THE AUTOMOBILE INDUSTRY

POCKET GUIDE 2024/2025

acea

DRIVING MOBILITY FOR EUROPE

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FOREWORD

ACEA's Pocket Guide is the must-have resource for intelligence on the automotive industry and market, updated annually. Putting the focus on the data that matters most, we've slimmed down where relevant, while adding new chapters on electric vehicles (EVs).

The picture painted by this new edition is revealing as uncertainties and global competition mount. While there are positive takeaways from this year's update, the challenges our industry faces are monumental as we undergo the most significant transformation in over a century.

Some of the highlights: our industry continues to lead the way in R&D investment, with a sizeable €73 billion spent in 2023. Not only is that €14 billion more than the preceding year, but it's also double the amount invested by the next biggest sectoral investor.

EU car production jumped in 2023 nearing 15 million vehicles – nearly two million more than the previous year. Commercial vehicle production also rebounded, climbing by a notable 20%. Although volumes for all vehicle categories remain lower than pre-pandemic levels, this marks the fastest growth in the past decade.

Global car sales experienced a notable 10% rise last year with Europe's market share rising by a percentage point to reach 21%. EU car sales climbed for the first time since 2019 with battery-electric models nearly tripling their market share. Commercial vehicle sales performed even better with electric van and truck registrations almost quadrupling. Electric buses were not far behind, more than doubling their share in the same period.

While electric vehicle sales last year moved in the right direction, the share of vehicles on Europe's roads with a plug remains markedly low, underscoring the need for more robust measures to stimulate the market and replace older vehicles. And while most EU governments offer some form of incentive or tax scheme for EV buyers, charging infrastructure incentives are only available in a mere five member states.

Trade figures were promising despite the unpredictable context last year. The value of EU vehicle exports outweighed imports, culminating in a healthy 5% trade surplus growth compared to 2022. Bus exports posted an outstanding increase, climbing by 286%. The US and the UK remain the top two destinations in both units and value, underscoring the importance of safeguarding smooth trade in our sector. Türkiye is also becoming an increasingly important trade partner, not only for imports but also as an attractive export market.

The EU also continues to lead in global road safety, with fatalities slashed by 9% with drops recorded in 21 member states. Our continual investment in vehicle automation and safety will bring further road safety benefits as newer models take the road. Our environmental footprint also continued its downward trajectory. CO2 production emissions per vehicle hit new lows and have now fallen by a significant 60% since 2005. Production water usage per vehicle also sank, having now fallen by nearly 60% in the same period.

The ACEA Pocket Guide underlies why it is so important to ensure critical industries like ours are allowed to thrive by investing and trading freely. A holistic and coordinated industrial strategy that exceeds other regions' ambitions and puts in place the right conditions for competitiveness matters.

Whether it's trade, investment, road safety, employment and beyond, our industry touches so many facets of our everyday lives – allowing businesses to grow and keep society on the move. We intend our Pocket Guide to continue acting as a valuable resource in guiding both law makers and industry on the road to a more competitive and sustainable shared future.

"The ACEA Pocket Guide underlies why it is so important to ensure critical industries like ours are allowed to thrive by investing and trading freely. A holistic and coordinated industrial strategy that exceeds other regions' ambitions and puts in place the right conditions for competitiveness matters"

Sigrid de Vries
ACEA Director General

KEY FIGURES

EMPLOYMENT	Motor vehicle manufacturing (EU)	2.4 million jobs = 8.1% of EU manufacturing employment	2022
	Total (EU manufacturing, services, and construction)	13.2 million jobs = 6.8% of EU employment	2022
PRODUCTION	Motor vehicles (global)	93.9 million units	2023
	Motor vehicles (EU)	14.8 million units = 15.8% of global vehicle production	2023
	Passenger cars (global)	75.9 million units	2023
	Passenger cars (EU)	12.2 million units = 16% of global car production	2023
REGISTRATIONS	Motor vehicles (global)	90.1 million units	2023
	Motor vehicles (EU)	12.4 million units = 13.8% of global vehicle registrations	2023
	Passenger cars (global)	72.8 million units	2023
	Passenger cars (EU)	10.5 million units = 14.5% of global car registrations	2023
	New cars by fuel (EU)	battery electric 14.6%, petrol 35.3% market share	2023
	New vans by fuel (EU)	electric 7.4%, diesel 82.6% market share	2023
	New trucks by fuel (EU)	electric 1.5%, diesel 95.7% market share	2023
	New buses by fuel (EU)	electric 15.9%, diesel 62.3% market share	2023
TRADE	Motor vehicle exports (extra-EU)	€195.1 billion	2023
	Motor vehicle imports (extra-EU)	€88.4 billion	2023
	Trade balance (extra-EU)	€106.7 billion	2023

