













# THE AUTOMOBILE INDUSTRY

POCKET GUIDE 2021/2022



# SUMMARY

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# FOREWORD

**EVERY YEAR**, the European Automobile Manufacturers' Association (ACEA) publishes this Pocket Guide in order to provide a clear and comprehensive overview of one of Europe's most strategic and innovative sectors: the auto industry.

Updated with the latest data on employment, vehicle production and sales, trade flows, the vehicle fleet, road safety, the environment, innovation and taxation, this is the reference guide for anyone interested in automotive issues and related EU policies.

You will surely notice that the 2021-2022 edition is rather special, as our landmark publication got a complete overhaul in line with ACEA's new visual identity.

On a less positive note, the facts and figures in this Pocket Guide also reveal the dramatic impact of COVID-19 on Europe's auto industry.

Almost 13 million motor vehicles were made in the EU in 2020, representing 16.7% of global production, but down 5 million units compared to 2019. Car output plummeted by 23.3% during the crisis year, while EU commercial vehicle production took a 21% hit. Exports of EU-built vehicles also decreased by nearly 15% in 2020, although still generating a €76.3 billion trade surplus for the European Union.

Despite this unprecedented downturn, these statistics also demonstrate the continued importance of the industry as an economic powerhouse that literally keeps Europe on the move, regardless of what happens.



**As we work towards  
a new era of mobility  
and a carbon-neutral  
Europe, innovation  
remains at the core  
of our sector's DNA**

With some 3.5 million people directly and indirectly involved in the production of vehicles across the EU, the auto industry accounts for 11.6% of all manufacturing jobs in the region. Looking at the entire automotive ecosystem, the sector provides work to 12.6 million Europeans, or 6.6% of the EU's total workforce.

Apart from ensuring that people and goods can continue to move freely throughout Europe, the 278 million vehicles on our roads are also a major source of government income, annually generating €398.4 billion in taxes for 14 major EU markets alone.

And as we work towards a new era of mobility and a carbon-neutral Europe, innovation remains at the core of our sector's DNA. Investing an impressive €62 billion per year, and responsible for a whopping 33% of total EU spending on innovation, the automotive sector has really solidified its position as Europe's number one investor in R&D. More than ever, we are ready and committed to provide solutions for the challenges of tomorrow.



**Eric-Mark Huitema**  
ACEA Director General

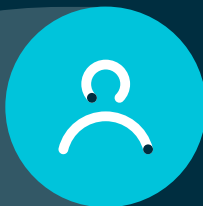
## KEY FIGURES

EMPLOYMENT		
Manufacture of motor vehicles (EU)	2.6 million people = 8.6% of EU employment in manufacturing	2018
Total (EU manufacturing, services and construction)	12.6 million people = 6.6% of total EU employment	2018
PRODUCTION		
Motor vehicles (world)	77.9 million units	2020
Motor vehicles (EU)	13.0 million units = 16.7% of global motor vehicle production	2020
Passenger cars (world)	61.4 million units	2020
Passenger cars (EU)	10.8 million units = 17.6% of global passenger car production	2020
REGISTRATIONS		
Motor vehicles (world)	80.3 million units	2020
Motor vehicles (EU)	11.7 million units = 14.5% of global motor vehicle registrations	2020
Passenger cars (world)	63.4 million units	2020
Passenger cars (EU)	9.9 million units = 15.7% of global passenger car registrations	2020
Petrol (EU)	47.5% market share	2020
Diesel (EU)	28% market share	2020
Electrically-chargeable cars (EU)	10.5% market share	2020
Electrically-chargeable vans (EU)	2.0% market share	2020
Electrically-chargeable trucks (EU)	0.4% market share	2020
Electrically-chargeable buses (EU)	6.1% market share	2020
TRADE		
Motor vehicle exports (extra-EU)	€134.1 billion	2020
Motor vehicle imports (extra-EU)	€57.7 billion	2020
Trade balance (extra-EU)	€76.3 billion	2020
VEHICLES IN USE		
Motor vehicles (EU)	277.8 million units	2019
Passenger cars (EU)	242.7 million units	2019
Motorisation rate (EU)	628 vehicles per 1,000 inhabitants	2019
Average age of cars (EU)	11.5 years	2019
Average age of vans (EU)	11.6 years	2019
Average age of trucks (EU)	13.0 years	2019
Average age of buses (EU)	11.7 years	2019
ROAD SAFETY		
Road fatalities per million inhabitants (EU)	51 people	2019
ENVIRONMENT		
Average CO <sub>2</sub> emissions (EU)	108.2g CO <sub>2</sub> /km	2020
INNOVATION		
Automotive R&D investment (EU)	€62.0 billion	2019
TAXATION		
Fiscal income from motor vehicles (EU14)	€398.4 billion	2020



# EMPLOYMENT

THE AUTOMOBILE INDUSTRY  
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## EU AUTOMOTIVE SECTOR: DIRECT AND INDIRECT EMPLOYMENT

In thousands / 2018

DIRECT MANUFACTURING		2,571	2.6 m jobs	3.5 m manufacturing jobs	2.6 m direct jobs
Motor vehicles		1,120			
Bodies (coachwork), trailers and semi-trailers		158			
Parts and accessories		1,293			
INDIRECT MANUFACTURING		909	0.9 m jobs	3.5 m manufacturing jobs	2.6 m direct jobs
Rubber tyres and tubes, retreading and rebuilding of rubber tyres		122			
Computers and peripheral equipment		60			
Electric motors, generators and transformers		245			
Bearings, gears, gearing and driving elements		232			
Cooling and ventilation equipment		249	12.6 m jobs		
AUTOMOBILE USE		3,948	3.9 m jobs	9.1 m non-manufacturing jobs	10.0 m manufacturing jobs
Sale of motor vehicles		1,411			
Maintenance and repair of motor vehicles		1,323			
Sale of motor vehicle parts and accessories		641			
Retail sale of automotive fuel in specialised stores		404			
Renting and leasing of motor vehicles		168	12.6 m jobs		
TRANSPORT		4,483	4.5 m jobs	9.1 m non-manufacturing jobs	10.0 m manufacturing jobs
Other passenger land transport		1,393			
Freight transport by road		3,090	12.6 m jobs		
CONSTRUCTION		666	0.7 m jobs	9.1 m non-manufacturing jobs	10.0 m manufacturing jobs
Roads and motorways		629			
Bridges and tunnels		37			

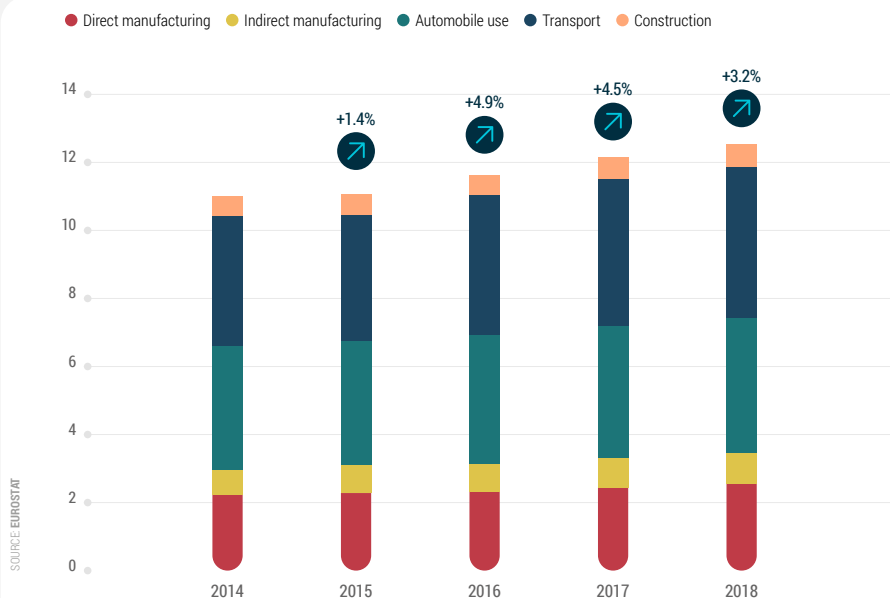
SOURCE: EUROSTAT

The auto industry provides direct and indirect jobs for 12.6 million Europeans



## EMPLOYMENT IN THE EU AUTOMOTIVE SECTOR

In million jobs / 2014 – 2018



EU automotive employment	2014	2015	2016	2017	2018	% change 18/17
Direct manufacturing	2,211,571	2,282,219	2,325,011	2,440,720	2,571,359	+5.4
Indirect manufacturing	769,086	829,749	823,201	878,774	908,747	+3.4
Automobile use	3,657,867	3,668,769	3,789,494	3,888,807	3,947,518	+1.5
Transport	3,826,799	3,715,235	4,136,627	4,341,044	4,483,090	+3.3
Construction	487,741	610,684	578,368	633,423	665,863	+5.1
<b>TOTAL</b>	<b>10,953,064</b>	<b>11,106,656</b>	<b>11,652,701</b>	<b>12,182,768</b>	<b>12,576,577</b>	<b>+3.2</b>

Source: EUROSTAT

**The automotive sector  
accounts for 6.6% of all EU jobs**

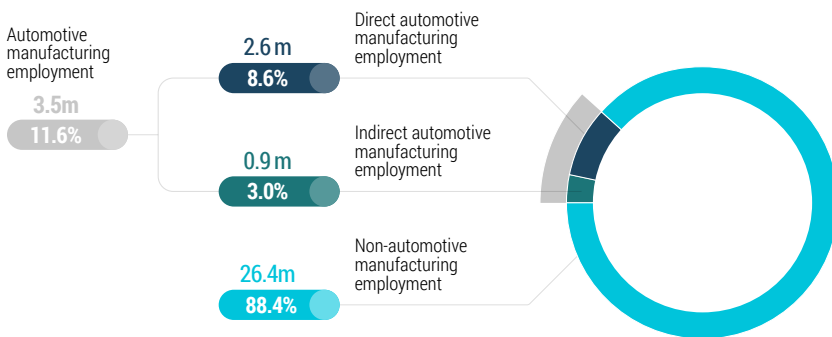




## MANUFACTURING JOBS IN THE EU AUTO SECTOR

% share / 2018

SOURCE: EUROSTAT



SOURCE: EUROSTAT

Direct automotive manufacturing employment	<b>2.6 million people</b> = 8.6% of EU employment in manufacturing
Direct & indirect automotive manufacturing employment	<b>3.5 million people</b> = 11.6% of EU employment in manufacturing
Total automotive employment (manufacturing, services and construction)	<b>12.6 million people</b> = 6.6% of total EU employment
EU employment in the manufacturing sector	<b>29.9 million people</b> = 15.7% of total EU employment
EU total employment <sup>1</sup>	<b>190 million people</b>

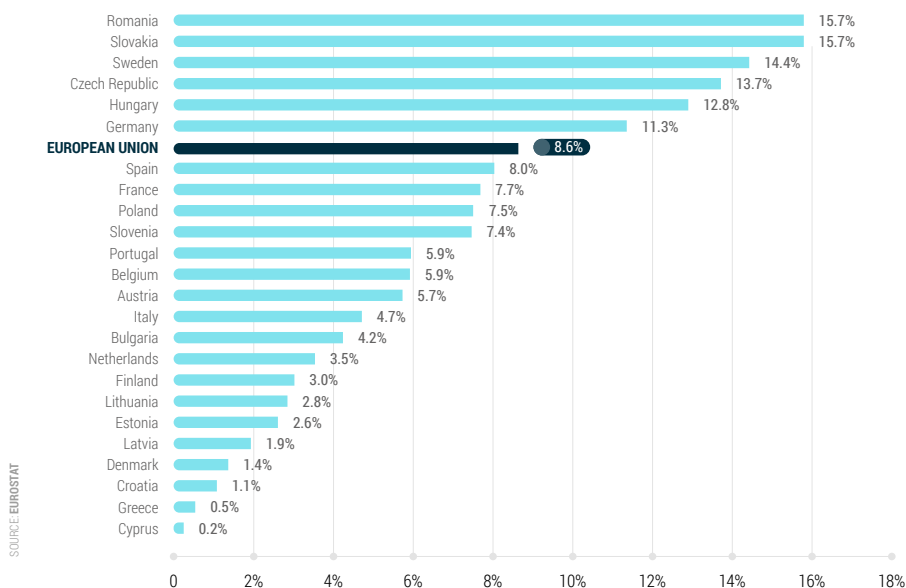
1. Total employment from 20 to 64 years

**11.6% of EU manufacturing employment is in the automotive sector**



## EU DIRECT AUTOMOTIVE EMPLOYMENT

Share of total manufacturing, by country / 2018



SOURCE: EUROSTAT

By country / 2018

Austria	38,873	France	238,666	Malta	0
Belgium	29,749	Germany	919,002	Netherlands	25,162
Bulgaria	23,556	Greece	1,965	Poland	214,642
Croatia	2,910	Hungary	101,908	Portugal	43,553
Cyprus	85	Ireland	0	Romania	194,787
Czech Republic	181,487	Italy	177,908	Slovakia	80,963
Denmark	4,346	Latvia	2,316	Slovenia	15,889
Estonia	2,871	Lithuania	6,216	Spain	161,722
Finland	10,207	Luxembourg	0	Sweden	92,576
		<b>EUROPEAN UNION</b>		<b>2,571,359</b>	

SOURCE: EUROSTAT

The EU automotive sector directly employs 2.6 million people in manufacturing



# PRODUCTION

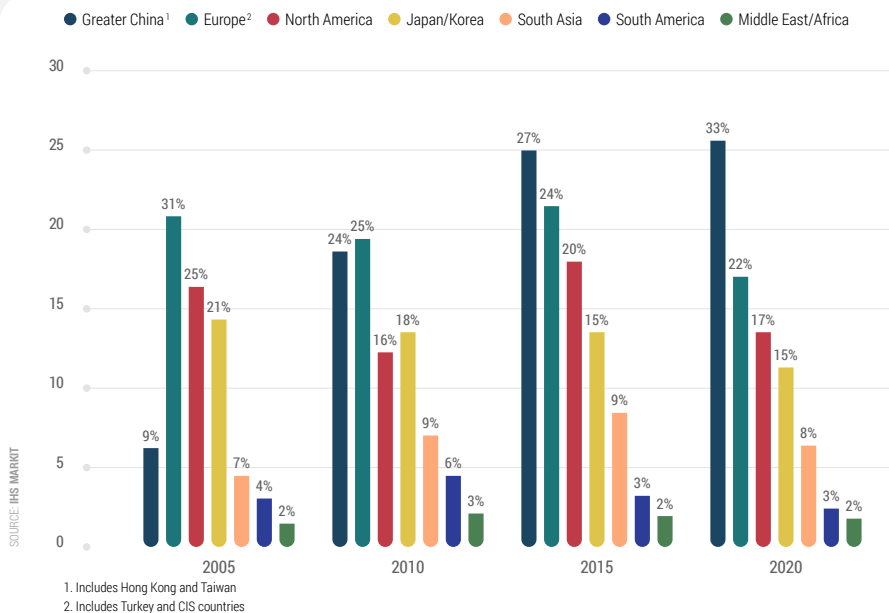
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## WORLD VEHICLE PRODUCTION

In million units, % share / 2005 – 2020



In thousand units / 2020

	2020	2019	% change 20/19	% share 2020
Europe <sup>1</sup>	17,093	21,778	-21.5	21.9
Greater China <sup>2</sup>	25,584	26,150	-2.2	32.8
Japan/Korea	11,393	13,322	-14.5	14.6
Middle East/Africa	1,705	2,010	-15.1	2.2
North America	13,486	16,971	-20.5	17.3
South America	2,355	3,417	-31.1	3.0
South Asia	6,326	8,931	-29.2	8.1
<b>WORLD</b>	<b>77,942</b>	<b>92,578</b>	<b>-15.8</b>	<b>100.0</b>

