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2016  
2017

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# The Automobile Industry Pocket Guide



ACEA

European  
Automobile  
Manufacturers  
Association

[WWW.ACEA.BE](http://WWW.ACEA.BE)



## Foreword

It is with great pleasure that I present to you the Automobile Industry Pocket Guide for 2016-2017. Updated with the latest data, it provides a clear overview of one of Europe's key industries, making the Pocket Guide a demanded and valued tool for all those interested in automotive industry issues and policies.

2016 is a special year for ACEA, as it was exactly 25 years ago that our association was founded. Looking back at what Europe's auto industry has achieved over these two and a half decades, it becomes clear that our industry has made a significant contribution to powering economic growth, spurring innovation, and driving safe and sustainable mobility for Europe and its citizens.

The latest employment data show that 12.2 million Europeans now work directly or indirectly in the automotive sector, producing 18.4 million cars, vans, trucks and buses a year. A fleet of 291 million motor vehicles provides efficient mobility and transport solutions across the EU. In 2015, 15.8 million new motor vehicles were sold in the EU, with automobile trade generating a healthy trade surplus of more than €100 billion.

Representing one of Europe's most vital strategic industries, ACEA continues to contribute constructively to discussions with policy makers and other stakeholders in order to strengthen the global competitiveness of the automobile sector. At the same time, we are committed to meeting tomorrow's challenges. In order to make mobility cleaner, smarter and safer in the future, the automobile industry will continue to play its role as a driving force for innovation in Europe. To that end, the automotive sector invests over €44.7 billion in innovation each year, making us the EU's largest investor in R&D.

A novelty to the 25<sup>th</sup> anniversary edition of our Pocket Guide, is that we are also making its content accessible through interactive infographics on our website, allowing everyone to explore the data in detail over time or to compare countries. I invite you to start exploring these figures and statistics by visiting the 'Interactive Infographics' part of our website's 'Statistics' section.



A handwritten signature in black ink, appearing to read 'Erik Jonnaert', written in a cursive style.

Erik Jonnaert  
**ACEA Secretary General**

**BMW Group**

**DAF**

**DAIMLER**

**FCA**  
FIAT CHRYSLER AUTOMOBILES



  
**HYUNDAI**

**IVECO**



**PSA**  
GROUPE

**GROUPE  
RENAULT**

**TOYOTA**

**VOLKSWAGEN**  
AKTIENGESELLSCHAFT



**VOLVO**

# 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 Trucks, Fiat Chrysler Automobiles, Ford of Europe, Hyundai Motor Europe, Iveco, Jaguar Land Rover, Opel Group, PSA Group, Renault Group, Toyota Motor Europe, Volkswagen Group, Volvo Cars and 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 the 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**

- 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.

## **Priority fields**

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

- Connected and Automated driving
- 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 comes 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.



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, matched with industry funding.

EUCAR collaborative research and innovation activities cover both passenger and commercial vehicles, focused on the following strategic pillars:



**SAFE & INTEGRATED MOBILITY**

Smart and safe vehicles for all purposes, integrated into a secure and intelligent transport system, progressing towards seamless mobility for all, maximum efficiency and ever-fewer accidents



**SUSTAINABLE PROPULSION**

Collaborative automotive R&I towards propulsion systems which are clean and energy efficient over the full life-cycle, with cost-effective technologies, while maintaining customer priorities



**AFFORDABILITY & COMPETITIVENESS**

New sustainable approach to developing and producing affordable and competitive vehicles in Europe



**COMMERCIAL VEHICLES**

An integrated approach for reliable, clean, safe and efficient freight transport and passenger mobility, through dedicated vehicle concepts and effective logistics



EUCAR is governed by its Council, composed of the heads of the research and advanced development divisions of the member companies.

The EUCAR Chairman is nominated annually from the Council on a rotating basis.

EUCAR's members are:

BMW Group, DAF Trucks, Daimler, Fiat Chrysler Automobiles, Ford of Europe, Hyundai Motor Europe, Jaguar Land Rover, Opel Group, PSA Group, Renault Group, Toyota Motor Europe, Volkswagen Group, Volvo Cars and Volvo Group.

## Key figures

### EMPLOYMENT

Manufacture of motor vehicles (EU28)	2.3 million people = 7.7% of EU employment in manufacturing	2013
Total (EU28 manufacturing, services and construction)	12.2 million people = 5.6% of total EU employment	2013

### PRODUCTION

Motor vehicles (world)	91.5 million units	2015
Motor vehicles (EU28)	18.4 million units = 20% of global motor vehicle production	2015
Passenger cars (world)	73.5 million units	2015
Passenger cars (EU28)	16.0 million units = 22% of global passenger car production	2015

### REGISTRATIONS

Motor vehicles (world)	90.8 million units	2015
Motor vehicles (EU27)	15.8 million units = 17% of global motor vehicle registrations/sales	2015
Passenger cars (world)	73.2 million units	2015
Passenger cars (EU27)	13.7 million units = 19% of global passenger car registrations/sales	2015
Diesel (EU28)	51.6%	2015
Alternative fuels (EU28)	3.0%	2015

### VEHICLES IN USE

Motor vehicles (EU28)	291.1 million units	2014
Passenger cars (EU28)	252.7 million units	2014
Motorisation rate (EU28)	574 units per 1,000 inhabitants	2014
Average age (EU28)	9.7 years	2015

### TRADE

Exports (extra-EU28)	€139.4 billion	2015
Imports (extra-EU28)	€39.1 billion	2015
Trade balance	€100.4 billion	2015

### ENVIRONMENT

Average CO2 emissions (EU28)	119.6g CO2/km	2015
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### INNOVATION

Automobiles & parts sector	€44.7 billion	2014
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### TAXATION

Fiscal income from motor vehicles (EU15)	€401.5 billion	2015
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# Employment



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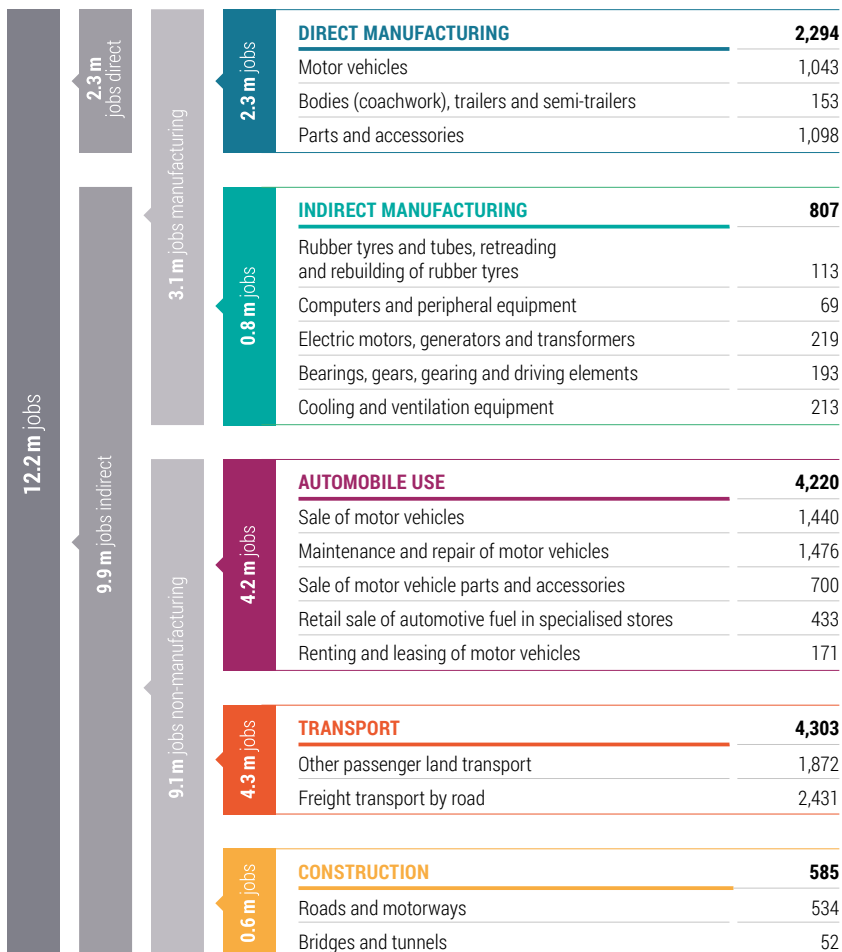
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## Automotive sector: direct and indirect employment in the EU

IN THOUSANDS / 2013

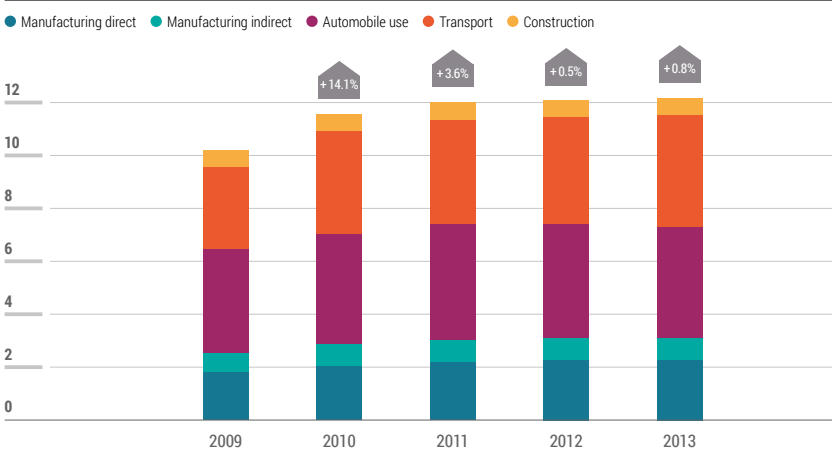


SOURCE: EUROSTAT

**The automotive industry provides  
direct and indirect jobs for 12.2 million Europeans**

## EU automotive employment

IN MILLION UNITS / 2009 – 2013



SOURCE: EUROSTAT

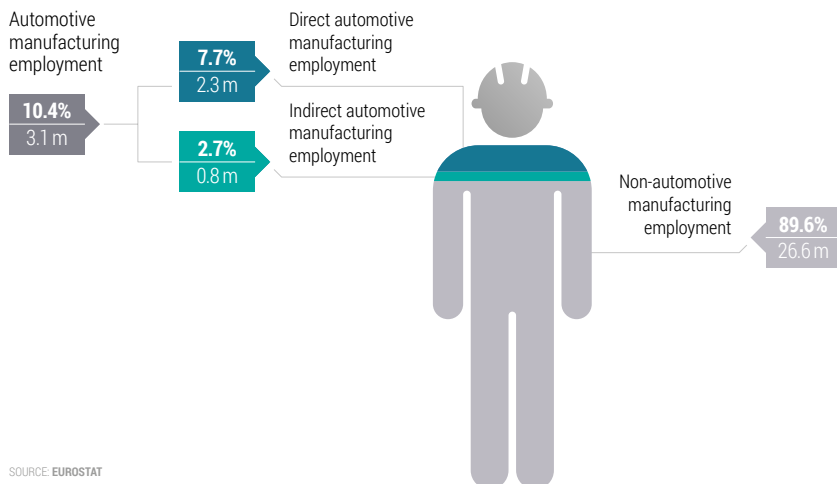
EU automotive employment	2009	2010	2011	2012	2013	% change 13/12
Manufacturing direct	1,807,450	2,049,371	2,230,937	2,290,416	2,294,104	0.2
Manufacturing indirect	750,703	813,283	844,287	829,588	806,641	-2.8
Automobile use	3,936,779	4,188,782	4,374,409	4,299,720	4,220,262	-1.8
Transport	3,116,011	3,926,462	3,945,370	4,067,166	4,303,079	5.8
Construction	587,592	653,989	653,752	625,386	585,195	-6.4
<b>TOTAL</b>	<b>10,198,535</b>	<b>11,631,887</b>	<b>12,048,755</b>	<b>12,112,276</b>	<b>12,209,281</b>	<b>0.8</b>

SOURCE: EUROSTAT

**The automotive sector accounts  
for 5.6% of all EU jobs**

## EU manufacturing employment

% SHARE / 2013



Direct automotive employment (manufacturing)

**2.3 m people**

= 7.7% of EU employment in manufacturing

Direct &amp; indirect automotive manufacturing employment

**3.1 m people**

= 10.4% of EU employment in manufacturing

Total automotive employment (manufacturing, services and construction)

**12.2 m people**

= 5.6% of total EU employment

EU economically-active population (labour force)

**242.5 m people**

EU total employment

**217.7 m people**

EU employment in the manufacturing sector

**29.7 m people**

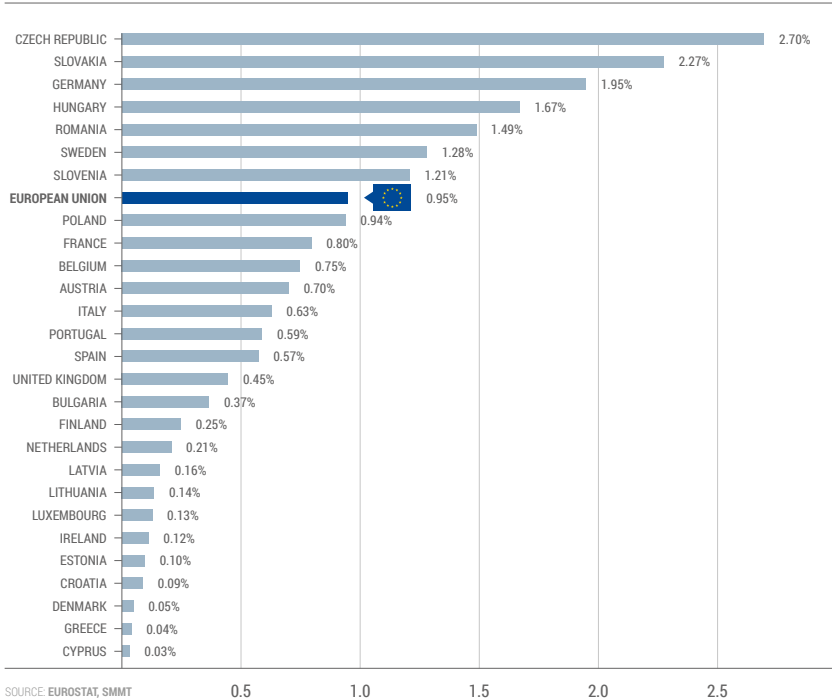
= 13.6% of total EU employment

SOURCE: EUROSTAT

**Over 10% of EU manufacturing employment is in the automotive sector**

## Direct automotive manufacturing employment / Active population ratio

% SHARE, BY COUNTRY / 2013



## Direct automotive manufacturing employment

BY COUNTRY / 2013

Austria	30,303	France	234,358	Netherlands	18,792
Belgium	36,973	Germany	815,127	Poland	162,830
Bulgaria	12,329	Greece	2,104	Portugal	30,461
Croatia	1,642	Hungary	74,362	Romania	137,512
Cyprus	144	Ireland	2,510	Slovakia	61,857
Czech Republic	142,556	Italy	161,318	Slovenia	12,234
Denmark	1,450	Latvia	1,621	Spain	131,493
Estonia	660	Lithuania	2,042	Sweden	66,400
Finland	6,687	Luxembourg	339	United Kingdom	146,000