VEHICLES ON ROADS	Motor vehicles (EU)	289.6 million units	2022
	Passenger cars (EU)	252.2 million units	2022
	Motorisation rate (EU)	659 vehicles per 1,000 inhabitants	2022
	Average age of cars (EU)	12.3 years	2022
	Average age of vans (EU)	12.5 years	2022
	Average age of trucks (EU)	13.9 years	2022
	Average age of buses (EU)	12.5 years	2022
ROAD SAFETY	Road fatalities per million inhabitants (EU)	46 people	2022
	Road fatalities (EU)	-28% since 2011	2022
ENVIRONMENT	Average CO2 emissions from new cars (EU)	107.8g CO2/km	2023
	CO2 emissions from car production	-53.4% since 2005	2023
INNOVATION	Automobiles and parts sector (EU)	€72.8 billion = 33% of the EU's total R&D spending	2022
TAXATION	Fiscal income from motor vehicles (EU major markets)	€383.7 billion	2023

EMPLOYMENT

THE AUTOMOBILE INDUSTRY
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DRIVING MOBILITY FOR EUROPE

The EU auto sector employs more than 13 million across the value chain

EU AUTOMOTIVE SECTOR: DIRECT AND INDIRECT EMPLOYMENT

In thousands, 2022[1]

13.2 m jobs

2.4 m direct jobs | **10.8 m** indirect jobs

3.1 m manufacturing jobs | **10.1 m** non-manufacturing jobs

DIRECT MANUFACTURING	2,401
Motor vehicles	1,067
Bodies (coachwork), trailers, and semi-trailers	163
Parts and accessories	1,170

2.4 m jobs

INDIRECT MANUFACTURING	674
Computers and peripheral equipment	57
Electric motors, generators, and transformers	617

0.7 m jobs

AUTOMOBILE USE	4,077
Sale of vehicles	1,415
Maintenance and repair of vehicles	1,413
Sale of vehicle parts and accessories	642
Retail sale of automotive fuel in specialised stores	409
Renting and leasing of vehicles	198

4.1 m jobs

TRANSPORT	5,204
Other passenger land transport	1,759
Freight transport by road	3,445

