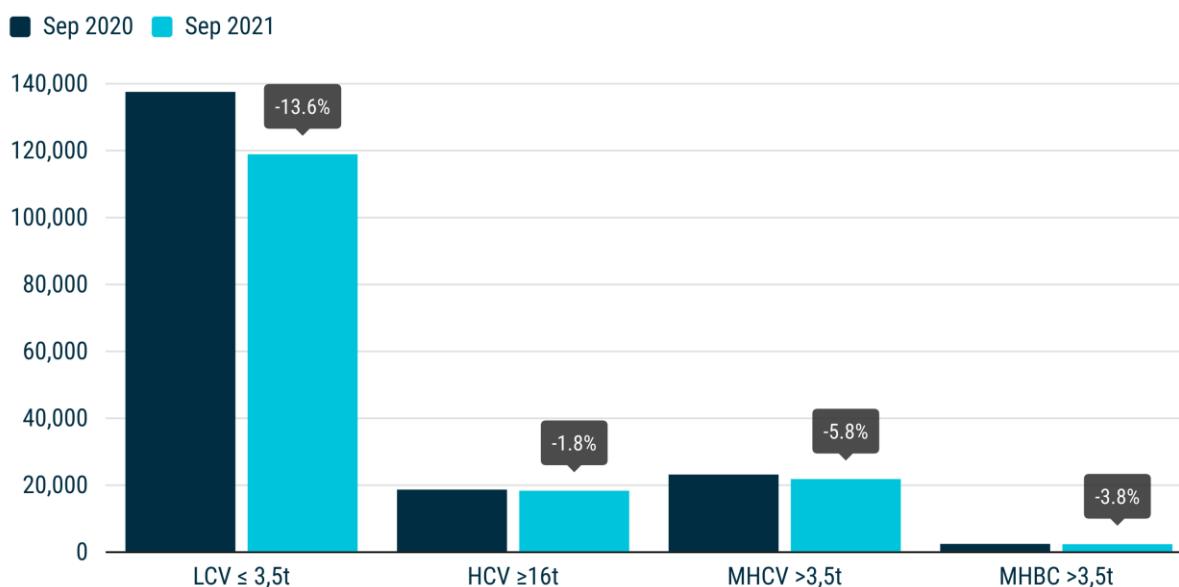


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8.00am CEST (6.00am GMT), 28 October 2021

Commercial vehicle registrations: +19.1% nine months into 2021; -12.3% in September



TOTAL NEW COMMERCIAL VEHICLES

In **September 2021**, commercial vehicle registrations in the EU decreased again (-12.3%), as the microchip shortage negatively affected sales volumes across all segments and in all major EU markets. Spain saw the strongest decline last month (-26.7%), followed by Germany (-18.2%), France (-16.1%) and Italy (-10.4%).

Nine months into the year, demand for new commercial vehicles in the European Union remained positive (+19.1%), totalling 1.4 million units. Because of 2020's low base of comparison, each of the four big EU markets recorded growth so far this year: Italy (+29.7%), France (+16.8%), Spain (+10.4%) and Germany (+8.5%).

NEW LIGHT COMMERCIAL VEHICLES (LCV) UP TO 3.5T²

In **September**, registrations of new vans contracted by 13.6% across the EU to 118,903 units, marking the third consecutive month of decline. The region's overall result was not helped by the performance of its four major markets, which all posted

¹ Data for Malta not available

² Including light buses & coaches

double-digit declines: Spain (-29.8%), Germany (-17.8%), France (-16.6%) and Italy (-13.8%).

Over the first three quarters of 2021, EU light commercial vehicle sales were still up by 18.7%, at nearly 1.2 million units, due to the substantial gains recorded during the first half of the year. The four key markets reflected the same trend, with cumulative growth still in positive territory despite the declines seen in recent months: Italy (+29.6%), France (+17.4%), Spain (+9.8%) and Germany (+8.1%).

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

After seven months of consecutive growth, EU demand for heavy trucks suffered a slight slowdown in **September** (-1.8%). Only Italy (+19.4%) managed to post growth among the major EU markets, while Spain (-12.2%), France (-10.8%) and Germany (-9.8%) all recorded declines.

From January to September, nearly 180,000 new heavy trucks were registered across the European Union, up 28.4% compared to the same period in 2020. With the exception of Greece (-9.2%), all EU markets posted growth so far in 2021, including the four major ones.

