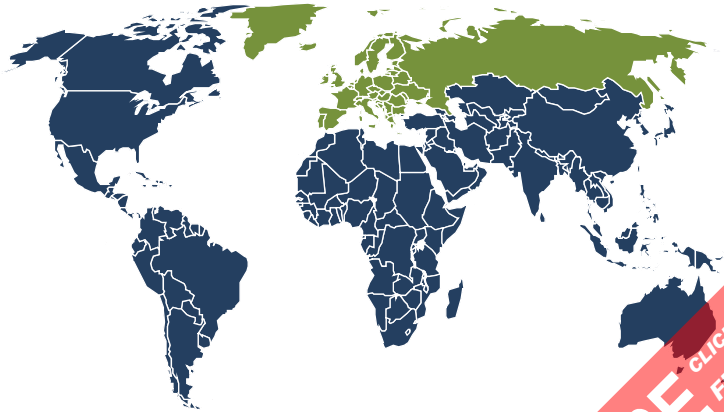


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Motor Vehicles: Europe

October 2020



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Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
Impact of COVID-19 Pandemic on Motor Vehicle Production	6
Production & Retail Sales by Country	8
3. Segmentation & Forecasts	11
New Motor Vehicles	11
Light Vehicles	17
Medium & Heavy Vehicles	19
4. Industry Structure	21
Industry Characteristics	21
Market Leaders	22
PSA Group	22
Renault Group	23
Volkswagen Group	23
5. About This Report	25
Scope	25
Sources	26
Industry Codes	27
Freedonia Methodology	28
Resources	29

List of Tables & Figures

Figure 1 Europe: Key Trends in the Motor Vehicle Market, 2019 – 2024	3
Figure 2 Europe: Motor Vehicle Production & Retail Sales Trends, 2009 – 2019	4
Table 1 Europe: Key Indicators for Motor Vehicle Production & Retail Sales, 2009 – 2024 (2018US\$ bil)	5
Figure 3 Europe: Motor Vehicle Production by Country, 2019 (%)	8
Figure 4 Europe: Motor Vehicle Retail Sales by Country, 2019 (%)	9
Figure 5 Europe: Motor Vehicle Production by Type, 2009 – 2024 (mil units)	11
Table 2 Europe: Motor Vehicle Production by Type, 2009 – 2024 (000 units)	11
Figure 6 Europe: Motor Vehicle Production by Type, 2009 – 2024 (%)	12
Figure 7 Europe: Motor Vehicle Retail Sales by Type, 2009 – 2024 (mil units)	13
Table 3 Europe: Motor Vehicle Retail Sales by Type, 2009 – 2024 (000 units)	14
Figure 8 Europe: Motor Vehicle Retail Sales by Type, 2009 – 2024 (%)	15
Figure 9 Europe: Motor Vehicle Parc by Type, 2009 – 2024 (mil units)	16
Table 4 Europe: Motor Vehicle Parc by Type, 2009 – 2024 (mil units)	17
Figure 10 Europe: Motor Vehicle Parc by Type, 2009 – 2024 (%)	17
Table 5 Europe: Selected Suppliers to the Motor Vehicle Market	22
Table 6 Countries in Western Europe	25
Table 7 Countries in Eastern Europe	26
Table 8 NACE Codes Related to Motor Vehicles	27
Table 9 HS Codes Related to Motor Vehicles	27

About This Report

Scope

This report forecasts to 2020 and 2024 motor vehicle production, new retail sales, and parc in units in Europe. Total production, new retail sales, and parc are segmented by type in terms of:

- light vehicles
- medium and heavy vehicles

To illustrate historical trends, total production, new retail sales, and parc, as well as the various segments, are provided in annual series from 2009 to 2019.

Estimates for 2020 were developed using a combination of partial-year source data through April 2020 (when available) and a proprietary model that estimates monthly or quarterly trends for the remainder of the year. Partial-year estimates were then aggregated to form full calendar year projections, which were refined based on industry-expertise and the expected impact of macroeconomic events through May 2020.

Projections account for the reoccurrence of the novel coronavirus during cold weather seasons later in 2020, but the “second-wave” of COVID-19 infections is not expected to be equal or close to the size or scale of the initial outbreak and its related economic effects.

Other forms of motorized transport equipment, such as all-terrain vehicles; bicycles; military armored vehicles and tanks; motorcycles; off-road agriculture, construction, and mining equipment; race cars; snowmobiles; and parts are excluded from the scope of this report.

