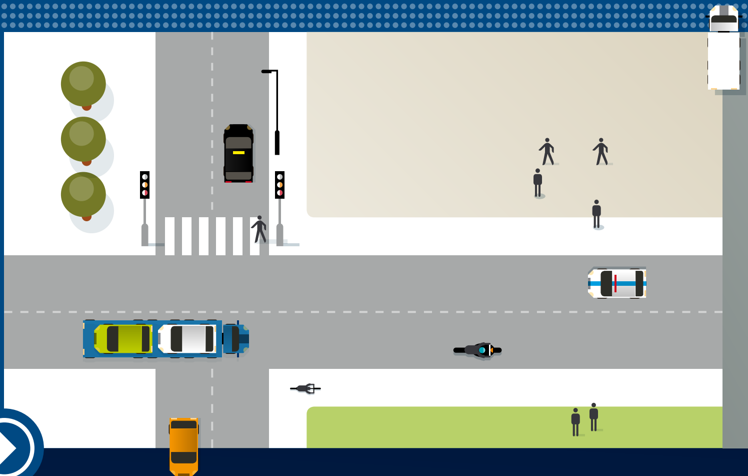

ACEA

European
Automobile
Manufacturers
Association

The Automobile Industry Pocket Guide

2014–2015

PUBLISHED BY
ACEA Communications department
Please order your personal copy via communications@acea.be

This paper is made in an environmentally-friendly way and according to FSC certification

Foreword

The European Automobile Manufacturers' Association (ACEA) produces this Pocket Guide annually in order to provide a clear overview of the main characteristics of one of Europe's key industries. These statistics show an industry that continues to provide employment and mobility for Europe's citizens, generate tax and trade revenue for governments, and lead the world in terms of innovation.

In 2013, around 13.6 million new cars, vans, trucks and buses were registered in the EU. Sales have dropped by over a quarter since the pre-crisis peak in 2007, but things are now gradually improving. With the European economy slowly recovering, ACEA predicts that sales in Europe will recover moderately over the next few years.

As one of the cornerstones of Europe's economy, ACEA is continuing to contribute constructively to discussions with policy makers and other stakeholders in order to consolidate this growth and strengthen the global competitiveness of the automobile sector - thereby fully supporting the EU's industrial renaissance. ACEA believes that the right policy environment can deliver this – that means a policy environment that is based on three building blocks: driving innovation, fostering growth through international trade, and building a supportive and smart regulatory framework.

Erik Jonnaert
ACEA Secretary General

ACEA
European Automobile Manufacturers Association

ACEA

European
Automobile
Manufacturers
Association

About ACEA

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

Members and partners

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

ACEA's members are: BMW Group, Daimler, DAF, Fiat Chrysler Automobiles, Ford of Europe, Opel Group, Hyundai Motor Europe, Iveco, Jaguar Land Rover, PSA Peugeot Citroën, Renault, Toyota Motor Europe, Volkswagen Group, Volvo Cars, Volvo Group.

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

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

ACEA's mission and priority areas

ACEA's mission is to:

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

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

- Competitiveness, Market and Economy
- Environment and Sustainability
- International Trade
- Research and Innovation
- Safety
- Transport Policy

How ACEA works

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

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

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

Together with its members, EUCAR drives the strategy and assessment of collaborative automotive research and innovation, and establishes common work with the European Commission, member states and other key stakeholders. These activities facilitate the participation of EUCAR's members in high-quality projects with industrially-relevant results. Projects are mainly financed through the European Union Framework Programmes for research and innovation, currently Horizon 2020, matched with industry funding.

EUCAR collaborative research and innovation activities cover both passenger and commercial vehicles, focused on the following "Strategic Pillars":

- Sustainable Propulsion
- Safe and Integrated Mobility
- Affordability and Competitiveness

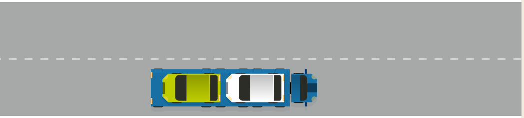
EUCAR is governed by its Council, composed of the heads of the research and advanced development divisions of the member companies. EUCAR's Chairman is nominated annually from the Council on a rotating basis.

ACEA

European Automobile Manufacturers Association

Key Figures

The automobile industry: the engine of Europe



DELIVERING THE GOODS

Trucks and vans deliver the goods and services we take for granted in our daily lives, carrying 75% of freight transported over land and delivering 18 billion tonnes of goods per year.

CREATING SKILLED JOBS

12.7 million people work in the sector – representing 5.8% of the EU employed population.

The 3.1 million high-skilled jobs in automotive manufacturing represent 10.3% of the EU's manufacturing employment.

MOVING PEOPLE

Cars and buses offer freedom and mobility for all, providing us with direct access to education, health and employment.

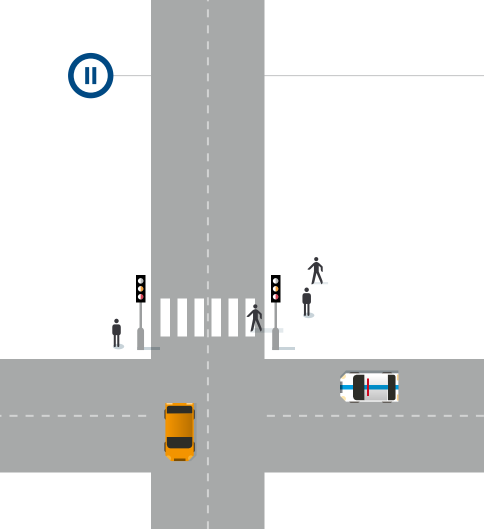
SERVING THE COMMUNITY

Many of our essential public services – such as postal, waste and emergency services – are delivered by cars, trucks and vans.

SPURRING INNOVATION

The automotive sector is the EU's largest investor in R&D, accounting for 25% of total R&D spending.

The EU auto industry invests over €32 billion into R&D. The European Patent Office registers 10,500 applications in the auto sector per year.



DRIVING SUSTAINABLE MOBILITY

Europe's cars, vans, trucks and buses are the cleanest, safest and quietest in the world.

Europe leads the way in clean production, with decreasing quantities of water and energy used to manufacture a vehicle, and much less CO2 and waste produced in the process.

MANUFACTURING IN EUROPE

Vehicle manufacturing is a strategic industry in the EU, where 16.2 million cars, vans, trucks and buses are manufactured.

ACEA's members operate 190 vehicle assembly and production plants in 22 countries across Europe.

EXPORTING WORLDWIDE

The European auto industry is a global player, delivering 6.6 million 'Made in Europe' vehicles around the world, and bringing in a €95 billion trade surplus.

GENERATING GOVERNMENT REVENUE

Motor vehicles account for €389 billion in tax contribution in just 14 EU countries – a vital source of government revenue.

POWERING ECONOMIC GROWTH

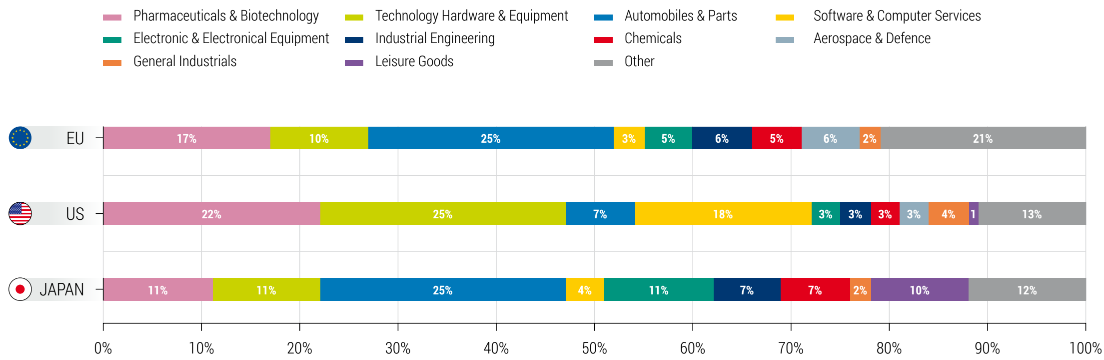
The €843 billion turnover generated by the automotive sector represents 6.6% of EU GDP.
The automobile industry has ripple effects throughout the economy, supporting a vast supply chain and generating an array of business services.

Driving safe and sustainable mobility

- Europe's cars, vans, trucks and buses are the cleanest, safest and quietest in the world.
- Huge advances have been made in air quality, largely through investments in new engine technologies. It now takes 100 modern passenger cars to produce the same quantity of pollutant emissions as just one from 1970. The average car engine emits 28 times less carbon monoxide than 20 years ago. Also, pollutant emissions from today's EURO VI trucks have been slashed to near-zero levels, down 98% since 1990.
- Engine improvements have also reduced the CO2 emissions from new vehicles. Some 49% of new cars emit less than 120g of CO2 per kilometre, and car fleet CO2 emissions decreased by 31.7% between 1995 and 2013. The fuel consumption of today's heavy duty vehicles is down at least 60% since 1965: a modern truck can transport 1 tonne of goods up to a distance of 100km using as little as 1 litre of fuel.
- EU road transport fatalities have been halved in the past decade, from 54,000 in 2001 to 26,000 in 2013.
- Noise from passenger cars has been reduced by 90% since 1970.
- Europe also leads the way in clean production, with decreasing quantities of water and energy used to manufacture a vehicle, and much less CO2 and waste produced in the process.

The automobile sector is the EU's largest investor in R&D

R&D shares of sectors of the main world regions | **2013**

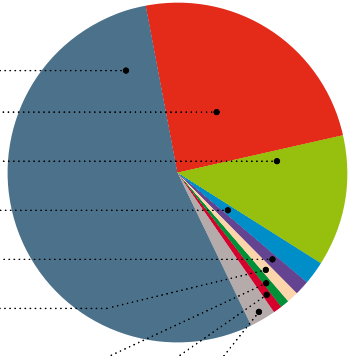


SOURCE: THE 2013 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD
EUROPEAN COMMISSION, JRC/DG RTD

Spurring innovation

Patent applications filed by the automotive sector | **2013**

54.3%	EU
24.5%	Japan
12.3%	US
2.2%	Switzerland
1.5%	South Korea
1.0%	China
0.9%	Canada
0.9%	Taiwan
2.3%	Others



In **2013**, a total of **10,568** patents were filed in the automotive sector at the European Patent Office

SOURCE: BASED ON EUROPEAN PATENT OFFICE DATA - 2014

Key figures

PRODUCTION	Total motor vehicles (World)	2013	87.3	m units	
	Total motor vehicles (EU27)	2013	16.2	m units	= 19% of worldwide MV production
	Total passenger cars (World)	2013	65.4	m units	
	Total passenger cars (EU27)	2013	14.6	m units	= 22% of worldwide PC production
	Production value	2012	€ 681.5	bn	
NEW REGISTRATIONS	Total motor vehicles (World)	2013	85.6	m units	
	Total motor vehicles (EU27)	2013	13.6	m units	= 16% of worldwide MV registrations/sales
	Total passenger cars (World)	2013	73.1	m units	
	Total passenger cars (EU27)	2013	11.9	m units	= 16% of worldwide PC registrations/sales
	Diesel (Western Europe)	2013	53	%	
EMPLOYMENT	Manufacture of motor vehicles (EU27)	2011	2.2	m people	= 7.4% of EU manufacturing
	Total (including indirect, EU27)	2011	12.7	m people	= 5.8% of EU employed population
TURNOVER	Manufacture of motor vehicles (EU27)	2012	€ 843.4	bn	= 6.6% of EU GDP
R&D INVESTMENT	ACEA members	2012	€ 32.3	bn	= 3.8% of turnover
VALUE ADDED	EU27	2011	€ 154.3	bn	= 9% of manufacturing sector
EXPORTS	Extra-EU27	2013	€ 123.1	bn	
IMPORTS	Extra-EU27	2013	€ 27.9	bn	
TRADE BALANCE		2013	€ 95.1	bn	
MV IN USE (PARC)	Total motor vehicles	2012	281.4	m units	
(EU27)	Passenger cars	2012	246.3	m units	
	Motorisation rate (cars)	2011	487	per 1,000 inhab.	
TAX REVENUE FROM MOTOR VEHICLES (EU15)		2013	€ 388.8	bn	

W.EUROPE = EU15 + EFTA

SOURCE: ACEA, VDA, AAA, IHS GLOBAL INSIGHT, EUROSTAT

ACEA

European
Automobile
Manufacturers
Association

1

Employment

The automotive industry generates 12.7 million jobs in the EU

Automobile sector: direct and indirect* employment

AUTOMOTIVE INDUSTRY (PRODUCTION OPERATIONS)	
› Automobile manufacturing	(NACE c291)
› Coachwork, trailers, caravans	(NACE c292)
› Equipment and accessories	(NACE c293)

2.2m jobs direct

OTHER MANUFACTURING ACTIVITIES	
› Manufacture, retreading and rebuilding of rubber tyres and tubes	(NACE c2211)
› Manufacture of bearings, gears, gearing and driving elements	(NACE c2815)
› Manufacture of cooling and ventilation equipment	(NACE c2825)
› Manufacture of computers and other information processing equipment	(NACE c262)
› Manufacture of electric motors, generators and transformers	(NACE c2711)

0.9m jobs indirect

3.1m jobs manufacturing

AUTOMOBILE USE	
› Sale of motor vehicles	(NACE g451)
› Maintenance and repair of motor vehicles	(NACE g452)
› Sale of motor vehicle parts and accessories	(NACE g453)
› Retail sale of automotive fuel	(NACE g473)
› Renting and leasing of motor vehicles	(NACE n771)

3.9m jobs

TRANSPORT	
› Passenger land transport (urban and suburban, taxi)	(NACE h493)
› Freight transport by road	(NACE h4941)

4.9m jobs

CONSTRUCTION	
› Construction of roads and motorways	(NACE f4211)
› Construction of bridges and tunnels	(NACE f4213)

0.7m jobs

9.6m jobs non-manufacturing

10.4m jobs indirect

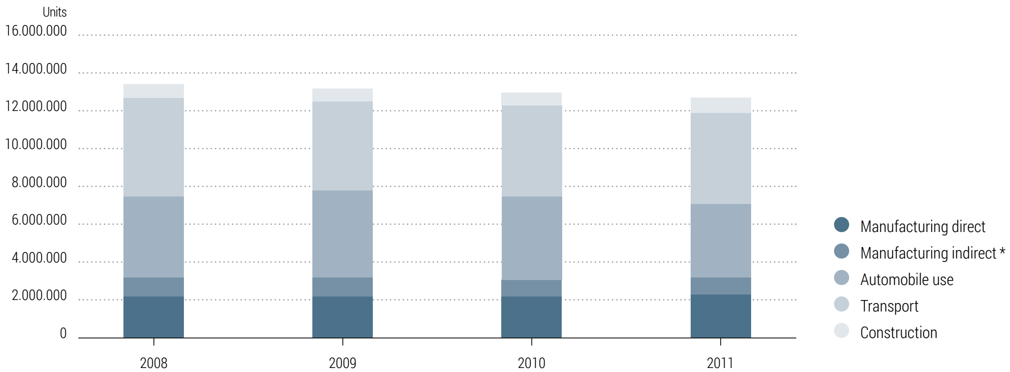
Total 12.7m jobs

* Indirect employment data does not report employment in the raw materials sector (eg steel, aluminium, glass, etc), textiles, driving schools, licensing activities, vehicle testing, vehicle insurance and financing, etc.