 European Union 2,294,104

SOURCE: EUROSTAT, SMMT

**The EU automotive sector directly employs  
2.3 million people in manufacturing**





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# Production



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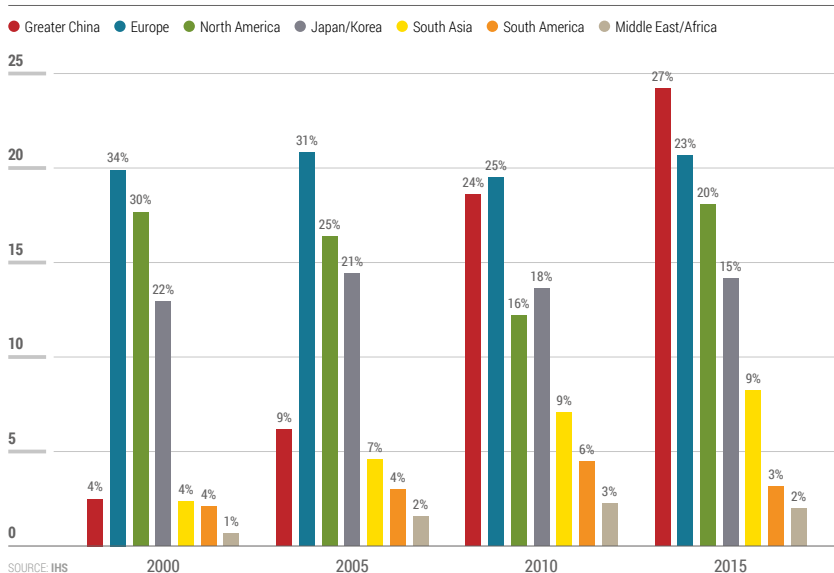
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## World motor vehicle production

IN MILLION UNITS, % SHARE / 2000 – 2015



## World motor vehicle production

IN 1,000 UNITS / 2015

	2015	2014	% change 15/14	% share 2015
Europe <sup>1</sup>	21,428	20,643	3.80	23.41
Greater China <sup>2</sup>	24,826	24,156	2.77	27.12
Japan/Korea	13,644	14,074	-3.06	14.91
Middle East/Africa	1,972	1,952	1.03	2.15
North America	18,053	17,523	3.03	19.72
South America	3,146	4,010	-21.56	3.44
South Asia	8,464	8,182	3.45	9.25
<b>WORLD</b>	<b>91,533</b>	<b>90,540</b>	<b>1.10</b>	<b>100.00</b>

SOURCE: IHS

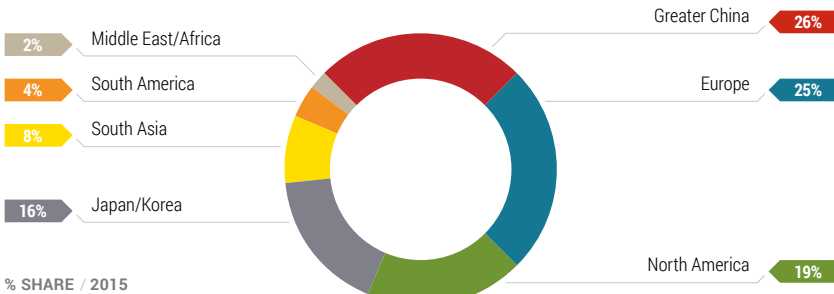
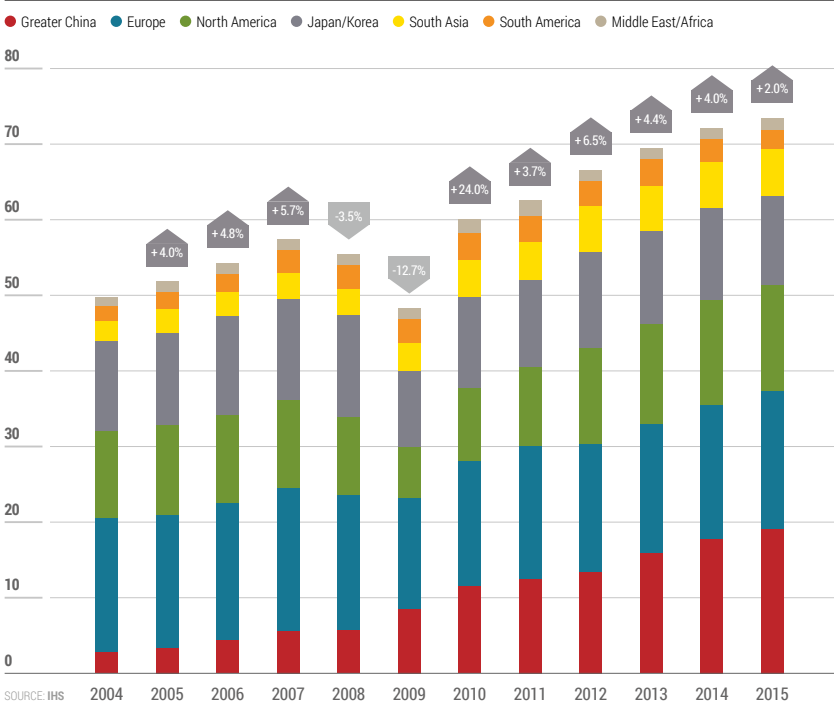
1. Includes Turkey and CIS countries

2. Includes Hong Kong and Taiwan

**91.5 million motor vehicles  
were produced globally in 2015**

## World passenger car production

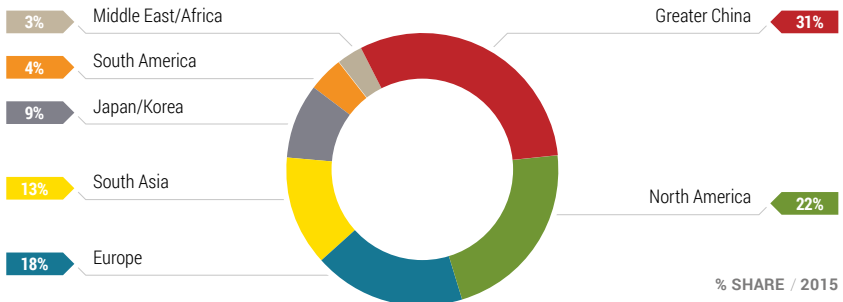
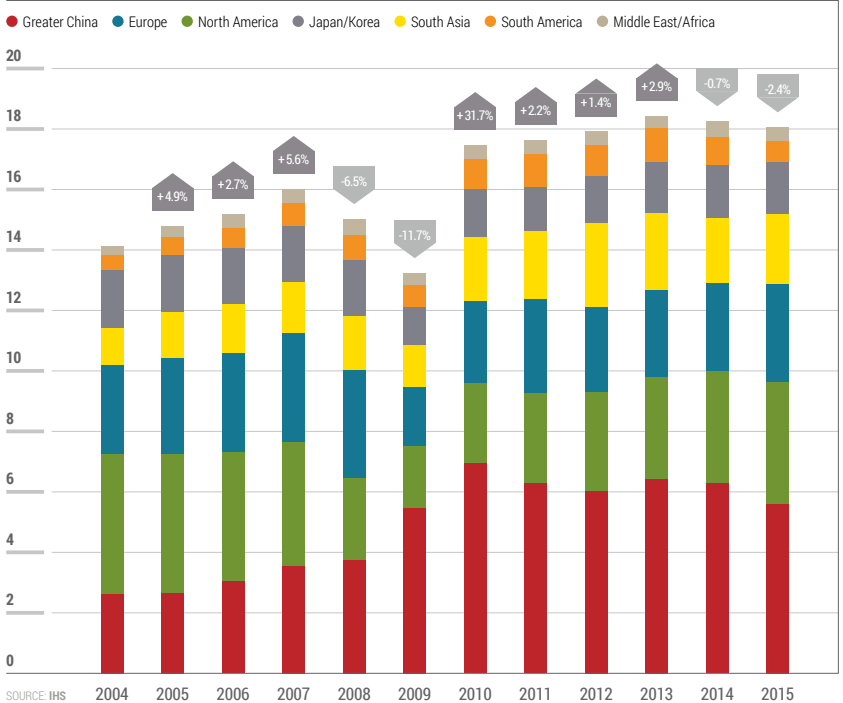
IN MILLION UNITS, % CHANGE / 2004 – 2015



**73.5 million passenger cars  
were produced globally in 2015**

### World commercial vehicle production


IN MILLION UNITS, % CHANGE / 2004 – 2015



**18.1 million commercial vehicles were manufactured worldwide in 2015**

## Motor vehicle production in the EU

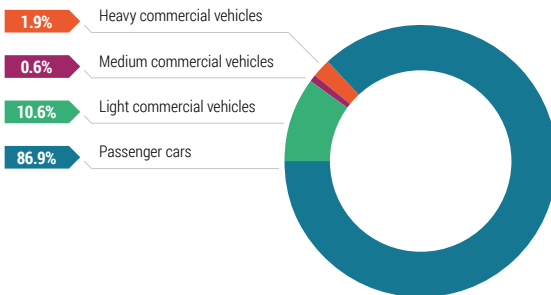
BY COUNTRY / 2015

	PC <sup>1</sup>	LCV <sup>2</sup>	MCV <sup>3</sup>	HCV <sup>4</sup>	TOTAL
Austria	102,512	–	11,342	7,759	121,613
Belgium	364,574	222	0	30,990	395,786
Bulgaria	975	758	–	–	1,733
Czech Republic	1,244,406	11,137	0	789	1,256,332
Finland	79,564	–	–	278	79,842
France	1,492,402	445,322	11,091	44,960	1,993,775
Germany	5,557,943	390,818	36,918	116,133	6,101,812
Hungary	522,955	–	–	0	522,955
Italy	666,234	280,606	32,383	10,287	989,510
Lithuania	–	–	0	70	70
Netherlands	56,778	–	–	62,485	119,263
Poland	472,041	172,519	0	10,372	654,932
Portugal	102,151	50,425	2,782	–	155,358
Romania	381,080	0	0	0	381,080
Slovakia	909,551	–	–	–	909,551
Slovenia	128,829	–	–	–	128,829
Spain	2,174,826	530,210	8,366	22,144	2,735,546
Sweden	171,949	–	–	35,918	207,867
United Kingdom	1,588,062	73,997	6,926	8,812	1,677,797
 <b>European Union</b>	<b>16,016,832</b>	<b>1,956,014</b>	<b>109,808</b>	<b>350,997</b>	<b>18,433,651</b>

SOURCE: IHS

## EU motor vehicle production by type

% SHARE / 2015

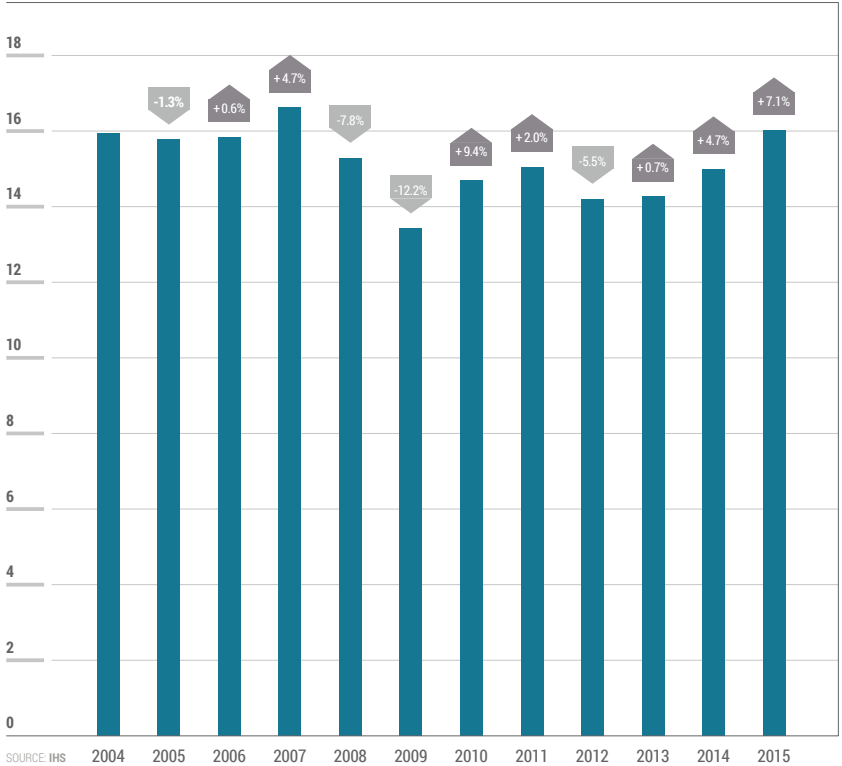


1. Passenger cars
2. Light commercial vehicles up to 3.5t
3. Medium commercial vehicles from 3.5t to 15t
4. Heavy commercial vehicles over 15t (incl. arctic trucks)

**18.4 million vehicles**  
**were manufactured in the EU in 2015**

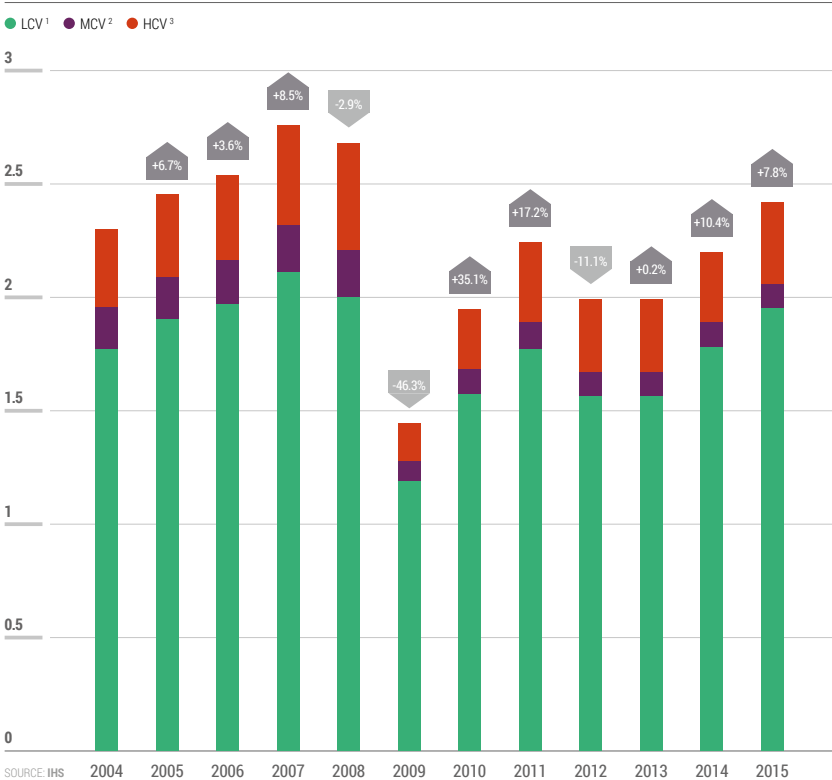
## Passenger car production in the EU

IN MILLION UNITS, % CHANGE / 2004 – 2015



Commercial vehicle production in the EU

IN MILLION UNITS, % CHANGE / 2004 – 2015



1. Light commercial vehicles up to 3.5t

2. Medium commercial vehicles from 3.5t to 15t

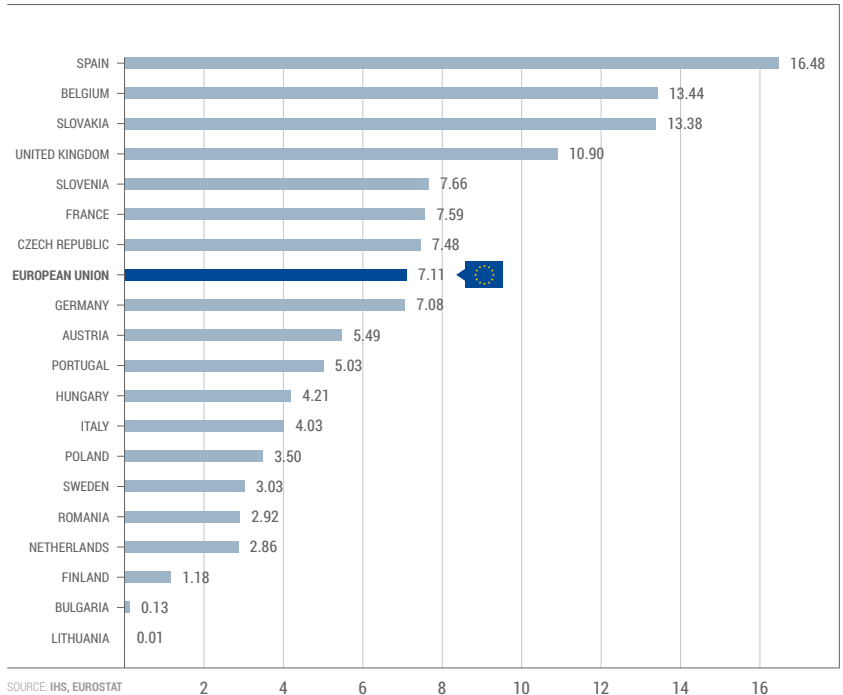
3. Heavy commercial vehicles over 15t (incl. arctic trucks)