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

In September 2021, EU demand for new trucks contracted for the first time in eight months. Poland continued to perform well, posting a 34.7% increase last month, just like Italy (+13.7%). However, the weak performance of the other key markets brought the region's overall result down by 5.8% compared to September 2020.

So far this year, new truck sales grew by 23.4%, counting 217,000 units registered across the region. All major markets recorded double-digit gains during this nine-month period: Italy (+32.6%), Spain (+16.7%), Germany (+11.1%) and France (+11.0%).

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

September registrations in the bus segment were down 3.8% compared to last year, totalling 2,377 units. Looking at the big EU markets, results were mixed. Demand contracted in France (-2.1%) and Germany (-26.3%) in particular, while Italy (+63.0%) and Spain (+53.3%) saw strong growth last month.

Nine months into 2021, new bus sales across the EU grew by 5.3%, primarily because of last year's low base of comparison. France, the leading market in this category with 5,103 buses registered, saw an increase of 18.4% so far this year, and Italy followed with similar growth (+18.2%). By contrast, demand in Spain (-6.3%) and Germany (-5.0%) declined during the same period.

³ Excluding heavy buses & coaches

⁴ Excluding medium and heavy buses & coaches

PRESS EMBARGO FOR ALL DATA
8.00am CEST (6.00am GMT), 28 October 2021

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

	SEPTEMBER			JANUARY-SEPTEMBER		
	Units		% change 21/20	Units		% change 21/20
	2021	2020		2021	2020	
Austria	5,059	3,581	+41.3	45,146	27,473	+64.3
Belgium	5,156	5,764	-10.5	56,304	52,849	+6.5
Bulgaria	516	386	+33.7	5,299	3,458	+53.2
Croatia	716	727	-1.5	6,302	5,073	+24.2
Cyprus	167	137	+21.9	1,427	1,178	+21.1
Czech Republic	1,755	1,858	-5.5	14,332	11,933	+20.1
Denmark	2,502	2,970	-15.8	24,109	21,679	+11.2
Estonia	313	304	+3.0	3,322	2,520	+31.8
Finland	1,059	1,158	-8.5	10,093	9,216	+9.5
France	34,924	41,898	-16.6	330,888	281,930	+17.4
Germany	20,071	24,432	-17.8	201,887	186,773	+8.1
Greece	967	600	+61.2	8,013	4,899	+63.6
Hungary	1,673	1,822	-8.2	17,410	15,223	+14.4
Ireland ³	1,696	2,250	-24.6	26,526	18,951	+40.0
Italy ⁴	13,787	16,002	-13.8	135,985	104,931	+29.6
Latvia	220	205	+7.3	1,944	1,588	+22.4
Lithuania	227	195	+16.4	2,688	2,164	+24.2
Luxembourg	286	366	-21.9	3,567	3,257	+9.5
Netherlands	4,879	5,314	-8.2	52,981	45,707	+15.9
Poland	5,494	5,075	+8.3	55,260	40,362	+36.9
Portugal	1,772	2,516	-29.6	20,520	18,627	+10.2
Romania	1,276	905	+41.0	12,237	9,677	+26.5
Slovakia	699	545	+28.3	6,065	4,621	+31.2
Slovenia	762	764	-0.3	7,383	5,755	+28.3
Spain	9,954	14,185	-29.8	120,110	109,350	+9.8
Sweden	2,973	3,596	-17.3	28,628	20,592	+39.0
EUROPEAN UNION	118,903	137,555	-13.6	1,198,426	1,009,786	+18.7
EU14⁵	105,085	124,632	-15.7	1,064,757	906,234	+17.5
EU12⁶	13,818	12,923	+6.9	133,669	103,552	+29.1
Iceland	48	76	-36.8	885	736	+20.2
Norway	2,747	3,045	-9.8	26,120	22,893	+14.1
Switzerland	2,249	2,371	-5.1	22,416	20,169	+11.1
EFTA	5,044	5,492	-8.2	49,421	43,798	+12.8
United Kingdom	31,535	52,096	-39.5	267,236	208,080	+28.4
EU + EFTA + UK	155,482	195,143	-20.3	1,515,083	1,261,664	+20.1
EU14 + EFTA + UK	141,664	182,220	-22.3	1,381,414	1,158,112	+19.3