SOURCE: BASED ON EUROSTAT MOST RECENT COMPREHENSIVE DATA AVAILABLE | 2011

Trends in automotive employment in the EU

EU automobile employment — **by year | 2008 – 2011**



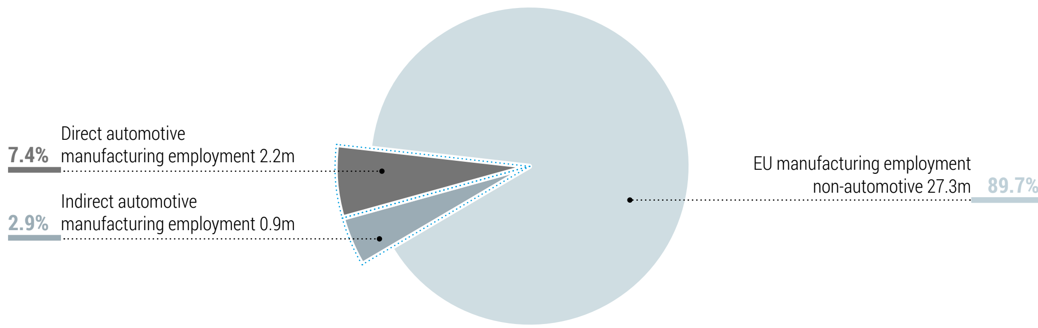
EMPLOYMENT RELATED TO THE AUTOMOTIVE SECTOR	2008	2009	2010	2011	% CHG 11/08
Manufacturing direct	2,233,422	2,218,600	2,171,800	2,239,100	0.3%
Manufacturing indirect*	846,010	879,023	889,124	885,295	4.6%
Automobile use	4,443,645	4,549,700	4,348,100	3,921,800	-11.7%
Transport	5,111,300	4,816,500	4,818,900	4,901,400	-4.1%
Construction	759,100	748,400	713,200	728,700	-4.0%
Total	**13,393,477**	**13,212,223**	**12,941,124**	**12,676,295**	**-5.4%**

* Indirect employment data does not report employment in the raw materials sector (eg steel, aluminium, glass, etc), textiles, driving schools, licensing activities, vehicle testing, vehicle insurance and financing, etc.

SOURCE: BASED ON EUROSTAT MOST RECENT COMPREHENSIVE DATA AVAILABLE | 2011

10.3% of EU manufacturing employment is in the automotive sector

Total manufacturing employment in the EU — **% share | 2011**



SOURCE: BASED ON EUROSTAT DATA | 2011

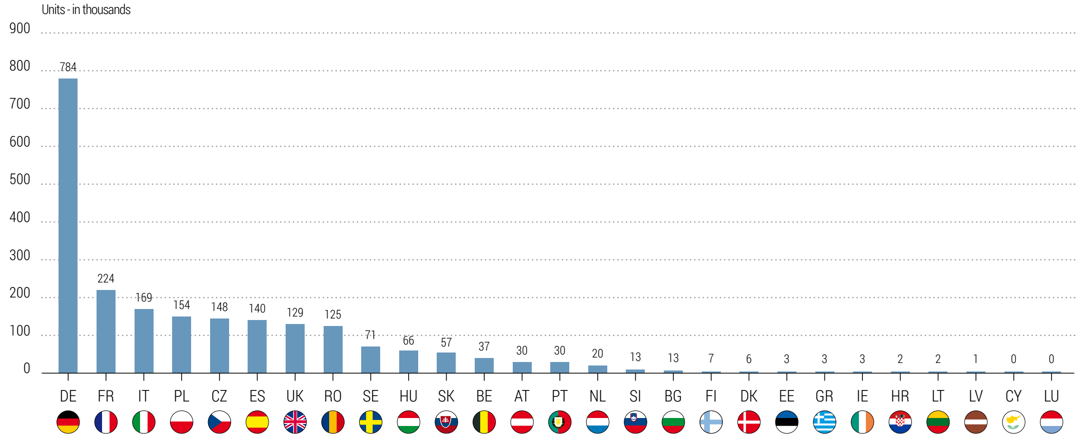
Direct automotive employment (manufacturing)	**2.2m people**	= 7.4% of total EU employment in manufacturing
Manufacturing employment related to the automotive sector	**3.1m people**	= 10.3% of total EU employment in manufacturing
Total automotive employment (manufacturing, services* and construction)	**12.7m people**	= 5.8% of EU employed population
EU28 total population in 2011	**497.9m people**	
EU28 total employment in 2011	**217.8m people**	
EU28 employed population in the manufacturing sector	**30.4m people**	= 13.9% of total employed population

SOURCE: BASED ON EUROSTAT MOST RECENT DATA AVAILABLE | 2011

*in activities specified

A closer look at automotive employment

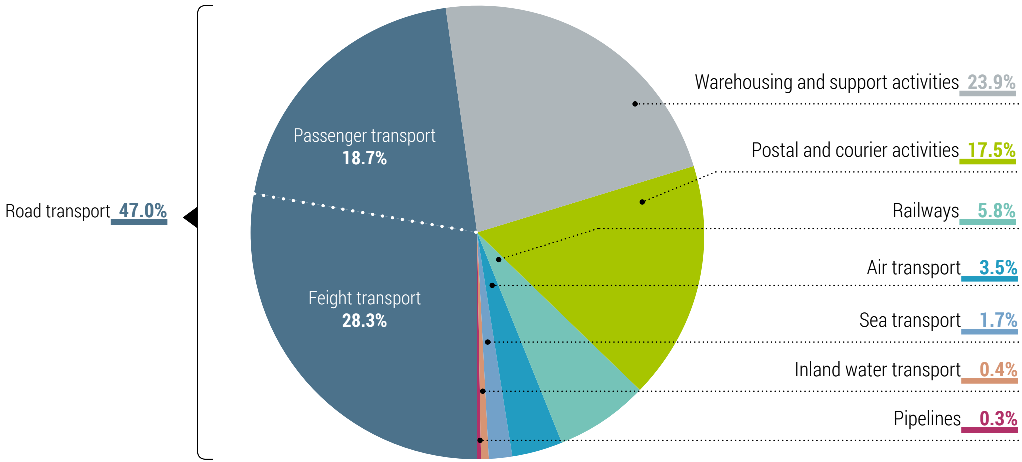
Direct automotive employment — **by country | 2011**



SOURCE: BASED ON EUROSTAT DATA | 2011

Road transport accounts for almost half of all transport-related jobs

Employment* — **by mode of transport in the EU | 2011**



SOURCE: BASED ON EUROSTAT DATA | 2011

* Employment in companies the main activity of which lies in the transport mode concerned

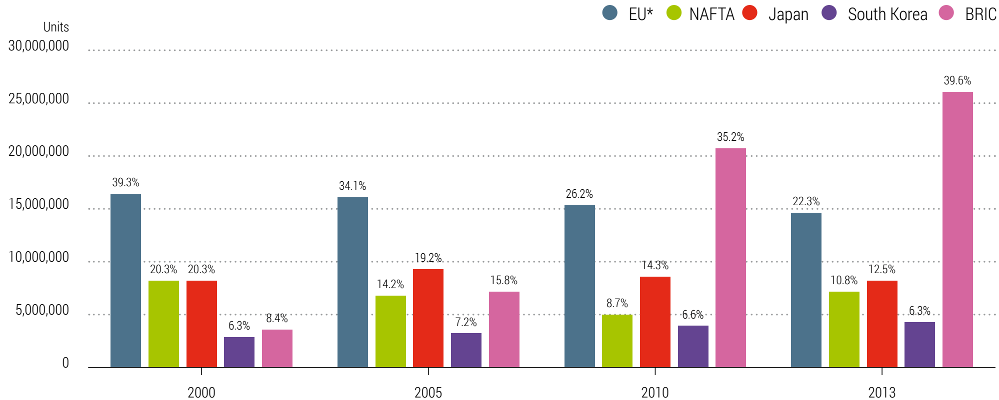
ACEA
European Automobile Manufacturers Association

Production

2

22.3% of the world's cars are produced in the EU

Passenger car production — **international comparison, % share | 2000 – 2013**



SOURCE: OICA | 2014

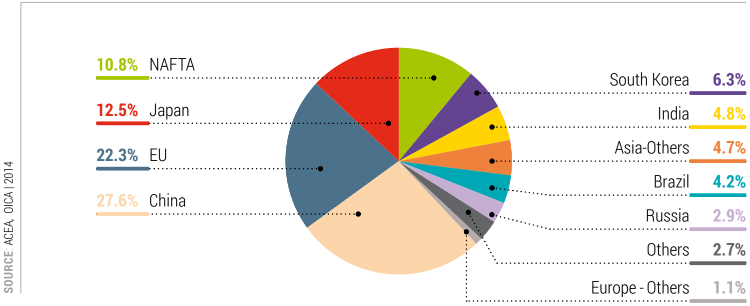
Passenger car production — **world | 2013**

	VOLUME	% SHARE
EU*	14,616,202	22.3%
NAFTA	7,084,136	10.8%
Japan	8,189,323	12.5%
South Korea	4,122,604	6.3%
BRIC	25,886,146	39.6%
Others	5,534,876	8.5%
Total World	**65.433.287**	**100%**

SOURCE: OICA | 2014

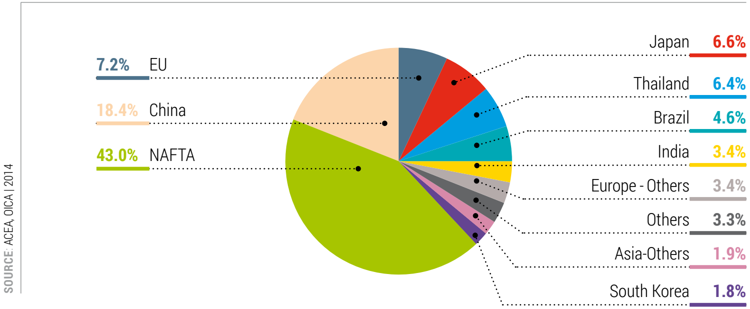
* constant EU27 perimeter throughout the period

Passenger car production — **world, % share** | **2013**



Asia – others : Australia, Indonesia, Malaysia, Taiwan, Thailand
Europe – others : Serbia, Turkey, Ukraine
Others : Argentina, Egypt, Iran, South Africa, Uzbekistan

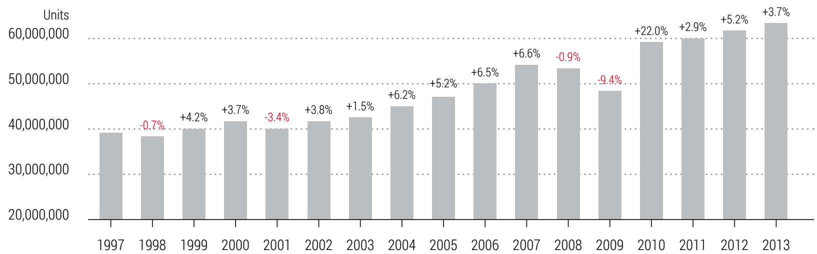
Commercial vehicle production — **world, % share** | **2013**



Asia – others : Australia, Indonesia, Malaysia, Taiwan
Europe – others : Russia, Serbia, Ukraine
Others : Argentina, Egypt, Iran, South Africa, Uzbekistan

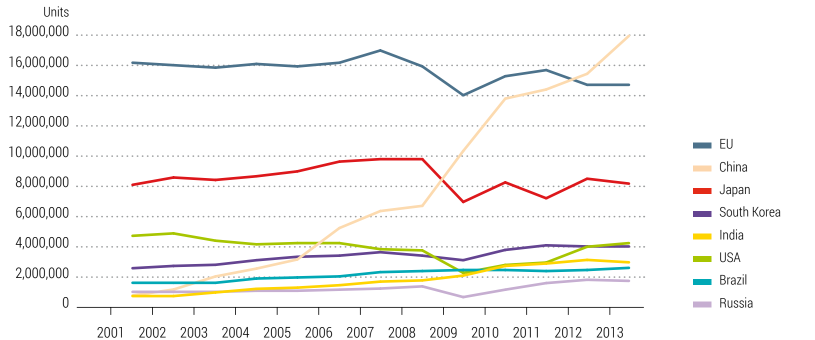
World car production is on the rise

World passenger car production — **trend** | **1997 – 2013**



SOURCE: OICA | 2014

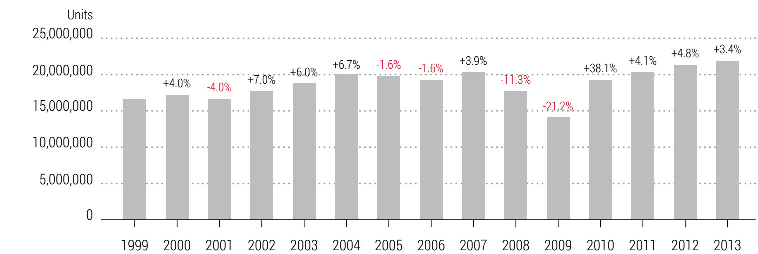
World passenger car production – **international comparison** | **2001 – 2013**