**2.4 million commercial vehicles  
were produced in the EU in 2015**



## Motor vehicle production per direct automotive manufacturing worker

IN UNITS, BY COUNTRY / 2013\*



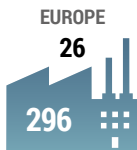
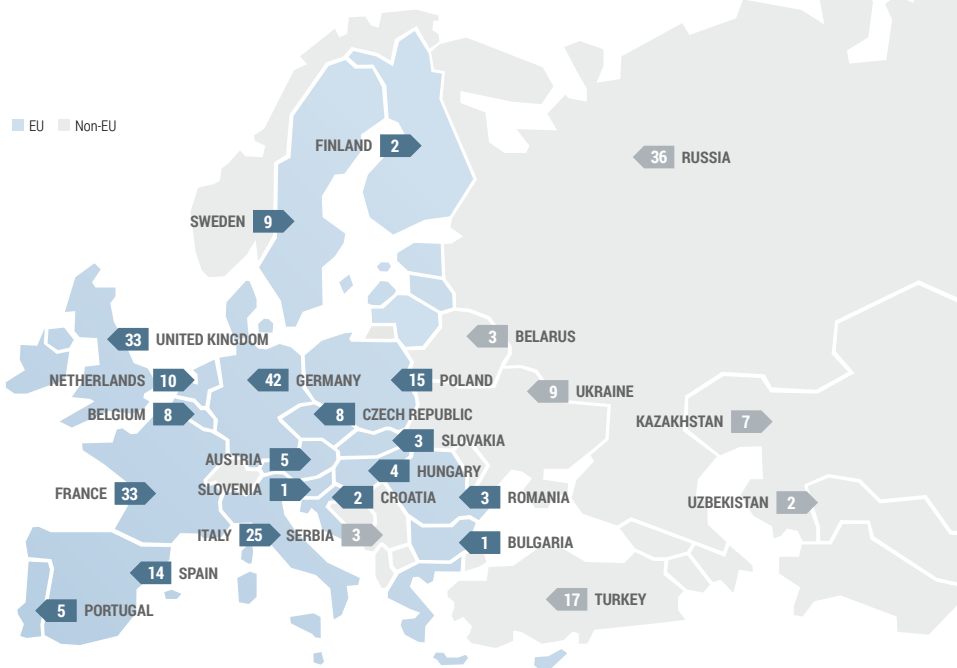
SOURCE: IHS, EUROSTAT

\* Based on most recent direct automotive manufacturing employment data available.

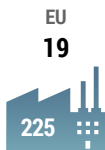
**The EU auto industry produces  
an average of 7 vehicles per worker annually**

## Automobile assembly and engine production plants in Europe

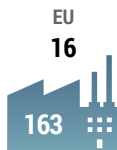
2016



ALL MANUFACTURERS



ACEA MEMBERS



SOURCE: ACEA

**There are 225 assembly and production plants in the EU**



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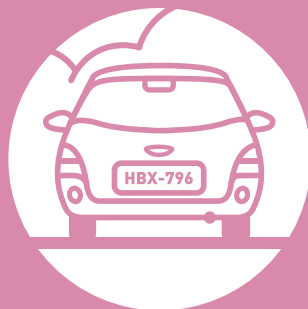
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# Registrations



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## World new motor vehicle registrations

MARKET SHARES / 2015

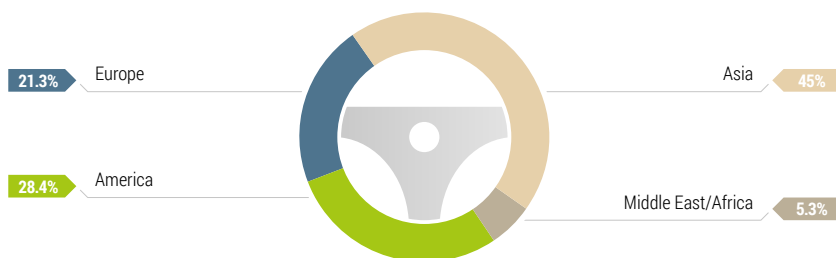
Motor vehicles	In 1,000 units	2015	2014	% change 15/14	% share 2015
<b>EUROPE</b>		<b>19,317</b>	<b>18,711</b>	<b>3.2</b>	<b>21.3</b>
EU <sup>1</sup>		15,793	14,401	9.7	17.4
EFTA		565	526	7.4	0.6
Russia		1,657	2,581	-35.8	1.8
Turkey		1,010	801	26.0	1.1
Ukraine		47	99	-52.0	0.1
Others: Europe <sup>2</sup>		245	303	-19.0	0.3
<b>AMERICA</b>		<b>25,803</b>	<b>25,572</b>	<b>0.9</b>	<b>28.4</b>
North America		21,255	19,959	6.5	23.4
<i>of which the US</i>		<i>17,929</i>	<i>16,926</i>	<i>5.9</i>	<i>19.7</i>
South America		4,549	5,613	-19.0	5.0
<i>of which Brazil</i>		<i>2,565</i>	<i>3,494</i>	<i>-26.6</i>	<i>2.8</i>
<b>ASIA</b>		<b>40,859</b>	<b>39,844</b>	<b>2.5</b>	<b>45.0</b>
China		25,333	24,264	4.4	27.9
Japan		5,038	5,558	-9.4	5.5
India		3,490	3,212	8.7	3.8
South Korea		1,839	1,654	11.2	2.0
Others: Asia <sup>3</sup>		5,160	5,155	0.1	5.7
<b>MIDDLE EAST/AFRICA</b>		<b>4,860</b>	<b>5,116</b>	<b>-5.0</b>	<b>5.3</b>
<b>WORLD</b>		<b>90,839</b>	<b>89,242</b>	<b>1.8</b>	<b>100.0</b>

SOURCE: ACEA, IHS

1. Data for Malta n.a.

2. Includes Belarus, Bosnia-Herzegovina, Kazakhstan, Macedonia, Serbia, Uzbekistan

3. Includes Hong Kong, Taiwan and other South Asian countries excluding India



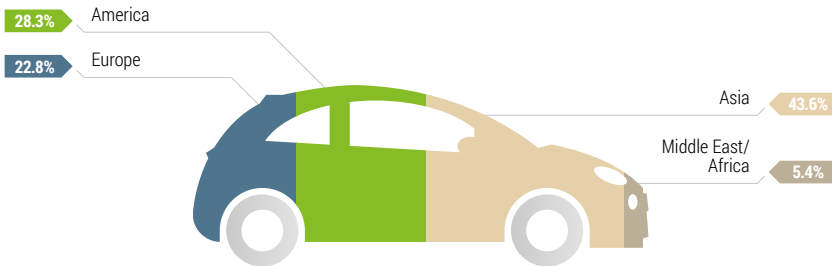
## World new passenger car registrations

MARKET SHARES / 2015

Passenger cars	In 1,000 units	2015	2014	% change 15/14	% share 2015
<b>EUROPE</b>		<b>16,672</b>	<b>16,270</b>	<b>2.5</b>	<b>22.8</b>
EU <sup>1</sup>		13,714	12,551	9.3	18.7
EFTA		488	456	7.2	0.7
Russia		1,495	2,327	-35.8	2.0
Turkey		726	587	23.5	1.0
Ukraine		43	91	-52.4	0.1
Others: Europe		206	257	-20.0	0.3
<b>AMERICA</b>		<b>20,714</b>	<b>20,630</b>	<b>0.4</b>	<b>28.3</b>
North America <sup>2</sup>		17,170	16,282	5.5	23.5
<i>of which the US</i>		<i>14,506</i>	<i>13,842</i>	<i>4.8</i>	<i>19.8</i>
South America		3,544	4,348	-18.5	4.8
<i>of which Brazil</i>		<i>2,125</i>	<i>2,801</i>	<i>-24.1</i>	<i>2.9</i>
<b>ASIA</b>		<b>31,888</b>	<b>30,376</b>	<b>5.0</b>	<b>43.6</b>
China		19,717	18,071	9.1	26.9
Japan		4,209	4,693	-10.3	5.7
India		2,823	2,601	8.6	3.9
South Korea		1,526	1,365	11.8	2.1
Others: Asia		3,612	3,646	-0.9	4.9
<b>MIDDLE EAST/AFRICA</b>		<b>3,937</b>	<b>4,084</b>	<b>-3.6</b>	<b>5.4</b>
<b>WORLD</b>		<b>73,210</b>	<b>71,360</b>	<b>2.6</b>	<b>100.0</b>

SOURCE: ACEA, IHS

1. Data for Malta n.a.  
2. Based on production type



**73.2 million cars were registered worldwide in 2015**

WWW.ACEA.BE

## World new commercial vehicle registrations

MARKET SHARES / 2015

Commercial vehicles <sup>1</sup> in 1,000 units	2015	2014	% change 15/14	% share 2015
<b>EUROPE</b>	<b>2,645</b>	<b>2,441</b>	<b>8.4</b>	<b>15.0</b>
EU <sup>2</sup>	2,079	1,849	12.4	11.8
EFTA	77	71	8.4	0.4
Russia	162	254	-36.3	0.9
Turkey	284	214	32.9	1.6
Ukraine	4	7	-47.2	0.0
Others: Europe	39	45	-13.1	0.2
<b>AMERICA</b>	<b>5,090</b>	<b>4,942</b>	<b>3.0</b>	<b>28.9</b>
North America <sup>3</sup>	4,085	3,677	11.1	23.2
<i>of which the US</i>	<i>3,423</i>	<i>3,084</i>	<i>11.0</i>	<i>19.4</i>
South America	1,005	1,265	-20.5	5.7
<i>of which Brazil</i>	<i>440</i>	<i>693</i>	<i>-36.6</i>	<i>2.5</i>
<b>ASIA</b>	<b>8,971</b>	<b>9,468</b>	<b>-5.2</b>	<b>50.9</b>
China	5,616	6,193	-9.3	31.9
Japan	828	865	-4.3	4.7
India	667	611	9.1	3.8
South Korea	313	288	8.6	1.8
Others: Asia	1,548	1,510	2.5	8.8
<b>MIDDLE EAST/AFRICA</b>	<b>922</b>	<b>1,032</b>	<b>-10.6</b>	<b>5.2</b>
<b>WORLD</b>	<b>17,629</b>	<b>17,882</b>	<b>-1.4</b>	<b>100.0</b>

SOURCE: ACEA, IHS

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

2. Data for Malta n.a.


3. Based on production type



**17.6 million vans, trucks and buses  
were registered globally in 2015**

## Motor vehicle registrations in the EU<sup>1</sup>

BY COUNTRY / 2015

	PC <sup>2</sup>	LCV <sup>3</sup>	CV <sup>4</sup>	BC <sup>5</sup>	TOTAL
Austria	308,555	32,862	7,281	899	349,597
Belgium	501,066	61,208	8,327	923	571,524
Bulgaria	23,500	4,553	-	-	28,053
Croatia	34,820	6,695	1,011	122	42,648
Cyprus	10,344	1,443	47	-	11,834
Czech Republic	230,857	17,131	10,732	1,350	260,070
Denmark	207,552	32,479	4,756	532	245,319
Estonia	20,349	3,580	762	230	24,921
Finland	108,812	11,431	2,707	526	123,476
France	1,917,226	377,738	42,783	7,345	2,345,092
Germany	3,206,042	237,902	89,744	6,137	3,539,825
Greece	75,805	5,653	457	129	82,044
Hungary	77,171	17,515	5,701	546	100,933
Ireland	124,945	23,722	1,841	313	150,821
Italy	1,574,872	132,186	15,248	2,419	1,724,725
Latvia	13,765	2,347	1,468	251	17,831
Lithuania	17,085	2,367	3,715	192	23,359
Luxembourg	46,473	3,807	1,076	251	51,607
Netherlands	449,393	57,717	13,767	344	521,221
Poland	354,975	53,285	22,437	1,739	432,436
Portugal	178,496	30,858	4,039	254	213,647
Romania	81,162	11,066	5,954	2,309	100,491
Slovakia	77,968	7,297	4,447	379	90,091
Slovenia	59,450	7,452	1,907	163	68,972
Spain	1,034,232	154,928	22,435	2,617	1,214,212
Sweden	345,108	44,798	5,457	1,330	396,693
United Kingdom	2,633,503	371,830	47,590	8,483	3,061,406
 European Union	<b>13,713,526</b>	<b>1,713,850</b>	<b>325,689</b>	<b>39,783</b>	<b>15,792,848</b>
Iceland	14,029	1,355	225	95	15,704
Norway	150,686	33,254	5,196	970	190,106
Switzerland	323,783	31,018	3,878	745	359,424
<b>EFTA</b>	<b>488,498</b>	<b>65,627</b>	<b>9,299</b>	<b>1,810</b>	<b>565,234</b>
<b>EU + EFTA</b>	<b>14,202,024</b>	<b>1,779,477</b>	<b>334,988</b>	<b>41,593</b>	<b>16,358,082</b>

SOURCE: ACEA, NATIONAL AUTOMOTIVE ASSOCIATIONS

1. Data for Malta n.a.

2. Passenger cars

3. New light commercial vehicles up to 3.5t

4. New commercial vehicles (trucks) over 3.5t

5. New buses and coaches over 3.5t

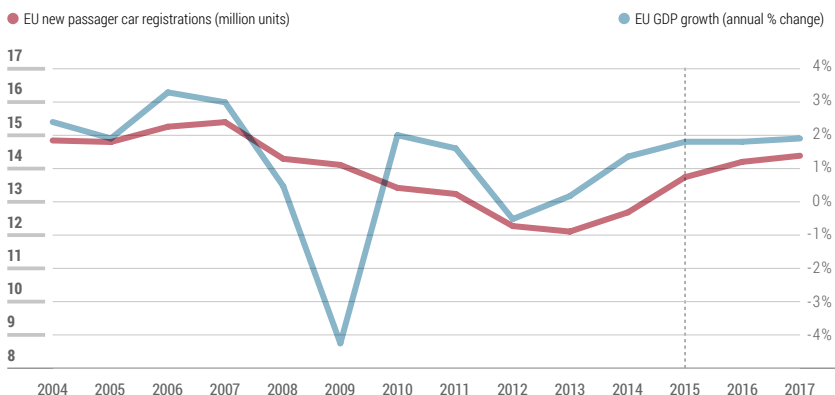
**The EU represents a market of 15.8 million vehicles**