For the purposes of this report, Europe encompasses the following countries:

Andorra	Gibraltar	Jersey	Saint Pierre and Miquelon
Austria	Greece	Liechtenstein	San Marino
Belgium	Greenland	Luxembourg	Spain
Channel Islands	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands	United Kingdom
France	Isle of Man	Norway	Vatican City
Germany	Italy	Portugal	

Source: The Freedonia Group

About This Report

Table 7 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland	

Source: The Freedonia Group

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Motor Vehicles: Europe (FE85029) is based on *Global Motor Vehicle Outlook 2020*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 8 | NACE Codes Related to Motor Vehicles

NACE Code	Definition
29102100	Vehicles with only spark-ignition engine of a cylinder capacity $\leq 1\,500\text{ cm}^3$
29102230	Motor vehicles with only petrol engine $> 1\,500\text{ cm}^3$ (including motor caravans of a capacity $> 3\,000\text{ cm}^3$) (excluding vehicles for transporting ≥ 10 persons, snowmobiles, golf cars and similar vehicles)
29102250	Motor caravans with only spark-ignition internal combustion reciprocating piston engine of a cylinder capacity $> 1\,500\text{ cm}^3$ but $\leq 3\,000\text{ cm}^3$
29102310	Motor vehicles with only diesel or semi-diesel engine $\leq 1\,500\text{ cm}^3$ (excluding vehicles for transporting ≥ 10 persons, snowmobiles, golf cars and similar vehicles)
29102330	Motor vehicles with only diesel or semi-diesel engine $> 1\,500\text{ cm}^3$ but $\leq 2\,500\text{ cm}^3$ (excluding vehicles for transporting ≥ 10 persons, motor caravans, snowmobiles, golf cars and similar vehicles)
29102340	Motor vehicles with only diesel or semi-diesel engine $> 2\,500\text{ cm}^3$ (excluding vehicles for transporting ≥ 10 persons, motor caravans, snowmobiles, golf cars and similar vehicles)
29102353	Motor caravans with only compression-ignition internal combustion piston engine (diesel or semi-diesel) of a cylinder capacity $> 1\,500\text{ cm}^3$ but $\leq 2\,500\text{ cm}^3$
29102355	Motor caravans with only compression-ignition internal combustion piston engine (diesel or semi-diesel) of a cylinder capacity $> 2\,500\text{ cm}^3$
29102410	Motor vehicles, with both spark-ignition or compression-ignition internal combustion reciprocating piston engine and electric motor as motors for propulsion, other than those capable of being charged by plugging to external source of electric power
29102430	Motor vehicles, with both spark-ignition or compression-ignition internal combustion reciprocating piston engine and electric motor as motors for propulsion, capable of being charged by plugging to external source of electric power
29102450	Motor vehicles, with only electric motor for propulsion
29102490	Other motor vehicles for the transport of persons (excluding vehicles with only electric motor for propulsion, vehicles for transporting ≥ 10 persons, snowmobiles, golf cars and similar vehicles)
29104110	Goods vehicles with a diesel or semi-diesel engine, of a gross vehicle weight ≤ 5 tonnes (excluding dumpers for off-highway use)
29104200	Goods vehicles, with spark-ignition internal combustion piston engine; other goods vehicles, new

Source: European Commission

Table 9 | HS Codes Related to Motor Vehicles

HS Code	Definition
8703.40	Vehicles; with both spark-ignition internal combustion reciprocating piston engine and electric motor for propulsion, incapable of being charged by plugging to external source of electric power
8703.50	Vehicles; with both compression-ignition internal combustion piston engine (diesel or semi-diesel) and electric motor for propulsion, incapable of being charged by plugging to external source of electric power
8703.60	Vehicles; with both spark-ignition internal combustion reciprocating piston engine and electric motor for propulsion, capable of being charged by plugging to external source of electric power
8703.70	Vehicles; with both compression-ignition internal combustion piston engine (diesel or semi-diesel) and electric motor for propulsion, capable of being charged by plugging to external source of electric power
8703.80	Vehicles; with only electric motor for propulsion

Source: United Nations Statistics Division

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Global Electric Motors

Global Filters

Global Flat Glass

Global Gaskets & Seals

Global Hybrid & Electric Vehicles

Global Industrial Fasteners

Global Industrial Rubber Products Market

Global Motorcycles

Global Off-Road Equipment Technology 2020

Global Tires

Lubricants in the US

Recreational Vehicles in the US

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Automotive Lubricants: United Kingdom

COVID-19 Market Impact Analysis

E-Bikes: Europe

Filters: United Kingdom

Global Light Vehicles

Global Macroeconomy

Global Medium- & Heavy-Duty Trucks & Buses

Hybrid & Electric Vehicles: United Kingdom

Industrial Rubber Products: United Kingdom

Motorcycles: Europe

Motor Vehicle Leasing: United States

Motor Vehicles: United States

Public Transport: United States

Tires: United Kingdom

Transport Equipment: United States

Freedonia Custom Research

Trade Publications

Automotive Industries
Automotive News Europe
Bus & Motorcoach News
Heavy Duty Trucking
School Bus Fleet
Truck News
WardsAuto

Agencies & Associations

Alliance for Automotive Innovation
Association of Diesel Specialists
The Association for the Work Truck Industry
European Automobile Manufacturers' Association
Eurostat
International Monetary Fund
Organisation for Economic Co-operation and Development
Organisation Internationale des Constructeurs d'Automobiles (OICA)
United Nations Comtrade
World Bank