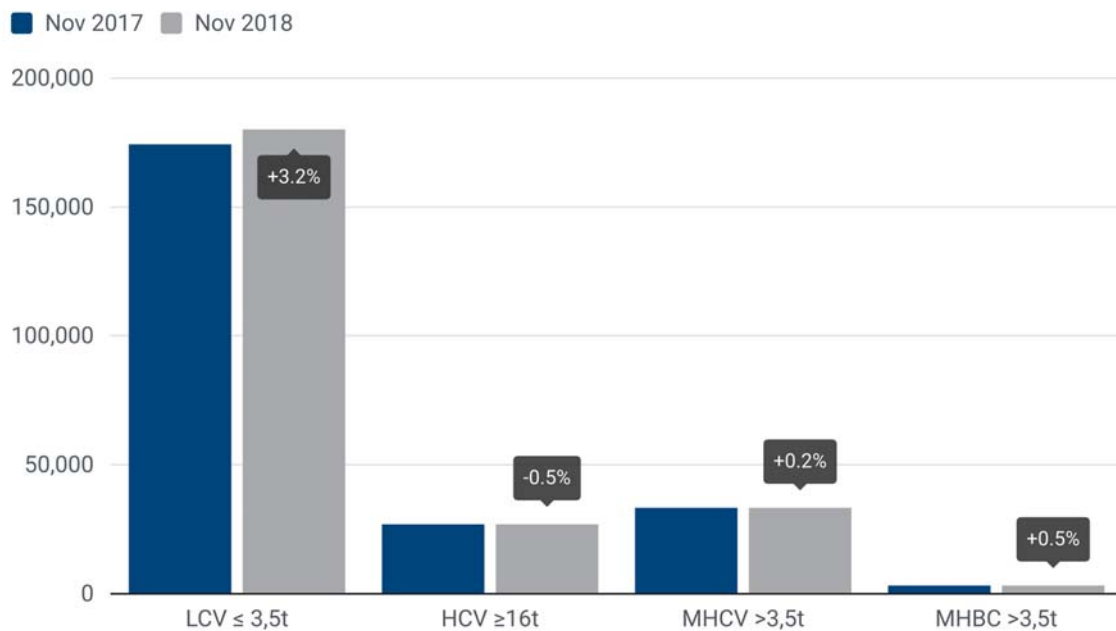


PRESS EMBARGO: 8.00 AM (7.00 AM GMT), 21 December 2018

NEW COMMERCIAL VEHICLE REGISTRATIONS EUROPEAN UNION¹

November 2018



Commercial vehicle registrations: +3.8% 11 months into 2018; +2.7% in November

Total new commercial vehicles

In November 2018, EU demand for commercial vehicles continued to grow (+2.7%), although at a slower pace than in October. This growth was mostly supported by the van segment, while registrations of new trucks and buses remained steady. The UK saw the biggest uplift (+6.8%) last month, followed by Germany (+6.6%) and France (+3.0%). By contrast, demand contracted in Spain and Italy (down 5.9% and 7.2% respectively) in November.

During the first 11 months of 2018, almost 2.3 million new commercial vehicles were registered in the European Union, up 3.8% compared to 2017. Registrations contracted in Italy (-2.8%) and the United Kingdom (-1.3%), but the Spanish (+6.5%), German (5.5%) and French (+5.2%) markets all performed well so far this year.

¹ Malta not available

New light commercial vehicles (LCV) up to 3.5t²

In November 2018, registrations of light commercial vehicles in the EU increased by 3.2% compared to one year ago. Looking at the five major markets, both Spain (-3.3%) and Italy (-7.7%) saw demand fall. However, registrations of new vans did increase in the UK (+9.6%), Germany (+6.4%) and France (+3.1%) last month.

From January to November 2018, EU van registrations were 3.7% higher than in the same period last year, totalling close to 1.9 million units sold. Spain (+7.6%), Germany (+6.2%) and France (+4.8%) posted positive results, but demand for light commercial vehicles declined in both the UK (-0.7%) and Italy (-5.0%).

New heavy commercial vehicles (HCV) of 16t and over³

November 2018 results show a slight slowdown (-0.5%) in registrations of new heavy trucks across the EU last month. Demand fell significantly in Spain (-22.7%) and Italy (-13.7%) but was partially sustained by the German and French markets (up 8.9% and 6.8% respectively).