5.2 m jobs

CONSTRUCTION	858
Roads, bridges and tunnels[2]	858

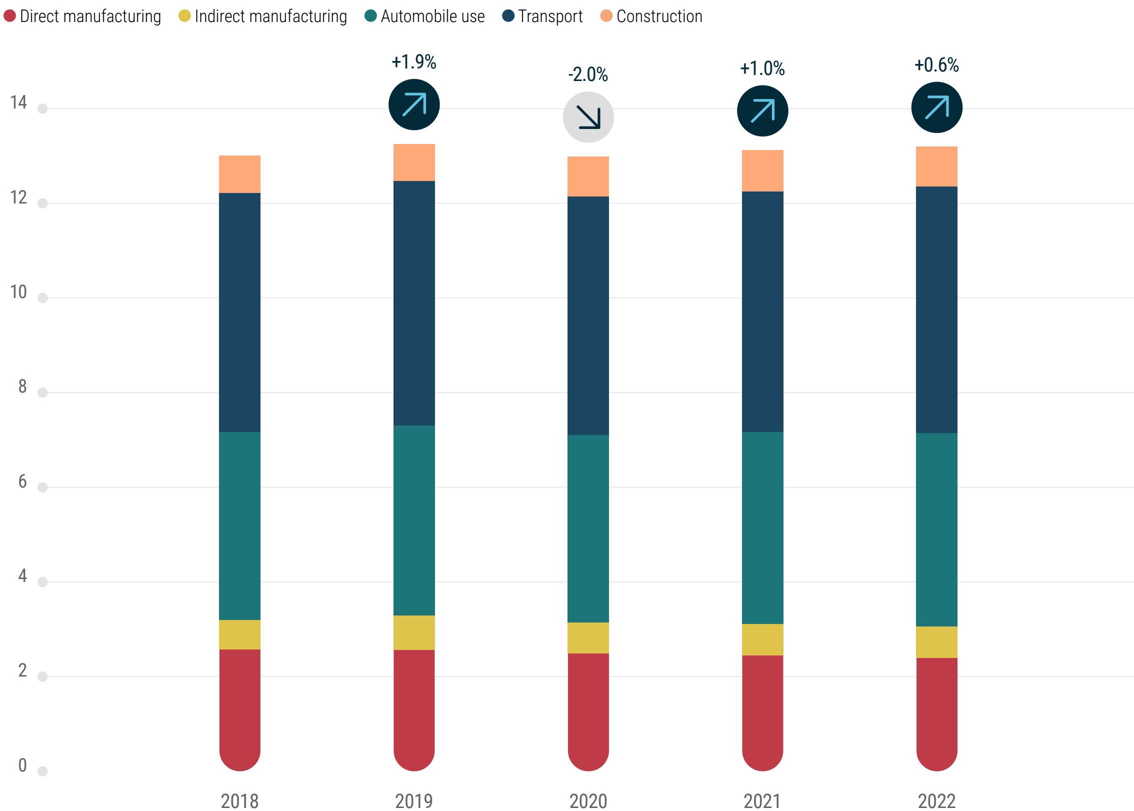
0.9 m jobs

SOURCE: **EUROSTAT**

1. Provisional
2. Including railways

EU AUTOMOTIVE SECTOR EMPLOYMENT

In million jobs, 2018 – 2022[1]



SOURCE: **EUROSTAT**

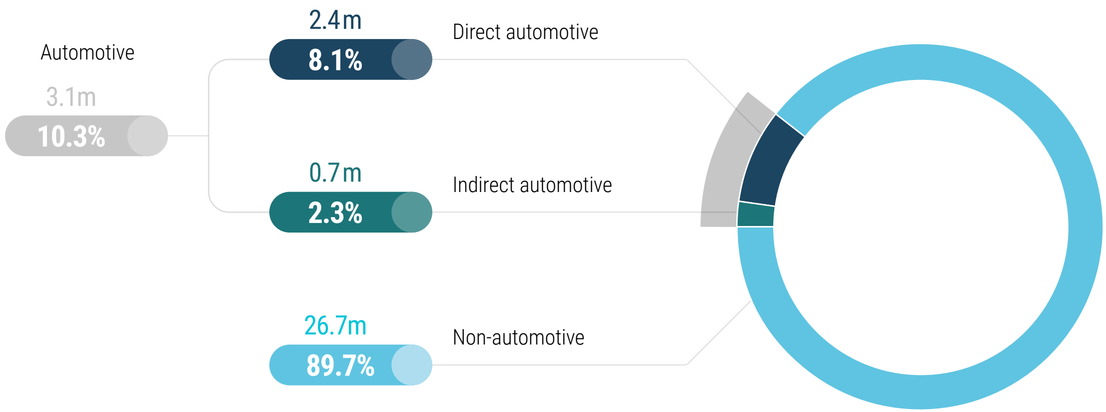
The EU auto sector accounts for around 7% of the bloc's employment

1. Provisional data for 2022. Historical data can be subject to revision in case of updates from Eurostat

The EU automotive sector accounts for over 10% of EU manufacturing jobs

AUTOMOTIVE SHARE OF EU MANUFACTURING JOBS

% share, 2022[1]