1. Includes Turkey and CIS countries

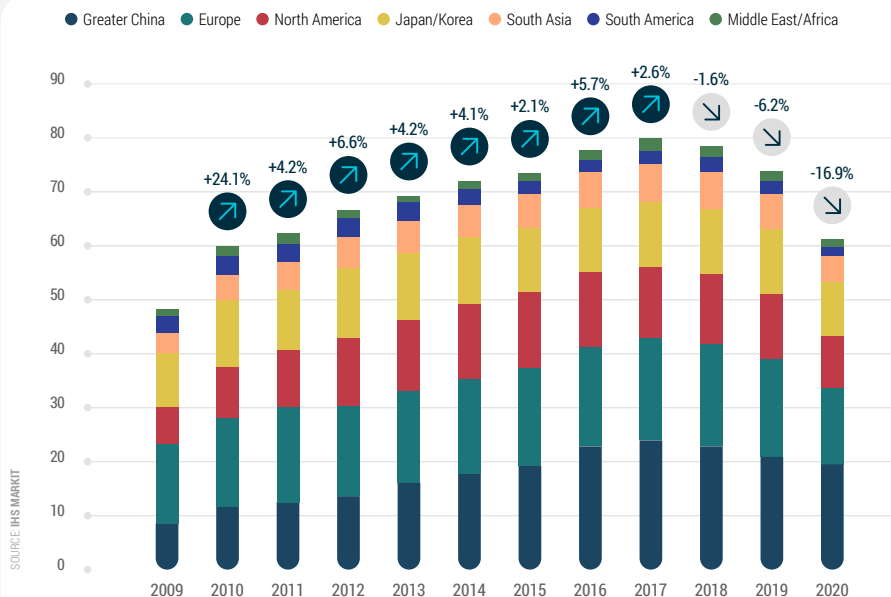
2. Includes Hong Kong and Taiwan

**World vehicle production dropped by almost 16% in 2020**

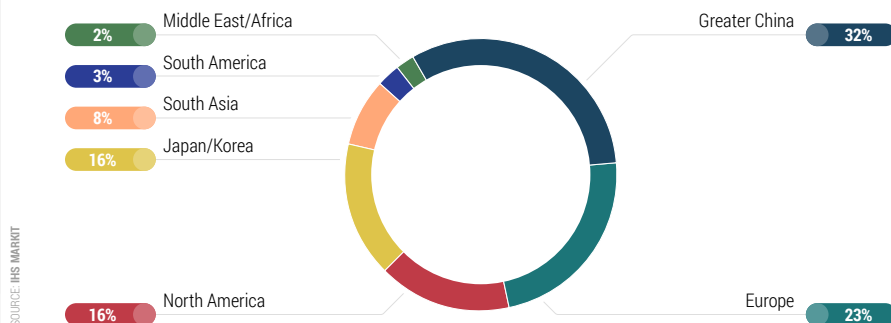


## WORLD CAR PRODUCTION

In million units, % change / 2009 – 2020



% share / 2020

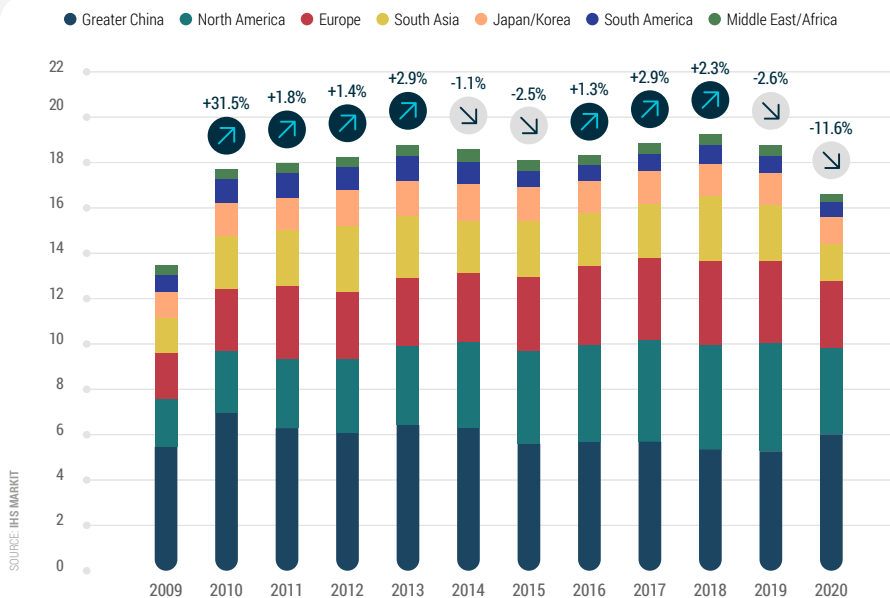


Almost a quarter of all cars are made in Europe



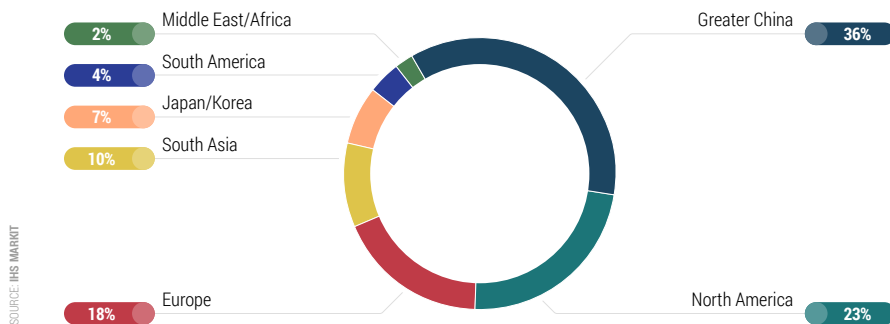
## WORLD COMMERCIAL VEHICLE PRODUCTION<sup>1</sup>

In million units, % change / 2009 – 2020



1. Includes buses

% share / 2020



**18% of all commercial vehicles are manufactured in Europe**



## VEHICLE PRODUCTION IN THE EU

By country / 2020

SOURCE: IHS MARKIT

	Cars	Vans <sup>1</sup>	Trucks <sup>2</sup>	Buses <sup>3</sup>	TOTAL
Austria	107,476	–	15,815	11	123,302
Belgium	237,261	–	26,166	500	263,927
Czech Republic	1,129,184	–	1,221	5,042	1,135,447
Finland	85,698	–	35	131	85,864
France	861,660	438,379	47,156	2,806	1,350,001
Germany	3,403,981	245,502	146,974	3,764	3,800,221
Hungary	432,603	–	–	464	433,067
Italy	476,288	271,730	48,534	324	796,876
Lithuania	–	–	79	–	79
Netherlands	125,651	–	66,284	638	192,573
Poland	220,855	203,287	20,720	5,672	450,534
Portugal	198,693	69,432	2,784	142	271,051
Romania	437,628	–	–	–	437,628
Slovakia	943,847	–	–	10	943,857
Slovenia	140,878	–	–	10	140,888
Spain	1,751,891	478,917	24,194	1,088	2,256,090
Sweden	256,671	–	36,014	4,053	296,738
<b>EUROPEAN UNION</b>	<b>10,810,265</b>	<b>1,707,247</b>	<b>435,976</b>	<b>24,655</b>	<b>12,978,143</b>

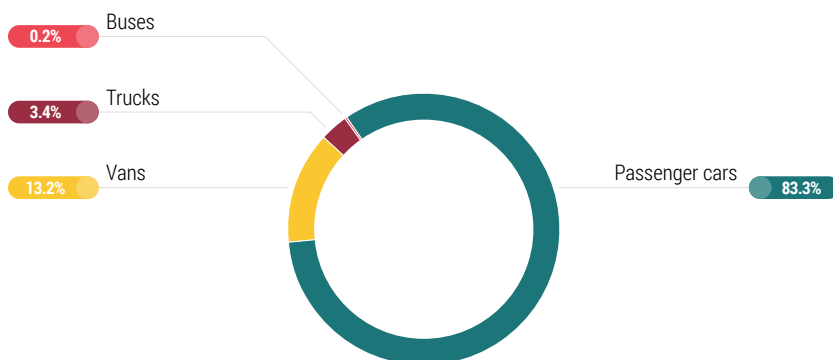
1. Light commercial vehicles up to 3.5t

2. Medium and heavy commercial vehicles over 3.5t

3. Medium and heavy buses over 3.5t

By type, % share / 2020

SOURCE: IHS MARKIT

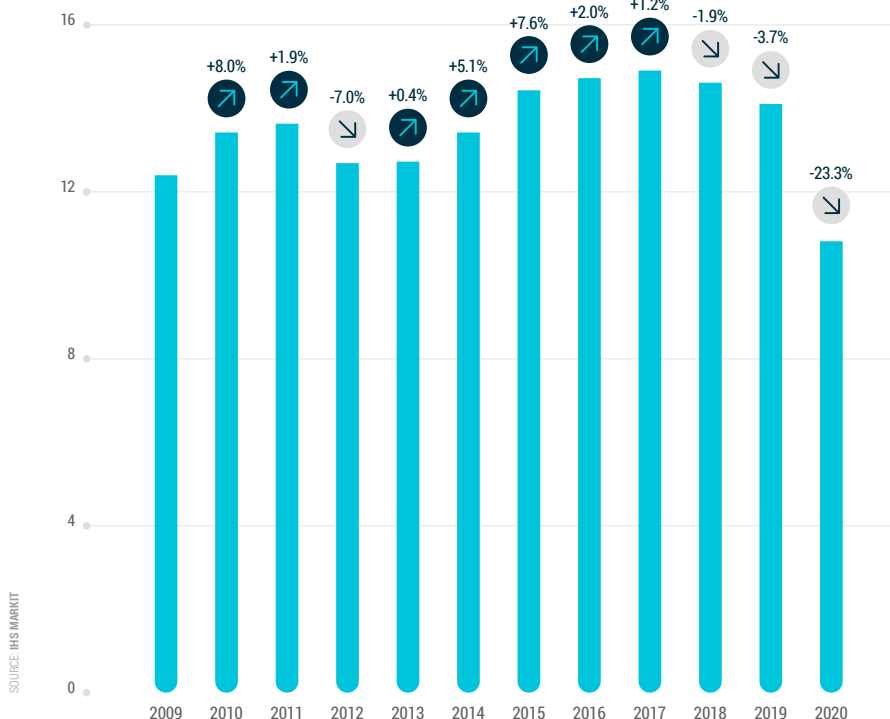


**13 million motor vehicles  
were manufactured in the EU in 2020**



## CAR PRODUCTION IN THE EU

In million units, % change / 2009 – 2020



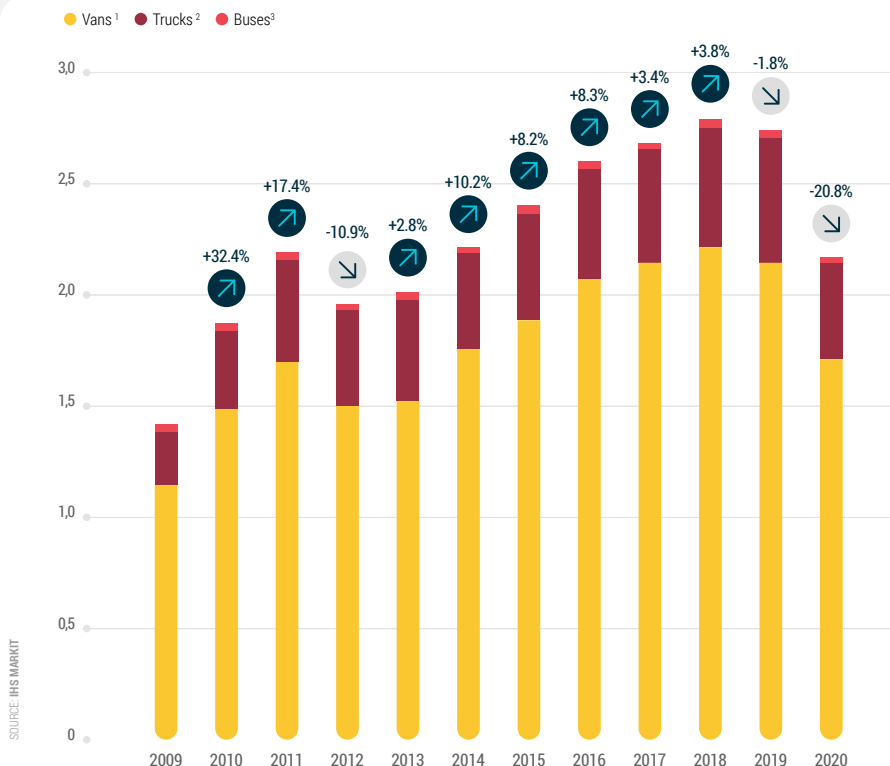
EU car production plummeted by 23%,  
or some five million units, in 2020





## COMMERCIAL VEHICLE PRODUCTION IN THE EU

In million units, % change / 2009 – 2020



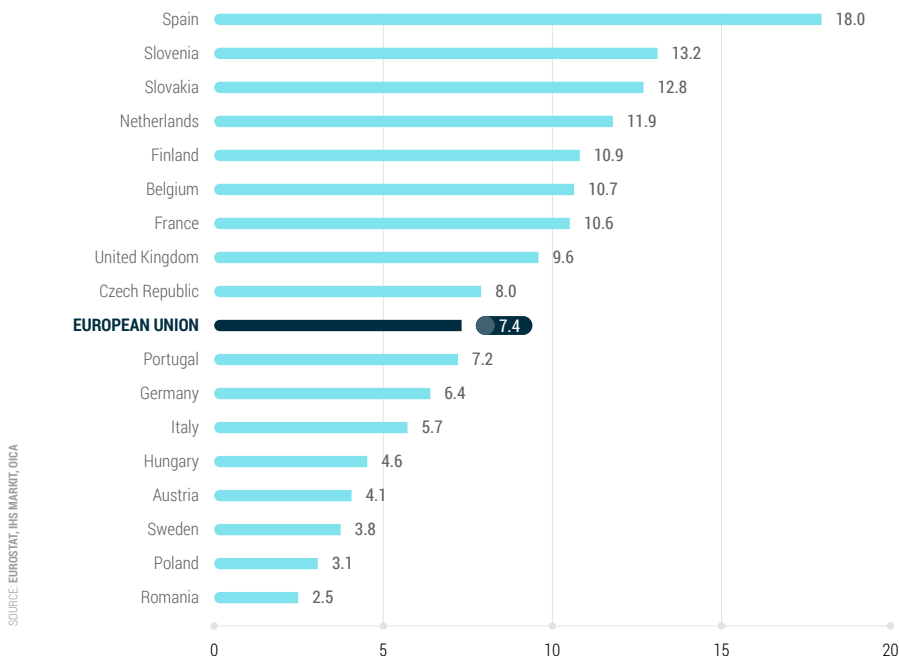
- 1. Light commercial vehicles up to 3.5t
- 2. Medium and heavy commercial vehicles over 3.5t
- 3. Medium and heavy buses over 3.5t

Commercial vehicle production in the EU  
decreased by 20.8% to 2.2 million units in 2020



## VEHICLES MADE PER DIRECT AUTOMOTIVE MANUFACTURING EMPLOYEE

By country / 2018<sup>1</sup>



SOURCE: EUROSTAT, IHS MARKIT, OICA

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

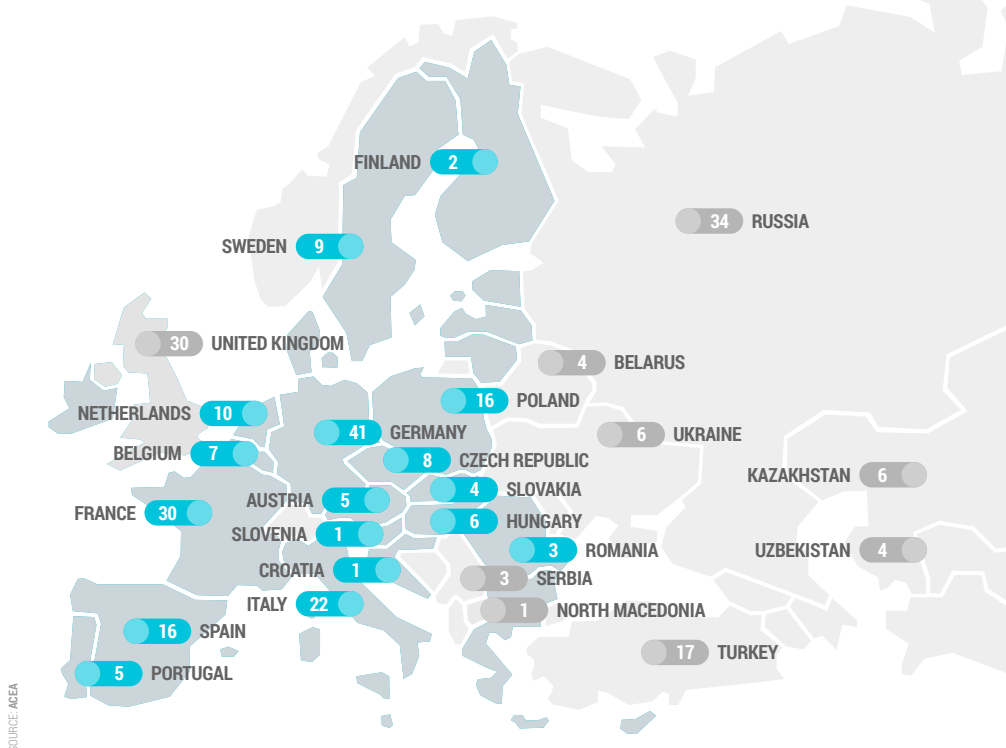
The EU auto industry produces  
an average of 7.4 vehicles per worker



## AUTOMOBILE ASSEMBLY AND ENGINE PRODUCTION PLANTS IN EUROPE

2021

● EU ● NON-EU



SOURCE: ACEA

	CARS	VANS	TRUCKS	BUSES	ENGINES	TOTAL
EU	84	22	29	29	51	185
EUROPE	135	37	54	58	71	290

There are 185 automobile assembly and production plants in the EU

acea



# REGISTRATIONS

THE AUTOMOBILE INDUSTRY  
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## GLOBAL NEW VEHICLE REGISTRATIONS

In thousand units / 2020

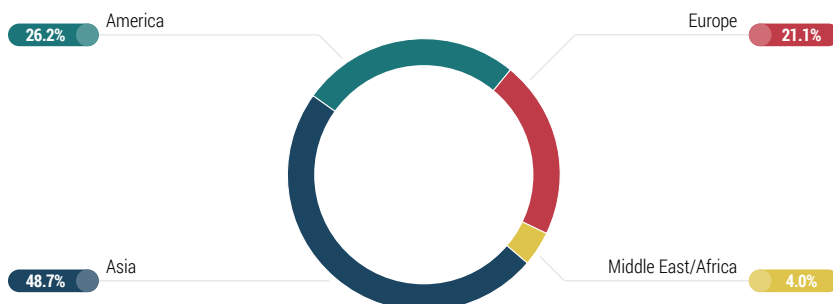
SOURCE: ACEA, IHS MARKIT

	2020	2019	% change 20/19	% share 2020
<b>EUROPE</b>	<b>16,905</b>	<b>21,155</b>	<b>-20.1</b>	<b>21.1</b>
European Union <sup>1</sup>	11,659	15,146	-23.0	14.5
EFTA	461	554	-16.9	0.6
United Kingdom	1,968	2,743	-28.3	2.5
Russia	1,689	1,843	-8.4	2.1
Turkey	794	491	+61.5	1.0
Ukraine	96	102	-6.5	0.1
Others: Europe <sup>2</sup>	239	274	-12.8	0.3
<b>AMERICA</b>	<b>21,044</b>	<b>25,631</b>	<b>-17.9</b>	<b>26.2</b>
North America	17,627	20,973	-16.0	22.0
<i>of which the United States</i>	<i>15,053</i>	<i>17,644</i>	<i>-14.7</i>	<i>18.7</i>
South America	3,416	4,657	-26.6	4.3
<i>of which Brazil</i>	<i>2,057</i>	<i>2,784</i>	<i>-26.1</i>	<i>2.6</i>
<b>ASIA</b>	<b>39,130</b>	<b>42,553</b>	<b>-8.0</b>	<b>48.7</b>
China	25,527	26,271	-2.8	31.8
Japan	4,600	5,188	-11.3	5.7
India	2,924	3,875	-24.5	3.6
South Korea	1,897	1,785	+6.3	2.4
Others: Asia <sup>3</sup>	4,182	5,434	-23.0	5.2
<b>MIDDLE EAST/AFRICA</b>	<b>3,211</b>	<b>3,955</b>	<b>-18.8</b>	<b>4.0</b>
<b>WORLD</b>	<b>80,289</b>	<b>93,293</b>	<b>-13.9</b>	<b>100.0</b>