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

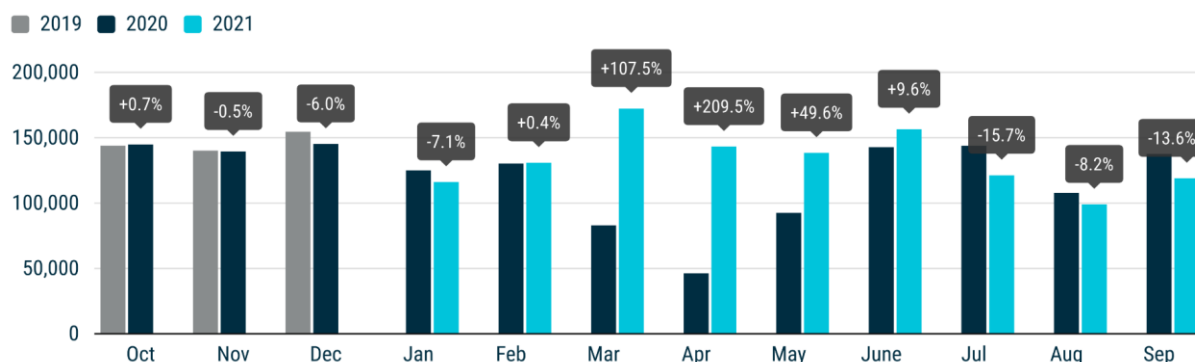
¹ Including light buses and coaches

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 CEST (6.00am GMT), 28 October 2021

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

	SEPTEMBER			JANUARY-SEPTEMBER		
	2021	2020	% change 21/20	2021	2020	% change 21/20
Austria	385	490	-21.4	5,182	4,167	+24.4
Belgium	521	512	+1.8	5,043	4,516	+11.7
Bulgaria	258	215	+20.0	2,237	1,419	+57.6
Croatia	49	42	+16.7	789	511	+54.4
Cyprus	5	6	-16.7	37	34	+8.8
Czech Republic	530	608	-12.8	5,304	3,991	+32.9
Denmark	358	329	+8.8	3,021	2,506	+20.6
Estonia	57	30	+90.0	593	338	+75.4
Finland	161	202	-20.3	1,832	1,708	+7.3
France	3,157	3,540	-10.8	28,780	25,910	+11.1
Germany	4,062	4,502	-9.8	42,253	36,383	+16.1
Greece	33	11	+200.0	275	303	-9.2
Hungary	316	290	+9.0	3,015	2,002	+50.6
Ireland ²	141	133	+6.0	1,639	1,430	+14.6
Italy ³	1,510	1,265	+19.4	15,839	11,544	+37.2
Latvia	125	48	+160.4	1,021	367	+178.2
Lithuania ⁴	638	520	+22.7	6,058	2,691	+125.1
Luxembourg ⁴	84	94	-10.6	692	560	+23.6
Netherlands	708	849	-16.6	8,086	7,152	+13.1
Poland	2,462	1,774	+38.8	21,423	11,618	+84.4
Portugal	406	606	-33.0	2,720	2,183	+24.6
Romania	299	381	-21.5	4,087	2,792	+46.4
Slovakia	169	157	+7.6	1,932	1,256	+53.8
Slovenia	146	79	+84.8	1,357	907	+49.6
Spain	1,371	1,561	-12.2	12,658	10,205	+24.0
Sweden	408	452	-9.7	3,963	3,568	+11.1
EUROPEAN UNION	18,359	18,696	-1.8	179,836	140,061	+28.4
EU14	13,305	14,546	-8.5	131,983	112,135	+17.7
EU12	5,054	4,150	+21.8	47,853	27,926	+71.4
Iceland	16	8	+100.0	111	73	+52.1
Norway	344	327	+5.2	3,220	3,092	+4.1
Switzerland	219	207	+5.8	2,348	2,209	+6.3
EFTA	579	542	+6.8	5,679	5,374	+5.7
United Kingdom ⁴	2,460	3,343	-26.4	22,582	18,652	+21.1
EU + EFTA + UK	21,398	22,581	-5.2	208,097	164,087	+26.8
EU14 + EFTA + UK	16,344	18,431	-11.3	160,244	136,161	+17.7