WWW.ACEA.BE



## New passenger car registrations and annual GDP growth in the EU

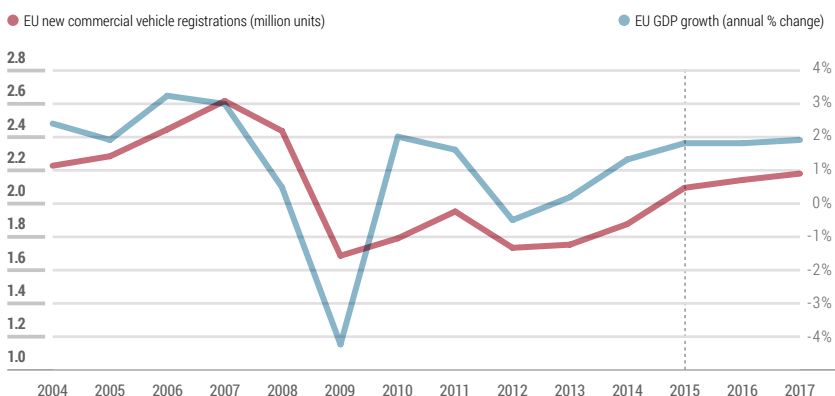
2004 – 2017



SOURCE: ACEA, IHS, DG ECFIN

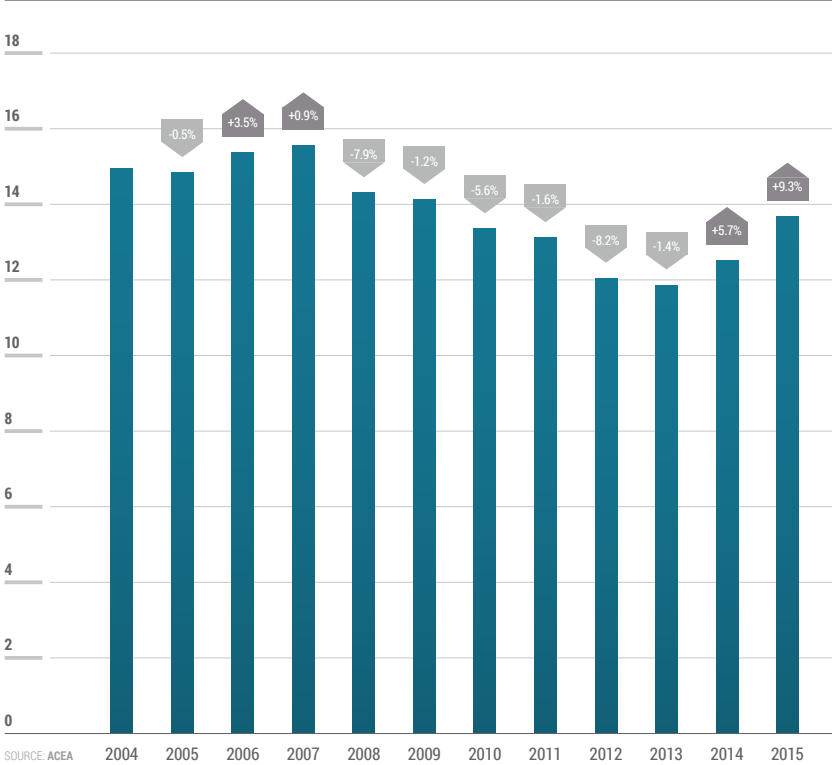
## New commercial vehicle registrations and annual GDP growth in the EU

2004 – 2017



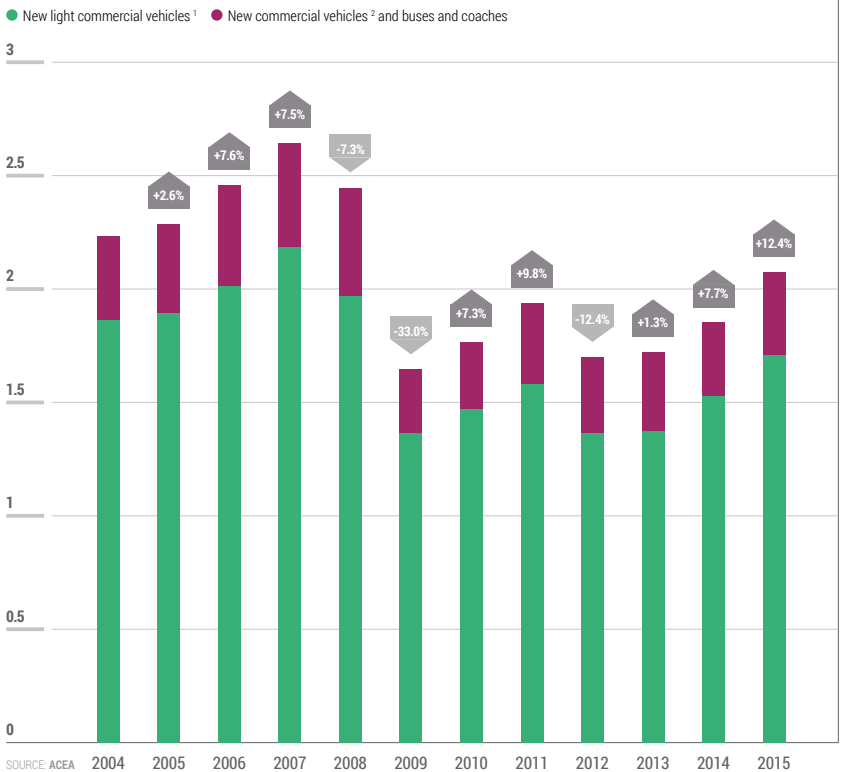
SOURCE: ACEA, IHS, DG ECFIN

New passenger car registrations in the EU IN MILLION UNITS, % CHANGE / 2004 – 2015



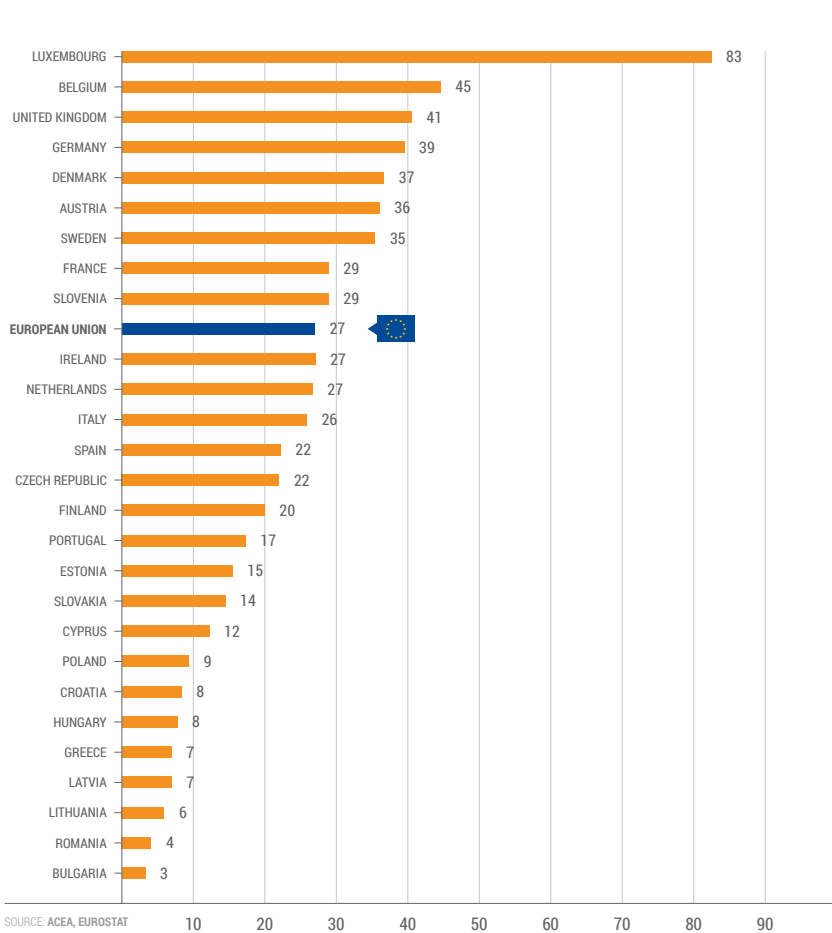
**13.7 million cars were registered in the EU in 2015**

## New commercial vehicle registrations in the EU IN MILLION UNITS, % CHANGE / 2004 – 2015



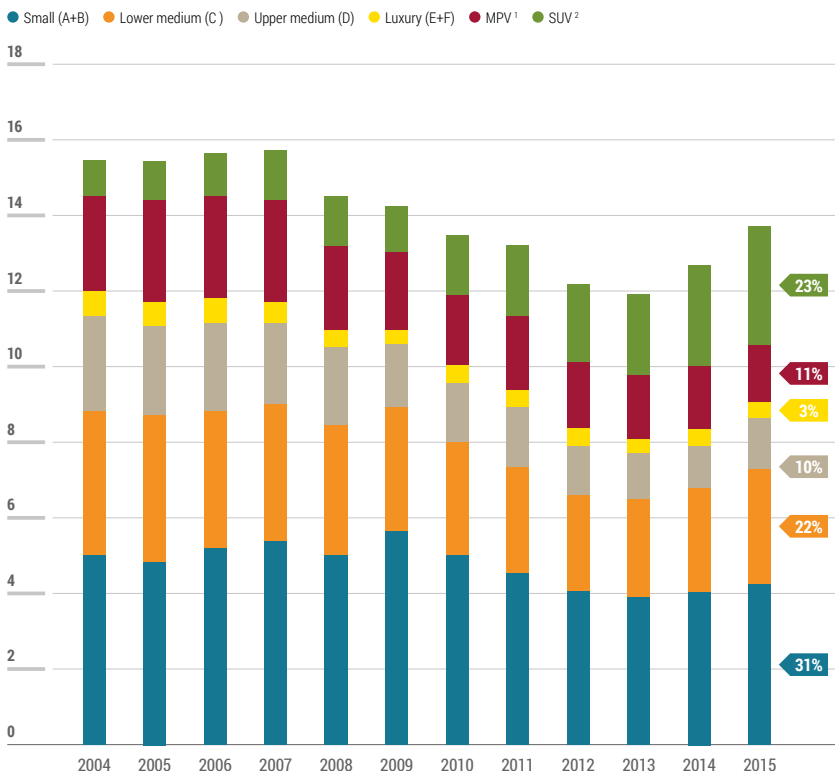
1. up to 3.5t  
2. over 3.5t

New passenger car registrations per 1,000 inhabitants BY COUNTRY, IN UNITS / 2015



**27 new cars were registered  
per 1,000 inhabitants in the EU in 2015**

## New passenger cars sold in the EU BY SEGMENT, IN MILLION UNITS, % SHARE / 2004 – 2015



SOURCE: IHS

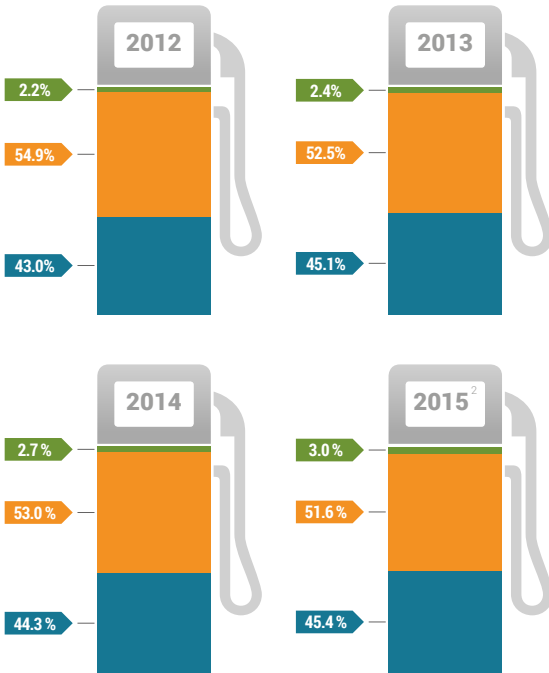
1. Multi-purpose vehicles  
2. Sport utility vehicles

**Small cars make up nearly  
one third of all EU car sales**

## New passenger cars in the EU by fuel type

% SHARE / 2012 – 2015

● Petrol ● Diesel ● Alternative fuels<sup>1</sup>



SOURCE: EEA

1. Includes pure electric, liquefied petroleum gas vehicles (LPG), natural gas vehicles, ethanol (E85), biodiesel and plug-in hybrid vehicles

2. Provisional data

**Alternative fuel vehicles represent a small but growing share of the EU car market**



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THE AUTOMOBILE INDUSTRY  
POCKET GUIDE 2016/2017

# Vehicles in use



ACEA

European  
Automobile  
Manufacturers  
Association

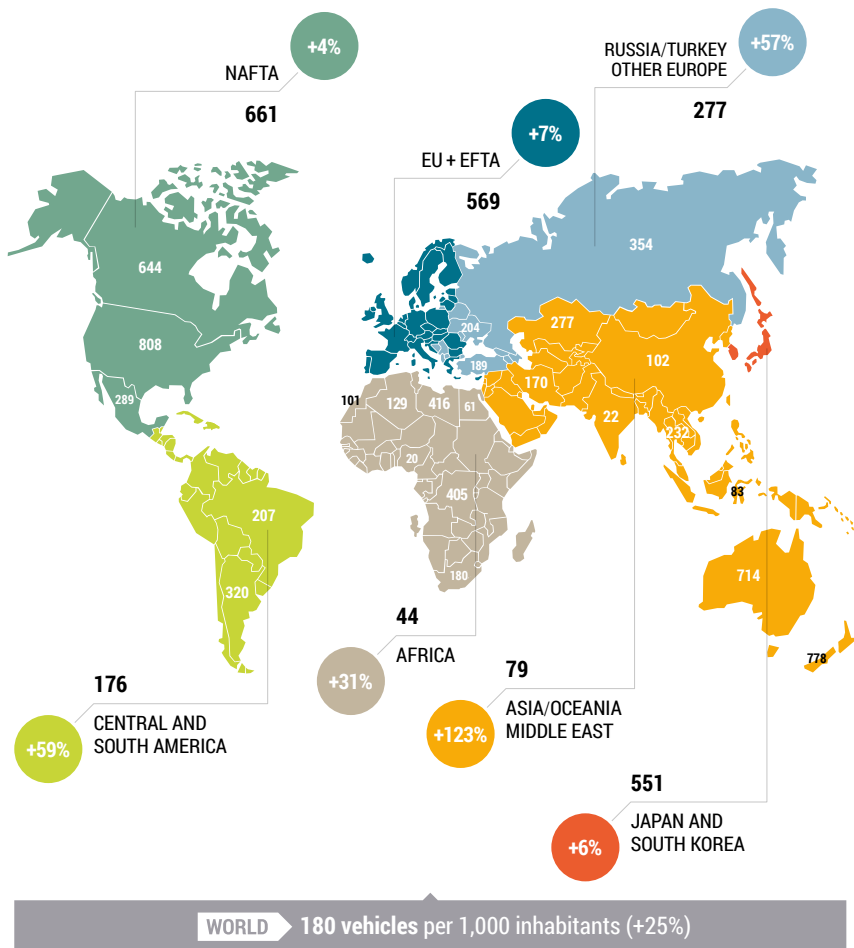
[WWW.ACEA.BE](http://WWW.ACEA.BE)