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

% share / 2020

SOURCE: ACEA, IHS MARKIT



Europe accounts for a fifth of global vehicle sales



## GLOBAL NEW CAR REGISTRATIONS

In thousand units / 2020

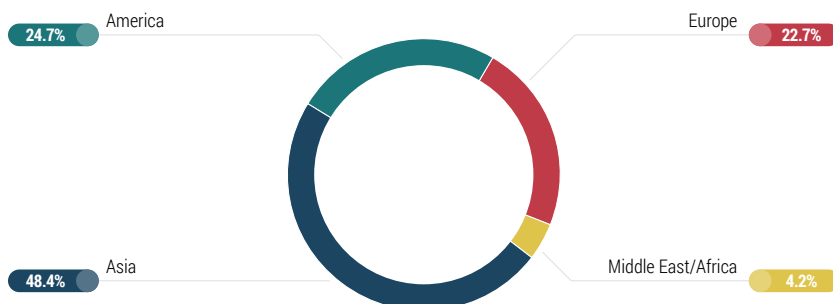
	2020	2019	% change 20/19	% share 2020
<b>EUROPE</b>	<b>14,382</b>	<b>18,112</b>	<b>-20.6</b>	<b>22.7</b>
EUROPEAN UNION <sup>1</sup>	9,943	13,029	-23.7	15.7
EFTA	388	466	-16.7	0.6
United Kingdom	1,631	2,311	-29.4	2.6
Russia	1,505	1,638	-8.1	2.4
Turkey	610	387	+57.5	1.0
Ukraine	86	90	-4.8	0.1
Others: Europe <sup>2</sup>	219	191	+15.0	0.3
<b>AMERICA</b>	<b>15,674</b>	<b>19,578</b>	<b>-19.9</b>	<b>24.7</b>
North America <sup>3</sup>	13,167	16,038	-17.9	20.8
<i>of which the United States</i>	<i>11,233</i>	<i>13,464</i>	<i>-16.6</i>	<i>17.7</i>
South America	2,507	3,539	-29.2	4.0
<i>of which Brazil</i>	<i>1,615</i>	<i>2,262</i>	<i>-28.6</i>	<i>2.5</i>
<b>ASIA</b>	<b>30,664</b>	<b>33,959</b>	<b>-9.7</b>	<b>48.4</b>
China	19,734	21,163	-6.8	31.1
Japan	3,814	4,296	-11.2	6.0
India	2,491	3,072	-18.9	3.9
South Korea	1,624	1,489	+9.0	2.6
Others: Asia <sup>4</sup>	3,001	3,939	-23.8	4.7
<b>MIDDLE EAST/AFRICA</b>	<b>2,685</b>	<b>3,248</b>	<b>-17.3</b>	<b>4.2</b>
<b>WORLD</b>	<b>63,405</b>	<b>74,897</b>	<b>-15.3</b>	<b>100.0</b>

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

% share / 2020

SOURCE: ACEA, IHS MARKIT



63 million cars were sold worldwide in 2020



## NEW COMMERCIAL VEHICLE<sup>1</sup> REGISTRATIONS

In thousand units / 2020

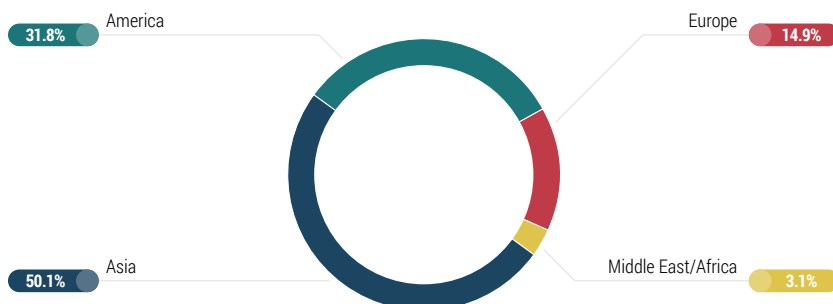
	2020	2019	% change 20/19	% share 2020
<b>EUROPE</b>	<b>2,523</b>	<b>3,043</b>	<b>-17.1</b>	<b>14.9</b>
European Union <sup>2</sup>	1,716	2,117	-18.9	10.2
EFTA	73	89	-17.7	0.4
United Kingdom	337	432	-22.0	2.0
Russia	184	205	-10.4	1.1
Turkey	184	104	+76.3	1.1
Ukraine	10	12	-18.9	0.1
Others: Europe <sup>3</sup>	20	84	-76.2	0.1
<b>AMERICA</b>	<b>5,369</b>	<b>6,053</b>	<b>-11.3</b>	<b>31.8</b>
North America <sup>4</sup>	4,460	4,935	-9.6	26.4
<i>of which the United States</i>	<i>3,820</i>	<i>4,180</i>	<i>-8.6</i>	<i>22.6</i>
South America	909	1,118	-18.7	5.4
<i>of which Brazil</i>	<i>442</i>	<i>522</i>	<i>-15.4</i>	<i>2.6</i>
<b>ASIA</b>	<b>8,466</b>	<b>8,593</b>	<b>-1.5</b>	<b>50.1</b>
China	5,793	5,107	+13.4	34.3
Japan	786	892	-11.9	4.7
India	433	802	-46.1	2.6
South Korea	274	296	-7.5	1.6
Others: Asia <sup>5</sup>	1,181	1,495	-21.0	7.0
<b>MIDDLE EAST/AFRICA</b>	<b>526</b>	<b>707</b>	<b>-25.7</b>	<b>3.1</b>
<b>WORLD</b>	<b>16,884</b>	<b>18,396</b>	<b>-8.2</b>	<b>100.0</b>

SOURCE: ACEA, IHS MARKIT

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

% share / 2020

SOURCE: ACEA, IHS MARKIT



**16.9 million vans, trucks and buses  
were registered globally in 2020**



## VEHICLE REGISTRATIONS IN THE EU <sup>1</sup>

By country / 2020

	Cars	Vans <sup>1</sup>	Trucks <sup>3</sup>	Buses <sup>4</sup>	TOTAL
Austria	248,740	36,545	5,676	872	291,833
Belgium	431,491	71,313	7,516	787	511,107
Bulgaria	22,368	5,060	2,055	180	29,663
Croatia	36,005	6,797	895	106	43,803
Cyprus	10,061	1,577	99	244	11,981
Czech Republic	202,971	17,141	7,355	1,367	228,834
Denmark	198,130	31,122	3,727	269	233,248
Estonia	18,750	3,289	493	224	22,756
Finland	96,415	12,842	3,430	284	112,971
France	1,650,118	401,154	42,699	6,050	2,100,021
Germany	2,917,678	267,832	74,779	6,460	3,266,749
Greece	80,977	6,865	561	307	88,710
Hungary	128,021	22,043	3,275	629	153,968
Ireland	88,324	21,732	1,936	130	112,122
Italy	1,381,496	159,709	20,303	3,162	1,564,670
Latvia	13,864	2,120	714	75	16,773
Lithuania	40,232	2,859	4,188	315	47,594
Luxembourg	45,189	4,420	991	214	50,814
Netherlands	358,330	60,433	10,426	643	429,832
Poland	428,347	59,649	20,671	1,486	510,153
Portugal	145,417	27,578	3,585	412	176,992
Romania	126,351	13,730	4,112	819	145,012
Slovakia	76,305	6,371	1,943	290	84,909
Slovenia	53,694	8,033	1,323	58	63,108
Spain	851,211	158,198	19,245	2,090	1,030,744
Sweden	292,024	31,015	5,502	1,674	330,215
<b>EUROPEAN UNION</b>	<b>9,942,509</b>	<b>1,439,427</b>	<b>247,499</b>	<b>29,147</b>	<b>11,658,582</b>
Iceland	9,369	1,001	205	15	10,590
Norway	141,412	32,110	5,993	1,370	180,885
Switzerland	236,828	28,158	3,579	640	269,205
<b>EFTA</b>	<b>387,609</b>	<b>61,269</b>	<b>9,777</b>	<b>2,025</b>	<b>460,680</b>
United Kingdom	1,631,064	292,657	39,312	4,623	1,967,656
<b>EU + EFTA + UK</b>	<b>11,961,182</b>	<b>1,793,353</b>	<b>296,588</b>	<b>35,795</b>	<b>14,086,918</b>

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

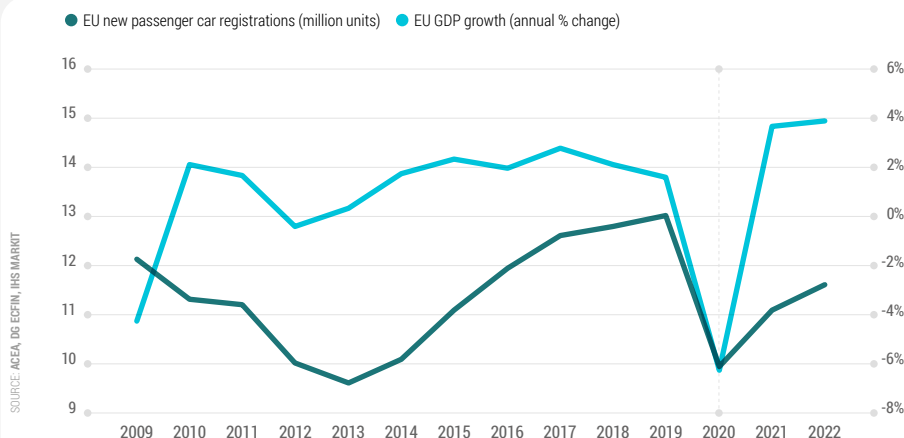
The EU represents a market of  
11.7 million motor vehicles per year





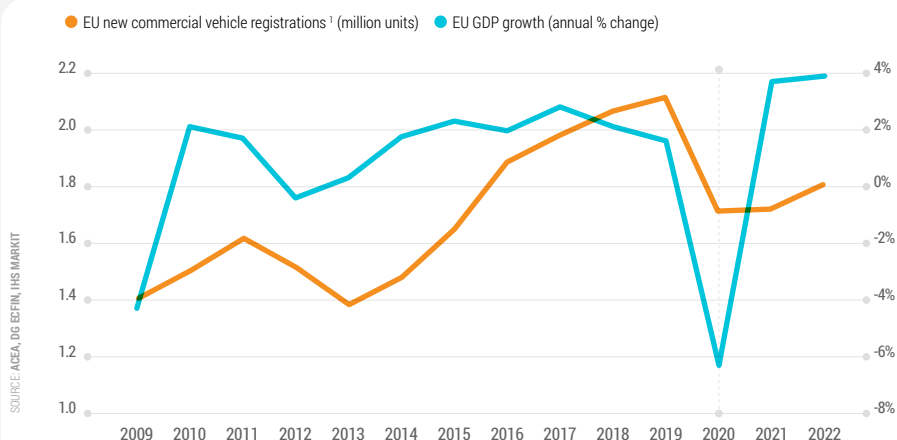
## NEW CAR REGISTRATIONS AND GDP IN THE EU

2009 – 2022



## NEW COMMERCIAL VEHICLE REGISTRATIONS AND GDP IN THE EU

2009 – 2022



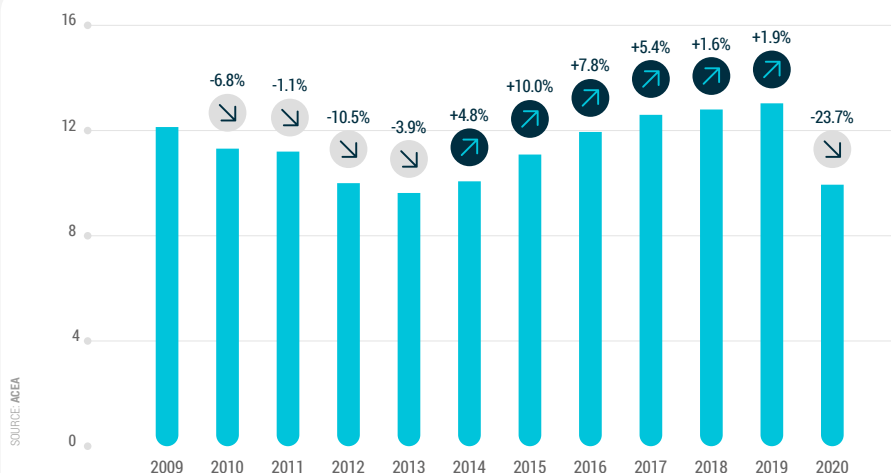
1. Includes light, medium and heavy commercial vehicles, and buses and coaches