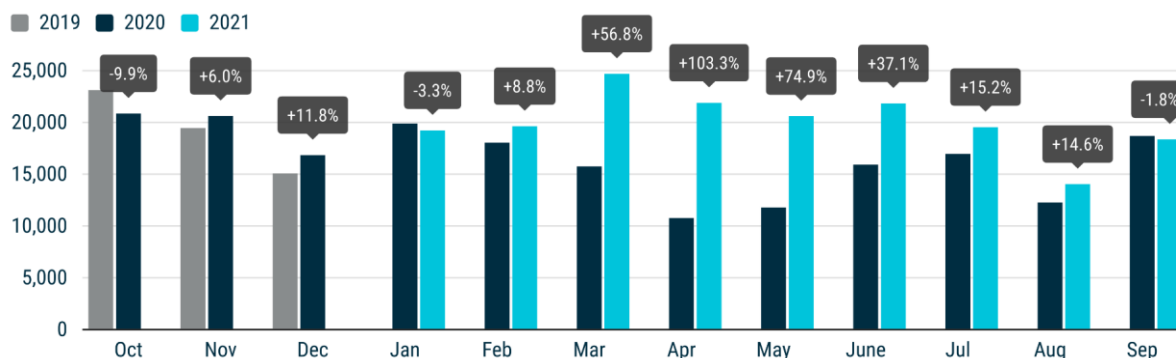
SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Excluding heavy buses and coaches

² HCV ≥17t

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

⁴ Estimates



PRESS EMBARGO FOR ALL DATA
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MEDIUM AND HEAVY COMMERCIAL VEHICLES (MHCV) OVER 3.5T¹
EUROPEAN UNION + EFTA + UK

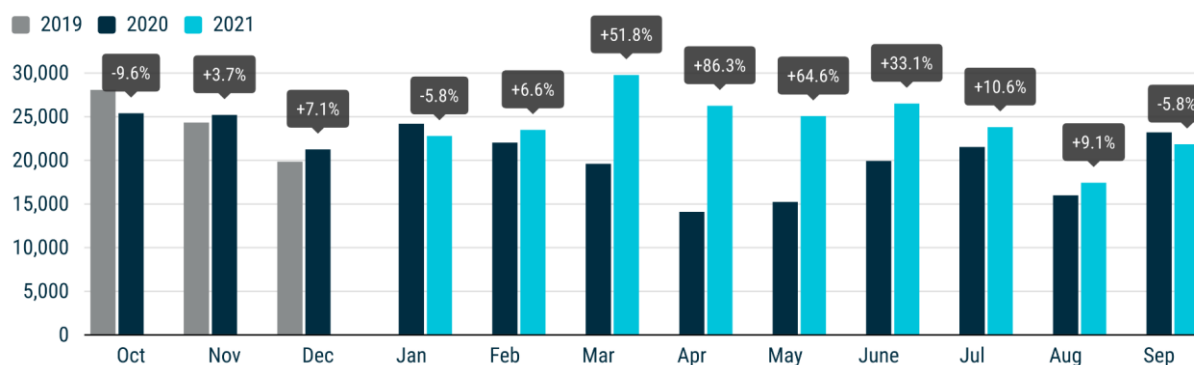
	SEPTEMBER			JANUARY-SEPTEMBER		
	Units		% change 21/20	Units		% change 21/20
	2021	2020		2021	2020	
Austria	390	527	-26.0	5,327	4,321	+23.3
Belgium	607	623	-2.6	6,093	5,517	+10.4
Bulgaria	268	224	+19.6	2,321	1,480	+56.8
Croatia	70	55	+27.3	997	659	+51.3
Cyprus	8	8	+0.0	66	84	-21.4
Czech Republic	607	752	-19.3	6,223	5,019	+24.0
Denmark	406	364	+11.5	3,349	2,803	+19.5
Estonia	62	34	+82.4	630	375	+68.0
Finland	265	286	-7.3	2,706	2,483	+9.0
France	3,587	4,072	-11.9	33,563	30,248	+11.0
Germany	5,585	6,859	-18.6	60,019	54,024	+11.1
Greece	45	25	+80.0	430	486	-11.5
Hungary	352	317	+11.0	3,326	2,230	+49.1
Ireland	180	155	+16.1	1,958	1,696	+15.4
Italy ²	1,796	1,580	+13.7	19,061	14,377	+32.6
Latvia	132	52	+153.8	1,099	412	+166.7
Lithuania ³	641	527	+21.6	6,121	2,759	+121.9
Luxembourg	95	116	-18.1	802	729	+10.0
Netherlands	833	975	-14.6	9,186	8,243	+11.4
Poland	2,682	1,991	+34.7	23,249	13,172	+76.5
Portugal	454	674	-32.6	3,164	2,560	+23.6
Romania	423	404	+4.7	4,396	2,983	+47.4
Slovakia	185	177	+4.5	2,166	1,450	+49.4
Slovenia	152	88	+72.7	1,471	1,011	+45.5
Spain	1,582	1,816	-12.9	14,852	12,729	+16.7
Sweden	444	503	-11.7	4,425	3,943	+12.2
EUROPEAN UNION	21,851	23,204	-5.8	217,000	175,793	+23.4
EU14	16,269	18,575	-12.4	164,935	144,159	+14.4
EU12	5,582	4,629	+20.6	52,065	31,634	+64.6
Iceland	30	10	+200.0	213	155	+37.4
Norway	468	504	-7.1	4,735	4,681	+1.2
Switzerland	264	267	-1.1	2,776	2,719	+2.1
EFTA	762	781	-2.4	7,724	7,555	+2.2
United Kingdom ³	3,397	4,459	-23.8	31,193	26,460	+17.9
EU + EFTA + UK	26,010	28,444	-8.6	255,917	209,808	+22.0
EU14 + EFTA + UK	20,428	23,815	-14.2	203,852	178,174	+14.4