## Motorisation rate per 1,000 inhabitants

IN UNITS, % CHANGE 2014/2005

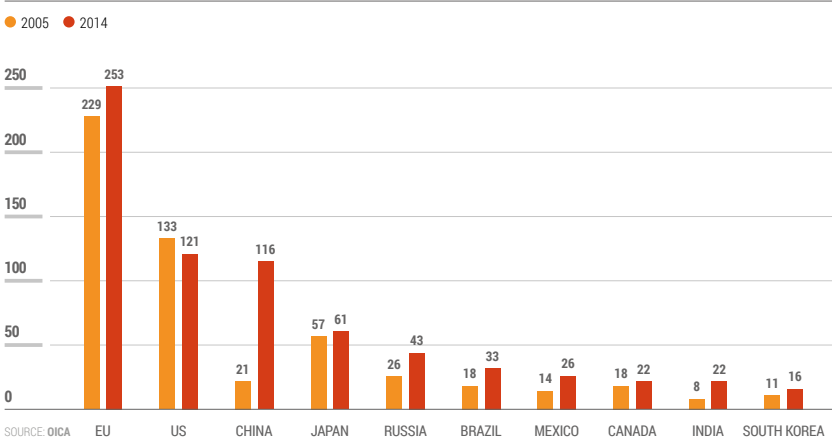


SOURCE: OICA

**The world motorisation rate rose by a quarter over the past decade**

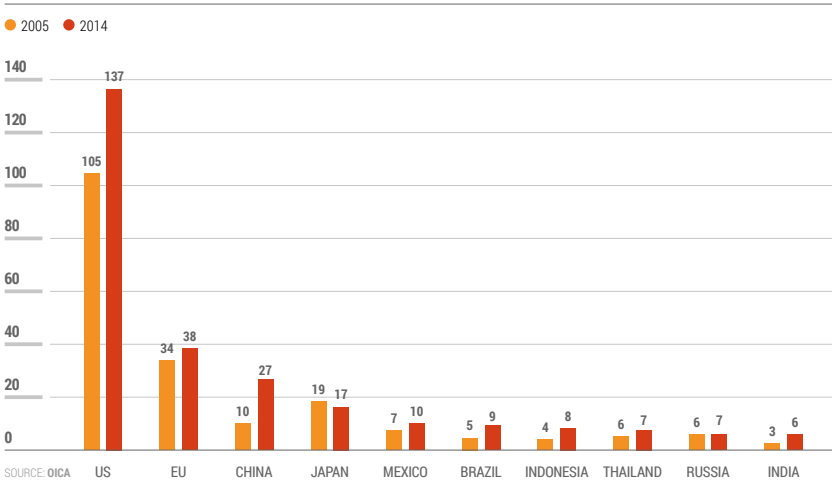
### Passenger cars in use

INTERNATIONAL COMPARISON, IN MILLION UNITS / 2005 – 2014



### Commercial vehicles in use

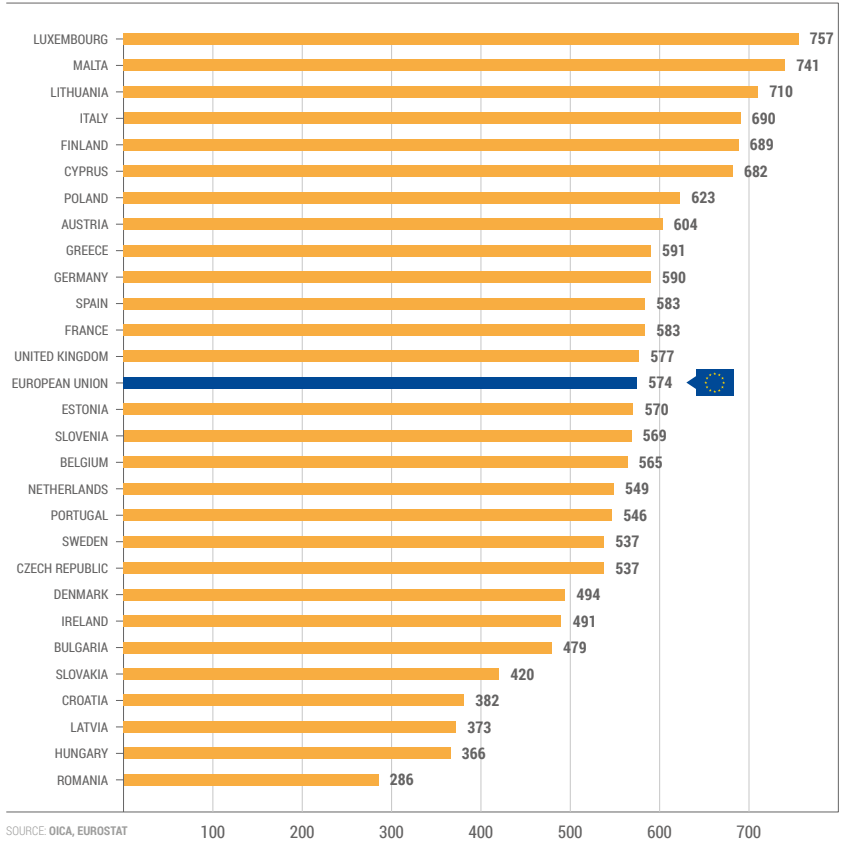
INTERNATIONAL COMPARISON, IN MILLION UNITS / 2005 – 2014



**The EU has the largest passenger car fleet in the world**

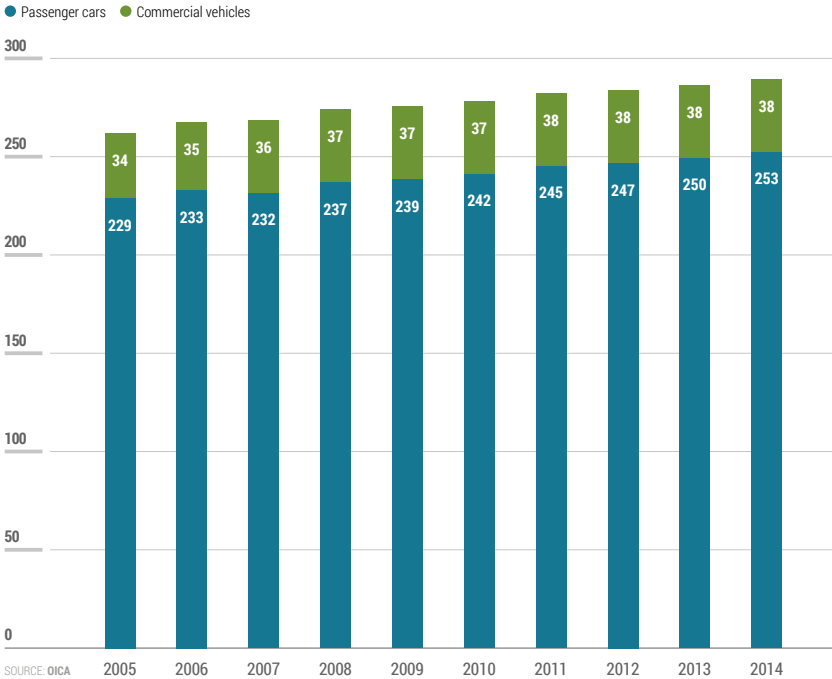
## Motorisation rate in the EU

PER 1,000 INHABITANTS / 2014



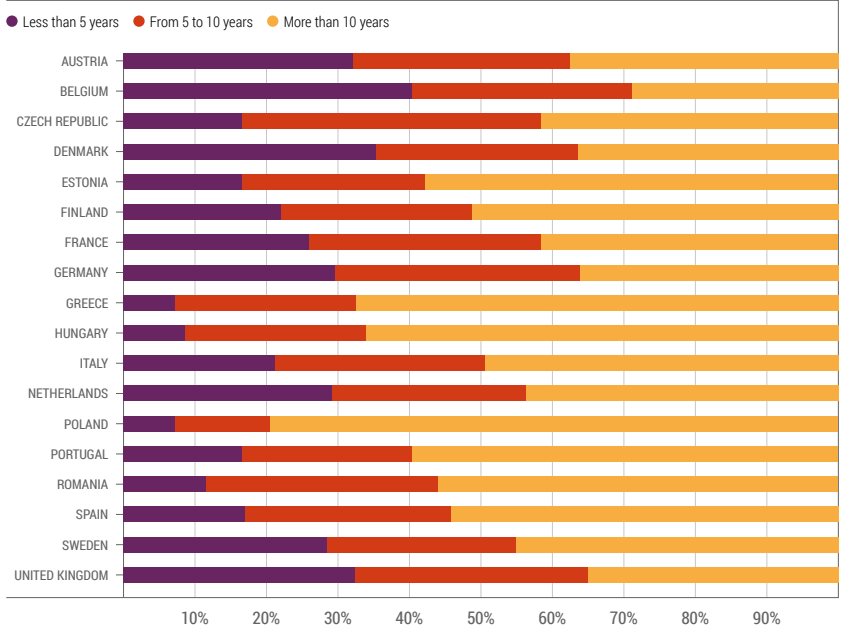
## EU vehicle fleet: size and distribution

IN MILLION UNITS / 2005 – 2014



## Passenger car fleet by country and age

% SHARE / 2014

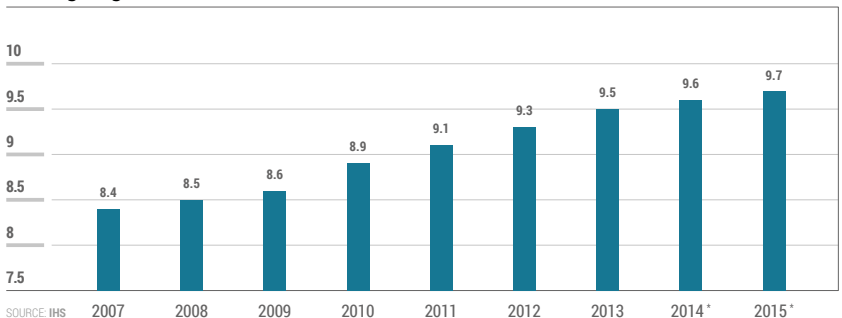


SOURCE: ANFAC VEHICLES IN USE REPORT

Note: Only countries for which sourced data is available are listed

## Average age of the EU car fleet

IN YEARS / 2007 – 2015



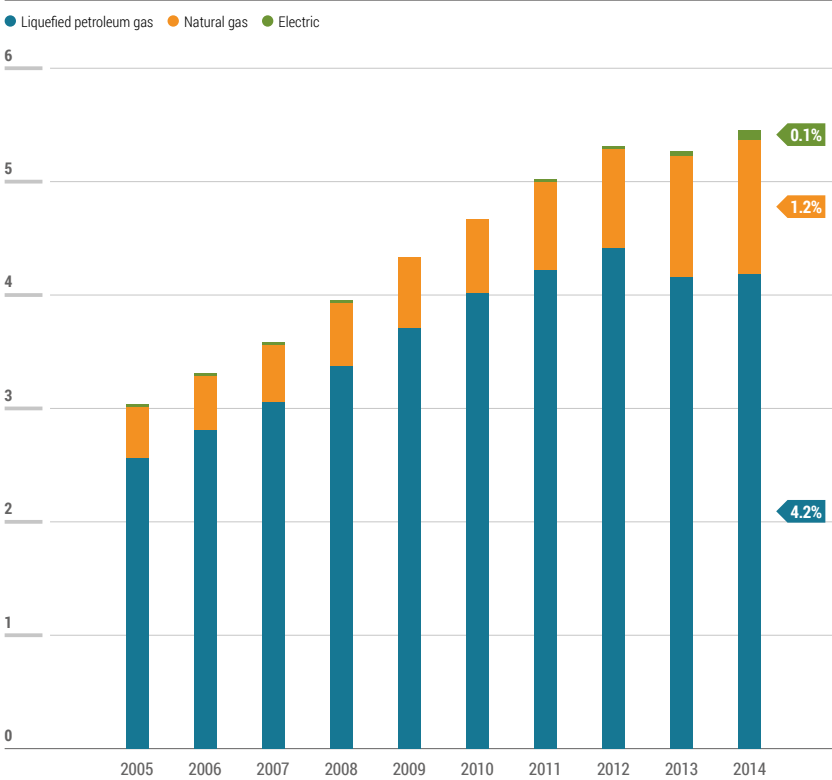
SOURCE: IHS

\* Years 2014 and 2015 are estimates

**The average age of cars  
in the EU is close to 10 years**

### Share of alternative fuel vehicles in the total passenger car fleet

% SHARE / 2005 – 2014



**Alternative fuel cars represent 5.5% of the EU fleet**

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THE AUTOMOBILE INDUSTRY  
POCKET GUIDE 2016/2017

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# Trade



ACEA

European  
Automobile  
Manufacturers  
Association

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TRADE

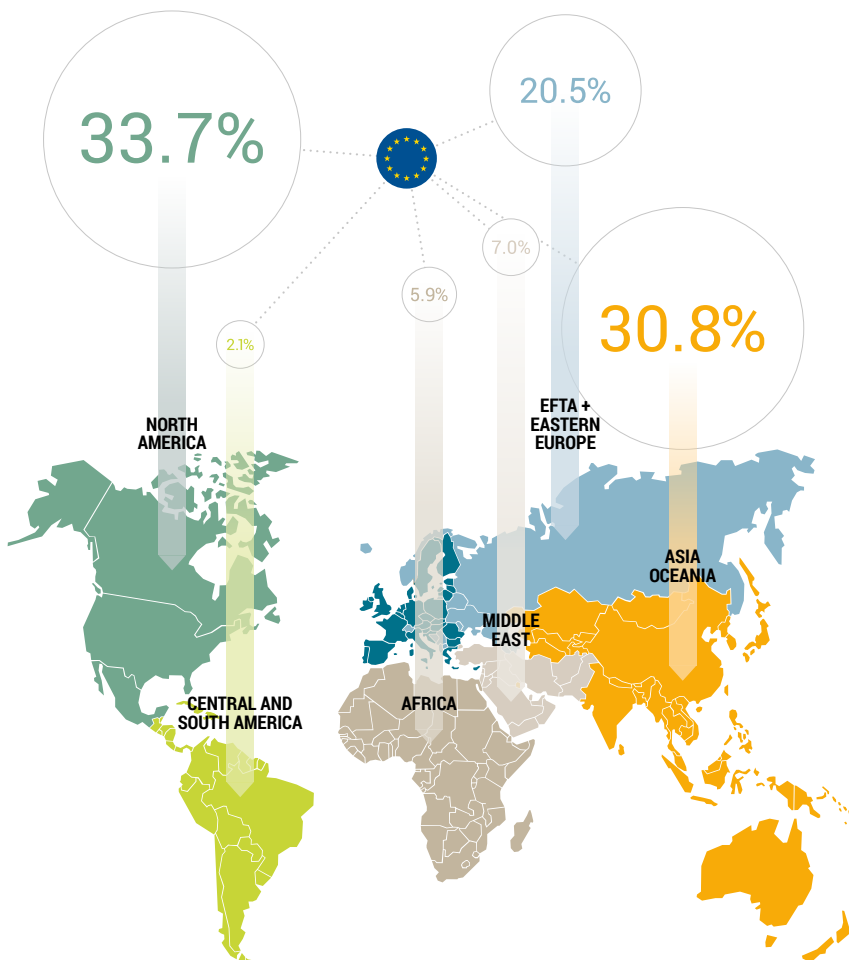






## EU exports of motor vehicles

VALUE MARKET SHARE / 2015



SOURCE: EUROSTAT

## EU motor vehicle trade

BY TYPE, IN MILLION € / 2015

Trade in value	PC <sup>1</sup>	LCV <sup>2</sup>	CV & BC <sup>3</sup>	TOTAL
<b>2015</b>				
Imports	32,488	5,003	1,560	<b>39,051</b>
Exports	129,104	3,957	6,382	<b>139,443</b>
Trade balance	96,616	-1,046	4,822	<b>100,392</b>
<b>2014</b>				
Imports	26,203	3,973	1,136	<b>31,312</b>
Exports	114,993	3,922	6,236	<b>125,151</b>
Trade balance	88,789	-51	5,100	<b>93,838</b>
<b>% change 15/14</b>				
Imports	24.0%	26.0%	37.4%	<b>24.7%</b>
Exports	12.3%	0.9%	2.4%	<b>11.4%</b>
Trade balance	8.8%	1951.2%	-5.5%	<b>7.0%</b>