Eleven months into the year, EU demand for heavy trucks maintained momentum (+4.7%), with 290,988 new vehicles registered so far in 2018. The United Kingdom (-6.2%) and Spain (-2.5%) saw registrations decline over this period, while France (+9.9%), Italy (+6.1%) and Germany (+4.3%) contributed positively to EU growth.

New medium and heavy commercial vehicles (MHCV) over 3.5t⁴

In November 2018, new truck registrations remained stable (+0.2%) compared to November 2017. The EU's five biggest markets showed different trends: while the Spanish (-20.1%), Italian (-9.5%) and UK (-3.5%) markets contracted strongly, demand for trucks increased in Germany (+8.2%) and France (+5.5%).

From January to November 2018, 357,270 new trucks were registered across the European Union – or 4.7% more than in the same period last year. France (+8.8%), Italy (+8.1%) and Germany (+3.9%) posted solid growth, but the United Kingdom (-4.1%) and Spain (-0.7%) performed worse than in 2017.

New medium and heavy buses & coaches (MHBC) over 3.5t

November 2018 results for the bus and coach segment show a slight increase (+0.5%), which contrasts heavily with the exceptional growth observed in October. The excellent performance of the Central European markets (+71.1%) provided crucial support to the overall results of the region. By contrast, with the exception of Italy (+54.7%) all major EU markets posted strong declines in November.

Over the first 11 months of the year, EU demand for new buses and coaches grew by 2.8% compared to one year ago. Growth was largely driven by the Italian market (+39.9%), given that registrations fell in the United Kingdom (-10.6%), Spain (-4.7%) and Germany (-0.9%).

² Including light buses & coaches

³ Excluding heavy buses & coaches

⁴ Excluding medium and heavy buses & coaches

PRESS EMBARGO FOR ALL DATA :

8.00 AM (7.00 AM GMT), 21 December 2018

PROVISIONAL

EU+EFTA¹ NEW REGISTRATION FIGURES BY COUNTRY
NEW LIGHT COMMERCIAL VEHICLES (LCV) UP TO 3,5T²

	November 2018	November 2017	% change 18/17	Jan-Nov 2018	Jan-Nov 2017	% change 18/17
AUSTRIA	3,689	3,205	15.1%	40,821	37,369	9.2%
BELGIUM	6,337	5,882	7.7%	73,323	71,911	2.0%
BULGARIA	577	720	-19.9%	5,670	5,373	5.5%
CROATIA	843	567	48.7%	8,110	7,802	3.9%
CYPRUS	196	222	-11.7%	1,714	1,822	-5.9%
CZECH REPUBLIC	2,087	1,730	20.6%	18,678	17,522	6.6%
DENMARK	3,200	3,428	-6.7%	31,134	32,557	-4.4%
ESTONIA	420	422	-0.5%	4,823	4,473	7.8%
FINLAND	1,260	1,389	-9.3%	14,411	14,419	-0.1%
FRANCE	39,939	38,739	3.1%	416,927	397,930	4.8%
GERMANY	27,951	26,276	6.4%	262,041	246,773	6.2%
GREECE	616	544	13.2%	6,337	6,108	3.7%
HUNGARY	2,122	2,112	0.5%	19,949	17,603	13.3%
IRELAND ³	571	581	-1.7%	25,339	23,971	5.7%
ITALY ⁴	18,500	20,045	-7.7%	161,466	169,945	-5.0%
LATVIA	249	249	0.0%	2,217	1,962	13.0%
LITHUANIA	264	203	30.0%	3,260	2,964	10.0%
LUXEMBOURG	479	453	5.7%	4,526	4,430	2.2%
NETHERLANDS	7,138	6,225	14.7%	75,299	69,994	7.6%
POLAND	6,545	5,263	24.4%	61,814	54,768	12.9%
PORTUGAL	3,779	3,623	4.3%	35,246	33,956	3.8%
ROMANIA	1,521	1,352	12.5%	16,325	14,670	11.3%
SLOVAKIA	1,021	685	49.1%	8,372	6,959	20.3%
SLOVENIA	1,155	1,115	3.6%	11,713	11,100	5.5%
SPAIN	17,665	18,273	-3.3%	196,719	182,875	7.6%
SWEDEN	3,341	5,044	-33.8%	52,681	50,110	5.1%
UNITED KINGDOM	29,035	26,486	9.6%	331,776	334,133	-0.7%
EUROPEAN UNION	180,500	174,833	3.2%	1,890,691	1,823,499	3.7%
EU15 ⁵	163,500	160,193	2.1%	1,728,046	1,676,481	3.1%
EU12 ⁶	17,000	14,640	16.1%	162,645	147,018	10.6%
ICELAND	159	128	24.2%	1,823	1,871	-2.6%
NORWAY	3,177	3,101	2.5%	34,143	32,645	4.6%
SWITZERLAND	3,216	2,887	11.4%	29,740	29,062	2.3%
EFTA	6,552	6,116	7.1%	65,706	63,578	3.3%
EU + EFTA	187,052	180,949	3.4%	1,956,397	1,887,077	3.7%
WESTERN EUROPE (EU15 + EFTA)	170,052	166,309	2.3%	1,793,752	1,740,059	3.1%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Malta not available