SOURCE: OICA | 2014

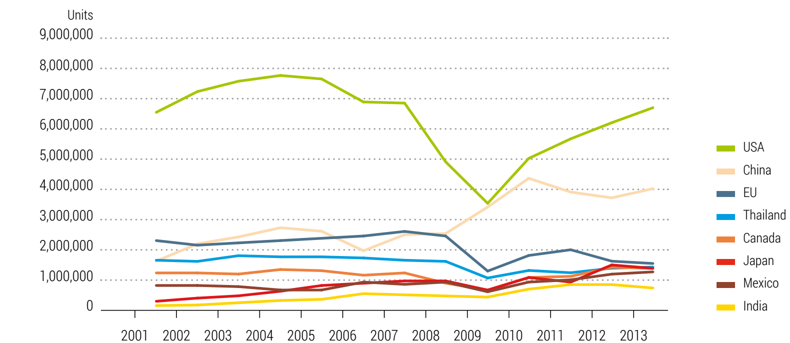
World commercial vehicle production is climbing

World commercial vehicle production — **trend** | **1999 – 2013**



SOURCE: OICA | 2014

World commercial vehicle production — **international comparison** | **2001 – 2013**



SOURCE: OICA | 2014

16.2 million vehicles are produced in the EU

Motor vehicle production in the EU — **by country** | **2013**

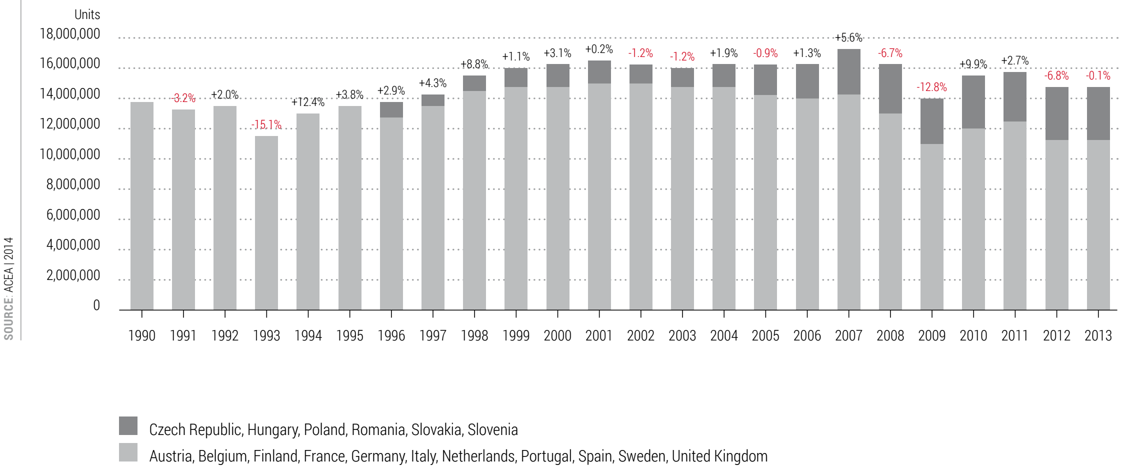
			+	TOTAL
AUSTRIA	146,566		19,862	166,428
BELGIUM	449,600		30,564	480,164
CZECH REPUBLIC	1,128,473		4,458	1,132,931
FINLAND	8,000			8,000
FRANCE [2]	1,460,000	280,000	n.a.	1,740,000
GERMANY [2]	5,439,904	278,318	n.a.	5,718,222
HUNGARY	220,000		2,400	222,400
ITALY	388,465	236,040	33,702	658,207
NETHERLANDS [2]	0	0	0	0
POLAND	475,000	104,055	4,203	583,258
PORTUGAL	109,698	40,918	3,400	154,016
ROMANIA	410,959		38	410,997
SLOVAKIA	975,000			975,000
SLOVENIA	89,395	4,339		93,734
SPAIN	1,719,700	419,954	23,684	2,163,338
SWEDEN [2]	161,080		n.a.	161,080
UNITED KINGDOM	1,509,762	68,823	18,848	1,597,433
EU [1]	**14,616,202**	**1,429,748**	**137,774**	**16,183,724**

1. Double countings are deducted from the totals
2. Figures for certain categories were not communicated in 2013

SOURCE: ACEA (NATIONAL AUTOMOBILE ASSOCIATIONS) | 2013

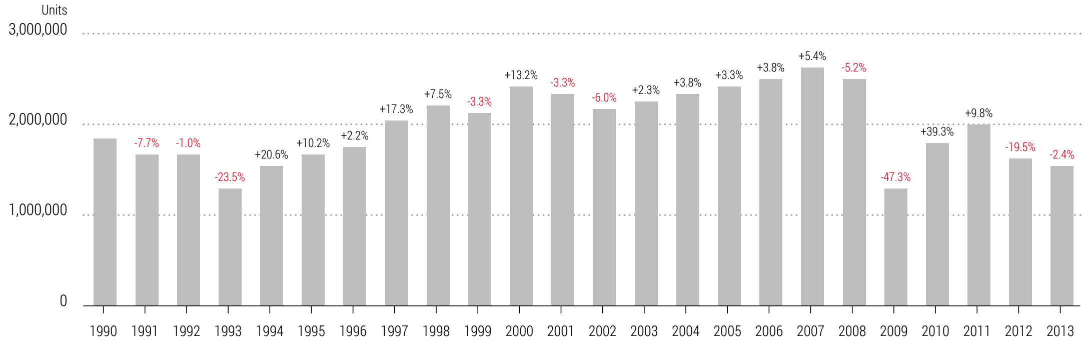
Trends in EU car production

Passenger car production in the EU | **1990 – 2013**



Trends in EU commercial vehicle production

Commercial vehicle production in the EU | **1990 – 2013**

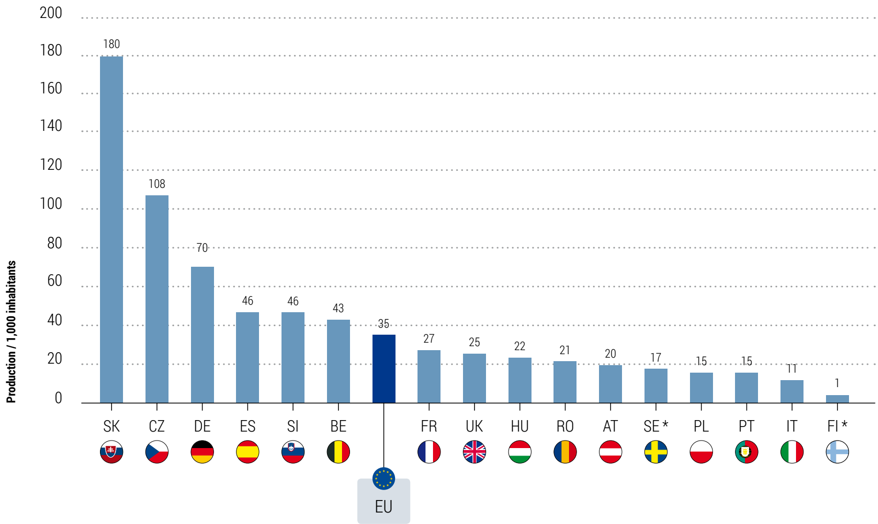


SOURCE: ACEA | 2014

PRODUCTION

The EU produces 35 vehicles per 1,000 inhabitants

Motor vehicle production per 1,000 inhabitants | **2013**



SOURCE: EUROSTAT, ACEA | 2014

* only production of cars available in 2013

ACEA members operate 190 plants across Europe

Automobile assembly and production plants in Europe | 2014

EU	Plants
Austria	5
Belgium	9
Bulgaria	1
Croatia	2
Czech Republic	8
Finland	2
France	34
Germany	43
Hungary	4
Italy	22
Netherlands	9
Poland	14
Portugal	6
Romania	3
Slovakia	3
Slovenia	1
Spain	15
Sweden	11
United Kingdom	34

NON - EU	Plants
Belarus	2
Kazakhstan	4
Russia	34
Serbia	3
Turkey	15
Ukraine	7
Uzbekistan	2

ALL MANUFACTURERS	Countries	Plants
Total Europe	26	293
TOTAL EU	19	226

ACEA MEMBERS	Countries	Plants
Total Europe	22	190
TOTAL EU	16	166

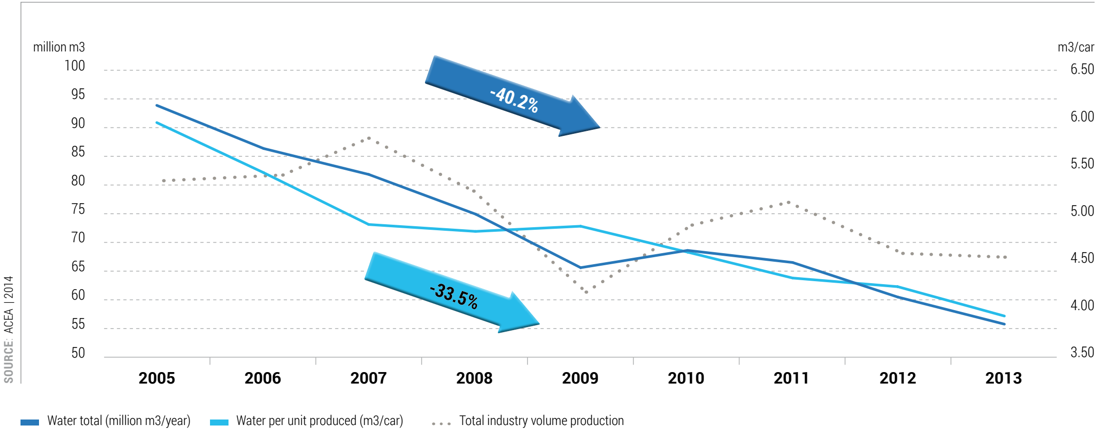
SOURCE: ACEA | 2014

Europe leads the way in resource-efficient production

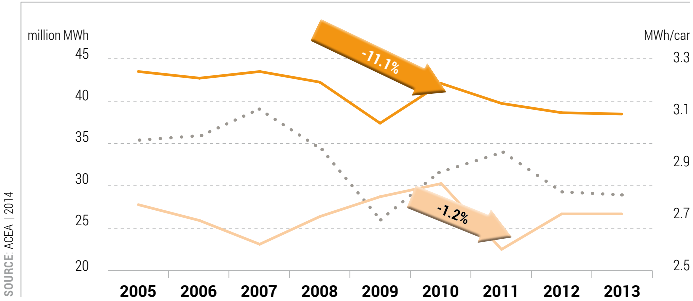
European automobile manufacturers have significantly reduced the environmental impact of vehicle production in recent years.

Long-term strategies for reducing **water consumption** have made it possible to reduce water use per car produced by 33.5% between 2005 and 2013. This includes the increased application of recirculation technologies for the reuse of water.

Water used

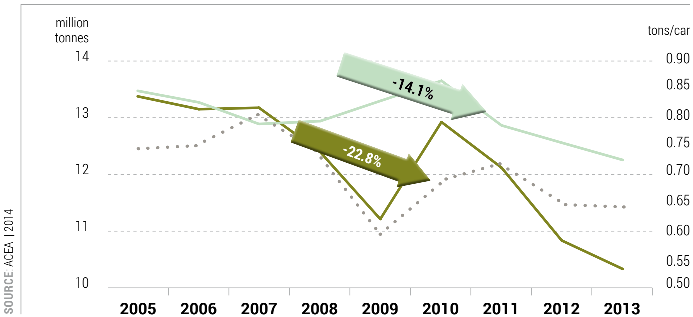


Energy consumption



Energy total (million MWh/year) Energy per unit produced (MWh/car) Total industry volume production

CO2 emissions

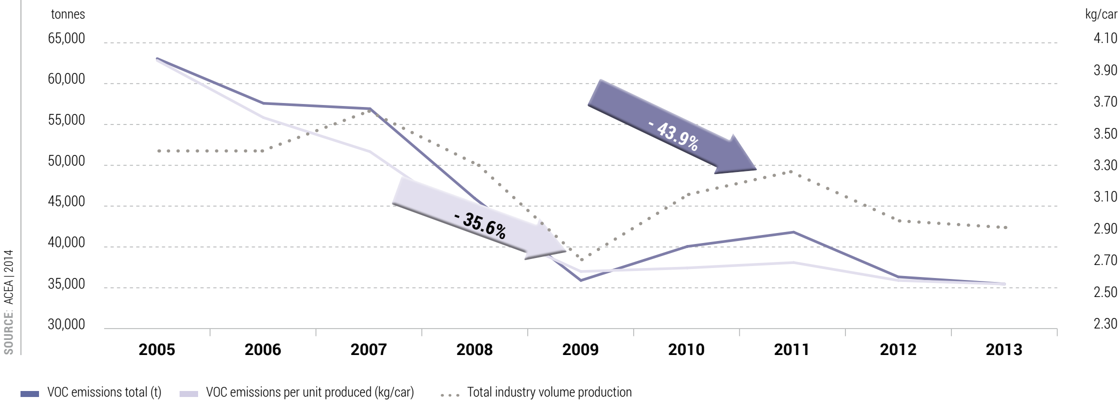


CO2 emissions total (million t/year) CO2 emissions per unit produced (t/car) Total industry volume production

As cars are equipped with more and more features to make them safer, more comfortable and more environmental friendly, the complexity of production increases as well, which affects energy demand. However, manufacturers constantly work on improving **energy efficiency**. As a result, total energy consumption in recent years, between 2005-2013, decreased by 11.1%. Fluctuation in energy per car produced can be explained by lower production volumes in certain years, as well as variable weather conditions in some years.