Vehicle sales mirror economic growth and decline



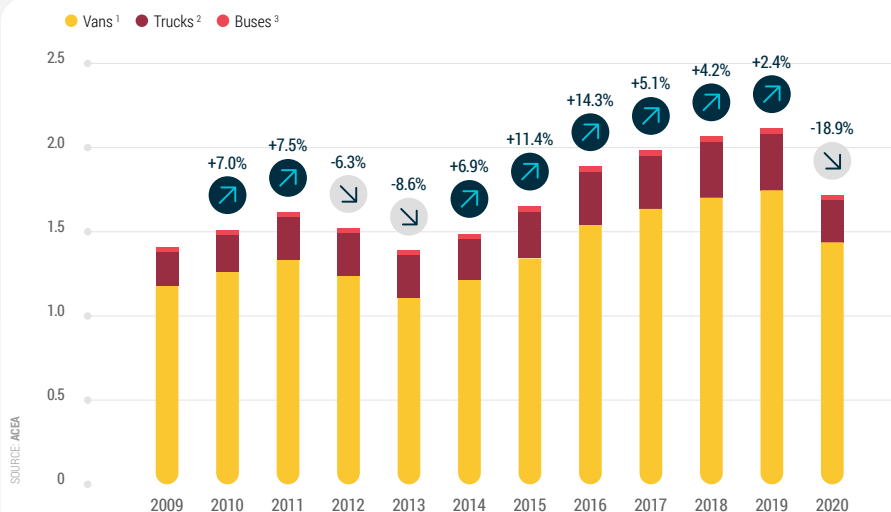
## NEW CAR REGISTRATIONS IN THE EU

In million units, % change / 2009 – 2020



## NEW COMMERCIAL VEHICLE REGISTRATIONS IN THE EU

In million units, % change / 2009 – 2020



1. Light commercial vehicles up to 3.5t

2. Commercial vehicles over 3.5t

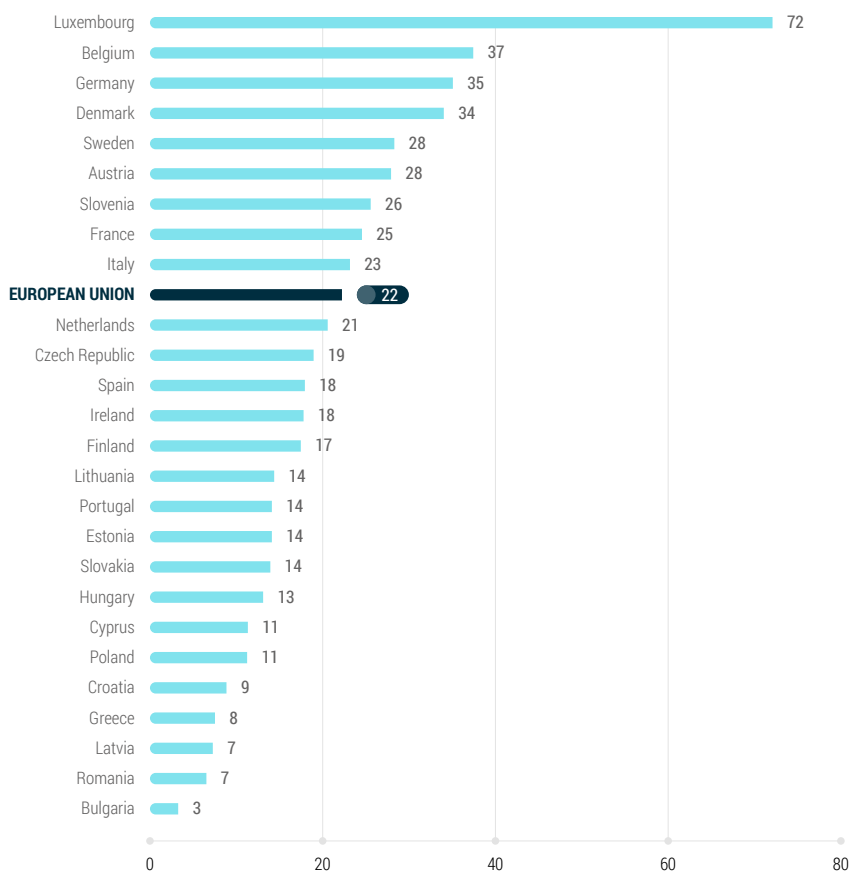
3. Buses and coaches over 3.5t

EU car sales collapsed by almost a quarter in 2020



## NEW CARS PER 1,000 INHABITANTS

By country, in units / 2020



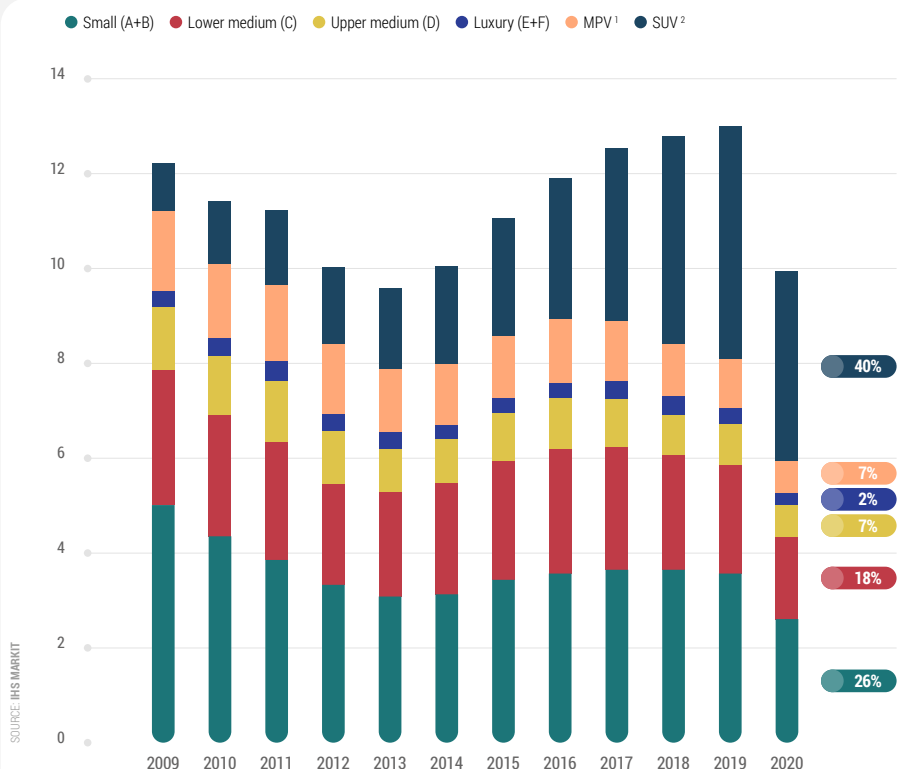
SOURCE: ACEA, EUROSTAT

22 new cars were registered per  
1,000 inhabitants in the EU in 2020



## NEW CARS IN THE EU BY SEGMENT

In million units, % share / 2009 – 2020



1. Multi-purpose vehicles

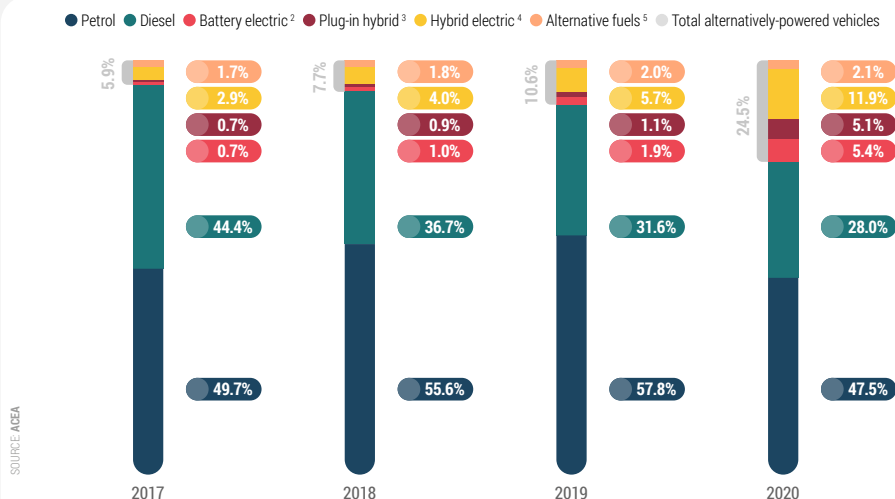
2. Sport utility vehicles

Small and lower medium cars account for 44% of total EU car sales



## NEW CARS IN THE EU BY FUEL TYPE <sup>1</sup>

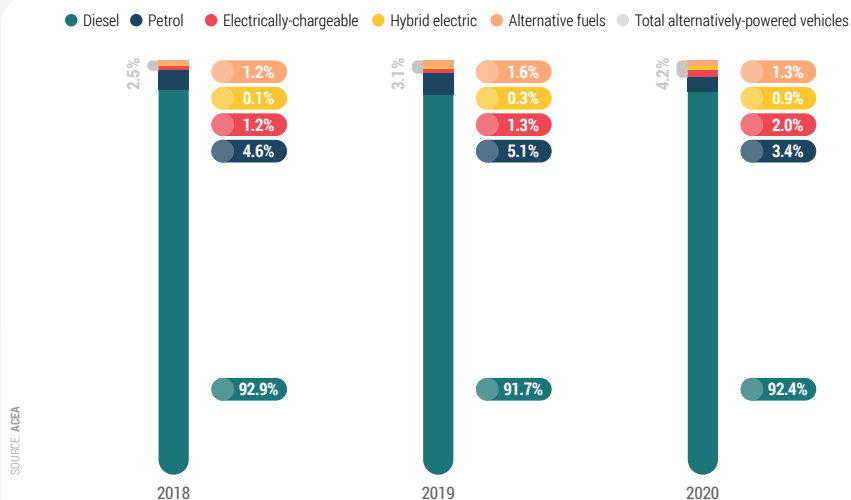
Market share / 2017 – 2020



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 VANS <sup>1</sup> IN THE EU BY FUEL TYPE <sup>2</sup>

Market share / 2018 – 2020



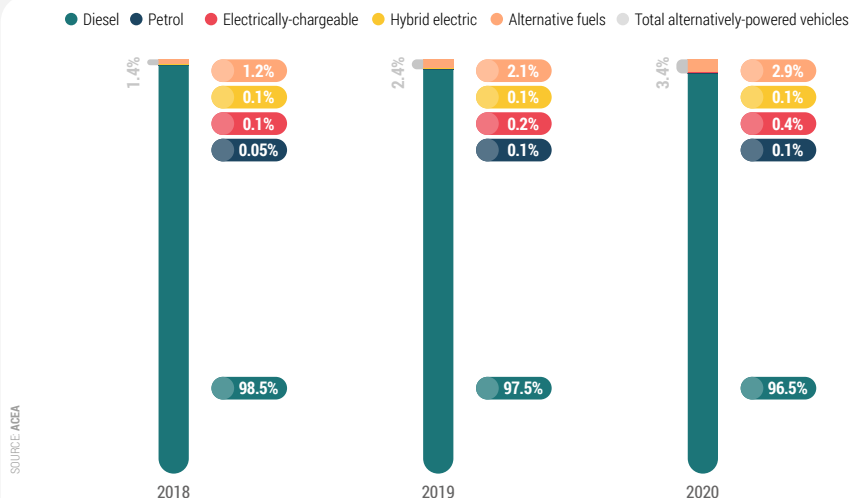
1. Light commercial vehicles up to 3.5t 2. Data for Bulgaria, Lithuania and Malta not available

**A quarter of all new cars  
in the EU are alternatively-powered**



## NEW TRUCKS<sup>1</sup> IN THE EU BY FUEL TYPE<sup>2</sup>

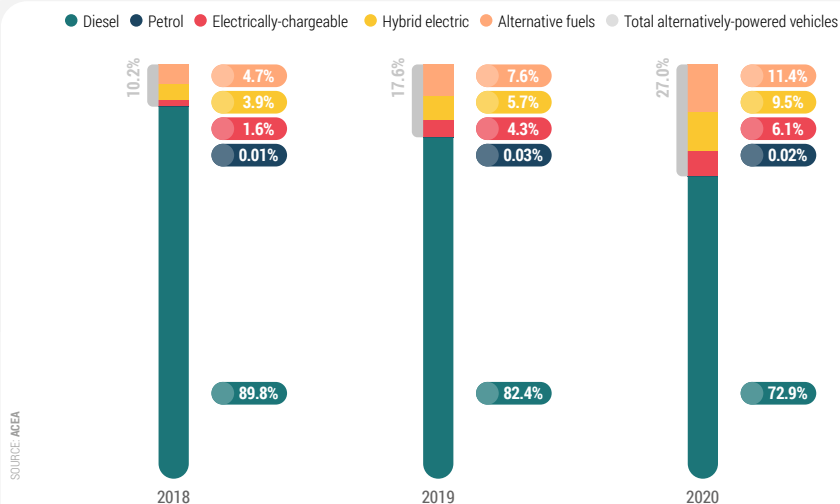
Market share / 2018 – 2020



1. Commercial vehicles over 3.5t 2. Data for Bulgaria, Lithuania and Malta not available

## NEW BUSES<sup>1</sup> IN THE EU BY FUEL TYPE<sup>2</sup>

Market share / 2018 – 2020



1. Buses and coaches over 3.5t 2. Data for Bulgaria, Lithuania and Malta not available

96.5% of new trucks in the EU are fuelled by diesel

acea



TRADE

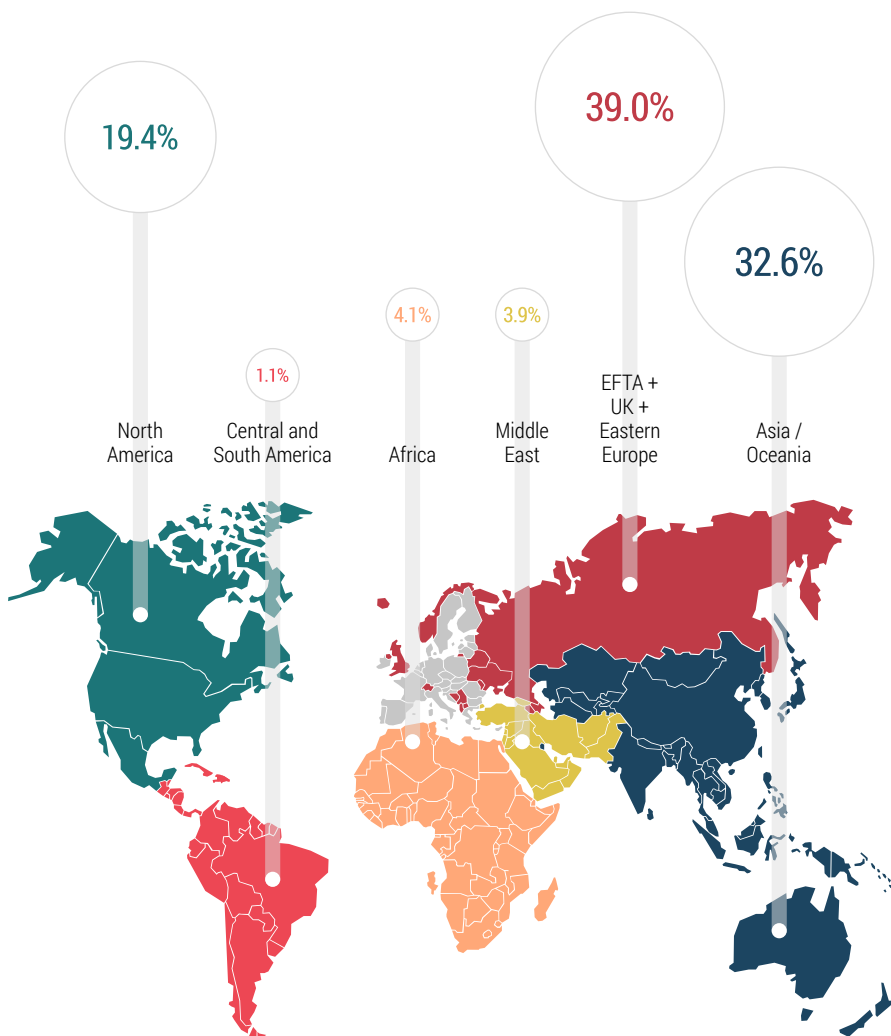
THE AUTOMOBILE INDUSTRY  
POCKET GUIDE 2021/2022





## MAIN DESTINATIONS FOR EU VEHICLE EXPORTS

Value market share / 2020



SOURCE: EUROSTAT

The automotive industry puts  
the EU firmly on the global map





## EU VEHICLE TRADE

By type, in million € / 2020

SOURCE: EUROSTAT

Trade in value	Cars <sup>1</sup>	Vans <sup>2</sup>	Trucks & buses <sup>3</sup>	TOTAL
<b>2020</b>				
Imports	51,337	4,108	2,300	57,746
Exports	121,244	6,226	6,620	134,090
Trade balance	69,907	2,118	4,319	76,344
<b>2019</b>				
Imports	63,103	5,413	2,768	71,284
Exports	140,317	7,586	8,603	156,506
Trade balance	77,214	2,172	5,835	85,221
<b>% change 20/19</b>				
Imports	-18.6%	-24.1%	-16.9%	-19.0%
Exports	-13.6%	-17.9%	-23.1%	-14.3%
Trade balance	-9.5%	-2.5%	-26.0%	-10.4%

1. Passenger cars

2. Commercial vehicles up to 5t

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

By type, in units / 2020

SOURCE: EUROSTAT

Trade in volume	Cars <sup>1</sup>	Vans <sup>2</sup>	Trucks & buses <sup>3</sup>	TOTAL
<b>2020</b>				
Imports	3,052,178	266,072	392,921	3,711,171
Exports	5,189,538	423,792	189,760	5,803,090
<b>2019</b>				
Imports	3,974,072	378,495	269,491	4,622,058
Exports	6,156,553	583,646	242,055	6,982,254
<b>% change 20/19</b>				
Imports	-23.2%	-29.7%	+45.8%	-19.7%
Exports	-15.7%	-27.4%	-21.6%	-16.9%

1. Passenger cars

2. Commercial vehicles up to 5t

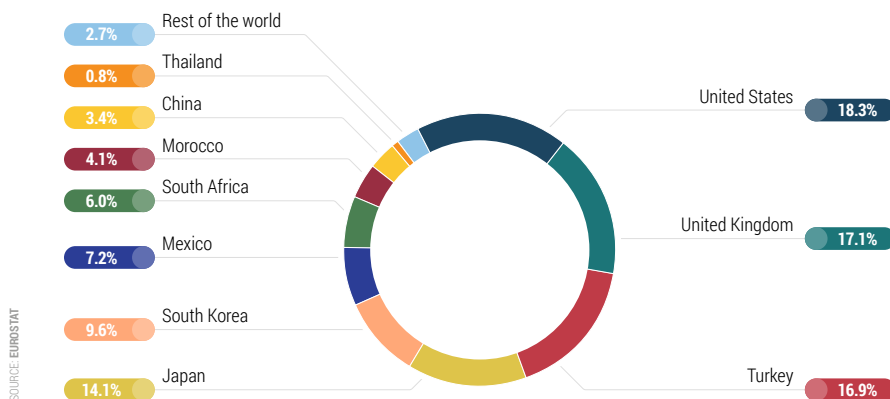
3. Commercial vehicles over 5t, including buses and coaches

**The auto industry generates an annual trade surplus of €76 billion for the EU**



## COUNTRIES OF ORIGIN OF EU VEHICLE IMPORTS

Value market share / 2020



By value, in million € / 2020

SOURCE: EUROSTAT

	2015	2016	2017	2018	2019	2020	% change 20/19	% share 2020
United States	6,944	7,246	6,529	5,550	9,510	10,542	+10.9	18.3
United Kingdom	15,534	16,780	16,097	15,127	14,134	9,864	-30.2	17.1
Turkey	8,054	10,489	12,237	12,693	13,022	9,776	-24.9	16.9
Japan	6,539	7,857	8,348	8,808	10,737	8,118	-24.4	14.1
South Korea	3,084	3,452	5,200	5,804	6,576	5,518	-16.1	9.6
Mexico	1,650	2,153	4,622	5,214	5,006	4,130	-17.5	7.2
South Africa	2,582	3,332	3,586	4,422	5,669	3,465	-38.9	6.0
Morocco	1,394	1,623	1,974	2,357	2,542	2,362	-7.1	4.1
China	167	229	405	479	864	1,963	+127.3	3.4
Thailand	674	858	863	711	783	443	-43.4	0.8
<b>WORLD</b>	<b>49,354</b>	<b>57,320</b>	<b>63,226</b>	<b>63,788</b>	<b>71,284</b>	<b>57,746</b>	<b>-19.0</b>	<b>100.0</b>

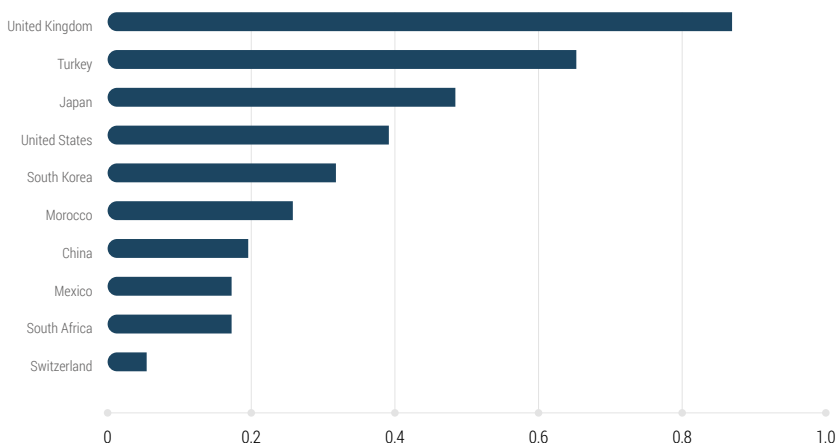
The EU imported almost €58 billion  
worth of vehicles in 2020