SOURCE: EUROSTAT

## EU motor vehicle trade

BY TYPE, IN UNITS / 2015

Trade in volume	PC <sup>1</sup>	LCV <sup>2</sup>	CV & BC <sup>3</sup>	TOTAL
<b>2015</b>				
Imports	2,504,438	389,228	182,497	<b>3,076,163</b>
Exports	5,694,563	326,299	211,077	<b>6,231,939</b>
<b>2014</b>				
Imports	2,221,924	316,331	89,990	<b>2,628,245</b>
Exports	5,513,768	356,727	177,870	<b>6,048,365</b>
<b>% change 15/14</b>				
Imports	12.7%	23.0%	102.8%	<b>17.0%</b>
Exports	3.3%	-8.5%	18.7%	<b>3.0%</b>

SOURCE: EUROSTAT

1. Passenger cars

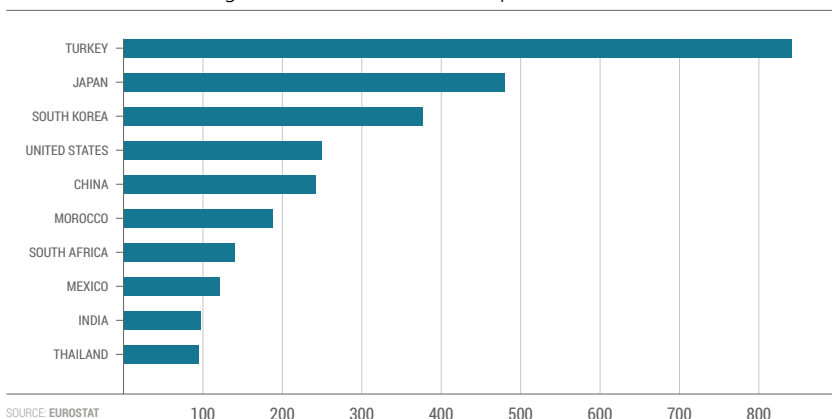
2. Commercial vehicles up to 5t

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

**The automobile industry generates a  
trade surplus of over €100 billion for the EU**

## Main countries of origin of EU motor vehicle imports

IN THOUSAND UNITS / 2015



## Main countries of origin of EU motor vehicle imports

IN UNITS / 2015

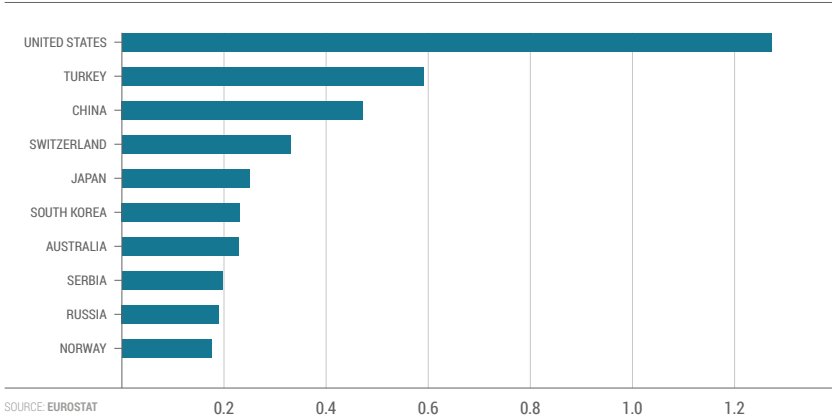
	2010	2011	2012	2013	2014	2015	% change 15/14	% share 2015
<b>WORLD</b>	<b>2,494,969</b>	<b>2,634,179</b>	<b>2,462,253</b>	<b>2,442,309</b>	<b>2,628,245</b>	<b>3,076,163</b>	<b>17.0</b>	<b>100.0</b>
Turkey	571,304	580,076	585,392	584,693	707,560	843,112	19.2	27.4
Japan	613,975	526,270	406,982	384,694	439,678	480,536	9.3	15.6
South Korea	299,765	388,230	408,266	406,376	348,815	376,142	7.8	12.2
United States	187,392	244,507	243,926	222,920	243,264	250,305	2.9	8.1
China	171,399	179,795	197,908	184,349	191,376	241,764	26.3	7.9
Morocco	4,904	20,302	64,625	99,503	168,995	188,369	11.5	6.1
South Africa	74,228	85,676	67,702	59,515	87,083	140,899	61.8	4.6
Mexico	137,767	183,971	179,622	107,429	76,118	121,799	60.0	4.0
India	227,561	234,197	162,652	175,464	107,775	98,503	-8.6	3.2
Thailand	44,445	40,471	25,270	41,066	68,184	94,903	39.2	3.1

SOURCE: EUROSTAT

**More than 3 million motor vehicles  
are imported to the EU annually**

## Main destinations for EU motor vehicle exports

IN MILLION UNITS / 2015



## Main destinations for EU motor vehicle exports

IN UNITS / 2015

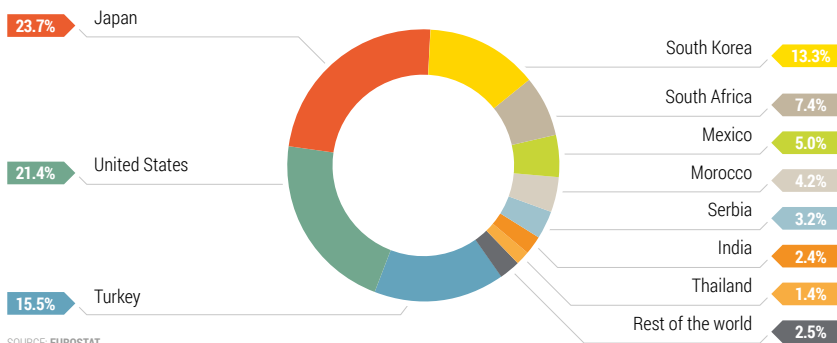
	2010	2011	2012	2013	2014	2015	% change 15/14	% share 2015
<b>WORLD</b>	<b>4,741,601</b>	<b>6,410,008</b>	<b>6,466,867</b>	<b>6,696,077</b>	<b>6,048,365</b>	<b>6,231,939</b>	<b>3.0</b>	<b>100.0</b>
United States	715,668	753,660	890,655	963,281	1,010,196	1,271,566	25.9	20.4
Turkey	384,028	434,647	395,544	533,957	416,496	591,897	42.1	9.5
China	349,774	552,300	534,965	596,703	613,632	472,994	-22.9	7.6
Switzerland	282,351	322,462	334,158	303,551	299,572	331,138	10.5	5.3
Japan	148,321	178,175	208,865	246,658	237,675	250,308	5.3	4.0
South Korea	66,201	77,006	96,325	118,431	177,485	230,840	30.1	3.7
Australia	141,354	157,364	190,833	188,738	183,085	229,922	25.6	3.7
Serbia	81,497	89,616	98,554	115,268	77,924	198,347	154.5	3.2
Russia	324,939	516,823	623,328	491,889	327,876	191,933	-41.5	3.1
Norway	168,656	179,249	171,934	227,358	170,682	177,062	3.7	2.8

SOURCE: EUROSTAT

**The US is the biggest market  
for EU motor vehicle exports**

## Countries of origin of EU passenger car imports

VALUE MARKET SHARE / 2015



## Countries of origin of EU passenger car imports

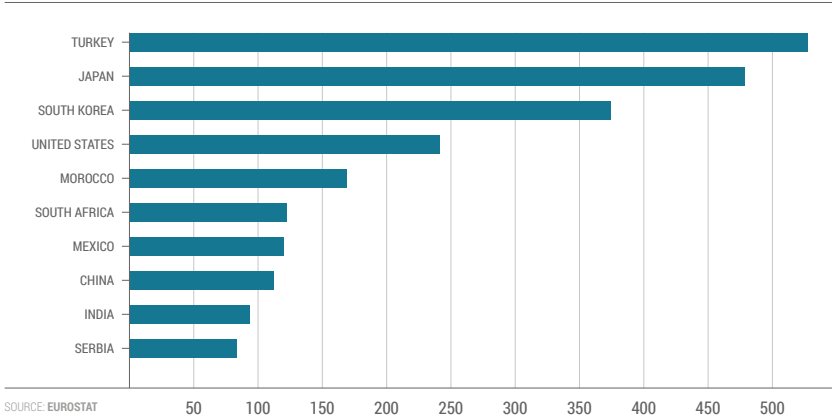
BY VALUE, IN MILLION € / 2015

	2010	2011	2012	2013	2014	2015	% change 15/14	% share 2015
<b>WORLD</b>	<b>22,384</b>	<b>25,161</b>	<b>24,724</b>	<b>23,785</b>	<b>26,203</b>	<b>32,488</b>	<b>24.0</b>	<b>100.0</b>
Japan	7,557	7,487	6,262	5,894	6,685	7,692	15.1	23.7
United States	3,497	4,678	5,520	4,320	4,911	6,941	41.4	21.4
Turkey	3,416	3,417	3,162	3,523	4,363	5,051	15.8	15.5
South Korea	2,478	3,424	3,916	4,091	4,009	4,329	8.0	13.3
South Africa	846	896	548	586	1,208	2,400	98.7	7.4
Mexico	1,758	2,463	2,500	1,605	1,068	1,639	53.5	5.0
Morocco	10	163	608	763	1,225	1,369	11.7	4.2
Serbia	2	2	277	1,081	1,149	1,035	-10.0	3.2
India	1,301	1,570	1,059	1,077	722	765	6.0	2.4
Thailand	142	96	38	146	218	442	102.4	1.4

SOURCE: EUROSTAT

Countries of origin of EU passenger car imports

IN THOUSAND UNITS / 2015



SOURCE: EUROSTAT

Countries of origin of EU passenger car imports

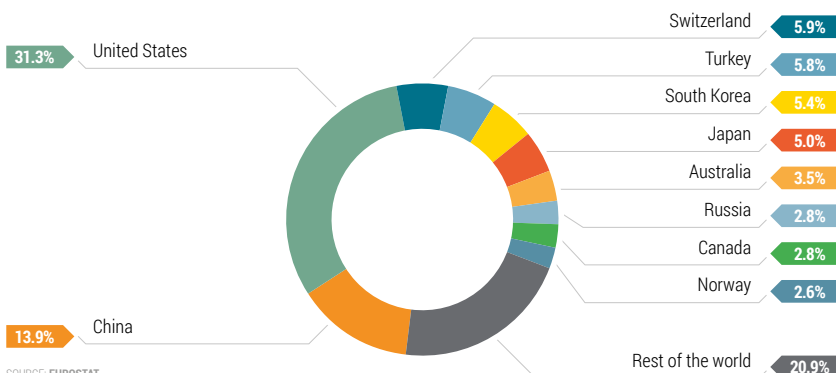
IN UNITS / 2015

	2010	2011	2012	2013	2014	2015	% change 15 / 14	% share 2015
<b>WORLD</b>	<b>2,146,289</b>	<b>2,279,658</b>	<b>2,037,725</b>	<b>2,064,854</b>	<b>2,221,924</b>	<b>2,504,438</b>	<b>12.7</b>	<b>100.0</b>
Turkey	332,656	340,316	322,399	363,006	472,768	527,458	11.6	21.1
Japan	599,712	515,854	405,094	379,238	438,638	478,957	9.2	19.1
South Korea	297,770	386,611	406,699	405,179	347,845	374,726	7.7	15.0
United States	180,845	237,832	236,360	215,437	235,009	241,950	3.0	9.7
Morocco	2,959	19,846	62,386	83,956	152,588	169,822	11.3	6.8
South Africa	65,352	71,601	43,946	42,483	68,078	122,156	79.4	4.9
Mexico	137,752	183,955	179,598	107,154	75,515	120,893	60.1	4.8
China	161,944	167,710	125,267	112,769	118,034	112,261	-4.9	4.5
India	226,101	233,045	162,077	175,034	107,306	93,941	-12.5	3.8
Serbia	183	4,243	21,676	84,639	92,031	83,782	-9.0	3.3

SOURCE: EUROSTAT

## Destinations for EU passenger car exports

VALUE MARKET SHARE / 2015



SOURCE: EUROSTAT

## Destinations for EU passenger car exports

BY VALUE, IN MILLION € / 2015

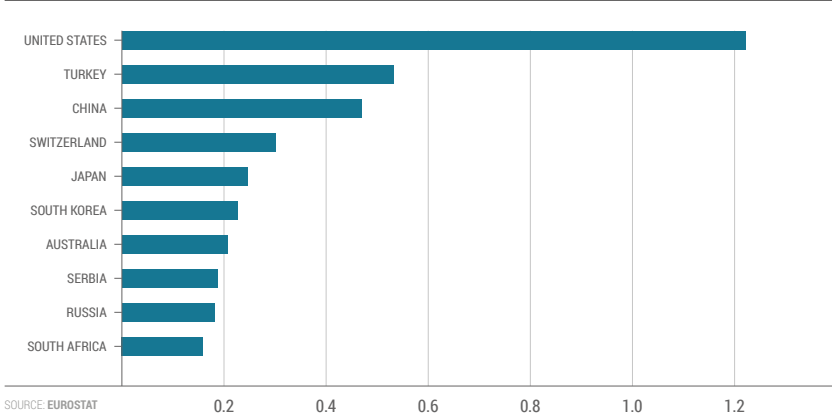
	2010	2011	2012	2013	2014	2015	% change 15 / 14	% share 2015
<b>WORLD</b>	<b>75,882</b>	<b>93,326</b>	<b>107,967</b>	<b>111,594</b>	<b>114,993</b>	<b>129,104</b>	<b>12.3</b>	<b>100.0</b>
United States	19,144	19,550	25,002	27,854	29,779	40,429	35.8	31.3
China	12,183	17,337	19,298	19,672	23,492	17,920	-23.7	13.9
Switzerland	5,236	6,659	6,859	6,193	6,375	7,617	19.5	5.9
Turkey	4,257	5,230	4,885	5,999	5,133	7,455	45.3	5.8
South Korea	1,682	1,956	2,497	3,127	4,693	6,911	47.3	5.4
Japan	3,846	5,093	6,310	6,404	5,996	6,462	7.8	5.0
Australia	2,759	3,179	3,498	3,633	3,482	4,582	31.6	3.5
Russia	4,063	7,016	8,744	7,049	5,198	3,669	-29.4	2.8
Canada	2,415	2,482	2,997	2,849	3,014	3,638	20.7	2.8
Norway	2,720	3,044	3,262	3,214	3,179	3,378	6.3	2.6