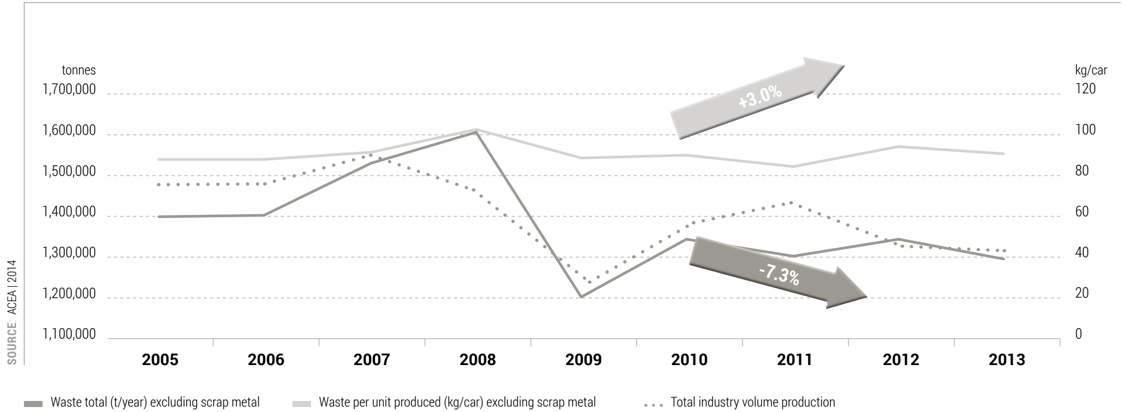
The **CO2 emissions** per vehicle produced between 2005-2013 dropped by 14.1%, while the overall figure went down by 22.8%, reflecting the industry's efforts to reduce CO2 emissions.

Volatile Organic Compounds (VOC) emissions



Volatile organic compounds (VOC) are organic solvents mainly emitted from paintshops. The graph shows the VOC emissions per car produced and the absolute emissions of all passenger car manufacturers altogether. With new technologies, such as water-based paints that replace solvent-based paints, manufacturers have been able to reduce emissions by 35.6% per vehicle over the last nine years.

Waste (excluding scrap metal)



The total amount of **waste** generated by the manufacturing of vehicles went down by 7.3% over nine years. The 3% rise in waste per unit produced occurs mainly due to the increasing portion of one-way packaging which is a result of globalisation. Fluctuation, both in absolute waste and waste per car, especially in 2008, can be explained by the occurrence of singular events, such as the formation of demolition waste.

European
Automobile
Manufacturers
Association

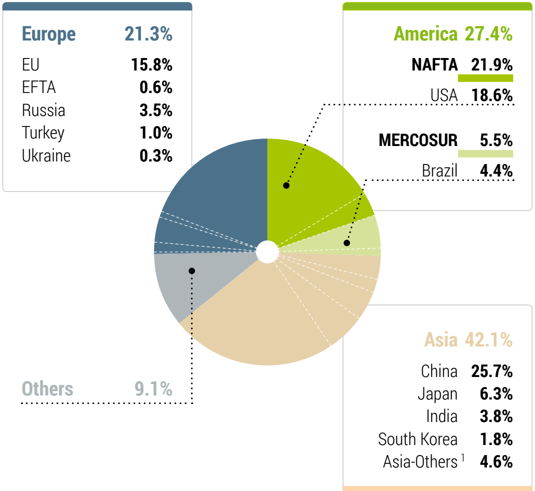
Registrations

3

Europe accounts for 21% of all motor vehicle registrations

New motor vehicle registrations — **world, market shares | 2013**

MOTOR VEHICLES in 1,000 units	2013	% share	2012	% change 13/12
EUROPE	**18,252**	**21.3%**	**18,577**	**-1.8%**
EU	13,563	15.8%	13,749	-1.4%
EFTA	529	0.6%	549	-3.6%
Russia	3,034	3.5%	3,198	-5.1%
Turkey	893	1.0%	818	9.2%
Ukraine	233	0.3%	264	-11.7%
AMERICA	23,494	27.4%	22,159	6.0%
NAFTA	18,762	21.9%	17,527	7.0%
of which USA	15,883	18.6%	14,788	7.4%
MERCOSUR	4,731	5.5%	4,632	2.1%
of which Brazil	3,767	4.4%	3,802	-0.9%
ASIA	**36,049**	**42.1%**	**33,642**	**7.2%**
China	21,984	25.7%	19,306	13.9%
Japan	5,376	6.3%	5,370	0.1%
India	3,241	3.8%	3,575	-9.3%
South Korea	1,538	1.8%	1,542	-0.2%
Asia-Others [1]	3,910	4.6%	3,849	1.6%
OTHERS	**7,796**	**9.1%**	**7,734**	**0.8%**
TOTAL WORLD	**85,591**	**100.0%**	**82,112**	**4.2%**



1. Indonesia, Malaysia, Philippines, Taiwan, Thailand, Pakistan, Singapore, Vietnam

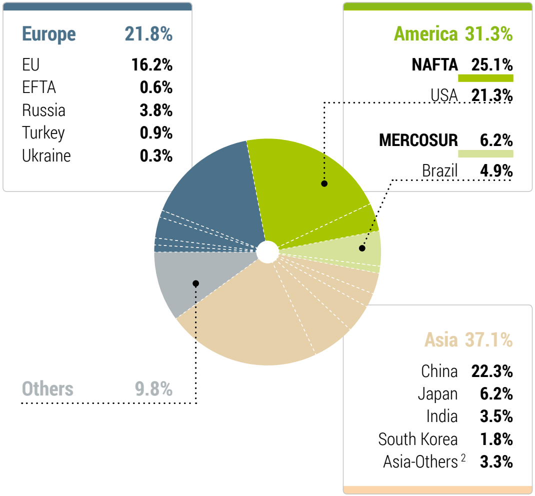
SOURCE: ACEA, VDA | 2014

REGISTRATIONS

16 million cars were registered in Europe in 2013

New passenger car registrations — **world, market shares | 2013**

PASSENGER CARS in 1,000 units	2013	% share	2012	% change 13/12
EUROPE	**15,964**	**21.8%**	**16,261**	**-1.8%**
EU	11,851	16.2%	12,054	-1.7%
EFTA	457	0.6%	474	-3.5%
Russia	2,777	3.8%	2,939	-5.5%
Turkey	665	0.9%	556	19.5%
Ukraine	213	0.3%	238	-10.2%
AMERICA [1]	**22,837**	**31.3%**	**21,531**	**6.1%**
NAFTA	18,333	25.1%	17,100	7.2%
of which USA	15,532	21.3%	14,442	7.5%
MERCOSUR	4,504	6.2%	4,431	1.6%
of which Brazil	3,580	4.9%	3,634	-1.5%
ASIA	**27,111**	**37.1%**	**24,185**	**12.1%**
China	16,304	22.3%	13,239	23.2%
Japan	4,562	6.2%	4,572	-0.2%
India	2,554	3.5%	2,761	-7.5%
South Korea	1,292	1.8%	1,307	-1.1%
Asia-Others [2]	2,399	3.3%	2,306	4.0%
OTHERS	**7,159**	**9.8%**	**7,104**	**0.8%**
TOTAL WORLD	**73,070**	**100.0%**	**69,080**	**5.8%**



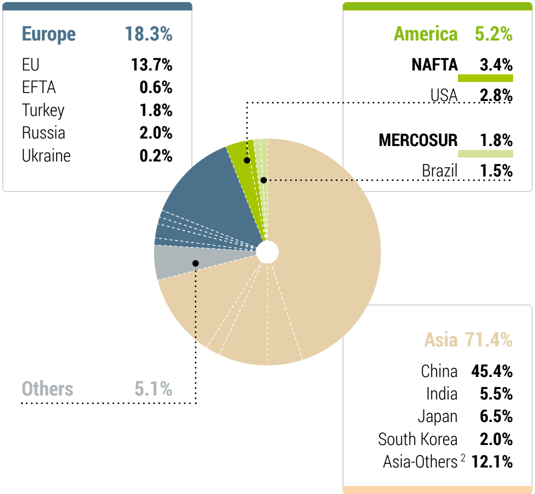
1. including Light Commercial Vehicles
2. Indonesia, Malaysia, Philippines, Taiwan,Thailand, Pakistan, Singapore, Vietnam

SOURCE: ACEA, VDA | 2014

Europe accounts for 18% of commercial vehicle registrations worldwide

New commercial vehicle registrations — **world, market shares | 2013**

COMMERCIAL VEHICLES in 1,000 units	2013	% share	2012	% change 13/12
EUROPE	**2,288**	**18.3%**	**2,317**	**-1.2%**
EU	1,712	13.7%	1,695	1.0%
EFTA	72	0.6%	75	-3.7%
Russia	256	2.0%	259	-1.1%
Turkey	228	1.8%	261	-12.6%
Ukraine	20	0.2%	26	-24.7%
AMERICA [1]	**657**	**5.2%**	**628**	**4.5%**
NAFTA	430	3.4%	427	0.5%
of which USA	352	2.8%	346	1.7%
MERCOSUR	227	1.8%	201	13.0%
of which Brazil	187	1.5%	168	11.6%
ASIA	**8,938**	**71.4%**	**9,457**	**-5.5%**
China	5,680	45.4%	6,068	-6.4%
Japan	813	6.5%	797	2.0%
India	687	5.5%	814	-15.6%
South Korea	246	2.0%	235	4.8%
Asia-Others [2]	1,511	12.1%	1,543	-2.1%
OTHERS	**638**	**5.1%**	**630**	**1.3%**
TOTAL WORLD	**12,521**	**100.0%**	**13,032**	**-3.9%**



1. Excluding light commercial vehicles
2. Indonesia, Malaysia, Pakistan, Philippines, Singapore, Taiwan, Thailand, Vietnam

SOURCE: ACEA, VDA | 2014

REGISTRATIONS

The EU represents a market of almost 14 million vehicles

Motor vehicle registrations in the EU — **by country | 2013**

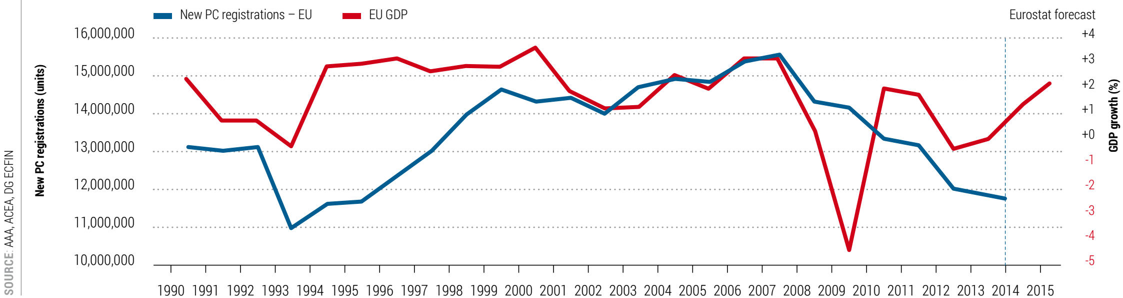
					TOTAL
AT	319,035	30,701	7,443	713	357,892
BE	486,065	53,419	7,655	765	547,904
BG	19,352	3,614	n.a.	n.a.	22,966
CY	7,102	909	62	n.a.	8,073
CZ	164,736	11,669	8,643	891	185,939
DK	182,198	24,039	4,310	401	210,948
EE	19,500	2,702	861	126	23,189
FI	103,450	10,405	3,508	388	117,751
FR	1,790,456	364,989	44,965	6,963	2,207,373
DE	2,952,431	212,691	86,772	5,824	3,257,718
GR	58,694	3,431	345	100	62,570
HU	56,139	11,418	4,986	432	72,975
IE	74,303	11,076	1,554	163	87,096
IT	1,303,534	100,989	12,596	2,375	1,419,494
LV	10,637	2,174	1,406	239	14,456
LT	12,152	1,823	3,421	176	17,572
LU	46,624	3,142	949	171	50,886
NL	417,036	50,582	13,523	583	481,724
PL	289,913	42,182	19,715	1,385	353,195
PT	105,921	18,202	2,392	174	126,689
RO	57,710	8,681	3,192	865	70,448
SK	66,000	5,075	3,856	275	75,206
SI	50,878	6,727	1,195	154	58,954
ES	722,703	85,463	13,136	1,648	822,950
SE	269,599	37,342	4,896	1,230	313,067
UK	2,264,737	271,073	52,952	6,951	2,595,713
EU [1]	**11,850,905**	**1,374,518**	**304,333**	**32,992**	**13,562,748**
IS	7,274	584	91	73	8,022
NO	142,151	30,859	5,773	1,259	180,042
CH	307,885	29,242	3,569	585	341,281
EFTA	**457,310**	**60,685**	**9,433**	**1,917**	**529,345**
EU+EFTA	**12,308,215**	**1,435,203**	**313,766**	**34,909**	**14,092,093**