## MAIN COUNTRIES OF ORIGIN OF EU VEHICLE IMPORTS

In million units / 2020

SOURCE: EUROSTAT



In units / 2020

SOURCE: EUROSTAT

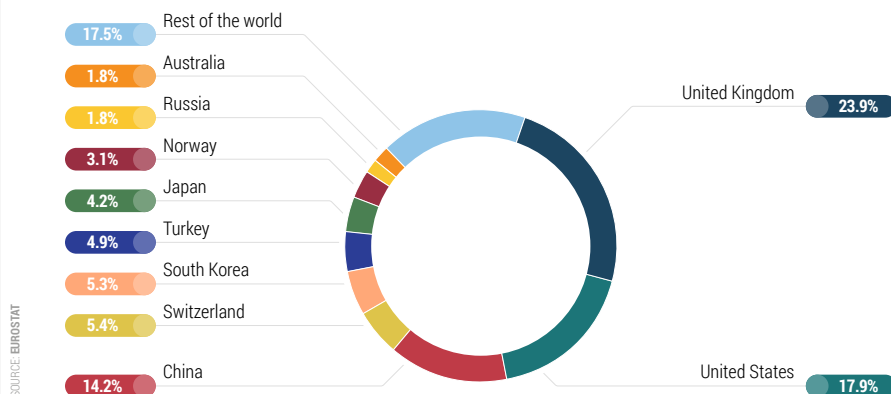
	2015	2016	2017	2018	2019	2020	% change 20/19	% share 2020
United Kingdom	966,380	1,225,657	952,151	917,531	957,690	872,146	-8.9	23.5
Turkey	684,481	860,478	974,269	970,942	929,834	654,612	-29.6	17.6
Japan	414,494	491,779	553,948	583,057	676,024	485,371	-28.2	13.1
United States	245,303	258,883	248,460	265,827	355,767	393,728	+10.7	10.6
South Korea	276,599	295,551	412,882	436,693	443,441	318,917	-28.1	8.6
Morocco	170,794	201,189	246,664	293,959	306,518	258,393	-15.7	7.0
China	81,152	73,661	113,658	157,428	154,400	196,833	+27.5	5.3
Mexico	121,963	134,875	230,755	265,680	222,463	173,307	-22.1	4.7
South Africa	134,056	174,743	172,252	210,845	267,755	172,632	-35.5	4.7
Switzerland	48,388	67,714	71,508	73,085	65,099	54,168	-16.8	1.5
<b>WORLD</b>	<b>3,440,441</b>	<b>4,123,915</b>	<b>4,318,539</b>	<b>4,462,922</b>	<b>4,622,058</b>	<b>3,711,171</b>	<b>-19.7</b>	<b>100.0</b>

**3.7 million vehicles were  
imported to the EU in 2020**



## DESTINATIONS FOR EU VEHICLE EXPORTS

Value market share / 2020



By value, in million €/2020

SOURCE: EUROSTAT

	2015	2016	2017	2018	2019	2020	% change 20/19	% share 2020
United Kingdom	45,972	46,251	42,295	39,992	41,741	32,010	-23.3	23.9
United States	34,981	30,473	31,297	29,659	29,195	23,964	-17.9	17.9
China	13,406	15,742	17,844	18,927	19,369	19,063	-1.6	14.2
Switzerland	8,275	7,807	7,969	7,652	8,088	7,282	-10.0	5.4
South Korea	6,521	5,561	6,034	6,290	5,927	7,069	+19.3	5.3
Turkey	7,928	7,980	6,992	4,415	2,949	6,531	+121.4	4.9
Japan	5,839	6,445	7,187	7,215	7,095	5,676	-20.0	4.2
Norway	3,867	4,010	4,539	4,343	4,712	4,103	-12.9	3.1
Russia	3,070	2,627	2,982	3,205	3,614	2,480	-31.4	1.8
Australia	4,060	4,239	4,284	4,233	3,451	2,459	-28.8	1.8
<b>WORLD</b>	<b>164,135</b>	<b>159,947</b>	<b>162,297</b>	<b>155,933</b>	<b>156,506</b>	<b>134,090</b>	<b>-14.3</b>	<b>100.0</b>

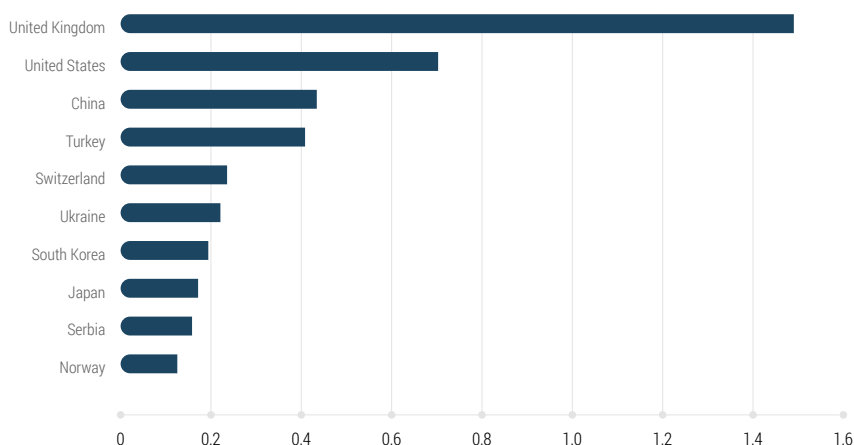
EU vehicle exports brought in €134 billion in 2020



## MAIN DESTINATIONS FOR EU VEHICLE EXPORTS

In million units / 2020

SOURCE: EUROSTAT



In units / 2020

SOURCE: EUROSTAT

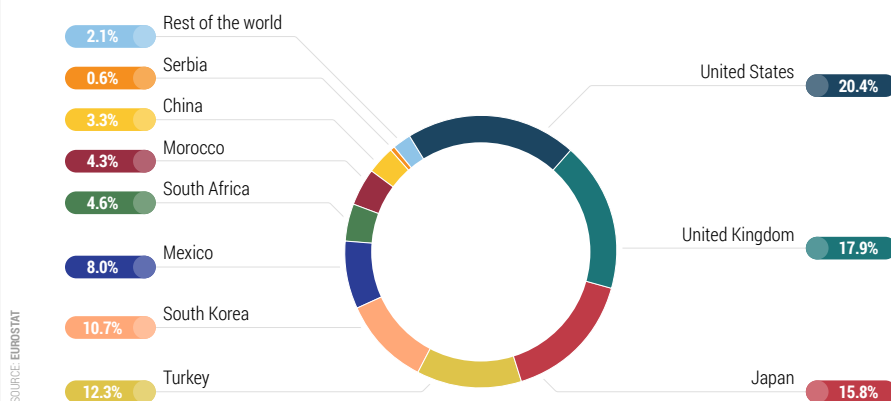
	2015	2016	2017	2018	2019	2020	% change 20/19	% share 2020
United Kingdom	2,409,801	2,606,695	2,304,480	2,156,781	2,165,213	1,491,160	-31.1	25.7
United States	1,095,129	969,083	965,929	933,491	827,621	702,642	-15.1	12.1
China	349,250	400,997	472,592	473,201	412,045	434,382	+5.4	7.5
Turkey	540,415	541,079	486,403	282,166	199,699	408,676	+104.6	7.0
Switzerland	322,072	304,267	294,394	283,628	312,822	233,430	-25.4	4.0
Ukraine	44,136	72,540	112,552	109,279	178,997	220,011	+22.9	3.8
South Korea	207,884	160,014	169,021	169,828	162,494	193,439	+19.0	3.3
Japan	224,450	217,963	240,441	241,704	227,843	171,258	-24.8	3.0
Serbia	97,478	129,506	131,193	155,510	150,697	157,650	+4.6	2.7
Norway	157,056	157,747	164,611	208,439	165,597	125,440	-24.2	2.2
<b>WORLD</b>	<b>7,748,866</b>	<b>7,639,058</b>	<b>7,448,598</b>	<b>7,241,268</b>	<b>6,982,254</b>	<b>5,803,090</b>	<b>-16.9</b>	<b>100.0</b>

25.7% of EU vehicle exports  
go to the United Kingdom



## COUNTRIES OF ORIGIN OF EU CAR IMPORTS

Value market share / 2020



By value, in million € / 2020

SOURCE: EUROSTAT

	2015	2016	2017	2018	2019	2020	% change 20/19	% share 2020
United States	6,915	7,202	6,380	5,450	9,435	10,452	+10.8	20.4
United Kingdom	14,890	15,885	15,214	14,205	13,291	9,182	-30.9	17.9
Japan	6,520	7,817	8,319	8,786	10,715	8,094	-24.5	15.8
Turkey	4,271	5,672	7,900	8,147	8,283	6,331	-23.6	12.3
South Korea	3,067	3,439	5,186	5,789	6,549	5,510	-15.9	10.7
Mexico	1,641	2,141	4,600	5,179	4,962	4,098	-17.4	8.0
South Africa	2,233	2,808	2,930	3,631	4,556	2,366	-48.1	4.6
Morocco	1,233	1,428	1,773	2,124	2,308	2,191	-5.1	4.3
China	80	103	329	393	717	1,709	+138.3	3.3
Serbia	1,035	999	844	655	440	306	-30.5	0.6
<b>WORLD</b>	<b>43,419</b>	<b>49,681</b>	<b>55,708</b>	<b>56,095</b>	<b>63,103</b>	<b>51,337</b>	<b>-18.6</b>	<b>100.0</b>

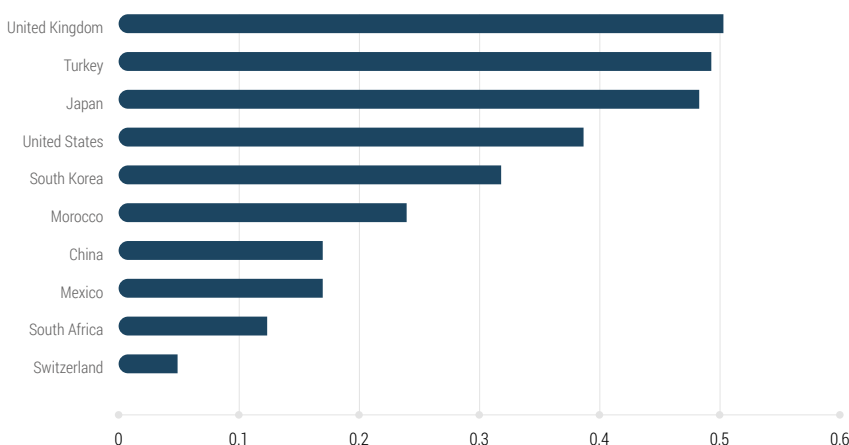
The United States accounts for the highest import value of cars, with a 20.4% share



## MAIN COUNTRIES OF ORIGIN OF EU CAR IMPORTS

In million units / 2020

SOURCE: EUROSTAT



In units / 2020

SOURCE: EUROSTAT

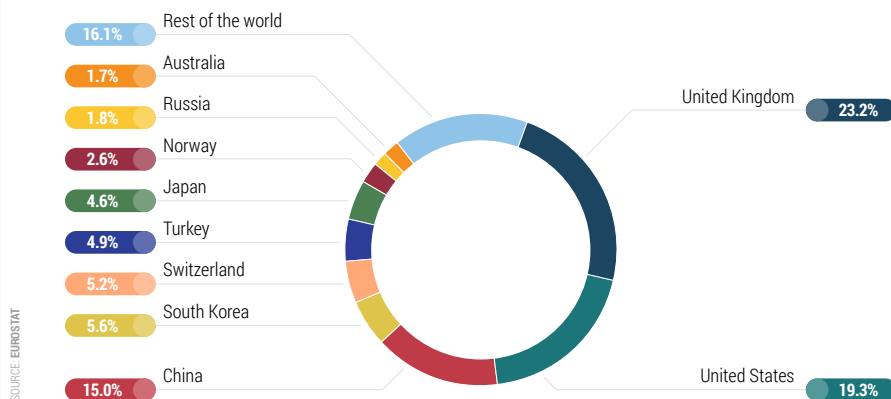
	2015	2016	2017	2018	2019	2020	% change 20/19	% share 2020
United Kingdom	934,643	1,170,174	901,298	840,140	700,546	503,282	-28.2	16.5
Turkey	451,459	569,756	718,163	714,895	701,111	494,149	-29.5	16.2
Japan	413,289	489,473	552,017	581,385	674,328	483,626	-28.3	15.8
United States	241,598	253,205	239,786	256,411	349,091	386,877	+10.8	12.7
South Korea	275,559	294,623	411,952	435,814	441,870	318,479	-27.9	10.4
Morocco	152,247	179,959	222,965	266,276	280,731	240,479	-14.3	7.9
China	73,346	60,954	99,854	133,280	133,465	170,244	+27.6	5.6
Mexico	121,034	133,601	228,668	262,147	218,077	170,153	-22.0	5.6
South Africa	114,974	148,521	140,966	172,410	213,198	124,335	-41.7	4.1
Switzerland	42,232	60,965	64,113	65,877	58,514	48,059	-17.9	1.6
<b>WORLD</b>	<b>3,068,995</b>	<b>3,659,905</b>	<b>3,865,048</b>	<b>3,961,764</b>	<b>3,974,072</b>	<b>3,052,178</b>	<b>-23.2</b>	<b>100.0</b>

The EU imported more than 3 million cars in 2020



## DESTINATIONS FOR EU CAR EXPORTS

Value market share / 2020



By value, in million € / 2020

SOURCE: EUROSTAT

	2016	2016	2017	2018	2019	2020	% change 20/19	% share 2020
United Kingdom	41,287	41,039	37,854	35,516	36,487	28,097	-23.0	23.2
United States	34,309	29,915	30,664	29,010	28,727	23,374	-18.6	19.3
China	13,218	15,522	17,526	18,338	18,632	18,202	-2.3	15.0
South Korea	6,197	5,027	5,508	5,899	5,679	6,830	+20.3	5.6
Switzerland	7,248	6,872	6,973	6,601	6,990	6,286	-10.1	5.2
Turkey	6,809	7,082	5,990	3,875	2,581	5,969	+131.3	4.9
Japan	5,798	6,425	7,170	7,189	7,062	5,635	-20.2	4.6
Norway	2,975	2,995	3,472	3,297	3,196	3,114	-2.6	2.6
Russia	2,846	2,347	2,499	2,780	3,145	2,147	-31.7	1.8
Australia	3,685	3,690	3,586	3,284	2,806	2,074	-26.1	1.7
<b>WORLD</b>	<b>149,407</b>	<b>144,651</b>	<b>147,426</b>	<b>141,008</b>	<b>140,317</b>	<b>121,244</b>	<b>-13.6</b>	<b>100.0</b>

EU car exports are worth €121.2 billion

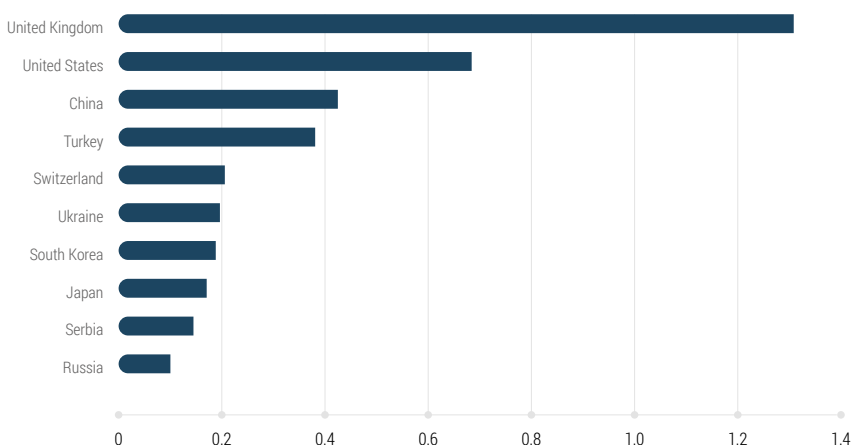




## MAIN DESTINATIONS FOR EU CAR EXPORTS

In million units / 2020

SOURCE: EUROSTAT



In units / 2020

SOURCE: EUROSTAT

	2015	2016	2017	2018	2019	2020	% change 20/19	% share 2020
United Kingdom	2,187,284	2,229,987	2,077,829	1,922,448	1,866,399	1,310,061	-29.8	25.2
United States	1,081,301	958,389	952,965	919,264	819,658	684,428	-16.5	13.2
China	346,519	397,420	467,684	465,177	402,884	424,124	+5.3	8.2
Turkey	480,360	490,463	430,025	258,328	184,401	381,278	+106.8	7.3
Switzerland	293,566	271,546	265,898	252,451	249,756	205,901	-17.6	4.0
Ukraine	27,255	50,530	88,856	86,074	149,399	196,267	+31.4	3.8
South Korea	204,141	154,043	163,182	164,978	155,776	187,739	+20.5	3.6
Japan	223,374	217,801	240,269	241,395	227,588	170,804	-25.0	3.3
Serbia	88,394	115,560	117,438	137,971	130,400	145,246	+11.4	2.8
Russia	150,800	116,291	124,949	152,608	146,411	100,028	-31.7	1.9
<b>WORLD</b>	<b>7,074,989</b>	<b>6,811,656</b>	<b>6,768,781</b>	<b>6,444,153</b>	<b>6,156,553</b>	<b>5,189,538</b>	<b>-15.7</b>	<b>100.0</b>