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



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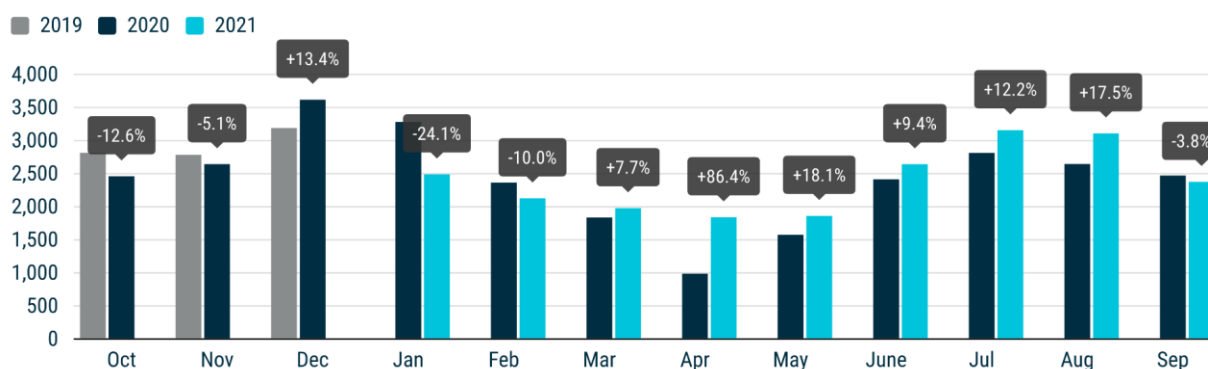
MEDIUM AND HEAVY BUSES & COACHES (MHBC) OVER 3.5T
EUROPEAN UNION + EFTA + UK