1. Data for Malta not available

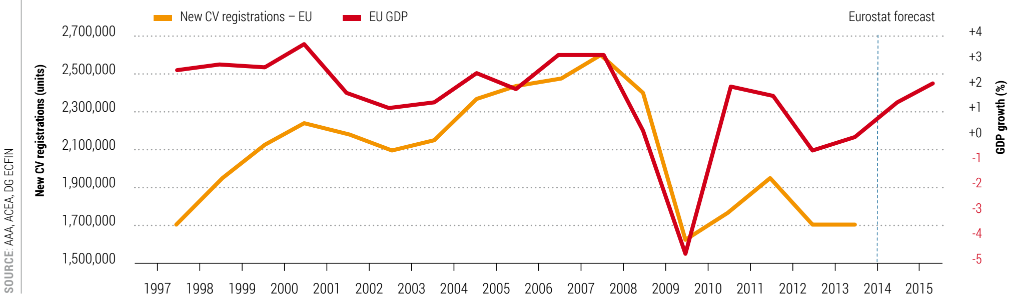
SOURCE: ACEA (NATIONAL AUTOMOBILE ASSOCIATIONS) | 2014

Vehicle sales mirror economic growth

New passenger car registrations in the EU and GDP | **1990-2013**

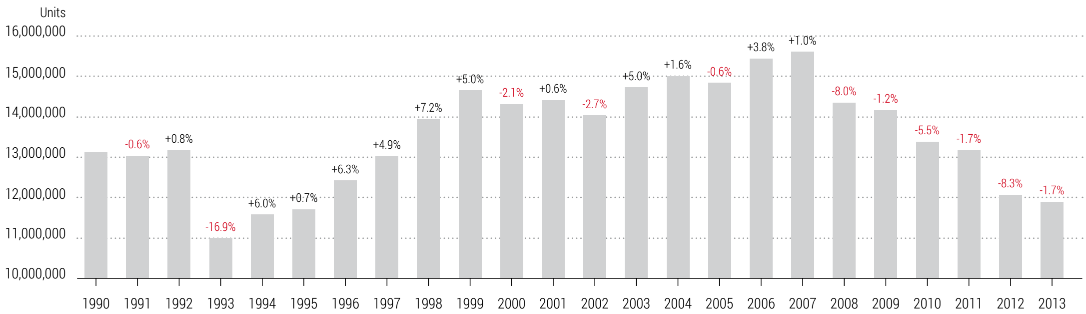


New commercial vehicle registrations in the EU and GDP | **1997-2013**



Trend in new EU car registrations

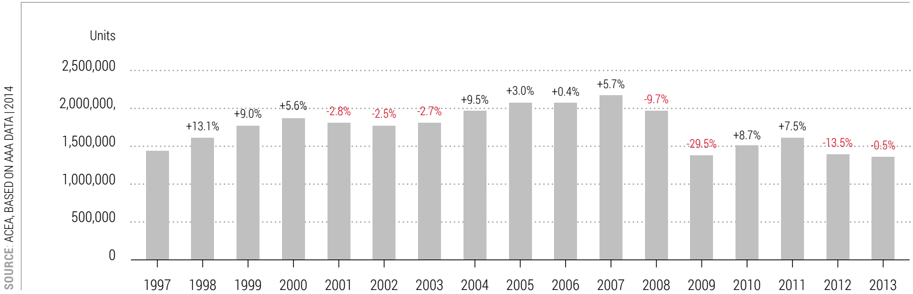
New passenger car registrations in the EU — **in units, % change | 1990-2013**



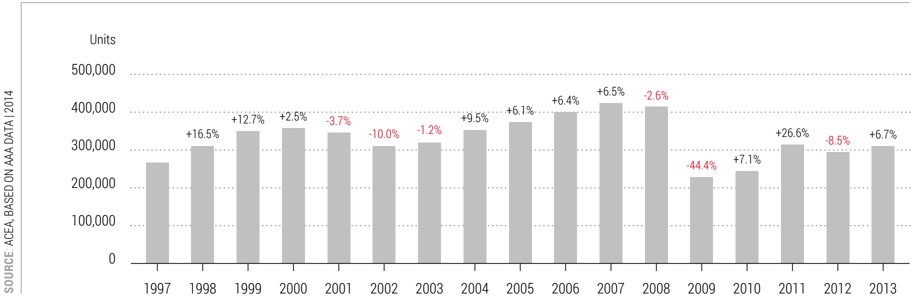
SOURCE: ACEA | 2014

Trend in new EU commercial vehicle registrations

New light commercial vehicle registrations in the EU — **in units, % change | 1997-2013**



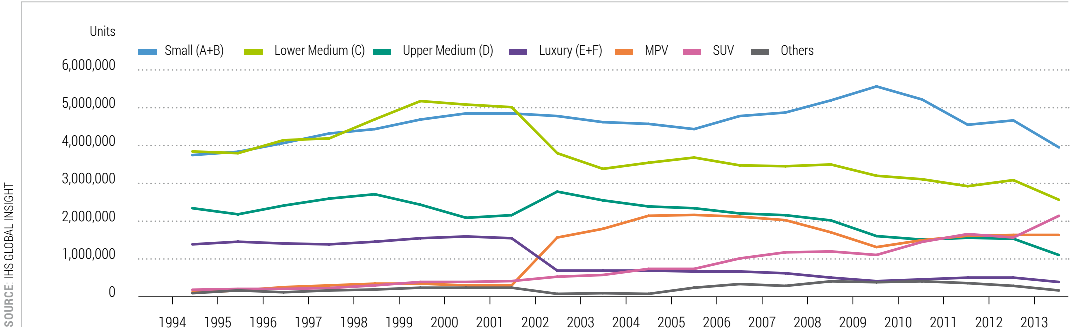
New medium & heavy commercial vehicle registrations in the EU — **in units, % change | 1997-2013**



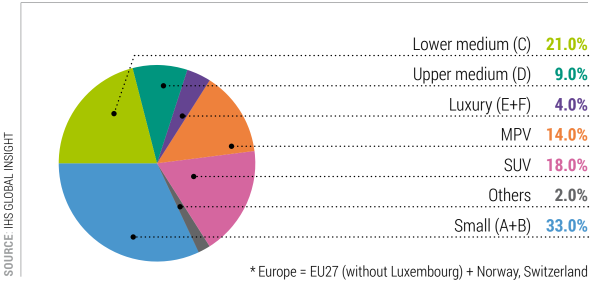
REGISTRATIONS

A closer look at consumer demand

New passenger cars sold in Europe* — **by segment, in units | 1994-2013**



New cars sold in Europe* — **by segment, % share | 2013**

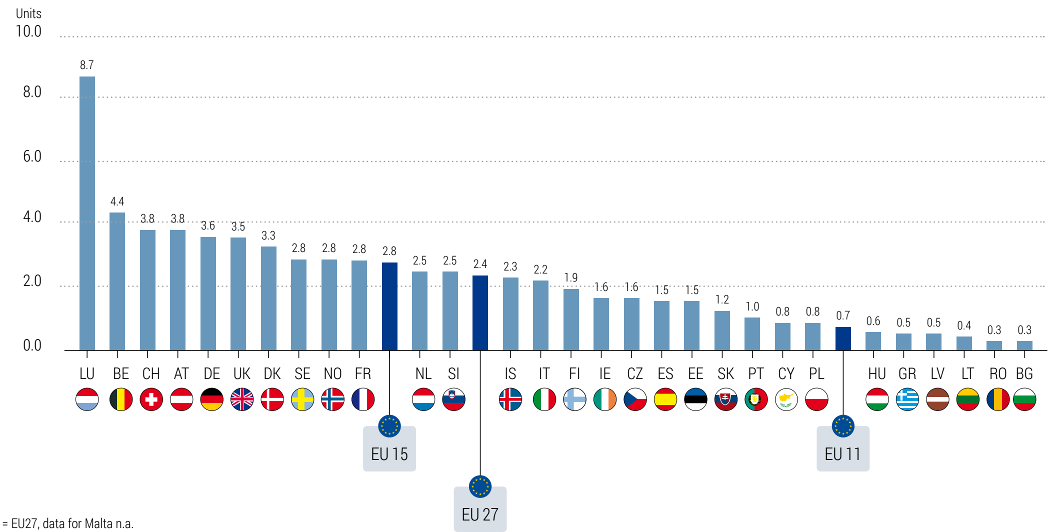


* Europe = EU27 (without Luxembourg) + Norway, Switzerland

More information on trends in new car characteristics at **www.acea.be**

2.4 new cars were registered per 100 inhabitants in the EU in 2013

New passenger car registrations per 100 inhabitants — **in units | 2013**



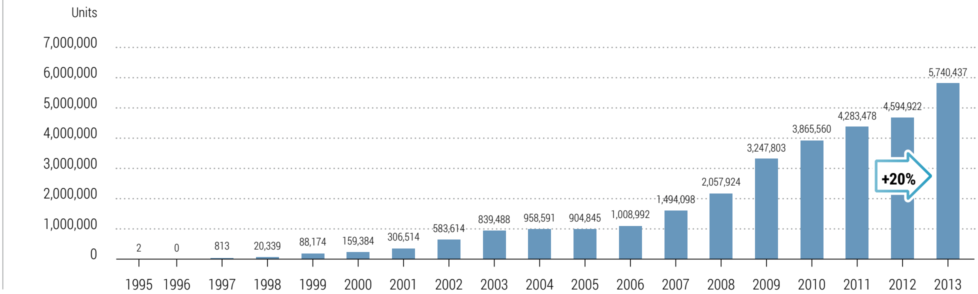
EU = EU27, data for Malta n.a.
EU15 = AT, BE, DE, DK, ES, FI, FR, GR, IE, IT, LU, NL, PT, SE, UK
EU11 = BG, CY, CZ, EE, HU, LV, LT, PL, RO, SK, SI

SOURCE: ACEA, EUROSTAT | 2013

The drive towards fuel efficiency

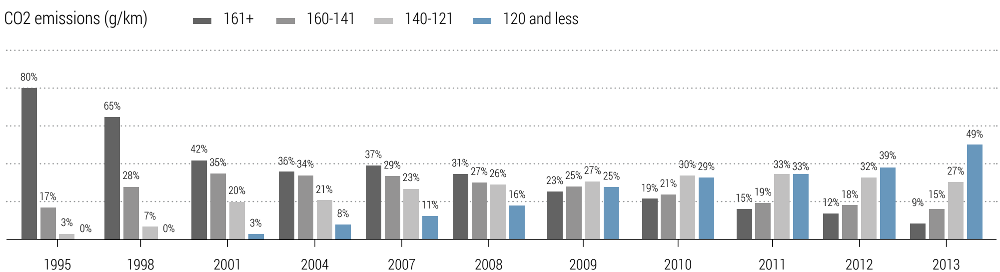
Demand for passenger cars ≤ 120g CO2 /km | **1995-2013**

SOURCE: BASED ON AAA DATA | 1995-2009: EU15, 2010-2012: 23 EU COUNTRIES (DATA FOR BG, RO, CY, MT N.A.)



New passenger cars in the EU — **by CO2 emissions | 1995-2013**

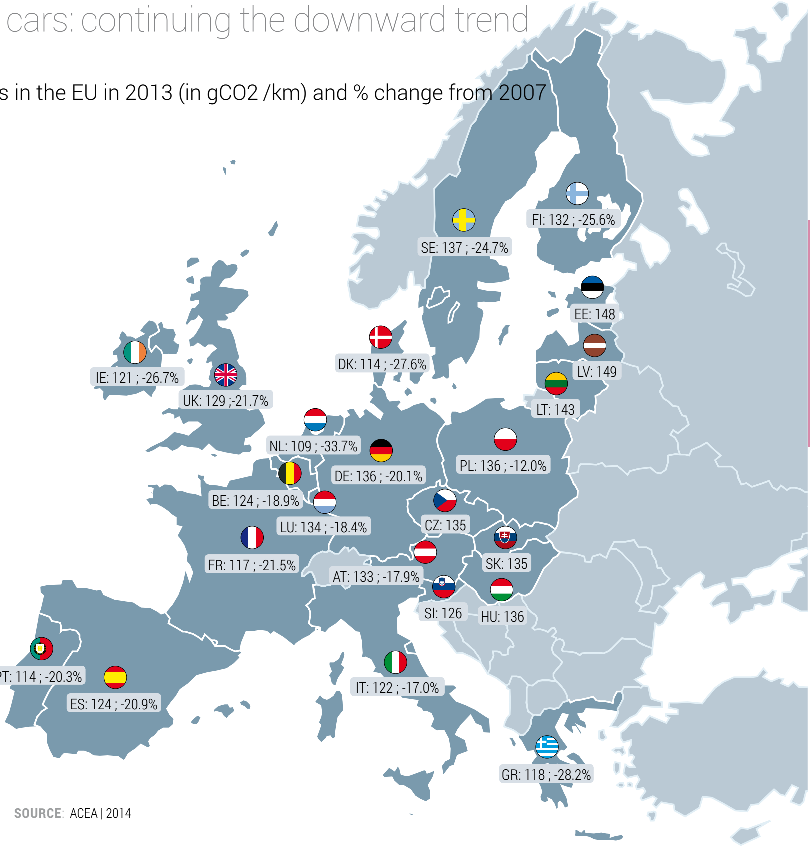
SOURCE: BASED ON AAA DATA | 1995-2009: EU15, 2010-2012: 23 EU COUNTRIES (DATA FOR BG, RO, CY, MT N.A.)



