,911	+24.4	22,832	23,403	-2.4
EU14	1,752	1,577	+11.1	18,281	18,874	-3.1
EU12	625	334	+87.1	4,551	4,529	+0.5
Iceland	2	1	+100.0	19	21	-9.5
Norway	68	38	+78.9	529	1,024	-48.3
Switzerland	34	61	-44.3	271	462	-41.3
EFTA	104	100	+4.0	819	1,507	-45.7
United Kingdom ²	240	388	-38.1	3,672	3,399	+8.0
EU + EFTA + UK	2,721	2,399	+13.4	27,323	28,309	-3.5
EU14 + EFTA + UK	2,096	2,065	+1.5	22,772	23,780	-4.2

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

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

² Estimates



PRESS EMBARGO FOR ALL DATA
8.00am CET (7.00am GMT), 24 November 2022

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

	OCTOBER			JANUARY-OCTOBER		
	Units		% change 22/21	Units		% change 22/21
	2022	2021		2022	2021	
Austria	2,458	8,694	-71.7	24,572	59,769	-58.9
Belgium	5,625	6,605	-14.8	54,834	69,832	-21.5
Bulgaria	821	685	+19.9	7,439	8,430	-11.8
Croatia	764	804	-5.0	7,323	8,209	-10.8
Cyprus	156	222	-29.7	1,801	1,734	+3.9
Czech Republic	2,018	2,171	-7.0	21,942	23,517	-6.7
Denmark	2,363	2,594	-8.9	27,442	30,458	-9.9
Estonia	374	344	+8.7	4,294	4,494	-4.5
Finland	1,299	1,236	+5.1	12,257	14,372	-14.7
France	32,496	34,332	-5.3	326,827	403,886	-19.1
Germany	24,089	27,513	-12.4	248,319	293,552	-15.4
Greece	947	961	-1.5	8,844	9,724	-9.0
Hungary	1,859	2,063	-9.9	20,301	23,629	-14.1
Ireland	1,632	1,481	+10.2	24,752	30,133	-17.9
Italy	15,788	16,435	-3.9	156,796	174,911	-10.4
Latvia	320	347	-7.8	3,749	3,572	+5.0
Lithuania	1,601	809	+97.9	11,548	9,693	+19.1
Luxembourg	501	427	+17.3	4,466	4,928	-9.4
Netherlands	5,666	6,608	-14.3	60,316	69,069	-12.7
Poland	8,738	8,210	+6.4	79,529	87,775	-9.4
Portugal	2,288	2,848	-19.7	23,330	26,908	-13.3
Romania	1,840	1,694	+8.6	17,449	19,381	-10.0
Slovakia	925	909	+1.8	9,616	9,286	+3.6
Slovenia	728	848	-14.2	8,121	9,763	-16.8
Spain	13,192	13,032	+1.2	118,120	149,304	-20.9
Sweden	3,332	2,882	+15.6	32,876	36,451	-9.8
EUROPEAN UNION	131,820	144,754	-8.9	1,316,863	1,582,780	-16.8
EU14	111,676	125,648	-11.1	1,123,751	1,373,297	-18.2
EU12	20,144	19,106	+5.4	193,112	209,483	-7.8
Iceland	81	106	-23.6	1,601	1,233	+29.8
Norway	2,877	2,863	+0.5	28,355	34,704	-18.3
Switzerland	2,161	2,396	-9.8	23,211	27,969	-17.0
EFTA	5,119	5,365	-4.6	53,167	63,906	-16.8
United Kingdom	26,943	31,373	-14.1	276,786	333,230	-16.9
EU + EFTA + UK	163,882	181,492	-9.7	1,646,816	1,979,916	-16.8
EU14 + EFTA + UK	143,738	162,386	-11.5	1,453,704	1,770,433	-17.9

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