⁴ ANFIA estimates

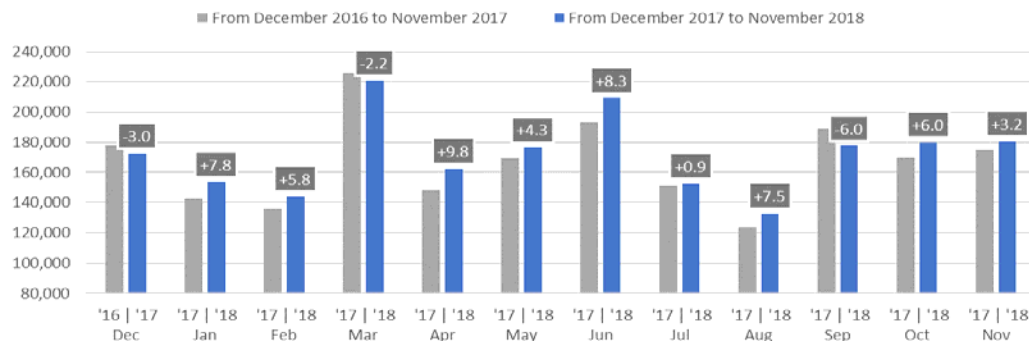
² Including light buses and coaches

⁵ Member states before the 2004 enlargement

³ LCV ≤5t

⁶ Member states having joined the EU since 2004

New light commercial vehicle registrations in the EU - 12 month trend



This information is available on the ACEA website: <http://www.acea.be>

Next press release on commercial vehicles to be issued on Thursday 24 January 2018

P R E S S R E L E A S E

PRESS EMBARGO FOR ALL DATA :