CO2 emissions of new cars: continuing the downward trend

Average CO2 emissions of new cars in the EU in 2013 (in gCO2 /km) and % change from 2007

	Average CO2 of new cars in 2013	% change 2013/2007
NL	109	-33.7%
DK	114	-27.6%
PT	114	-20.3%
FR	117	-21.5%
GR	118	-28.2%
IE	121	-26.7%
IT	122	-17.0%
BE	124	-18.9%
ES	124	-20.9%
SI	126	
UK	129	-21.7%
FI	132	-25.6%
AT	133	-17.9%
LU	134	-18.4%
SK	135	
CZ	135	
HU	136	
PL	136	-12.0%
DE	136	-20.1%
SE	137	-24.7%
LT	143	
EE	148	
LV	149	

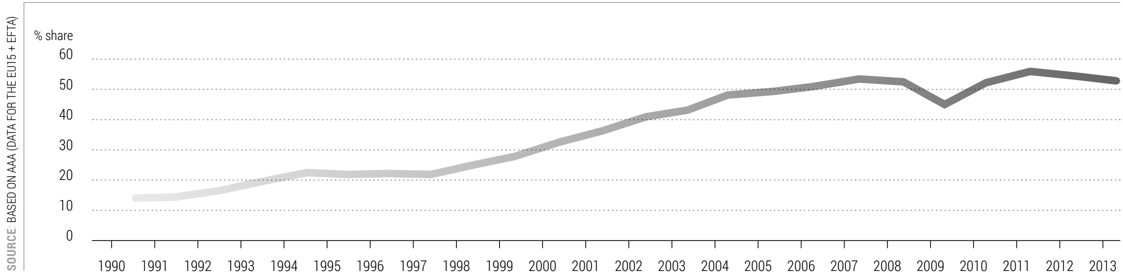


SOURCE: ACEA | 2014

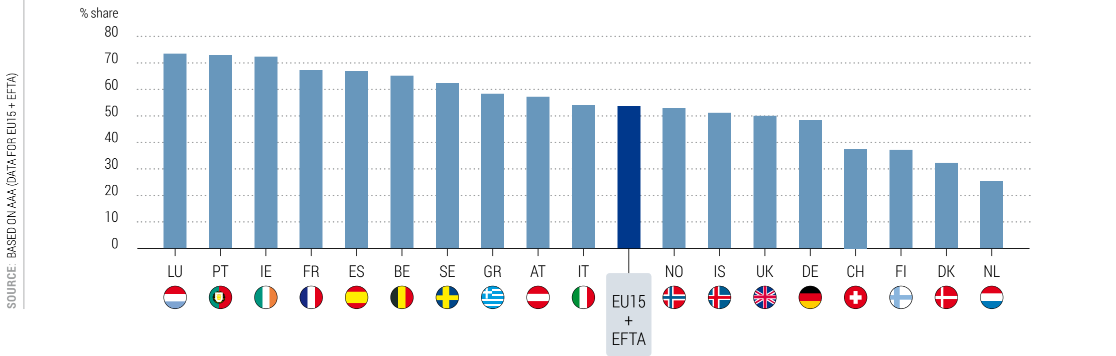
REGISTRATIONS

Most new cars have a diesel engine

Diesel penetration in the EU15 + EFTA — **% of new cars registered | 1990-2013**



Diesel penetration in the EU15 + EFTA — **by country, % of new cars registered | 2013**



More information on trends in new car characteristics at **www.acea.be/index.php/news/news_detail/trends_in_new_car_characteristics**

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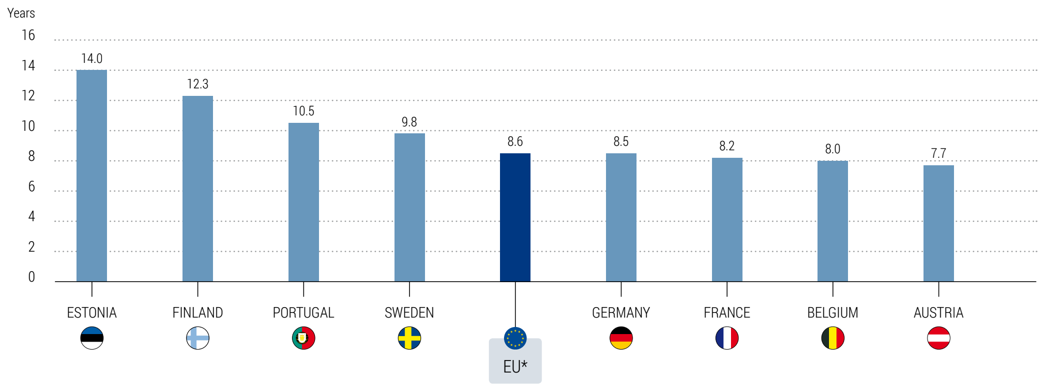
4 Vehicles in Use

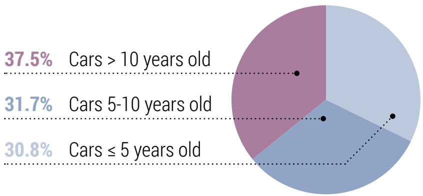
Cars in the EU are on average 8.6 years old

Average passenger car age — **by country** | **2011**



SOURCE: ANFAC, ACEA | 2014

Passenger car fleet* — **by age, % share** | **2011**

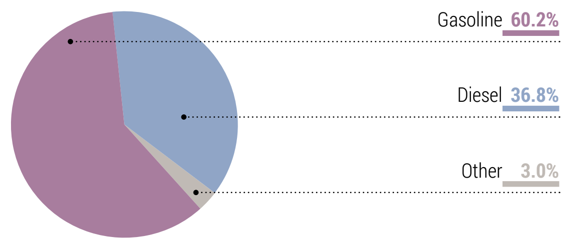


SOURCE: ANFAC, ACEA | 2014

* for available countries: Austria, Belgium, Estonia, Denmark, Finland, France, Germany, Greece, Italy, Netherlands, Portugal, Spain, Sweden, UK.

The share of diesel in the EU car fleet is gradually increasing

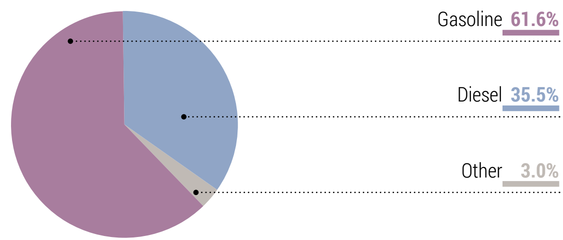
EU car fleet — **by fuel type, % share | 2011**



SOURCE: ANFAC, ACEA | 2014

* for available countries: Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Italy, Latvia, Netherlands, Poland, Romania, Sweden, United Kingdom.

EU car fleet — **by fuel type, % share | 2010**

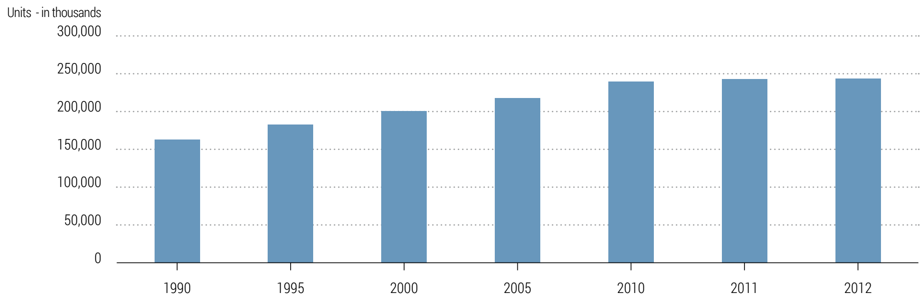


SOURCE: ANFAC, ACEA | 2012

* for available countries: Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Italy, Latvia, Lithuania, Netherlands, Poland, Romania, Spain, Sweden, UK.

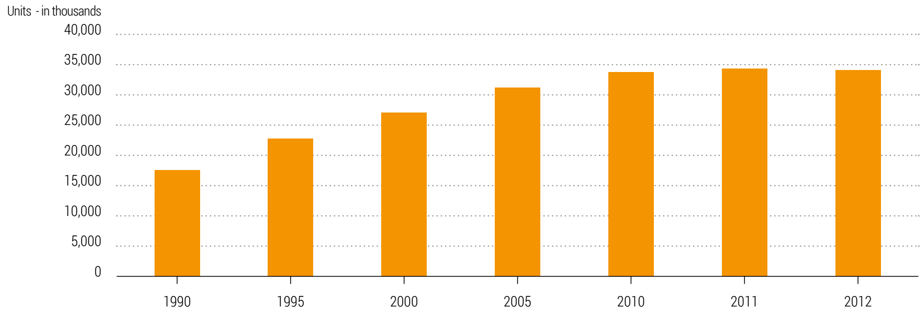
The EU's vehicle fleet continues to grow

EU passenger car fleet— **in units | 1990 – 2012**



SOURCE: EUROSTAT | 2014

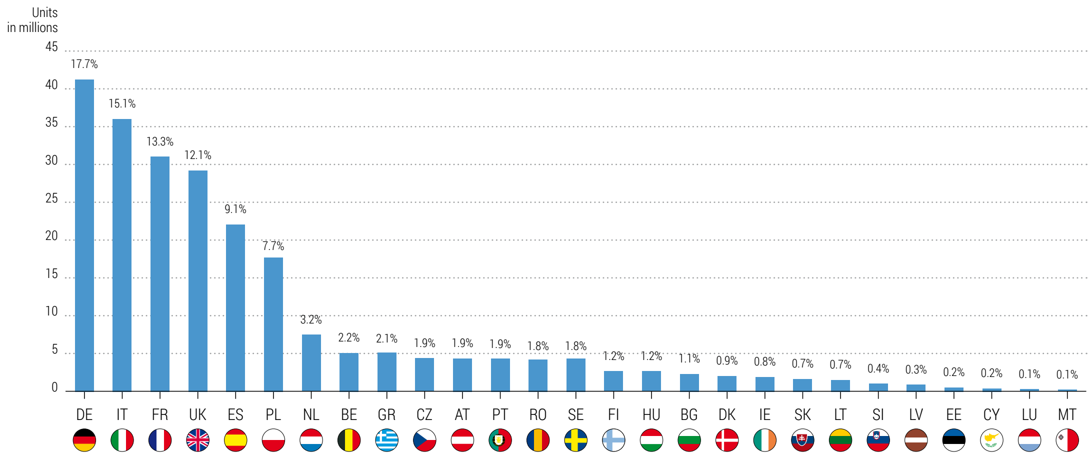
EU commercial vehicle fleet — **in units | 1990 – 2012**



SOURCE: EUROSTAT | 2014

Vehicle spread in the EU

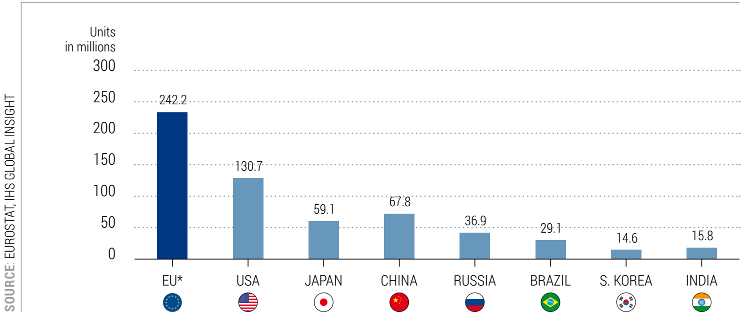
Passenger car fleet — **by country, % share & in units | 2012**



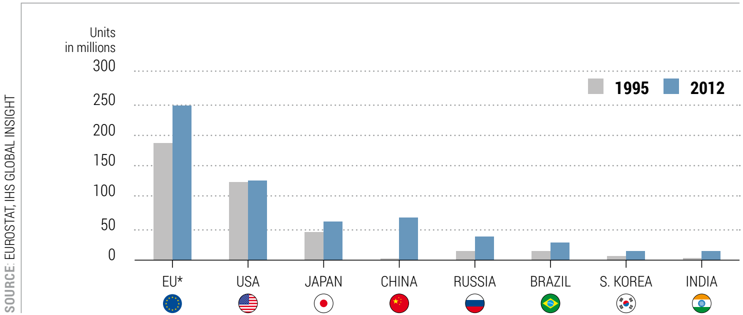
SOURCE: EUROSTAT | 2014

International comparison

Passenger car fleet— **in units | 2012**



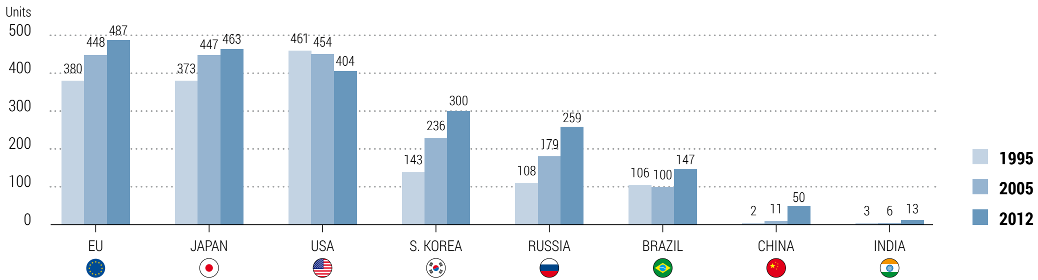
Passenger car fleet growth — **in units | 1995-2012**



* 27 countries included over the whole period

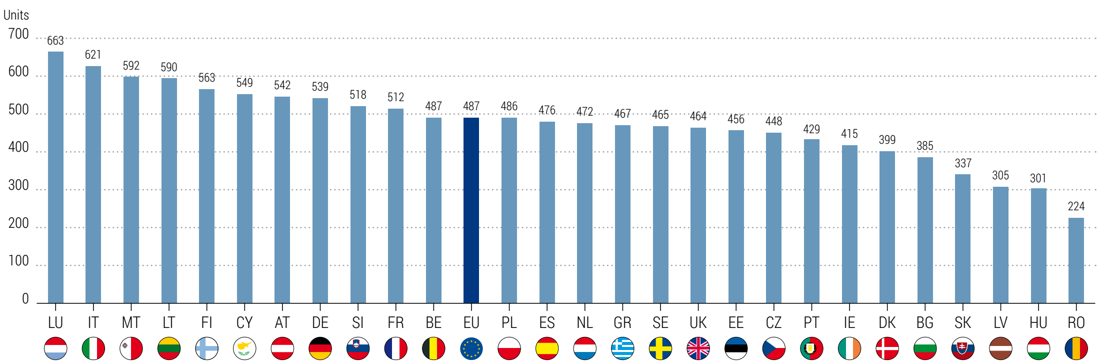
The EU has 487 cars per 1,000 inhabitants