SOURCE: EUROSTAT

**The United States is the EU's  
most valuable export market for cars**

Main destinations for EU passenger car exports

IN MILLION UNITS / 2015



SOURCE: EUROSTAT

Main destinations for EU passenger car exports

IN UNITS / 2015

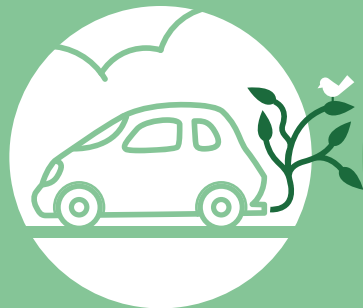
	2010	2011	2012	2013	2014	2015	% change 15/14	% share 2015
<b>WORLD</b>	<b>4,207,714</b>	<b>5,195,105</b>	<b>5,819,250</b>	<b>5,970,535</b>	<b>5,513,768</b>	<b>5,694,563</b>	<b>3.3</b>	<b>100.0</b>
United States	709,299	732,974	880,698	952,634	998,504	1,221,867	22.4	21.5
Turkey	339,694	388,268	357,256	488,138	372,753	531,773	42.7	9.3
China	345,618	544,069	527,098	592,053	608,912	470,055	-22.8	8.3
Switzerland	256,358	292,362	305,492	275,536	270,741	302,311	11.7	5.3
Japan	148,192	175,442	208,265	246,550	236,833	247,299	4.4	4.3
South Korea	64,170	75,189	94,674	116,458	174,496	227,113	30.2	4.0
Australia	123,348	141,960	150,960	166,768	162,756	206,499	26.9	3.6
Serbia	66,464	80,001	90,866	105,595	71,015	189,117	166.3	3.3
Russia	291,237	470,909	566,094	439,755	301,107	181,665	-39.7	3.2
South Africa	94,261	123,414	116,207	129,555	118,078	158,614	34.3	2.8

SOURCE: EUROSTAT

**More than a fifth of EU car exports go to the US**



# Environment



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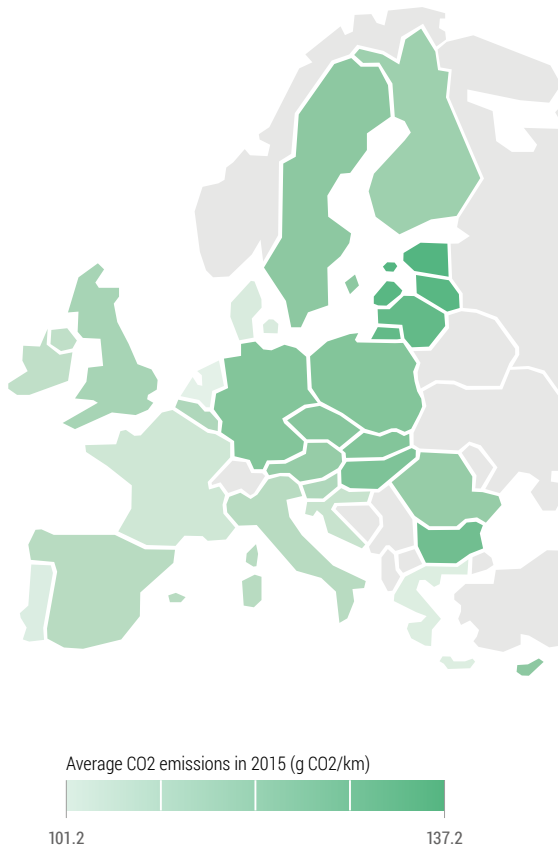


## Average emissions of new passenger cars by country

IN G CO<sub>2</sub>/KM / 2015

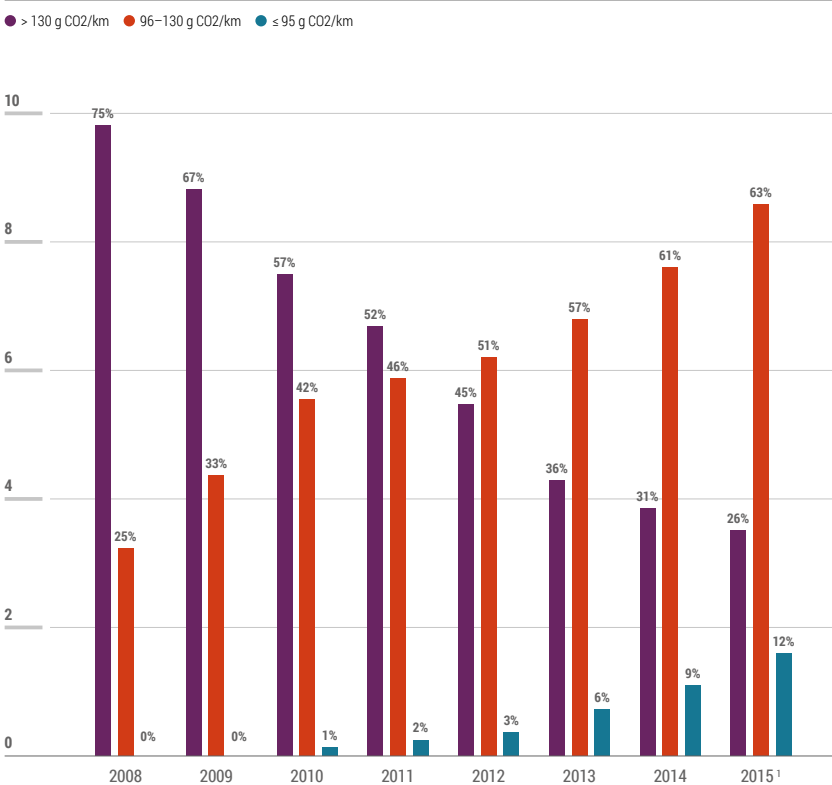
	2015 average emissions (g CO <sub>2</sub> /km)	% change 2015 – 2014
Austria	123.7	-3.8
Belgium	117.9	-2.9
Bulgaria	130.3	-4.2
Croatia	112.9	-2.5
Cyprus	125.8	-3.3
Czech Republic	126.3	-4.1
Denmark	106.2	-3.7
Estonia	137.2	-2.7
Finland	123.0	-3.5
France	111.0	-2.8
Germany	128.4	-3.1
Greece	106.4	-1.7
Hungary	129.6	-2.5
Ireland	114.3	-2.4
Italy	115.4	-2.4
Latvia	137.1	-2.3
Lithuania	130.0	-4.3
Luxembourg	127.5	-1.8
Malta	112.9	-1.9
Netherlands	101.2	-5.8
Poland	129.3	-2.6
Portugal	105.7	-2.9
Romania	125.0	-2.5
Slovakia	127.7	-3.1
Slovenia	119.2	-1.7
Spain	115.3	-2.8
Sweden	126.3	-3.6
United Kingdom	121.3	-2.7
<b>EU average</b>	<b>119.6</b>	<b>-3.1</b>

SOURCE: EEA



## New passenger cars in the EU by emissions classes

IN MILLION UNITS, % SHARE / 2008 – 2015

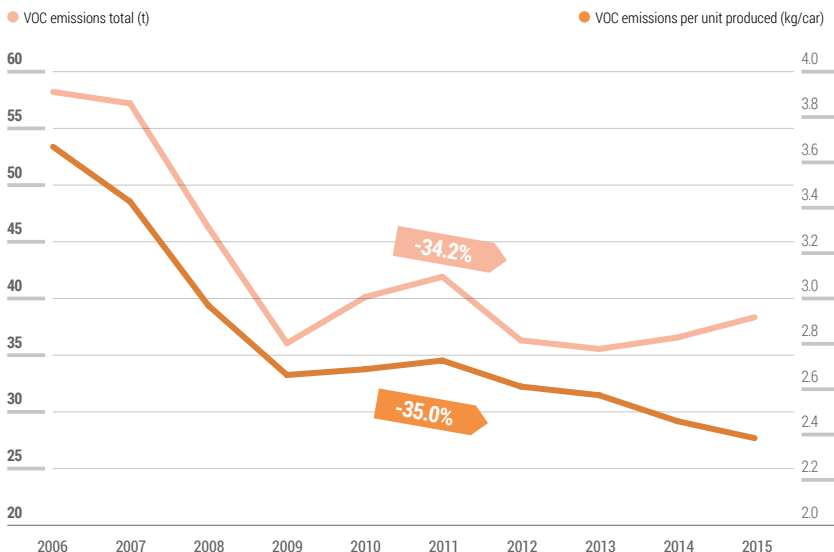


SOURCE: AAA (2008-2009), EEA (2010-2015). THE GEOGRAPHICAL SCOPE OF THE DATA CHANGES OVER TIME FROM EU-15 (2008-2009) TO EU-27 (2010-2013) AND EU-28 (2014-2015).

1. Provisional data

## VOC emissions from production

THOUSAND TONNES / 2006 – 2015



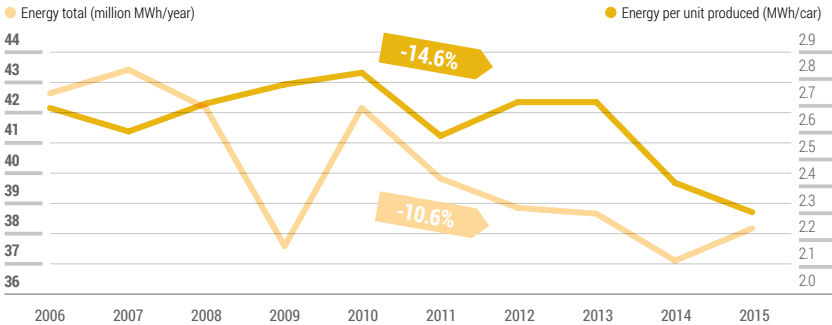
SOURCE: ACEA MEMBERS

**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 35% over the last 10 years.

**European manufacturers have significantly reduced the environmental impact of vehicle production over the last decade**

## Energy consumption during production

IN MWh / 2006 – 2015



SOURCE: ACEA MEMBERS

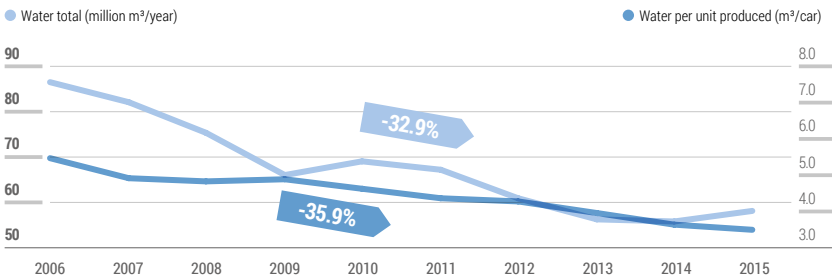
As cars have become equipped with ever more features to make them safer, cleaner and smarter, the complexity of vehicle production has increased. This increase in complexity affects energy demand.

Nevertheless, manufacturers have been working continuously to improve the **energy efficiency** of production. As a result, energy consumption per car produced has been decreased by 14.6% over the last decade.

Fluctuations in energy consumption can be explained by lower production volumes, especially during the economic crisis, as well as variable weather conditions in some years.

## Water used in production

IN MILLION M<sup>3</sup> / 2006 – 2015



SOURCE: ACEA MEMBERS

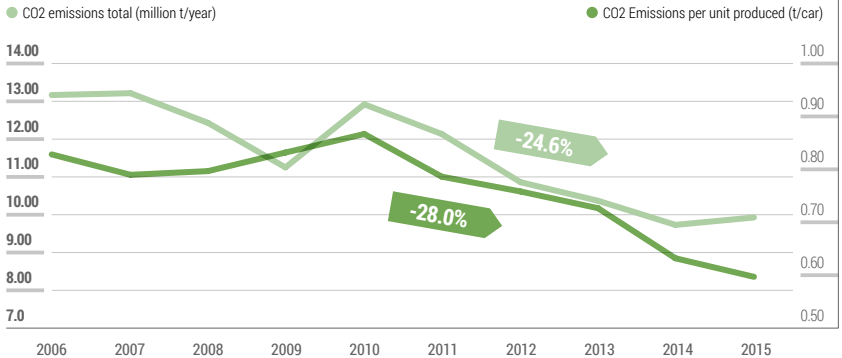
European automobile manufactures have significantly reduced the environmental impact of vehicle production over the last decade.

Long-term strategies for reducing **water consumption** have made it possible to reduce water use per car produced by 35.9% between 2006 and 2015.

**Water consumption per car produced has been reduced by 35.9% since 2006**

## CO2 emissions from production

IN MILLION TONNES / 2006 – 2015

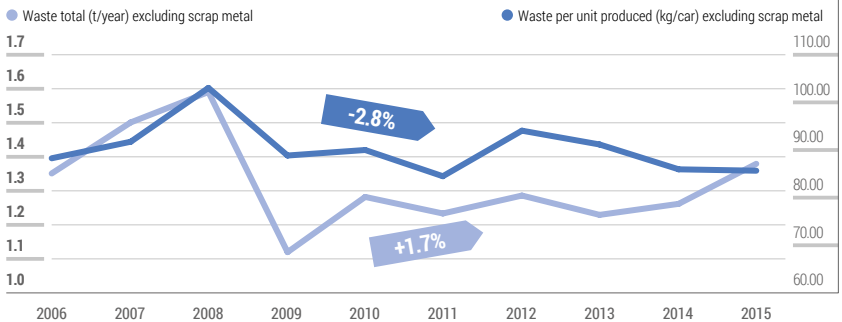


SOURCE: ACEA MEMBERS

The CO2 emissions per car produced dropped by 28% between 2006 and 2015, while the overall figure went down by 24.6% over the same period, reflecting the industry's efforts to reduce CO2 emissions.

## Waste (excluding scrap metal) from production

IN MILLION TONNES / 2006 – 2015



SOURCE: ACEA MEMBERS

The waste generated per unit produced by the manufacturing of passenger cars went down by 2.8% over ten years. Waste fluctuations, both in absolute and per unit terms can be explained by the occurrence of singular events, such as a fall in total production during the economic crisis.

**CO2 emissions per car produced  
dropped by 28% over the last decade**





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# Innovation



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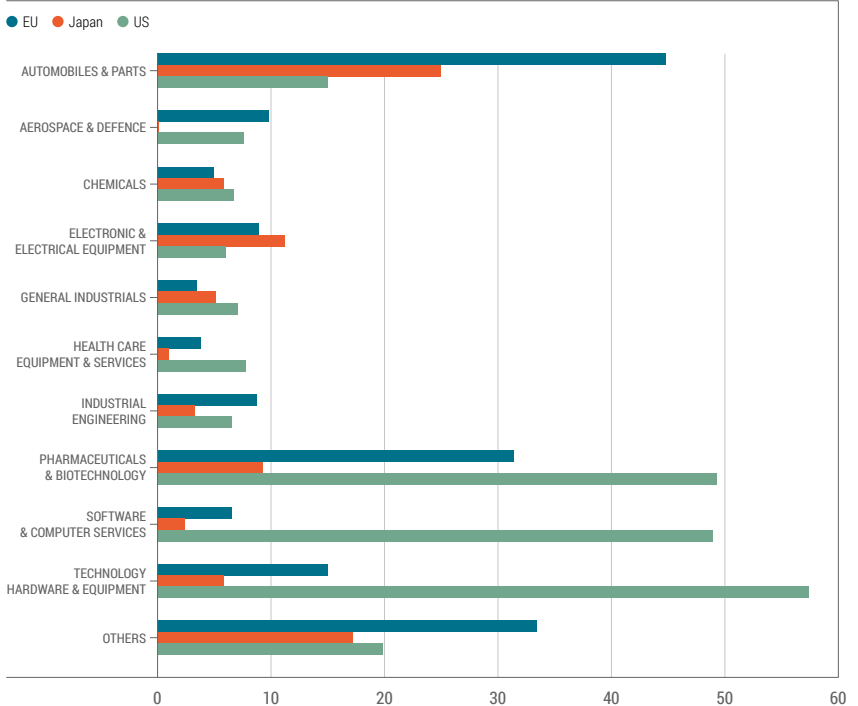
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## R&amp;D expenditure of industrial sectors in the main world regions