5.2 million cars were exported by the EU in 2020



# VEHICLES IN USE

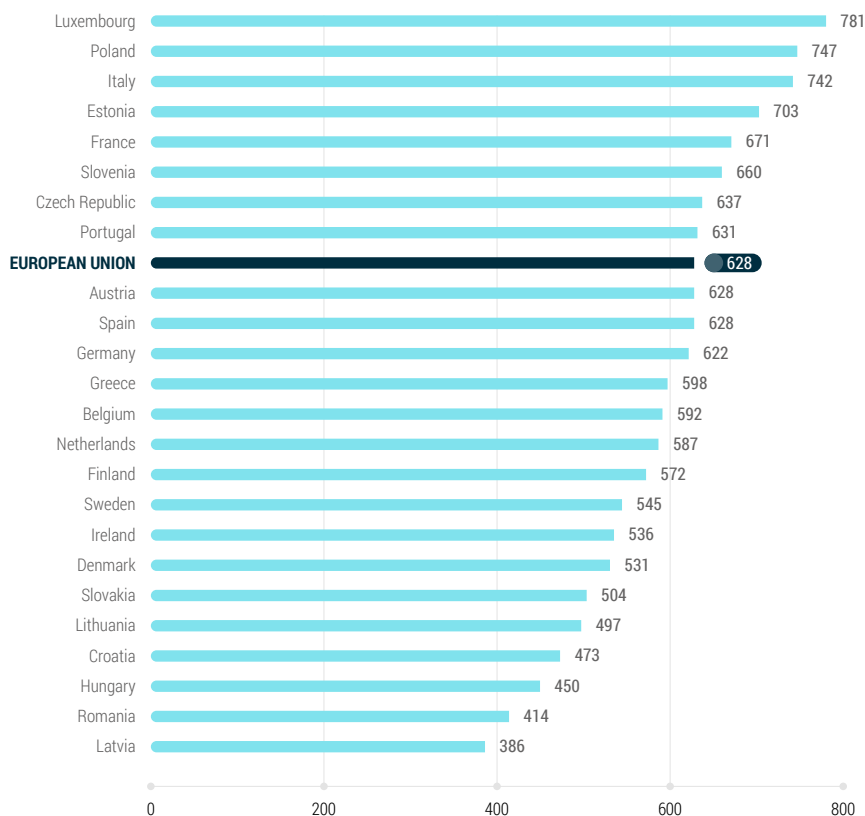
THE AUTOMOBILE INDUSTRY  
POCKET GUIDE 2021/2022





## MOTORISATION RATES IN THE EU

Vehicles per 1,000 inhabitants / 2019



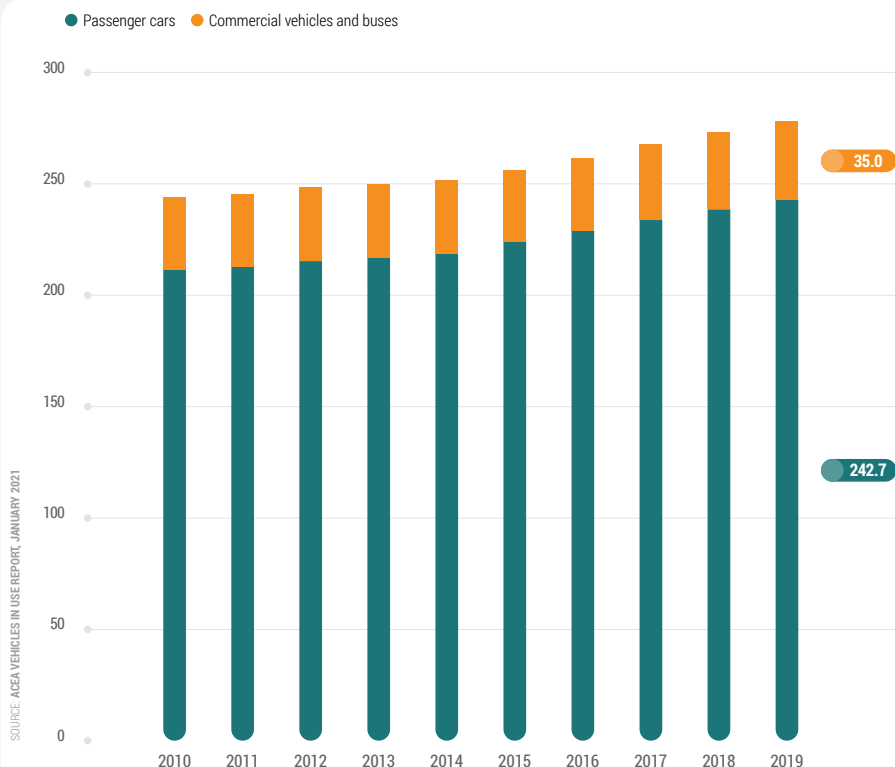
SOURCE: ACEA VEHICLES IN USE REPORT, JANUARY 2021

The EU has 628 motor vehicles per 1,000 inhabitants



## EU VEHICLE FLEET: SIZE AND DISTRIBUTION

In million units / 2010 – 2019

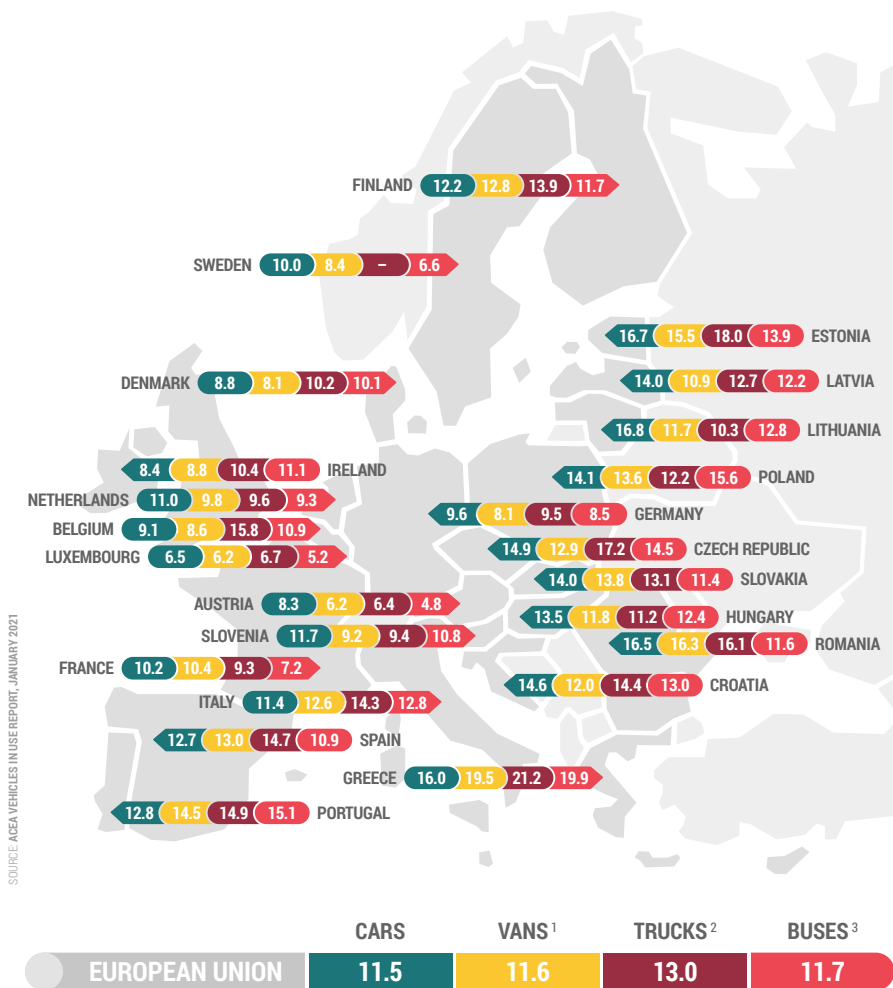


The EU fleet counts almost  
278 million motor vehicles



## AVERAGE AGE OF THE EU VEHICLE FLEET

By country, in years / 2019



1. Light commercial vehicles up to 3.5t

2. Medium and heavy commercial vehicles over 3.5t

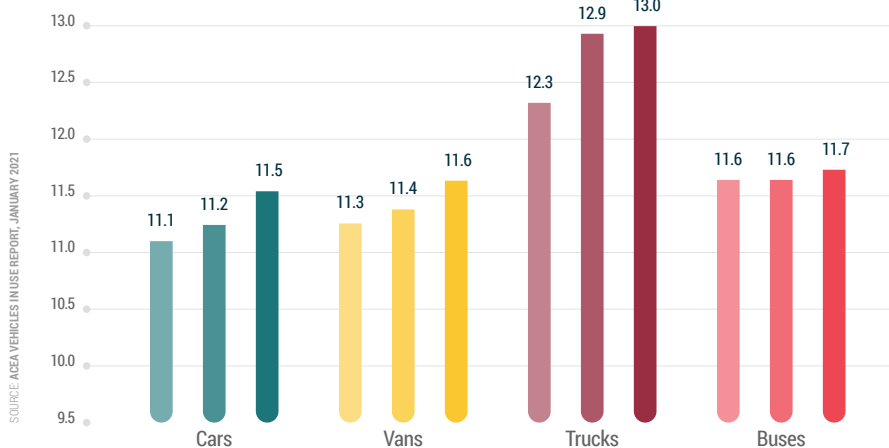
3. Buses and coaches over 3.5t

Cars in the EU are on average 11.5 years old



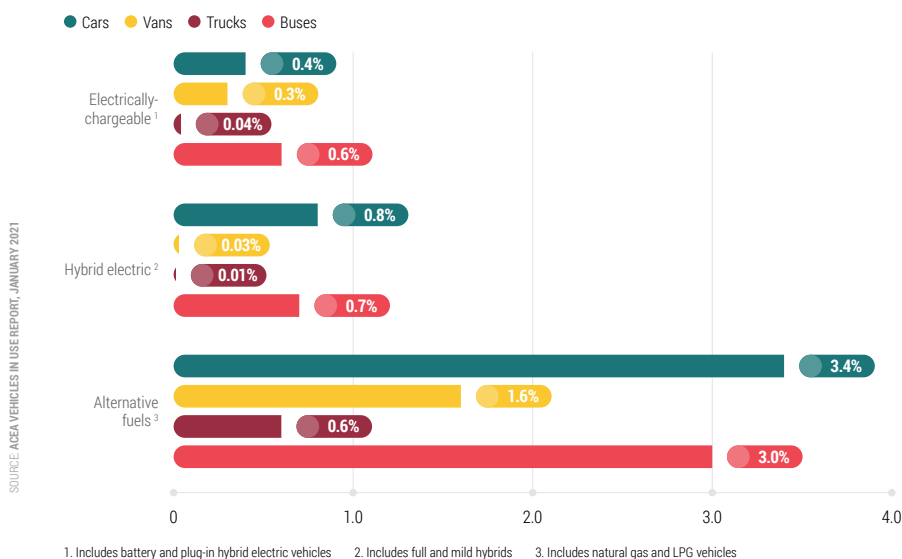
## AVERAGE AGE OF THE EU FLEET

By vehicle type, in years / 2017 – 2019



## SHARE OF ALTERNATIVELY-POWERED VEHICLES IN THE EU FLEET

By segment, % share / 2019



**0.4% of all passenger cars on EU roads are electrically-chargeable**



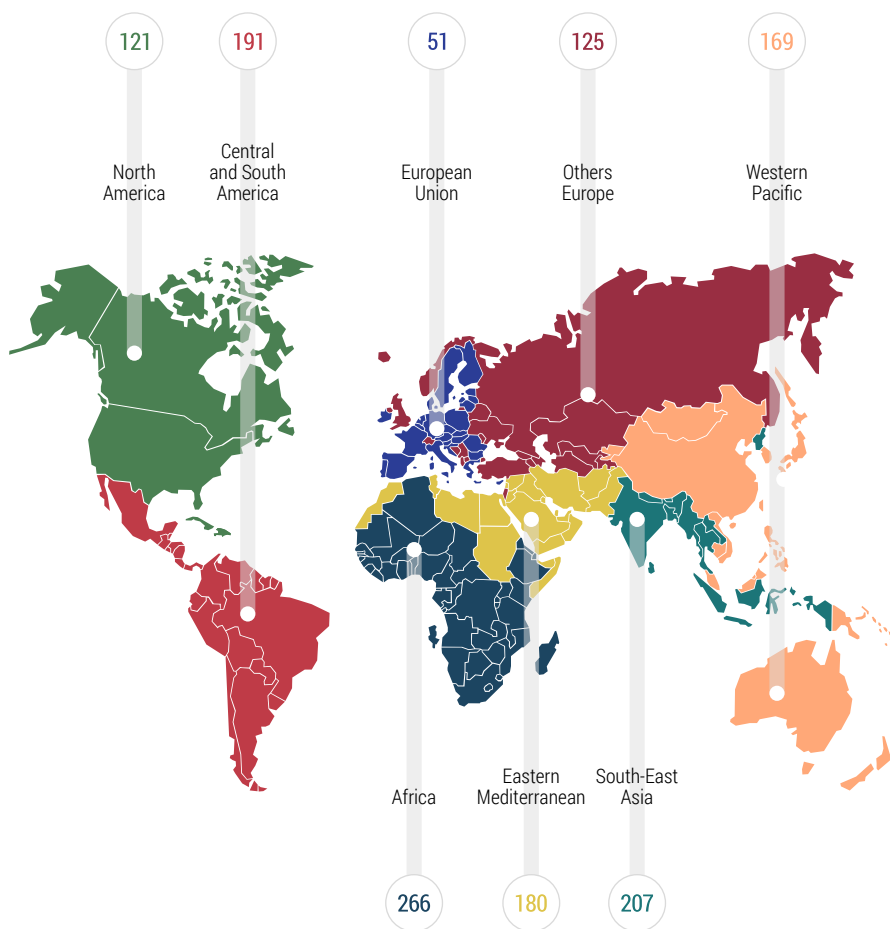
# ROAD SAFETY

THE AUTOMOBILE INDUSTRY  
POCKET GUIDE 2021/2022



# ROAD FATALITIES PER MILLION INHABITANTS

By region<sup>1</sup> / 2016, 2019



SOURCE: EUROPEAN ROAD SAFETY OBSERVATORY, WHO GLOBAL STATUS REPORT ON ROAD SAFETY 2018

**WORLD** 182 road fatalities per million inhabitants

1. WHO regions

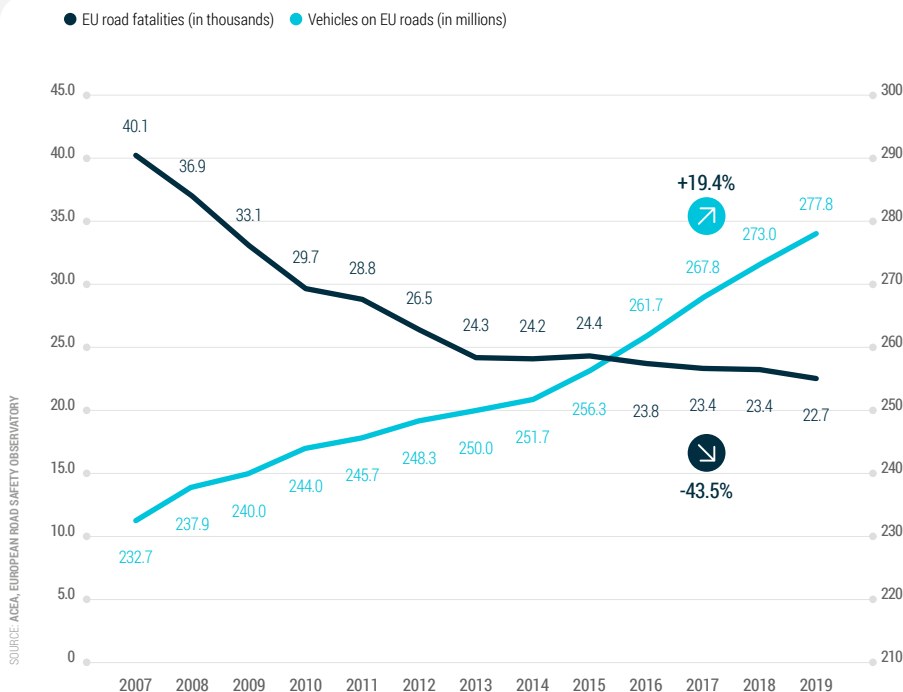
EU roads are by far the safest in the world





## NUMBER OF MOTOR VEHICLES AND ROAD FATALITIES IN THE EU

2007 – 2019



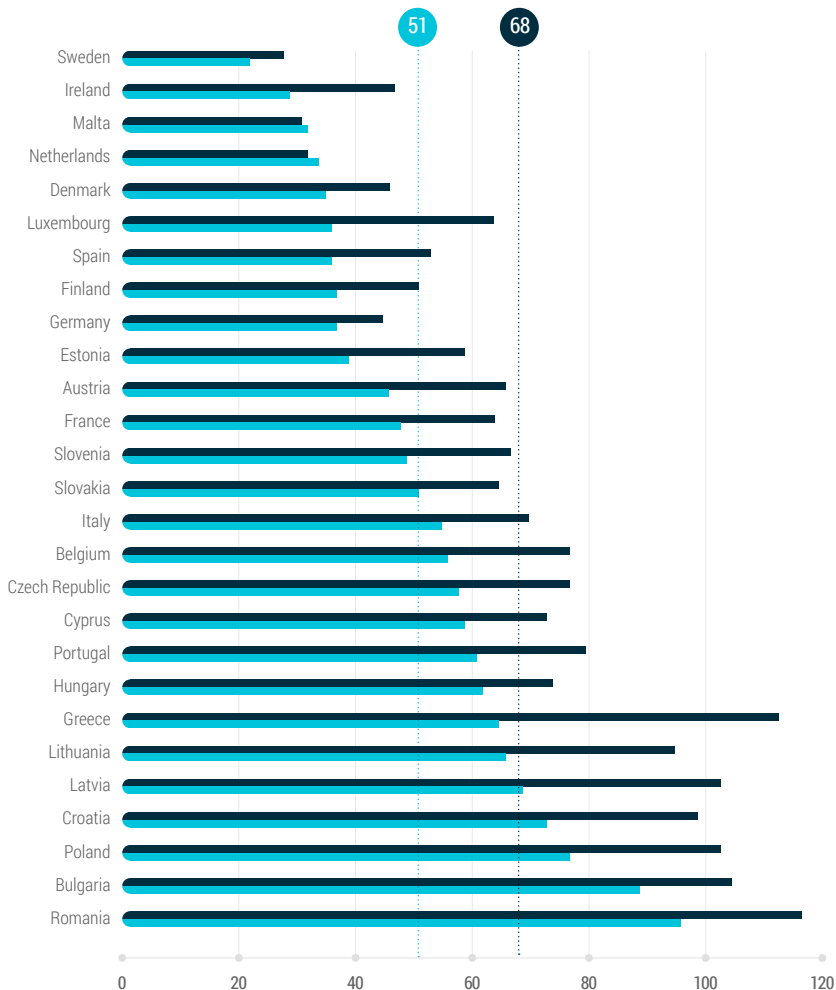
While there are 45 million more vehicles on EU roads, fatalities have fallen by -43.5% since 2007