Car density per 1,000 inhabitant — **world | 1995-2012**



SOURCE: EUROSTAT, IHS GLOBAL INSIGHT

Passenger car density per 1,000 inhabitants — **EU | 2012**



SOURCE: EUROSTAT | 2014

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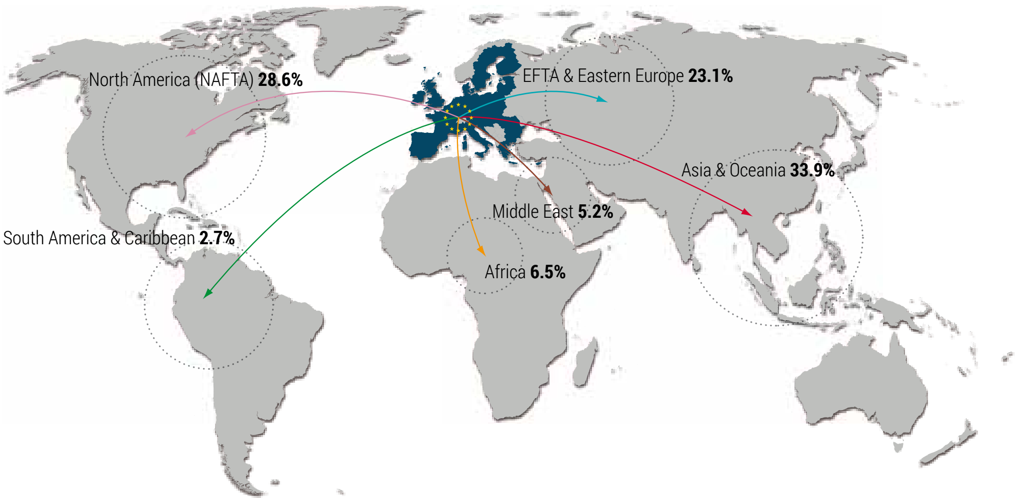
5

Trade

The EU automotive industry is a formidable exporter

EU exports of passenger cars — **by value, % share | 2013**



SOURCE: BASED ON EUROSTAT DATA | 2013

The EU exported 6.6 million vehicles in 2013

EU motor vehicle trade — **by type, in €m | 2013**

TRADE IN VALUE (€m)	2012 IMPORTS	2012 EXPORTS	2012 TRADE BALANCE	2013 IMPORTS	2013 EXPORTS	2013 TRADE BALANCE	% CHG 13/12 IMPORTS	% CHG 13/12 EXPORTS	% CHG 13/12 TRADE BALANCE
Passenger cars	24,074	107,751	83,677	23,510	111,560	88,050	-2.3%	3.5%	5.2%
Commercial vehicles (up to 5t)	3,401	4,637	1,236	3,487	4,503	1,016	2.5%	-2.9%	-17.8%
Commercial vehicles (over 5t) + buses & coaches	823	7,156	6,333	995	6,987	5,992	20.9%	-2.4%	-5.4%
TOTAL	**28,298**	**119,544**	**91,246**	**27,992**	**123,050**	**95,058**	**-1.1%**	**2.9%**	**4.2%**

SOURCE: EUROSTAT | 2013

EU motor vehicle trade — **by type, in units | 2013**

TRADE IN VOLUME (units)	2012 IMPORTS	2012 EXPORTS	2013 IMPORTS	2013 EXPORTS	% CHG 13/12 IMPORTS	% CHG 13/12 EXPORTS
Passenger cars	1,976,748	5,764,041	2,022,602	5,888,736	2.3%	2.2%
Commercial vehicles (up to 5t)	332,002	427,487	286,831	512,452	-13.6%	19.9%
Commercial vehicles (over 5t) + buses & coaches	91,560	220,134	89,342	247,215	-2.4%	12.3%
TOTAL	**2,400,310**	**6,411,662**	**2,398,775**	**6,648,403**	**-0.1%**	**3.7%**

SOURCE: EUROSTAT | 2013

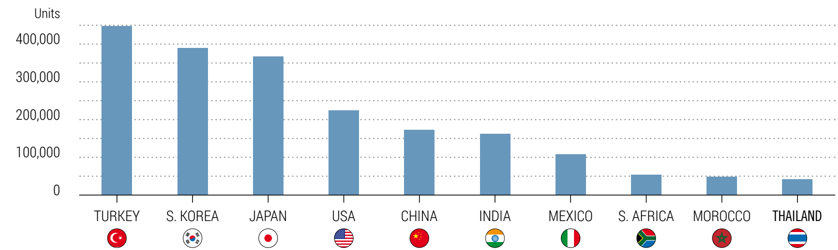
A closer look at imports of all vehicle categories

Origin of EU motor vehicle imports — **in units | 2013**

	2007	2008	2009	2010	2011	2012	2013	% CHG 13/13	% SHARE IN 2013
World	**3,620,596**	**3,246,820**	**2,522,080**	**2,488,966**	**2,527,846**	**2,400,310**	**2,398,775**	**-0.1%**	**100.0%**
Turkey	516,265	529,232	369,309	434,401	458,543	478,779	455,137	-4.9%	19.0%
South Korea	640,323	446,070	350,740	295,044	376,618	377,448	390,616	3.5%	16.3%
Japan	966,429	862,930	671,091	605,229	516,008	389,425	369,211	-5.2%	15.4%
United States	450,878	366,619	156,215	186,702	243,264	242,930	219,932	-9.5%	9.2%
China	349,075	268,069	209,158	164,993	161,487	182,961	172,976	-5.5%	7.2%
India	58,380	98,935	259,357	230,018	258,884	150,495	161,411	7.3%	6.7%
Mexico	151,916	182,124	116,449	139,319	184,367	166,889	107,335	-35.7%	4.5%
South Africa	25,263	32,392	35,934	70,091	77,578	62,289	56,637	-9.1%	2.4%
Morocco	2,995	2,386	3,877	3,891	7,150	19,515	50,172	157.1%	2.1%
Thailand	83,088	62,943	35,919	44,434	40,470	25,262	41,088	62.6%	1.7%

SOURCE: EUROSTAT | 2013

Origin of EU motor vehicle imports | **2013**



SOURCE: BASED ON EUROSTAT DATA | 2013

TRADE

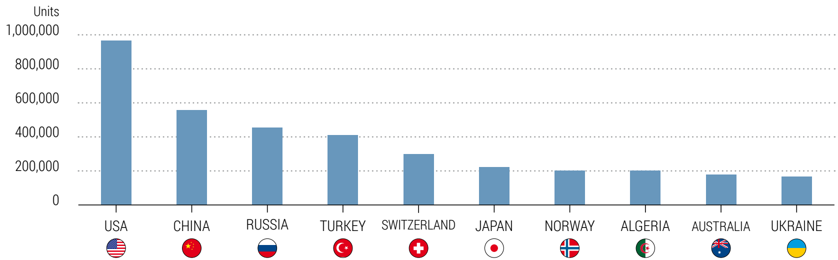
Most EU motor vehicle exports go to the US

Main destinations of EU motor vehicle **exports** — in units | 2013

	2007	2008	2009	2010	2011	2012	2013	% CHG 13/12	% SHARE IN 2013
World	**5,319,592**	**5,359,061**	**3,740,221**	**4,772,147**	**6,372,235**	**6,411,662**	**6,648,403**	**3.7%**	**100.0%**
United States	981,406	880,676	550,839	714,941	751,800	884,522	960,721	8.6%	14.5%
China	98,355	137,777	174,239	349,704	487,103	534,744	564,613	5.6%	8.5%
Russia	603,832	728,660	191,339	320,398	506,738	606,985	481,499	-20.7%	7.2%
Turkey	204,205	202,778	155,691	301,825	335,711	310,040	429,021	38.4%	6.5%
Switzerland	263,514	254,674	222,420	275,923	316,752	326,368	296,746	-9.1%	4.5%
Japan	191,055	145,009	114,670	148,109	177,898	207,151	245,172	18.4%	3.7%
Norway	165,650	135,024	114,962	155,595	167,996	163,107	217,598	33.4%	3.3%
Algeria	64,699	85,369	81,906	86,072	109,419	224,969	210,194	-6.6%	3.2%
Australia	135,932	136,538	96,374	141,255	156,381	190,290	186,843	-1.8%	2.8%
Ukraine	126,023	164,788	39,334	111,509	132,544	165,736	171,683	3.6%	2.6%

SOURCE: EUROSTAT | 2013

Destination of EU motor vehicle **exports** — in units | 2013



SOURCE: BASED ON EUROSTAT DATA | 2013

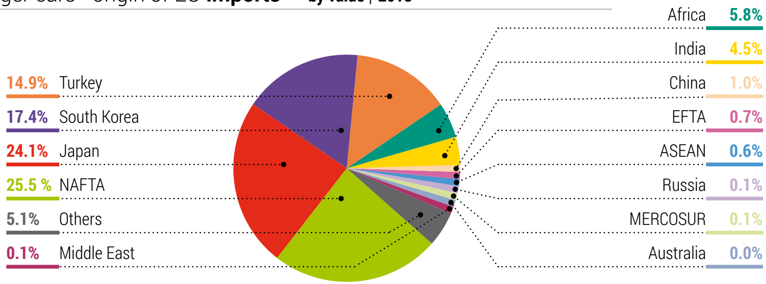
The US and Japan account for the highest import value for cars

Origin of most EU passenger car **imports** — by value, in €m | 2013

	2007	2008	2009	2010	2011	2012	2013	% CHG 13/12	% SHARE IN 2013
World	**33,617**	**29,953**	**22,137**	**22,572**	**25,268**	**24,074**	**23,510**	**-2.3%**	**100.0%**
Japan	11,875	10,720	8,284	7,701	7,469	5,868	5,678	-3.2%	24.1%
United States	6,368	6,007	2,967	3,491	4,670	5,516	4,313	-21.8%	18.3%
South Korea	6,746	3,997	2,631	2,477	3,424	3,915	4,087	4.4%	17.4%
Turkey	4,256	3,719	3,210	3,416	3,353	3,132	3,513	12.2%	14.9%
Mexico	1,998	2,414	1,501	1,773	2,467	2,374	1,604	-32.4%	6.8%
India	333	586	1,539	1,347	1,775	978	1,066	9.0%	4.5%
Morocco	46	40	27	10	163	608	763	25.5%	3.2%
South Africa	70	301	470	847	905	548	586	6.8%	2.5%
China	483	541	399	455	394	332	243	-26.8%	1.0%
Thailand	139	179	112	142	96	38	145	282.8%	0.6%

SOURCE: EUROSTAT | 2013

Passenger cars - origin of EU **imports** — by value | 2013



SOURCE: BASED ON EUROSTAT DATA | 2013

TRADE

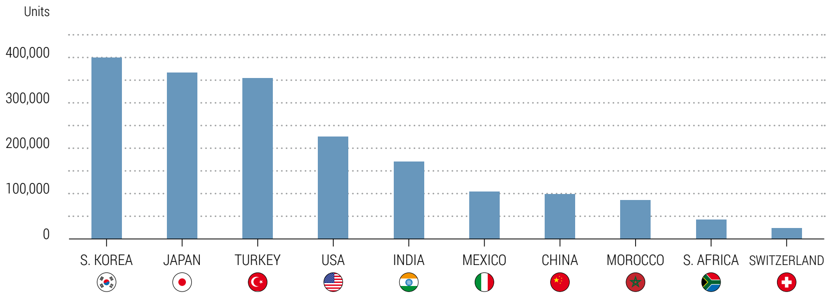
Most EU car imports come from South Korea

Origin of most EU passenger car **imports** — **in units | 2013**

	2007	2008	2009	2010	2011	2012	2013	% CHG 13/11	% SHARE IN 2013
World	**3,236,814**	**2,804,881**	**2,221,187**	**2,149,773**	**2,271,044**	**1,976,748**	**2,022,602**	**2.3%**	**100.0%**
South Korea	657,404	452,143	353,724	297,744	386,592	406,684	405,138	-0.4%	20.0%
Japan	955,261	859,627	680,141	606,489	515,648	390,939	365,652	-6.5%	18.1%
Turkey	390,123	365,758	316,224	332,643	337,340	319,690	362,355	13.3%	17.9%
United States	441,753	352,300	150,744	180,241	236,822	235,420	212,636	-9.7%	10.5%
India	61,621	99,547	266,204	232,821	260,604	150,914	172,965	14.6%	8.6%
Mexico	152,462	184,391	116,468	139,314	184,354	166,866	107,060	-35.8%	5.3%
China	336,866	253,813	154,775	155,679	149,464	110,642	101,418	-8.3%	5.0%
Morocco	6,977	5,472	3,044	2,959	19,846	62,385	83,956	34.6%	4.2%
South Africa	3,905	20,612	31,418	65,420	72,100	43,934	42,482	-3.3%	2.1%
Switzerland	41,287	36,315	26,263	23,962	23,506	22,562	30,422	34.8%	1.5%

SOURCE: EUROSTAT | 2013

Origin of EU passenger car **imports** — **in units | 2013**



SOURCE: BASED ON EUROSTAT DATA | 2013

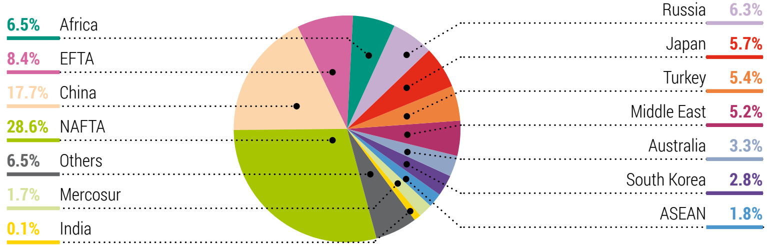
The US is the EU's most valuable export market