8.00 AM (7.00 AM GMT), 21 December 2018

PROVISIONAL

EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY NEW HEAVY COMMERCIAL VEHICLES (HCV) OF ≥16T AND OVER¹

	November 2018	November 2017	% change 18/17	Jan-Nov 2018	Jan-Nov 2017	% change 18/17
AUSTRIA	566	527	7.4%	7,169	7,146	0.3%
BELGIUM	750	621	20.8%	8,684	7,959	9.1%
BULGARIA	-	-		-	-	
CROATIA	86	76	13.2%	1,023	989	3.4%
CYPRUS	0	5	-100.0%	44	63	-30.2%
CZECH REPUBLIC ²	751	800	-6.1%	7,457	7,541	-1.1%
DENMARK	397	376	5.6%	4,319	4,223	2.3%
ESTONIA	69	97	-28.9%	967	963	0.4%
FINLAND	234	235	-0.4%	2,671	2,663	0.3%
FRANCE	4,452	4,168	6.8%	44,642	40,634	9.9%
GERMANY	6,051	5,554	8.9%	62,844	60,275	4.3%
GREECE	14	9	55.6%	163	207	-21.3%
HUNGARY	418	432	-3.2%	5,276	4,774	10.5%
IRELAND ⁴	50	55	-9.1%	1,757	1,804	-2.6%
ITALY ³	1,595	1,849	-13.7%	18,855	17,340	8.7%
LATVIA	108	179	-39.7%	1,437	1,355	6.1%
LITHUANIA ⁴	515	480	7.3%	8,057	6,585	22.4%
LUXEMBOURG ⁴	62	80	-22.5%	856	937	-8.6%
NETHERLANDS	1,012	989	2.3%	13,620	12,472	9.2%
POLAND	2,213	2,253	-1.8%	25,677	22,898	12.1%
PORTUGAL	278	489	-43.1%	3,905	4,078	-4.2%
ROMANIA	446	378	18.0%	6,253	5,455	14.6%
SLOVAKIA	314	263	19.4%	3,689	3,551	3.9%
SLOVENIA ⁴	196	152	28.9%	2,372	2,044	16.0%
SPAIN	1,982	2,565	-22.7%	18,584	19,063	-2.5%
SWEDEN	609	551	10.5%	5,667	5,623	0.8%
UNITED KINGDOM ⁴	4,026	4,141	-2.8%	35,000	37,310	-6.2%
EUROPEAN UNION	27,194	27,324	-0.5%	290,988	277,952	4.7%
EU15	22,078	22,209	-0.6%	228,736	221,734	3.2%
EU12	5,116	5,115	0.02%	62,252	56,218	10.7%
ICELAND	25	20	25.0%	243	196	24.0%
NORWAY ⁴	403	383	5.2%	4,581	4,168	9.9%
SWITZERLAND ²	257	292	-12.0%	3,261	3,516	-7.3%
EFTA	685	695	-1.4%	8,085	7,880	2.6%
EU + EFTA	27,879	28,019	-0.5%	299,073	285,832	4.6%
WESTERN EUROPE (EU15 + EFTA)	22,763	22,904	-0.6%	236,821	229,614	3.1%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

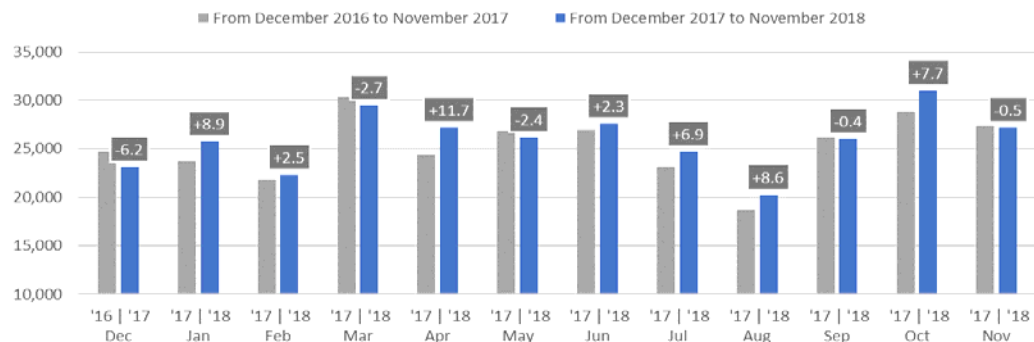
¹ Excluding heavy buses and coaches

³ ANFIA estimates based on vehicle registration certificates issued by the Italian Ministry of Transport

² HCV ≥18t

⁴ Estimates

New heavy commercial vehicle registrations in the EU - 12 month trend



For further information, please contact: Francesca Piazza - Statistics Manager - E-mail: fp@acea.be

This information is available on the ACEA website: <http://www.acea.be>

P R E S S R E L E A S E

PRESS EMBARGO FOR ALL DATA :

8.00 AM (7.00 AM GMT), 21 December 2018

PROVISIONAL EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY NEW MEDIUM AND HEAVY COMMERCIAL VEHICLES (MHCV) OVER 3.5T¹