## ROAD FATALITIES PER MILLION INHABITANTS

By country / 2010, 2019

● 2010 ● 2019 ... EU average 2010 ... EU average 2019



SOURCE: EUROPEAN ROAD SAFETY OBSERVATORY

Average road fatalities per million Europeans dropped by 25% since 2010

# ROAD FATALITIES IN THE EU

By country / 2019

● Road fatalities ● - % change 19/18 ● + % change 19/18



SOURCE: EUROPEAN ROAD SAFETY OBSERVATORY



Road fatalities declined by 3% in the EU in 2020



# ENVIRONMENT

THE AUTOMOBILE INDUSTRY  
POCKET GUIDE 2021/2022





## CO2 EMISSIONS OF NEW CARS BY COUNTRY

In g CO<sub>2</sub>/km / 2020<sup>1</sup>

● 2020 average emissions (g CO<sub>2</sub>/km) ● - % change 20/19 ● + % change 20/19



SOURCE: EEA

EU27 + IS + NO + UK	-11.9%	107.8
EU27	-11.3%	108.2

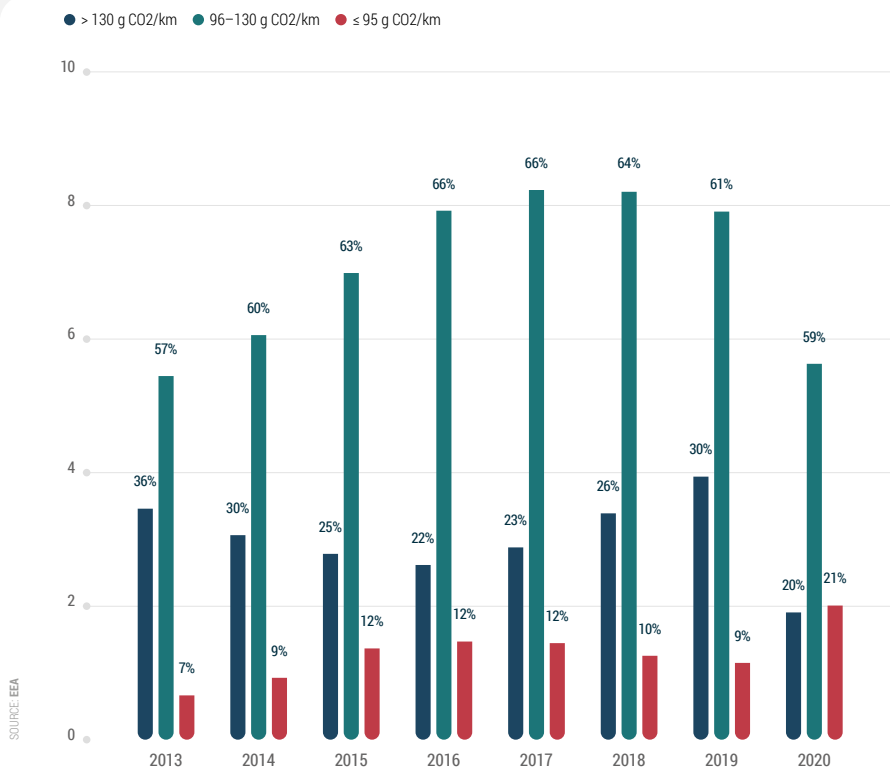
1. Provisional figures

The average new car in the EU emits 108.2g CO<sub>2</sub>/km



## NEW CARS BY EMISSIONS CLASSES IN THE EU

In million units, % share / 2013 – 2020<sup>1</sup>



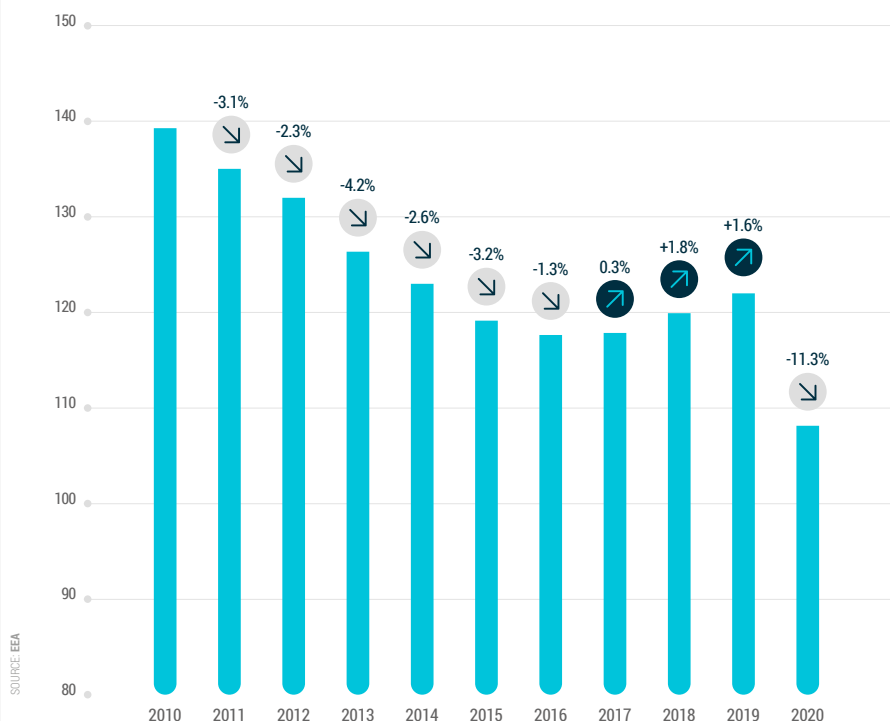
1. Provisional figures

**80% of all new cars sold in the EU  
emit less than 130g CO<sub>2</sub>/km**



## CO2 EMISSIONS OF NEW CARS IN THE EU

In g CO<sub>2</sub>/km, % change / 2010 – 2020<sup>1</sup>



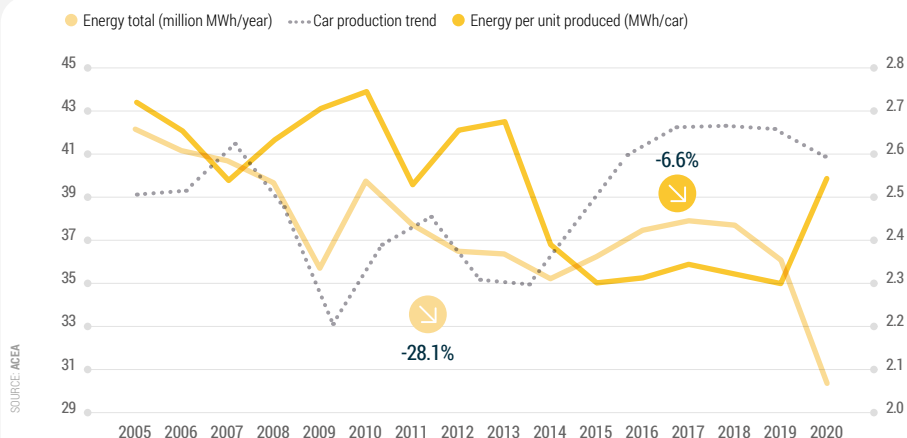
1. Provisional figures

**CO<sub>2</sub> emissions from new cars  
are down by 22.4% since 2010**



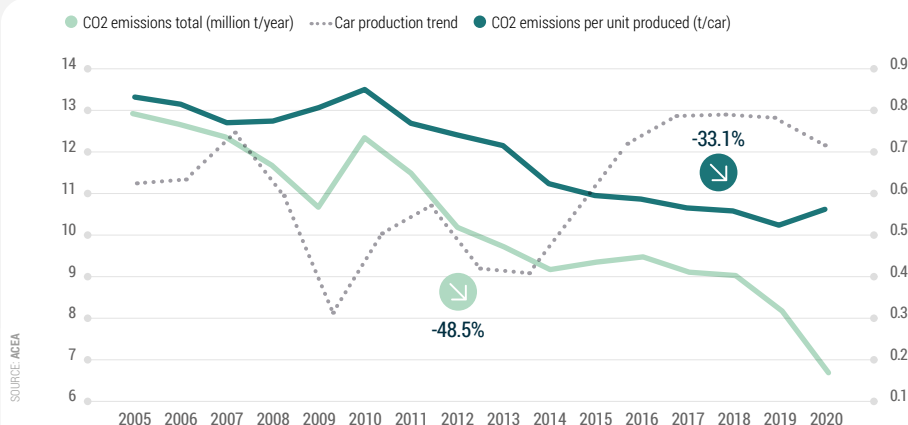
## ENERGY CONSUMPTION DURING CAR PRODUCTION

2005 – 2020



## CO2 EMISSIONS FROM CAR PRODUCTION

2005 – 2020



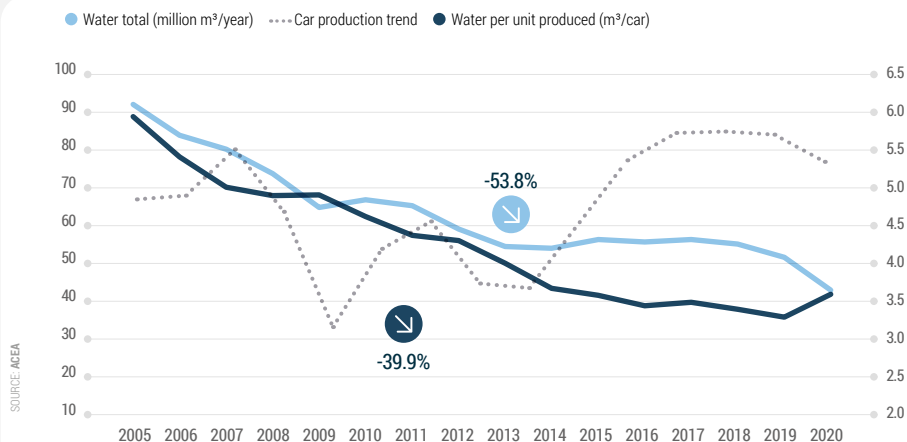
CO2 emissions from car production  
have dropped by 48.5% since 2005





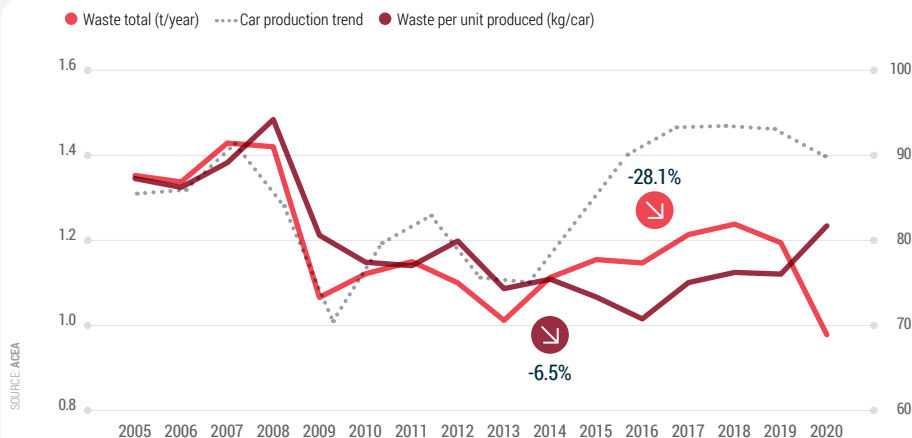
## WATER USED IN CAR PRODUCTION

2005 – 2020



## WASTE FROM CAR PRODUCTION<sup>1</sup>

2005 – 2020



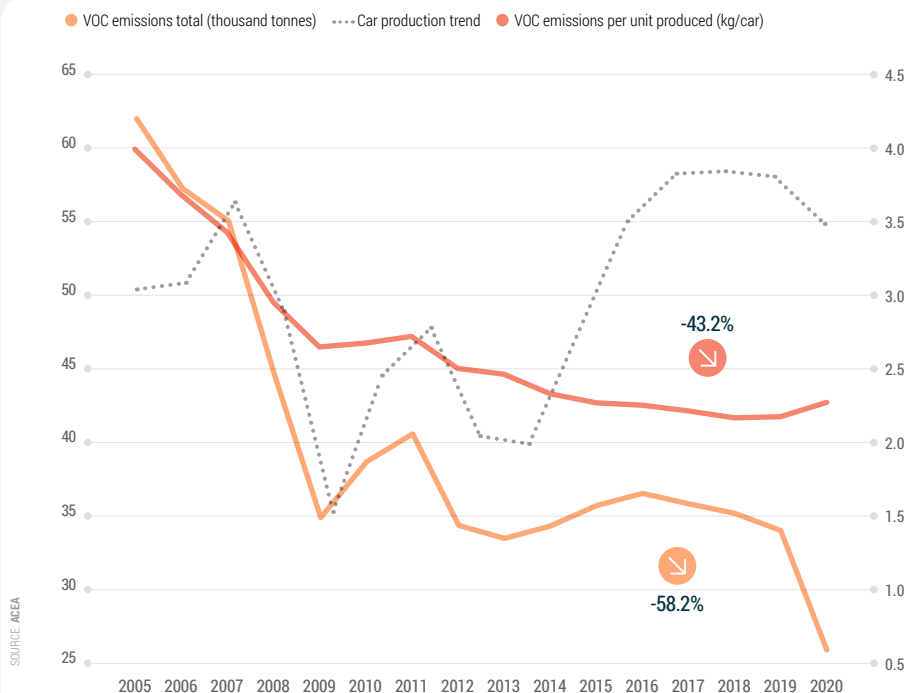
1. Excluding scrap metal and demolition waste

**Water consumption per car produced  
has been reduced by 53.8% since 2005**



## VOC<sup>1</sup> EMISSIONS FROM CAR PRODUCTION

2005 – 2020



1. Volatile organic compounds

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 43.2% over the last 15 years.

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



# INNOVATION

THE AUTOMOBILE INDUSTRY  
POCKET GUIDE 2021/2022

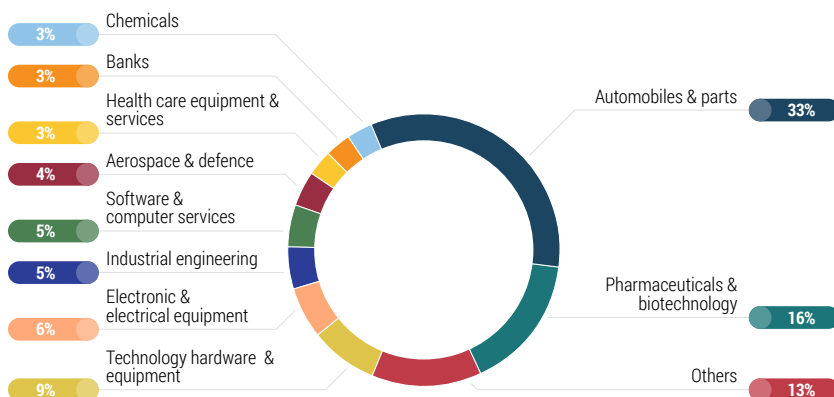




## R&D SHARE OF SECTORS IN THE EU

% share / 2019

SOURCE: THE 2020 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD



## EU R&D INVESTMENT IN THE TOP 10 INDUSTRIAL SECTORS

In billion € / 2019

SOURCE: THE 2020 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD

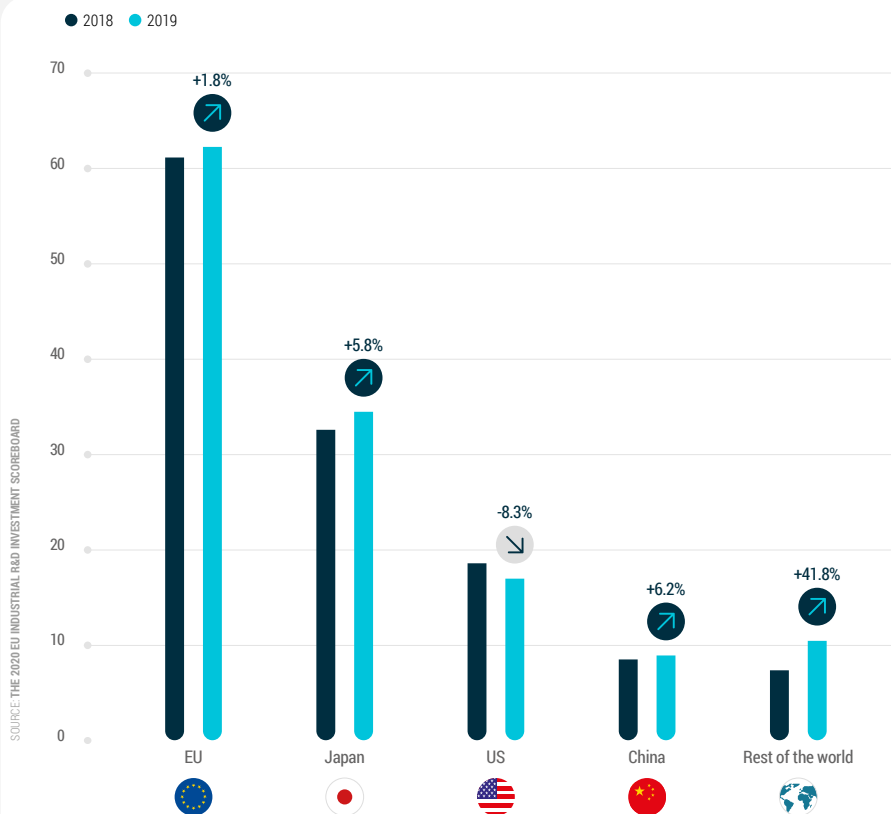
Automobiles & parts	62.0
Pharmaceuticals & biotechnology	30.5
Technology hardware & equipment	15.9
Electronic & electrical equipment	11.0
Industrial engineering	9.8
Software & computer services	9.6
Aerospace & defence	8.2
Health care equipment & services	5.8
Banks	5.6
Chemicals	5.5