	SEPTEMBER			JANUARY-SEPTEMBER		
	Units		% change 21/20	Units		% change 21/20
	2021	2020		2021	2020	
Austria	35	79	-55.7	602	597	+0.8
Belgium	78	55	+41.8	828	667	+24.1
Bulgaria	17	26	-34.6	125	152	-17.8
Croatia	1	1	+0.0	106	102	+3.9
Cyprus	4	10	-60.0	18	222	-91.9
Czech Republic	46	97	-52.6	791	966	-18.1
Denmark	3	19	-84.2	415	247	+68.0
Estonia	3	24	-87.5	198	188	+5.3
Finland	9	20	-55.0	336	242	+38.8
France	550	562	-2.1	5,103	4,310	+18.4
Germany	423	574	-26.3	4,133	4,350	-5.0
Greece	38	31	+22.6	317	232	+36.6
Hungary	96	62	+54.8	830	494	+68.0
Ireland	45	4	+1,025.0	303	105	+188.6
Italy ¹	375	230	+63.0	2,623	2,219	+18.2
Latvia	4	3	+33.3	203	42	+383.3
Lithuania ²	9	22	-59.1	115	213	-46.0
Luxembourg	10	21	-52.4	132	168	-21.4
Netherlands	36	41	-12.2	312	332	-6.0
Poland	99	110	-10.0	1,056	1,028	+2.7
Portugal	29	28	+3.6	376	321	+17.1
Romania	46	140	-67.1	554	590	-6.1
Slovakia	6	17	-64.7	146	197	-25.9
Slovenia	10	9	+11.1	60	40	+50.0
Spain	377	246	+53.3	1,310	1,398	-6.3
Sweden	28	41	-31.7	516	1,000	-48.4
EUROPEAN UNION	2,377	2,472	-3.8	21,508	20,422	+5.3
EU14	2,036	1,951	+4.4	17,306	16,188	+6.9
EU12	341	521	-34.5	4,202	4,234	-0.8
Iceland	3	1	+200.0	20	12	+66.7
Norway	39	169	-76.9	986	1,000	-1.4
Switzerland	47	49	-4.1	401	332	+20.8
EFTA	89	219	-59.4	1,407	1,344	+4.7
United Kingdom ²	521	619	-15.8	2,972	3,384	-12.2
EU + EFTA + UK	2,987	3,310	-9.8	25,887	25,150	+2.9
EU14 + EFTA + UK	2,646	2,789	-5.1	21,685	20,916	+3.7

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 CEST (6.00am GMT), 28 October 2021

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

	SEPTEMBER			JANUARY-SEPTEMBER		
	Units		% change 21/20	Units		% change 21/20
	2021	2020		2021	2020	
Austria	5,484	4,187	+31.0	51,075	32,391	+57.7
Belgium	5,841	6,442	-9.3	63,225	59,033	+7.1
Bulgaria	801	636	+25.9	7,745	5,090	+52.2
Croatia	787	783	+0.5	7,405	5,834	+26.9
Cyprus	179	155	+15.5	1,511	1,484	+1.8
Czech Republic	2,408	2,707	-11.0	21,346	17,918	+19.1
Denmark	2,911	3,353	-13.2	27,873	24,729	+12.7
Estonia	378	362	+4.4	4,150	3,083	+34.6
Finland	1,333	1,464	-8.9	13,135	11,941	+10.0
France	39,061	46,532	-16.1	369,554	316,488	+16.8
Germany	26,079	31,865	-18.2	266,039	245,147	+8.5
Greece	1,050	656	+60.1	8,760	5,617	+56.0
Hungary	2,121	2,201	-3.6	21,566	17,947	+20.2
Ireland	1,921	2,409	-20.3	28,787	20,752	+38.7
Italy	15,958	17,812	-10.4	157,669	121,527	+29.7
Latvia	356	260	+36.9	3,246	2,042	+59.0
Lithuania	877	744	+17.9	8,924	5,136	+73.8
Luxembourg	391	503	-22.3	4,501	4,154	+8.4
Netherlands	5,748	6,330	-9.2	62,479	54,282	+15.1
Poland	8,275	7,176	+15.3	79,565	54,562	+45.8
Portugal	2,255	3,218	-29.9	24,060	21,508	+11.9
Romania	1,745	1,449	+20.4	17,187	13,250	+29.7
Slovakia	890	739	+20.4	8,377	6,268	+33.6
Slovenia	924	861	+7.3	8,914	6,806	+31.0
Spain	11,913	16,247	-26.7	136,272	123,477	+10.4
Sweden	3,445	4,140	-16.8	33,569	25,535	+31.5
EUROPEAN UNION	143,131	163,231	-12.3	1,436,934	1,206,001	+19.1
EU14	123,390	145,158	-15.0	1,246,998	1,066,581	+16.9
EU12	19,741	18,073	+9.2	189,936	139,420	+36.2
Iceland	81	87	-6.9	1,118	903	+23.8
Norway	3,254	3,718	-12.5	31,841	28,574	+11.4
Switzerland	2,560	2,687	-4.7	25,593	23,220	+10.2
EFTA	5,895	6,492	-9.2	58,552	52,697	+11.1
United Kingdom	35,453	57,174	-38.0	301,401	237,924	+26.7
EU + EFTA + UK	184,479	226,897	-18.7	1,796,887	1,496,622	+20.1
EU14 + EFTA + UK	164,738	208,824	-21.1	1,606,951	1,357,202	+18.4

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