	November 2018	November 2017	% change 18/17	Jan-Nov 2018	Jan-Nov 2017	% change 18/17
AUSTRIA	603	601	0.3%	7,614	7,628	-0.2%
BELGIUM	929	729	27.4%	10,291	9,366	9.9%
BULGARIA	-	-	-	-	-	-
CROATIA	100	110	-9.1%	1,341	1,265	6.0%
CYPRUS	4	9	-55.6%	109	94	16.0%
CZECH REPUBLIC	990	1,003	-1.3%	9,153	9,055	1.1%
DENMARK	431	425	1.4%	4,707	4,675	0.7%
ESTONIA	71	101	-29.7%	1,033	1,004	2.9%
FINLAND	330	294	12.2%	3,578	3,202	11.7%
FRANCE	5,007	4,745	5.5%	51,028	46,919	8.8%
GERMANY	8,668	8,014	8.2%	88,305	84,987	3.9%
GREECE	39	18	116.7%	333	407	-18.2%
HUNGARY	463	547	-15.4%	5,852	5,336	9.7%
IRELAND	73	89	-18.0%	2,132	2,152	-0.9%
ITALY ²	1,999	2,209	-9.5%	23,338	21,584	8.1%
LATVIA	121	185	-34.6%	1,499	1,401	7.0%
LITHUANIA ³	522	495	5.5%	8,165	6,699	21.9%
LUXEMBOURG	69	91	-24.2%	989	1,085	-8.8%
NETHERLANDS	1,162	1,110	4.7%	15,171	13,735	10.5%
POLAND	2,404	2,475	-2.9%	27,852	24,930	11.7%
PORTUGAL	448	574	-22.0%	4,711	4,815	-2.2%
ROMANIA	460	398	15.6%	6,481	5,725	13.2%
SLOVAKIA	350	316	10.8%	4,111	3,959	3.8%
SLOVENIA ³	210	166	26.5%	2,528	2,186	15.6%
SPAIN	2,319	2,903	-20.1%	22,661	22,832	-0.7%
SWEDEN	675	596	13.3%	6,195	6,118	1.3%
UNITED KINGDOM ³	5,106	5,292	-3.5%	48,093	50,163	-4.1%
EUROPEAN UNION	33,553	33,495	0.2%	357,270	341,322	4.7%
EU15	27,858	27,690	0.6%	289,146	279,668	3.4%
EU12	5,695	5,805	-1.9%	68,124	61,654	10.5%
ICELAND	38	30	26.7%	398	360	10.6%
NORWAY	563	488	15.4%	6,686	5,870	13.9%
SWITZERLAND	331	385	-14.0%	4,137	4,304	-3.9%
EFTA	932	903	3.2%	11,221	10,534	6.5%
EU + EFTA	34,485	34,398	0.3%	368,491	351,856	4.7%
WESTERN EUROPE (EU15 + EFTA)	28,790	28,593	0.7%	300,367	290,202	3.5%

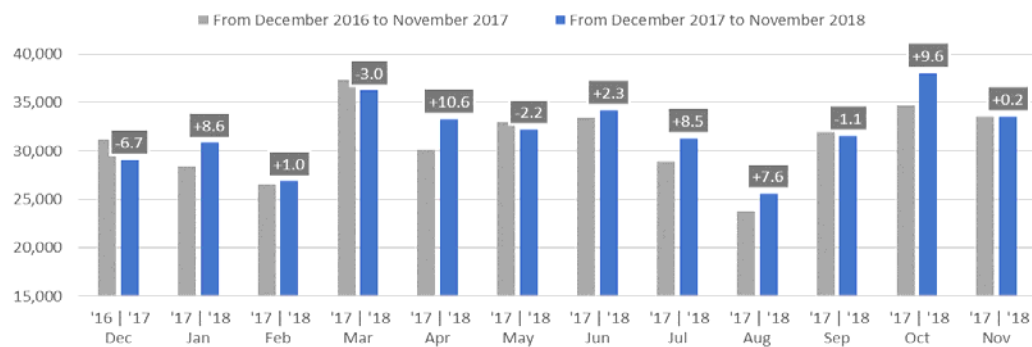
SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Excluding buses and coaches over 3.5t

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

³ Estimates

New medium and heavy commercial vehicle registrations in the EU - 12 month trend



For further information, please contact: Francesca Piazza - Statistics Manager - E-mail: fp@acea.be

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P R E S S R E L E A S E

PRESS EMBARGO FOR ALL DATA :