IN BILLION € / 2014

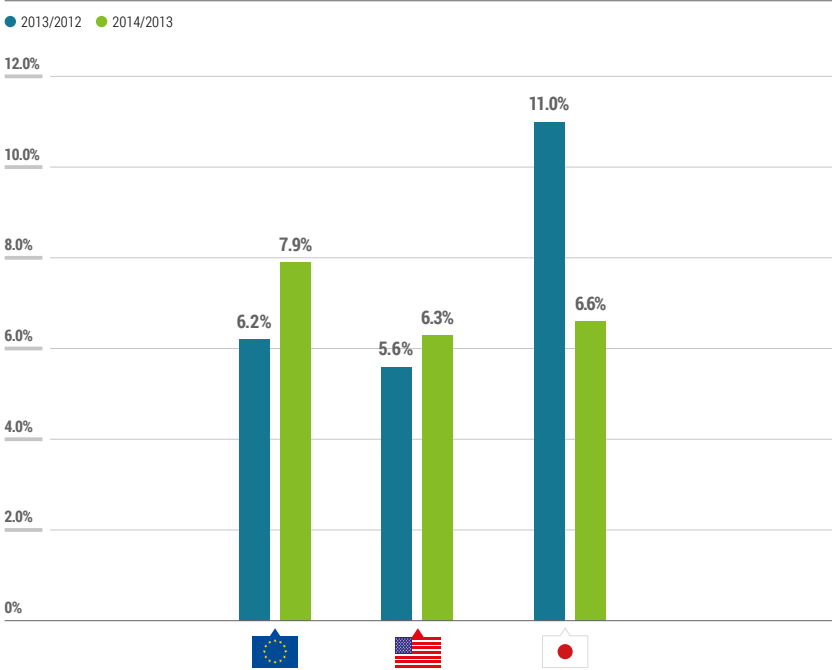


SOURCE: THE 2015 EU INDUSTRIAL R&amp;D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

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

### R&D growth in the automobile and parts sector for EU, US and Japan-based companies

% CHANGE

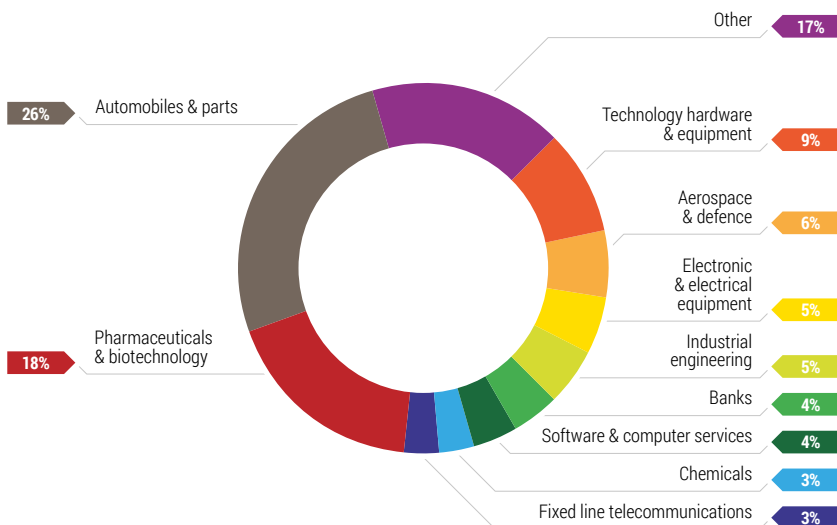


SOURCE: THE 2015 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

## **EU automotive companies continue to increase R&D investments**

## R&amp;D shares of sectors in the EU

%SHARE / 2014



SOURCE: THE 2015 EU INDUSTRIAL R&amp;D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

## EU R&amp;D investment in the top 10 industrial sectors

IN MILLION € / 2014

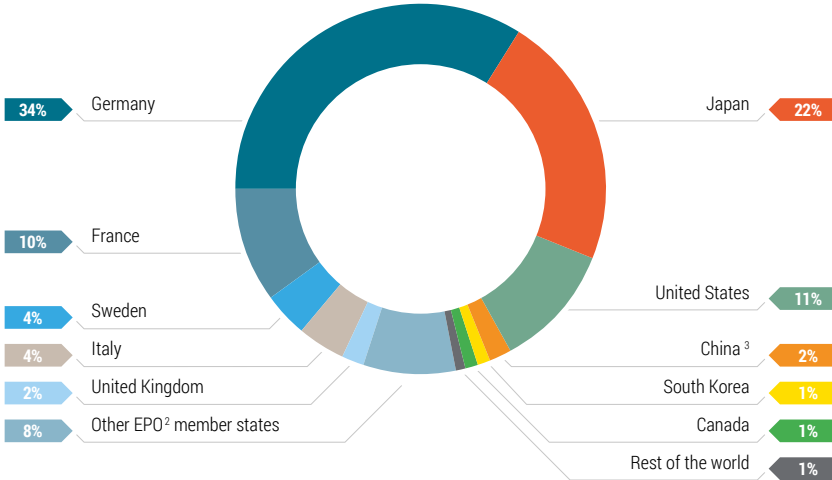
	R&D 2014
Automobiles & parts	44,736
Pharmaceuticals & biotechnology	31,401
Technology hardware & equipment	15,024
Aerospace & defence	9,900
Electronic & electrical equipment	8,924
Industrial engineering	8,778
Banks	7,564
Software & computer services	6,542
Chemicals	5,029
Fixed line telecommunications	4,260
Other	28,840

SOURCE: THE 2015 EU INDUSTRIAL R&amp;D INVESTMENT SCOREBOARD, EUROPEAN COMMISSION

**The automotive sector is the EU's number one investor in R&D, with €44.7 billion invested per year**

Patents granted in the automotive sector <sup>1</sup>

% SHARE / 2015



SOURCE: EUROPEAN PATENT OFFICE (EPO)

Patents

BY COUNTRY / 2015

Germany	2,058
France	609
Italy	268
Sweden	221
United Kingdom	146
other EPO member states <sup>2</sup>	501
Japan	1,291
United States	657
China <sup>3</sup>	90
South Korea	46
Canada	39
Rest of the world	70
<b>Total</b>	<b>5,996</b>

SOURCE: EUROPEAN PATENT OFFICE (EPO)

1. Includes categories B60, B62, F02 and F16  
 B60: Vehicles in general  
 B62: Land vehicles for travelling otherwise than on rail  
 F02: Combustion engines; hot-gas or combustion-product engine plants  
 F16: Engineering elements or units; general measures for producing and maintaining effective functioning of machines or installations; thermal insulation in general  
 2. Includes Liechtenstein, Monaco, Turkey and the other EU+EFTA countries  
 3. Includes Taipei

**About 6,000 patents are granted to the automotive sector per year**

# Taxation



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## CO2-based motor vehicle taxes in the EU in 2016

COUNTRY	CO2 / FUEL CONSUMPTION TAXES
Austria	Fuel consumption tax (CO2-based) levied on the first car registration of a car. CO2-based company car tax.
Belgium	CO2-based registration tax (Wallonia). Registration tax based on CO2 emissions, Euro standards, fuel consumption and age (Flanders). Annual circulation tax based on CO2 emissions (Flanders). CO2-based company car tax.
Croatia	Registration tax based on price, CO2 emissions and fuel consumption.
Cyprus	Registration tax and annual circulation tax based on CO2 emissions.
Denmark	Annual circulation tax based on fuel consumption. Registration tax (based on price) linked to fuel consumption.
Finland	Registration tax and annual circulation tax based on CO2 emissions.
France	Annual circulation tax and company car tax based on CO2 emissions. Under a bonus-malus system, a premium or a malus is applied based on vehicle's CO2 emissions.
Germany	CO2-based annual circulation tax.
Greece	CO2-based annual circulation tax.
Ireland	Registration tax and annual circulation tax based on CO2 emissions.
Latvia	CO2-based registration tax.
Luxembourg	CO2-based annual circulation tax.
Malta	Registration tax based on price, CO2 emissions and vehicle length. Annual circulation tax based on CO2 emissions and age.
Netherlands	Registration tax, annual circulation tax and company car tax based on CO2 emissions.
Portugal	Registration tax based on cc and CO2 emissions. Annual circulation tax based on cc, CO2 emissions and age.
Romania	Registration tax based on CO2 emissions, cc, exhaust emissions and age.
Slovenia	CO2-based registration tax.
Spain	CO2-based registration tax.
Sweden	Annual circulation tax based on CO2 emissions and exhaust emissions. Five year exemption from paying annual circulation tax (CO2-based). Super green car premium new cars (CO2-based).
United Kingdom	Annual circulation tax and company car tax based on CO2 emissions.

SOURCE: ACEA TAX GUIDE 2016

## Overview of purchase and tax incentives for electric vehicles in the EU in 2016

COUNTRY	INCENTIVES
Austria	EVs exempt from fuel consumption tax and monthly vehicle tax.
Belgium	EVs and PHEVs exempt from registration tax (Flanders). EVs pay the lowest rate of tax under the annual circulation tax. Reduction of company car taxation (CO <sub>2</sub> -based).
Bulgaria	EVs exempt from annual circulation tax.
Czech Republic	Electric, HEVs and other AFVs exempt from road tax.
Denmark	Electric, hydrogen and fuel cell-powered vehicles exempt from registration tax.
Finland	EVs pay the minimum rate of the CO <sub>2</sub> based registration tax.
France	Regions can provide exemption from registration tax (total or 50%) for AFVs. EVs and HEVs benefit from a premium (CO <sub>2</sub> -based). EVs exempt from company car tax (hybrids exempt for the first two years).
Germany	EVs exempt from paying annual circulation tax for 10 years.
Greece	EVs and HEVs exempt from registration tax, luxury tax and luxury living tax. Electric and hybrid passenger cars exempt from annual circulation tax (based on cc).
Hungary	EVs exempt from registration tax, annual circulation tax and company car tax.
Ireland	EVs, PHEVs, HEVs and other AFVs benefit from registration tax relief. EVs pay the minimum rate of the road tax.
Italy	EVs exempt from annual circulation tax for five years.
Latvia	EVs exempt from registration tax and pay the lowest amount of the company car tax.
Luxembourg	EVs pay the minimum rate of the annual circulation tax.
Netherlands	EVs exempt from registration tax. Vehicles exempt from annual circulation tax (CO <sub>2</sub> -based).
Portugal	EVs exempt from registration tax and annual circulation tax. HEVs benefit from a reduction of the registration tax.
Romania	Electric and hybrid vehicles exempt from registration tax. EVs also exempt from the annual circulation tax.
Slovakia	EVs exempt from registration tax and annual circulation tax. HEVs benefit from a reduction of the annual circulation tax.
Spain	Main city councils are reducing the annual circulation tax for electric and fuel-efficient vehicles.
Sweden	Five year exemption from paying annual circulation tax (CO <sub>2</sub> -based). Super green car premium new cars (CO <sub>2</sub> -based). Reduction of company car taxation for EVs and PHEVs.
United Kingdom	Purchase grant for EVs and PHEVs (CO <sub>2</sub> -based). EVs exempt from annual circulation tax.

SOURCE: ACEA TAX GUIDE 2016

AFV: alternative fuel vehicles  
EV: Electric vehicles  
HEV: Hybrid electric vehicles  
PHEV: Plug-in hybrid electric vehicles

**Incentives for electric vehicles  
are available in 21 countries**

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Fiscal income from motor vehicles in the EU<sup>1</sup>

	AUSTRIA	BELGIUM	DENMARK	FINLAND	FRANCE	GERMANY	GREECE
	€ bn 2014	€ bn 2012	DKK bn 2014	€ bn 2014	€ bn 2014	€ bn 2014	€ bn 2014
Purchase or transfer							
1. VAT on vehicle sales servicing/repair, parts, tyres	2.678	6.06	NA	1.552	13.744	26.319	NA
2. Fuels & lubricants	5.338	7.534	16.607	4.182	37.103	39.304	3.578
3. Sales & registration taxes	0.52	0.408	15.865	0.918	2.071	–	0.093
Annual ownership taxes	2.1	1.512	10.592	0.878	0.997	8.991	1.155
Driving license fees	–	0.007	–	–	–	0.01	–
Insurance taxes	0.324	0.934	1.579	0.378	4.59	3.786	–
Tolls	1.688	–	0.381	–	11.027	–	–
Customs duties	–	–	–	–	–	0.535	–
Other taxes	0.312	0.759	–	–	1.579	1.01	0.213
<b>TOTAL</b>	<b>12.960</b>	<b>17.214</b>	<b>45.024</b>	<b>7.908</b>	<b>71.111</b>	<b>79.955</b>	<b>5.039</b>
<b>EURO</b>	<b>13.0</b>	<b>17.2</b>	<b>6.0</b>	<b>7.9</b>	<b>71.1</b>	<b>80.0</b>	<b>5.0</b>
	IRELAND	ITALY	NETHER- LANDS	PORTUGAL	SPAIN	SWEDEN	UNITED KINGDOM
	€ bn 2015	€ bn 2014	€ bn 2014	€ bn 2015	€ bn 2014	SEK bn 2014	£ bn 2012
Purchase or transfer							
1. VAT on vehicle sales servicing/repair, parts, tyres	0.601	14.73	1.858	1.85	–	22	12.5
2. Fuels & lubricants	3.028	37.91	7.874	2.53	19.19	47.3	26.7
3. Sales & registration taxes	0.684	1.37	1.495	0.573	3.123	–	–
Annual ownership taxes	1.124	6.1	3.901	0.525	2.791	12.4	5.88
Driving license fees	–	–	0.28	–	0.056	–	–
Insurance taxes	–	4.44	0.907	–	–	2.8	–
Tolls	–	1.86	–	0.26	–	1.7	–
Customs duties	–	–	–	0.04	–	–	–
Other taxes	–	5.4	1.667	0.16	0.593	4.2	1.5
<b>TOTAL</b>	<b>5.437</b>	<b>71.810</b>	<b>17.982</b>	<b>5.938</b>	<b>25.753</b>	<b>90.400</b>	<b>46.580</b>
<b>EURO</b>	<b>5.4</b>	<b>71.8</b>	<b>18.0</b>	<b>5.9</b>	<b>25.8</b>	<b>9.6</b>	<b>64.8</b>

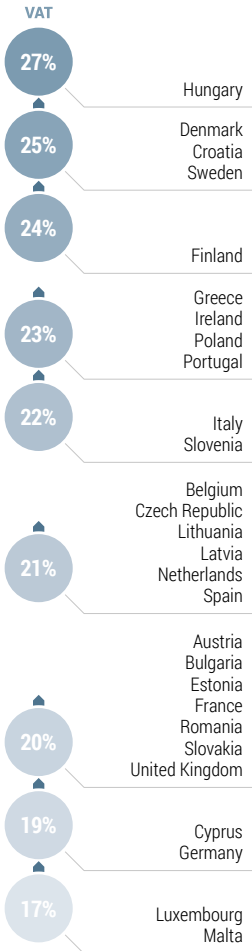
**GRAND TOTAL = € 401.5 bn**

SOURCE: ACEA TAX GUIDE 2016

1. Latest available data; no data are available for other EU member states

**Motor vehicles account for over €400 billion  
in tax contributions in the EU15**

### Share of VAT in net price of cars



SOURCE: ACEA TAX GUIDE 2016

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

	UNLEADED PETROL	DIESEL
Austria	515	425
Belgium	619	480
Bulgaria	363	330
Croatia	505	401
Cyprus	479	450
Czech Republic	473	403
Denmark	611	416
Estonia	423	393
Finland	681	506
France	641	498
Germany	670	486
Greece	670	330
Hungary	384	353
Ireland	588	479
Italy	728	617
Latvia	436	341
Lithuania	434	330
Luxembourg	465	338
Malta	549	472
Netherlands	770	484
Poland	393	344
Portugal	618	402
Romania	462	430
Slovakia	551	386
Slovenia	545	462
Spain	425	331
Sweden	673	623
United Kingdom	674	674
<b>EU minimum rates</b>	<b>359</b>	<b>330</b>

SOURCE: ACEA TAX GUIDE 2016

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