Main destinations of EU passenger car **exports** — in value, in €m | 2013

	2007	2008	2009	2010	2011	2012	2013	% CHG 13/12	% SHARE IN 2013
World	**69,751**	**68,453**	**47,714**	**75,767**	**93,171**	**107,751**	**111,560**	**3.5%**	**100.0%**
United States	24,748	20,520	12,768	19,128	19,482	24,939	27,834	11.6%	24.9%
China	3,344	4,608	5,475	12,182	17,335	19,296	19,698	2.1%	17.7%
Russia	6,627	8,758	2,563	4,063	7,016	8,744	7,071	-19.1%	6.3%
Japan	4,115	3,249	2,713	3,843	5,089	6,304	6,390	1.4%	5.7%
Switzerland	4,318	4,360	3,935	5,219	6,646	6,832	6,210	-9.1%	5.6%
Turkey	2,834	2,806	2,067	4,255	5,229	4,884	6,006	23.0%	5.4%
Australia	2,097	2,186	1,613	2,758	3,177	3,497	3,636	4.0%	3.3%
South Korea	974	911	805	1,682	1,955	2,497	3,129	25.3%	2.8%
Norway	2,694	2,180	1,854	2,699	3,016	3,174	3,039	-4.2%	2.7%
Canada	2,074	2,057	1,789	2,414	2,480	2,996	2,846	-5.0%	2.6%

SOURCE: EUROSTAT | 2013

Passenger cars - destination of EU **exports** — by value | 2013



SOURCE: BASED ON EUROSTAT DATA | 2013

TRADE

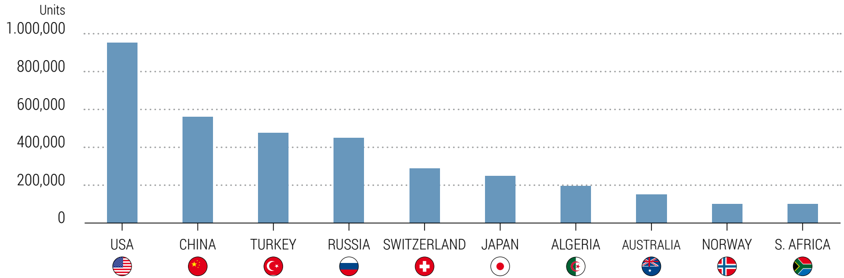
16% of EU car exports set sail to the US

Main destinations of EU passenger car **exports** — in units | 2013

	2007	2008	2009	2010	2011	2012	2013	% CHG 13/12	% SHARE IN 2013
World	**4,644,439**	**4,712,598**	**3,339,191**	**4,197,131**	**5,111,768**	**5,764,041**	**5,888,736**	**2.2%**	**100.0%**
United States	972,325	874,513	547,328	708,586	731,144	874,588	950,095	8.6%	16.1%
China	95,927	136,241	172,220	345,582	478,877	526,878	555,253	5.4%	9.4%
Turkey	225,508	223,334	170,457	339,561	388,001	357,131	487,134	36.4%	8.3%
Russia	528,678	670,382	176,595	291,164	470,880	565,987	442,025	-21.9%	7.5%
Switzerland	243,349	233,164	203,942	255,875	291,900	303,503	273,953	-9.7%	4.7%
Japan	190,864	145,006	114,650	148,083	175,242	206,714	245,364	18.7%	4.2%
Algeria	61,895	77,949	75,484	74,694	102,859	215,936	194,425	-10.0%	3.3%
Australia	107,470	109,740	84,157	123,250	141,396	150,429	165,846	10.2%	2.8%
Norway	151,956	122,103	110,027	147,473	153,693	145,260	136,836	-5.8%	2.3%
South Africa	102,828	65,611	62,834	93,145	123,355	116,179	129,605	11.6%	2.2%

SOURCE: EUROSTAT | 2013

Destination of EU passenger car **exports** — in units | 2013



SOURCE: BASED ON EUROSTAT DATA | 2013

ACEA

European Automobile Manufacturers Association

6 Taxation

CO2 taxation is gaining ground in the EU

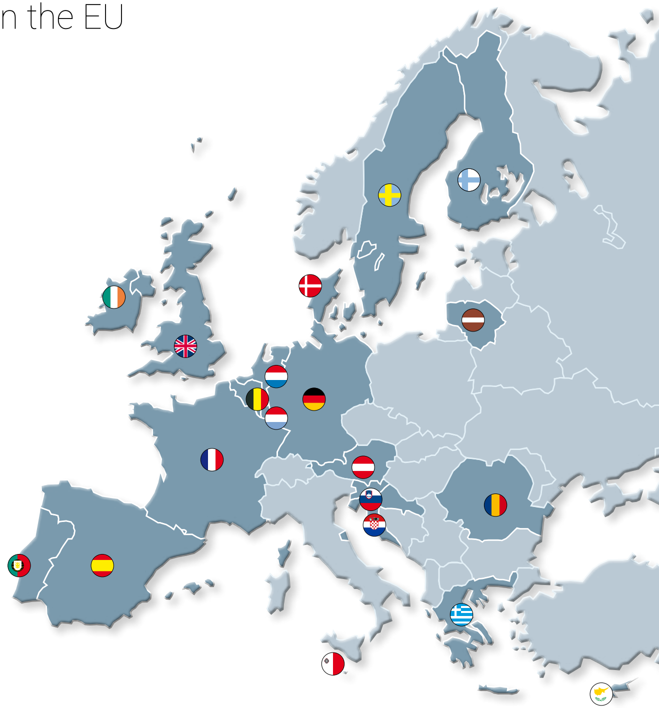
CO2 taxation is now well established across the European Union. 20 EU member states currently apply some form of CO2 tax to the registration and/or ownership of passenger cars, up from 17 in 2010.

The 20 EU countries that levy passenger car taxes partially or totally based on the cars' CO2 emissions and/or fuel consumption are: Austria, Belgium, Croatia, Cyprus, Denmark, Finland, France, Germany, Greece, Ireland, Latvia, Luxembourg, Malta, the Netherlands, Portugal, Romania, Slovenia, Spain, Sweden and the United Kingdom.

The European automobile industry welcomes this trend towards CO2-related car taxation. However, it regrets the lack of uniformity in the implementation of these taxes. European auto makers therefore support taxation for passenger cars that is:

– exclusively based on CO2 emissions;
– technologically neutral;
– linear; and
– budget neutral.

For more information, visit **www.acea.be**



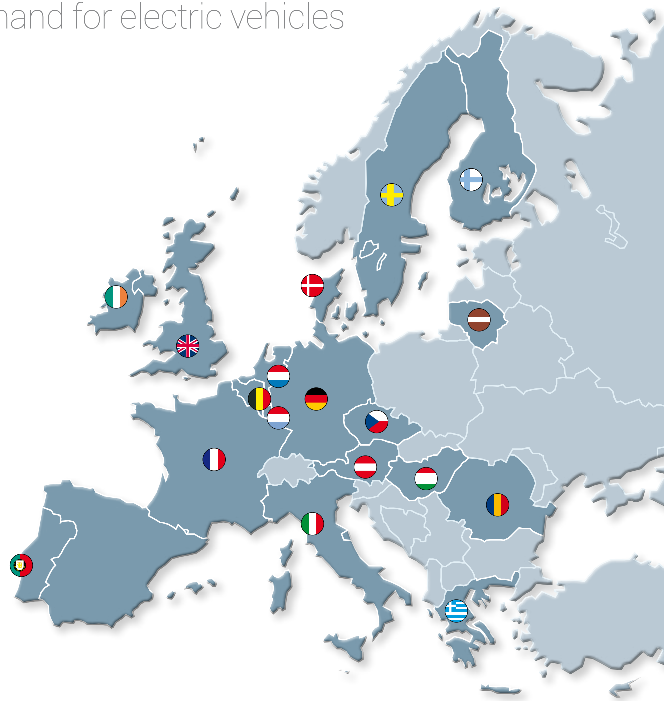
SOURCE: ACEA TAX GUIDE | 2014

Tax incentives help shape demand for electric vehicles

Incentives for electrically-chargeable vehicles are now applied in all western European countries. The incentives mainly consist of tax reductions and exemptions, as in countries such as Austria, Germany and the Netherlands, and bonus payments and premiums for the buyers of electric vehicles in France, Luxembourg and the UK.

The European car industry supports the further introduction of fiscal incentives for fuel efficiency. Tax measures are an important tool in shaping consumer demand towards fuel-efficient cars and help create a market for breakthrough technologies, notably during the introduction phase.

Innovations generally first enter the market in low volumes and at a significant cost premium, and this needs to be offset by a positive policy framework. Electric mobility will make an important contribution towards ensuring sustainable mobility. However, advanced conventional technologies, engines and fuels will play a predominant role for years to come. Governments must continue to include these CO2-efficient technologies and solutions in their overall sustainable mobility policy approach.



For more information, visit **www.acea.be**

SOURCE: ACEA TAX GUIDE | 2014

Motor vehicles are a vital source of government revenue

Fiscal income from motor vehicles in the EU*

	AT	BE	DK	DE	ES	FI	FR	GR	IE	IT	NL	PT	SE	UK
	€ bn 2012	€ bn 2012	DKK bn 2011	€ bn 2012	€ bn 2012	€ bn 2011	€ bn 2012	€ bn 2013	€ bn 2013	€ bn 2012	€ bn 2012	€ bn 2013	SEK bn 2012	£ bn 2012
Purchase or transfer														
1. VAT on vehicle sales servicing/repair, parts, tyres	2.510	6.060	N.A.	26.319	3.600	1.310	13.817	0.156	0.363	14.800	1.311	1.431	21.000	12.500
2. Fuels and lubricants	5.471	7.534	16.970	39.304	17.868	3.742	35.609	3.774	2.665	38.620	7.670	2.254	48.000	26.700
3. Sales and registration taxes	0.507	0.408	13.800		0.310	1.008	2.117	0.052	0.478	1.370	1.495	0.432		
Annual ownership taxes	1.773	1.512	9.872	8.991	2.886	0.706	1.157	1.304	1.155	6.350	3.592	0.506	12.000	5.880
Driving license fees		0.007		0.010	0.062		–				0.306			
Insurance taxes	0.310	0.934	1.757	3.786	0.600	0.299	4.373			4.620	0.403		2.800	
Tolls	1.622		0.370				10.542			1.730			0.800	
Customs duties				0.535			–					0.028		
Other taxes	0.290	0.759		1.010	0.390		1.624	0.055		5.600	2.864	0.196	4.200	1.500
TOTAL	**12.483**	**17.214**	**42.769**	**79.955**	**25.716**	**7.065**	**69.239**	**5.341**	**4.661**	**73.090**	**17.641**	**4.847**	**88.800**	**46.580**
EURO	**12.5**	**17.2**	**5.7**	**80.0**	**25.7**	**7.1**	**69.2**	**5.3**	**4.7**	**73.1**	**17.6**	**4.8**	**10.0**	**55.8**
GRAND TOTAL = €388.8bn														

* No data available for other EU member states.

SOURCE: ACEA | 2014

TAXATION

Share of VAT in net price of cars

Hungary	27%
Denmark, Sweden	25%
Romania, Finland	24%
Greece, Ireland, Poland, Portugal	23%
Italy	22%
Belgium, Czech Republic, Latvia, Lithuania, Netherlands, Spain	21%
Austria, Bulgaria, Estonia, Slovakia, Slovenia, UK	20%
France	19.6%
Germany, Cyprus	19%
Malta	18%
Luxembourg	15%

SOURCE: ACEA | 2014

Excise duties on fuels in **€/1,000 litres**

	AT	BE	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	UK	**EU** minimum rates
Unleaded petrol	515	628	363	479	501	423	456	650	607	670	454	416	587	728	434	465	434	411	509	759	395	586	383	656	549	551	674	359
Diesel	425	443	330	450	427	393	331	470	428	330	349	383	479	617	330	338	330	333	422	478	345	369	352	609	442	386	674	330

SOURCE: EUROPEAN COMMISSION | 2014

EU28

- **AT** Austria
- **BE** Belgium
- **BG** Bulgaria
- **CY** Cyprus
- **CZ** Czech Republic
- **DE** Germany
- **DK** Denmark
- **EE** Estonia
- **ES** Spain
- **FI** Finland
- **FR** France
- **GR** Greece
- **HR** Croatia
- **HU** Hungary
- **IE** Ireland
- **IT** Italy
- **LT** Lithuania
- **LU** Luxembourg
- **LV** Latvia
- **MT** Malta
- **NL** Netherlands
- **PL** Poland
- **PT** Portugal
- **RO** Romania
- **SE** Sweden
- **SI** Slovenia
- **SK** Slovakia
- **UK** United Kingdom

OTHERS

- **CH** Switzerland
- **IS** Iceland
- **NO** Norway
- **RS** Serbia
- **RU** Russia
- **TR** Turkey
- **UA** Ukraine

EUROPE EU27 + EFTA
EFTA Iceland + Norway + Switzerland
NAFTA USA + Canada + Mexico
BRIC Brazil + Russia + India + China
MERCOSUR Argentina + Brazil + Paraguay + Uruguay
ASEAN Brunei + Cambodia + Indonesia + Laos + Malaysia + Myanmar + Philippines + Singapore + Thailand + Vietnam

AAA Auxiliary Automobile Association
VDA German Association of the Automotive Industry
OICA International Organization of Motor Vehicle Manufacturers

CARS

PC Passenger cars
SUV Sport utility vehicles
MPV Multi-purpose vehicles

VANS

LCV Light commercial vehicles + minibus / coaches ≤ 3.5t

TRUCKS

MCV Medium commercial vehicles > 3.5t but ≤ 16t
HCV Heavy commercial vehicles > 16t
CV MCV + HCV

BUSES + COACHES

B&C Buses > 3.5t

MOTOR VEHICLES

MV Cars + vans + trucks + buses & coaches

PM particulate matter
CO carbon monoxide
NOX nitrogen oxides
CO2 carbon dioxide

m million
g gramme
tkm tonne-kilometre
GCW gross combined weight
bn billion
t tonne
pkm passenger-kilometre
GDP gross domestic product

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