8.00 AM (7.00 AM GMT), 21 December 2018

PROVISIONAL

EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY
NEW MEDIUM AND HEAVY BUSES & COACHES (MHBC) OVER 3.5T

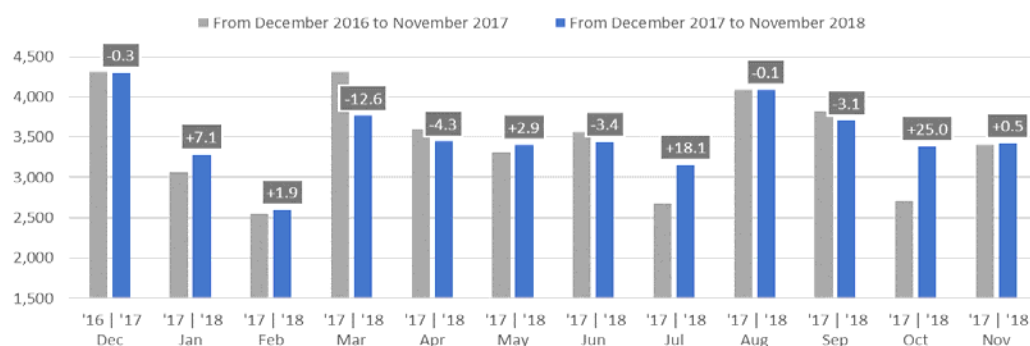
	November 2018	November 2017	% change 18/17	Jan-Nov 2018	Jan-Nov 2017	% change 18/17
AUSTRIA	153	110	39.1%	982	1,125	-12.7%
BELGIUM	106	35	202.9%	997	837	19.1%
BULGARIA	-	-	-	-	-	-
CROATIA	3	8	-62.5%	220	194	13.4%
CYPRUS	-	-	-	-	-	-
CZECH REPUBLIC	94	91	3.3%	939	629	49.3%
DENMARK	34	73	-53.4%	514	806	-36.2%
ESTONIA	2	4	-50.0%	133	211	-37.0%
FINLAND	23	39	-41.0%	450	469	-4.1%
FRANCE	445	573	-22.3%	5,793	5,516	5.0%
GERMANY	710	741	-4.2%	5,825	5,879	-0.9%
GREECE	8	10	-20.0%	216	171	26.3%
HUNGARY	84	47	78.7%	623	545	14.3%
IRELAND	7	40	-82.5%	406	325	24.9%
ITALY ¹	362	234	54.7%	4,299	3,074	39.9%
LATVIA	10	8	25.0%	111	165	-32.7%
LITHUANIA ²	49	27	81.5%	597	358	66.8%
LUXEMBOURG	6	18	-66.7%	211	233	-9.4%
NETHERLANDS	27	128	-78.9%	420	618	-32.0%
POLAND	153	110	39.1%	2,501	1,934	29.3%
PORTUGAL	65	20	225.0%	477	333	43.2%
ROMANIA	238	92	158.7%	1,095	923	18.6%
SLOVAKIA	60	9	566.7%	330	376	-12.2%
SLOVENIA ²	24	23	4.3%	181	167	8.4%
SPAIN	209	289	-27.7%	3,082	3,233	-4.7%
SWEDEN	94	63	49.2%	796	1,212	-34.3%
UNITED KINGDOM ²	454	610	-25.6%	6,948	7,774	-10.6%
EUROPEAN UNION	3,420	3,402	0.5%	38,146	37,107	2.8%
EU15	2,703	2,983	-9.4%	31,416	31,605	-0.6%
EU12	717	419	71.1%	6,730	5,502	22.3%
ICELAND	6	6	0.0%	106	152	-30.3%
NORWAY	46	92	-50.0%	988	1,097	-9.9%
SWITZERLAND	97	99	-2.0%	594	615	-3.4%
EFTA	149	197	-24.4%	1,688	1,864	-9.4%
EU + EFTA	3,569	3,599	-0.8%	39,834	38,971	2.2%
WESTERN EUROPE (EU15 + EFTA)	2,852	3,180	-10.3%	33,104	33,469	-1.1%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