**The automotive sector is the EU's number one investor in R&D, responsible for 33% of total spending**



## R&D INVESTMENT IN THE AUTOMOBILE SECTOR BY WORLD REGION

In billion €, % change

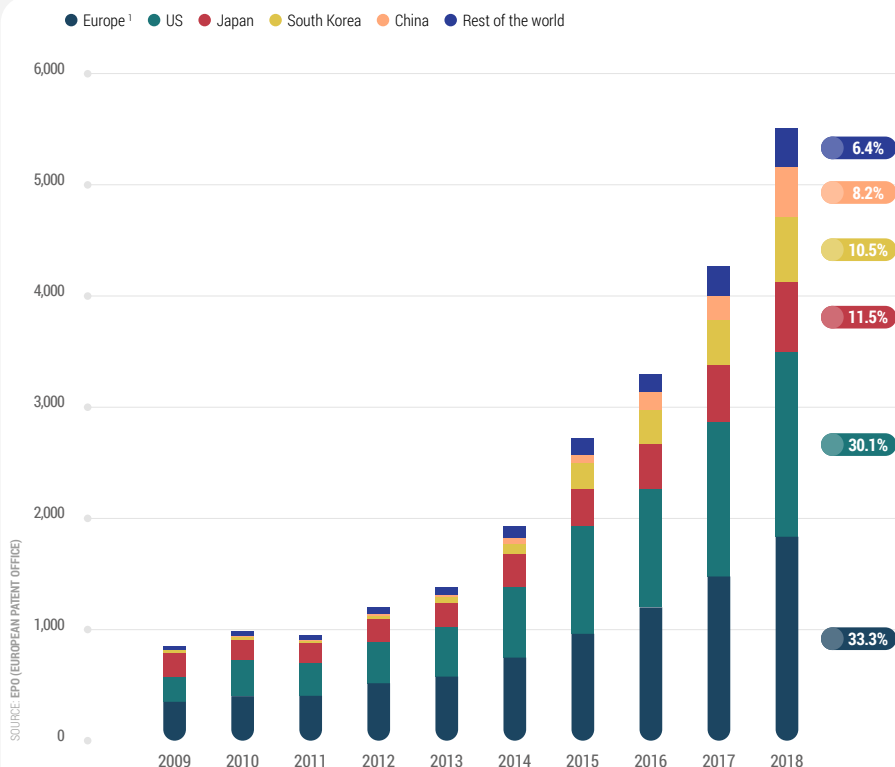


EU investment in automotive R&D stands  
at €62 billion annually



## PATENT APPLICATIONS RELATED TO SELF-DRIVING VEHICLES

Number of patents, % share / 2009 – 2018



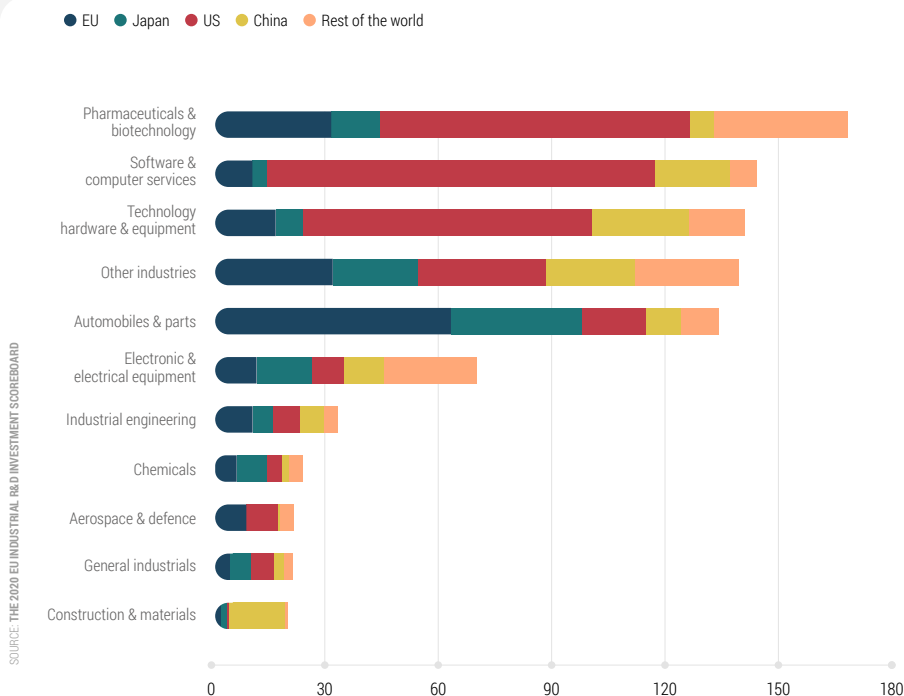
1. European Patent Convention (EPC)

Europe leads the world in patents for self-driving vehicles



## R&D INVESTMENT BY INDUSTRY AND WORLD REGION

In billion € / 2019



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



# TAXATION

THE AUTOMOBILE INDUSTRY  
POCKET GUIDE 2021/2022







## ELECTRIC VEHICLES: TAX BENEFITS AND PURCHASE INCENTIVES

2021

	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	✗	✓	✗	✓

SOURCE: AEEA TAX GUIDE 2021

Purchase incentives for electric vehicles  
are available in 18 EU countries



## CO2-BASED VEHICLE TAXATION

2021














		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	✗	✓	✗

SOURCE: ACEA TAX GUIDE 2021

21 EU member states apply CO2-based taxation



## FISCAL INCOME FROM VEHICLES IN MAJOR EUROPEAN MARKETS<sup>1</sup>

	 Austria	 Belgium	 Germany	 Denmark	 Spain	 Finland	 France
	€ bn 2020	€ bn 2019	€ bn 2019	DKK bn 2018	€ bn 2019	€ bn 2019	€ bn 2019
Purchase or transfer							
1. VAT on vehicle sales servicing, repair & parts	3.0	8.0	34.6	–	5.0	1.7	20.3
2. Sales & registration taxes	0.5	0.5	–	20.7	0.5	0.9	2.3
3. Annual ownership taxes	2.7	1.7	9.4	9.9	2.9	1.1	0.9
4. Fuels & lubricants	5.6	8.7	41.9	17.5	21.5	3.8	43.1
5. Others							
Driving license fees	–	0.0	0.2	–	0.1	–	–
Insurance taxes	0.4	1.0	5.4	1.5	–	0.4	5.3
Tolls	2.3	0.7	8.2	0.5	–	–	13.0
Customs duties	–	–	0.2	–	–	–	–
Other taxes	0.4	0.8	–	–	0.8	–	1.6
TOTAL (national currencies)	14.9	21.4	99.9	50.1	30.8	7.9	86.4
TOTAL (EURO) <sup>2</sup>	14.9	21.4	99.9	6.7	30.8	7.9	86.4
	 Greece	 Ireland	 Italy	 Netherlands	 Portugal	 Sweden	
	€ bn 2020	€ bn 2019	€ bn 2019	€ bn 2019	€ bn 2019	SEK bn 2020	
Purchase or transfer							
1. VAT on vehicle sales servicing, repair & parts	0.3	0.7	18.9	1.2	4.5	25.0	
2. Sales & registration taxes	0.3	1.0	1.9	2.2	0.7	–	
3. Annual ownership taxes	1.3	0.9	6.7	4.3	0.7	15.4	
4. Fuels & lubricants	5.5	3.5	37.3	10.4	3.5	43.1	
5. Others							
Driving license fees	–	0.0	–	0.3	–	–	
Insurance taxes	0.5	0.1	3.9	1.2	–	2.9	
Tolls	–	–	2.2	0.2	0.2	2.8	
Customs duties	–	–	–	–	–	–	
Other taxes	0.2	–	5.4	1.8	–	–	
TOTAL (national currencies)	8.1	6.2	76.3	21.5	9.6	89.2	
TOTAL (EURO) <sup>2</sup>	8.1	6.2	76.3	21.5	9.6	8.7	
GRAND TOTAL = €398.4 billion							

SOURCE: ACEA TAX GUIDE 2021

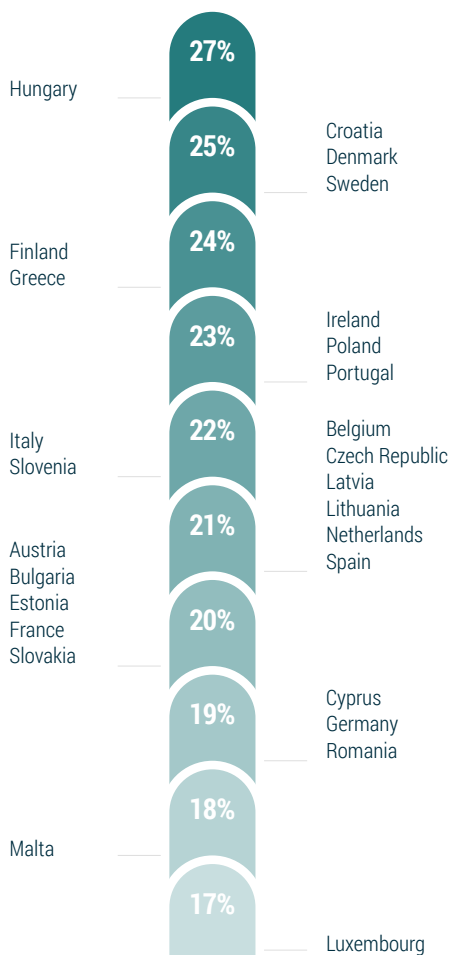
1. Latest available data; only countries for which sourced data is available are listed  
2. Euro foreign exchange reference rates at 30 March 2021; source: ECB

**Motor vehicles account for €398.4 billion  
in taxes in major European markets**



## SHARE OF VAT IN NET PRICE OF CARS

2021



SOURCE: ACEA TAX GUIDE 2021

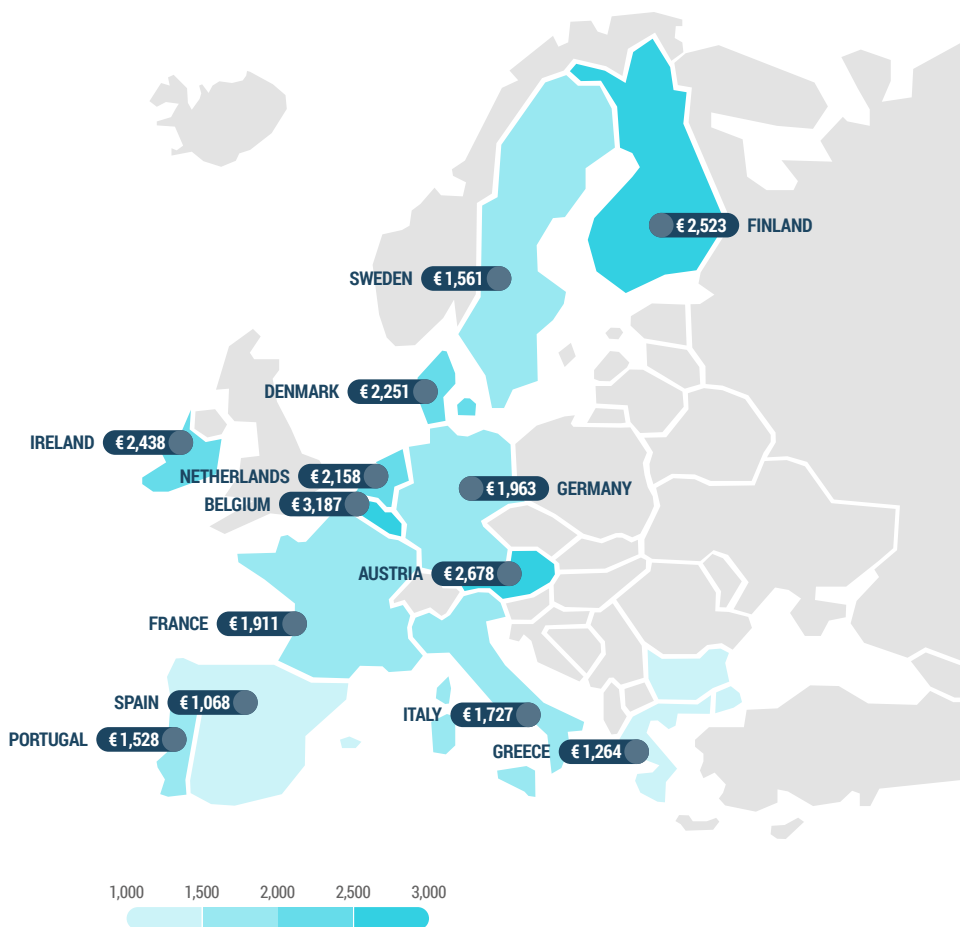
**Automobiles provide a vital source of government revenue**



## AVERAGE ANNUAL TAX REVENUE PER VEHICLE IN MAJOR EU MARKETS<sup>1</sup>

2021

SOURCE: ACEA TAX GUIDE 2021, VEHICLES IN USE REPORT JANUARY 2021



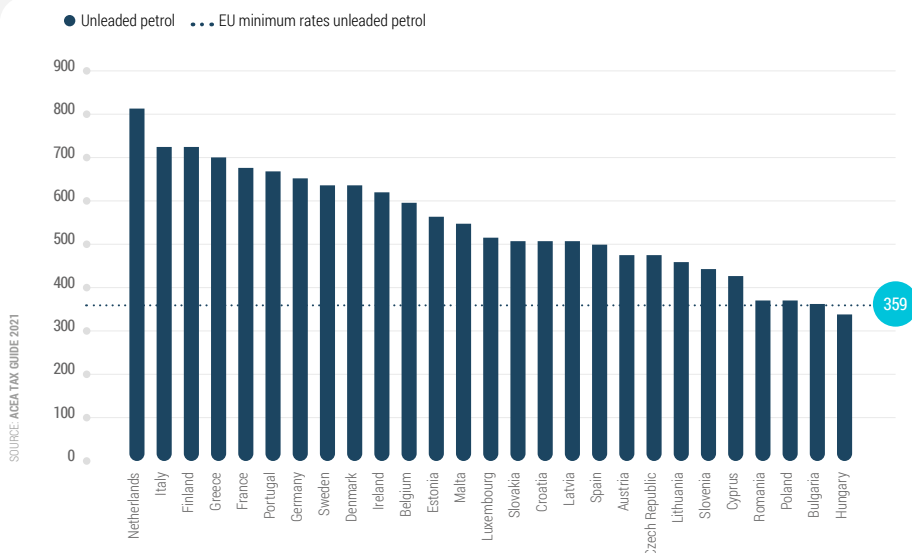
1. Per country estimates based on total number of vehicles in the fleet

Collecting €3,187 per vehicle annually,  
Belgium has the highest tax revenue



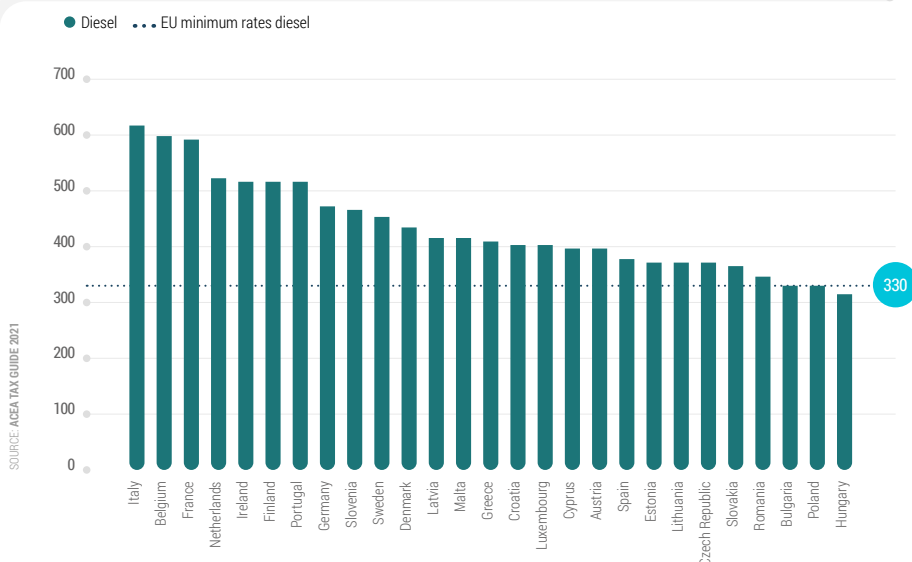
## EXCISE DUTIES ON UNLEADED PETROL

In €/1,000 litres



## EXCISE DUTIES ON DIESEL

In €/1,000 litres



**Hungary has the lowest excise duties on fuels - both petrol and diesel - in the EU**

acea



# ABOUT ACEA

THE AUTOMOBILE INDUSTRY  
POCKET GUIDE 2021/2022



## DRIVING MOBILITY FOR EUROPE

The European Automobile Manufacturers' Association, or ACEA, unites Europe's 15 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.



## DRIVING MOBILITY FOR EUROPE

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.



DRIVING MOBILITY  
FOR EUROPE

ACEA  
European Automobile  
Manufacturers' Association

+32 2 732 55 50  
[communications@acea.auto](mailto:communications@acea.auto)  
[www.acea.auto](http://www.acea.auto)



[twitter.com/ACEA\\_auto](https://twitter.com/ACEA_auto)



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