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

² Estimates

New medium and heavy buses & coaches registrations in the EU - 12 month trend



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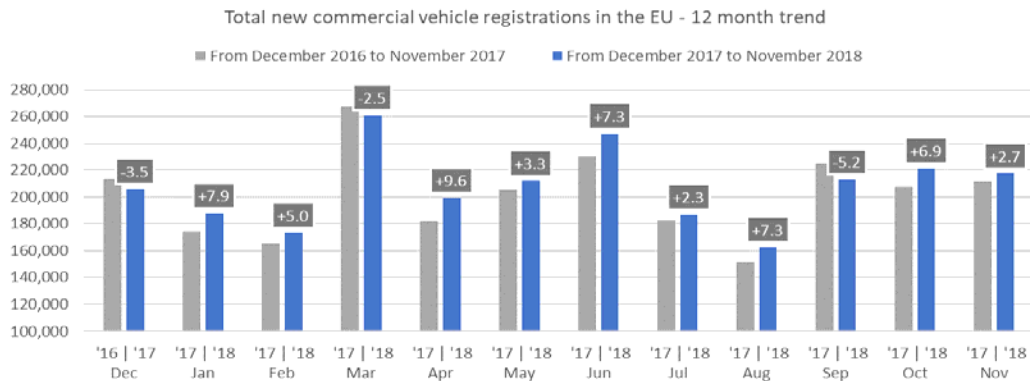
PROVISIONAL EU+EFTA NEW REGISTRATION FIGURES BY COUNTRY TOTAL NEW COMMERCIAL VEHICLES

	November 2018	November 2017	% change 18/17	Jan-Nov 2018	Jan-Nov 2017	% change 18/17
AUSTRIA	4,445	3,916	13.5%	49,417	46,122	7.1%
BELGIUM	7,372	6,646	10.9%	84,611	82,114	3.0%
BULGARIA ¹	577	720	-19.9%	5,670	5,373	5.5%
CROATIA	946	685	38.1%	9,671	9,261	4.4%
CYPRUS ²	200	231	-13.4%	1,823	1,916	-4.9%
CZECH REPUBLIC	3,171	2,824	12.3%	28,770	27,206	5.7%
DENMARK	3,665	3,926	-6.6%	36,355	38,038	-4.4%
ESTONIA	493	527	-6.5%	5,989	5,688	5.3%
FINLAND	1,613	1,722	-6.3%	18,439	18,090	1.9%
FRANCE	45,391	44,057	3.0%	473,748	450,365	5.2%
GERMANY	37,329	35,031	6.6%	356,171	337,639	5.5%
GREECE	663	572	15.9%	6,886	6,686	3.0%
HUNGARY	2,669	2,706	-1.4%	26,424	23,484	12.5%
IRELAND	651	710	-8.3%	27,877	26,448	5.4%
ITALY	20,861	22,488	-7.2%	189,103	194,603	-2.8%
LATVIA	380	442	-14.0%	3,827	3,528	8.5%
LITHUANIA	835	725	15.2%	12,022	10,021	20.0%
LUXEMBOURG	554	562	-1.4%	5,726	5,748	-0.4%
NETHERLANDS	8,327	7,463	11.6%	90,890	84,347	7.8%
POLAND	9,102	7,848	16.0%	92,167	81,632	12.9%
PORTUGAL	4,292	4,217	1.8%	40,434	39,104	3.4%
ROMANIA	2,219	1,842	20.5%	23,901	21,318	12.1%
SLOVAKIA	1,431	1,010	41.7%	12,813	11,294	13.4%
SLOVENIA	1,389	1,304	6.5%	14,422	13,453	7.2%
SPAIN	20,193	21,465	-5.9%	222,462	208,940	6.5%
SWEDEN	4,110	5,703	-27.9%	59,672	57,440	3.9%
UNITED KINGDOM	34,595	32,388	6.8%	386,817	392,070	-1.3%
EUROPEAN UNION	217,473	211,730	2.7%	2,286,107	2,201,928	3.8%
EU15	194,061	190,866	1.7%	2,048,608	1,987,754	3.1%
EU12	23,412	20,864	12.2%	237,499	214,174	10.9%
ICELAND	203	164	23.8%	2,327	2,383	-2.3%
NORWAY	3,786	3,681	2.9%	41,817	39,612	5.6%
SWITZERLAND	3,644	3,371	8.1%	34,471	33,981	1.4%
EFTA	7,633	7,216	5.8%	78,615	75,976	3.5%
EU + EFTA	225,106	218,946	2.8%	2,364,722	2,277,904	3.8%
WESTERN EUROPE (EU15 + EFTA)	201,694	198,082	1.8%	2,127,223	2,063,730	3.1%

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Data for MHCV and MHBC not available

² Data for MHBC not available



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