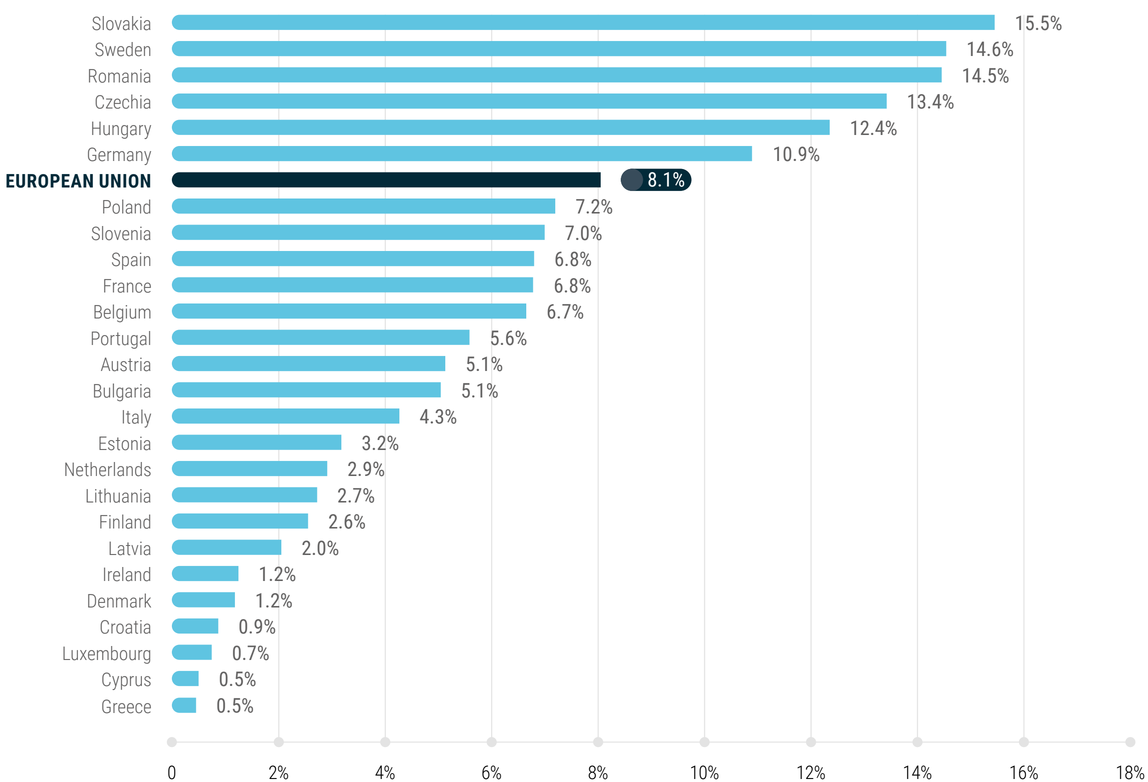


SOURCE: **EUROSTAT**

1. Provisional

EU DIRECT AUTOMOTIVE EMPLOYMENT

Share of total manufacturing by country, 2022[1]



SOURCE: **EUROSTAT**

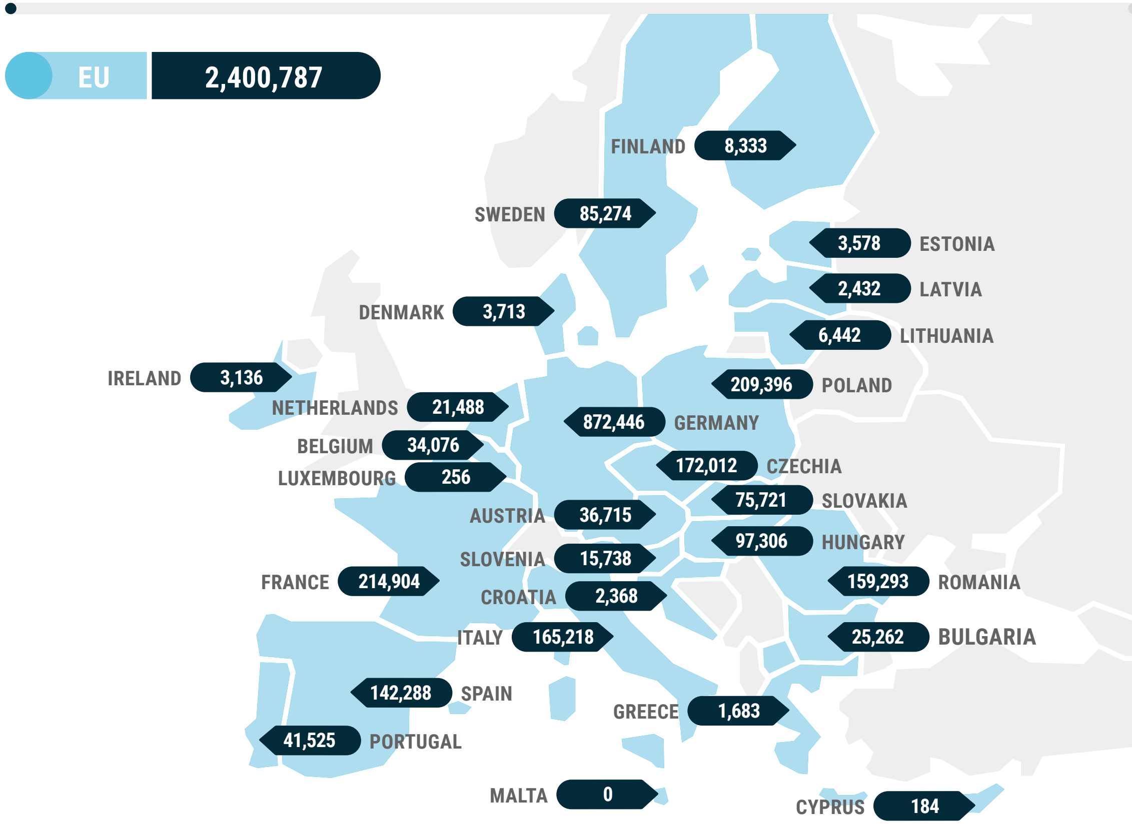
The EU auto industry accounts for over 10% of manufacturing jobs in six member states

1. Provisional

EU auto makers directly employ around 2.4 million Europeans in automotive manufacturing

DIRECT EU AUTOMOTIVE MANUFACTURING EMPLOYMENT

2022[1]

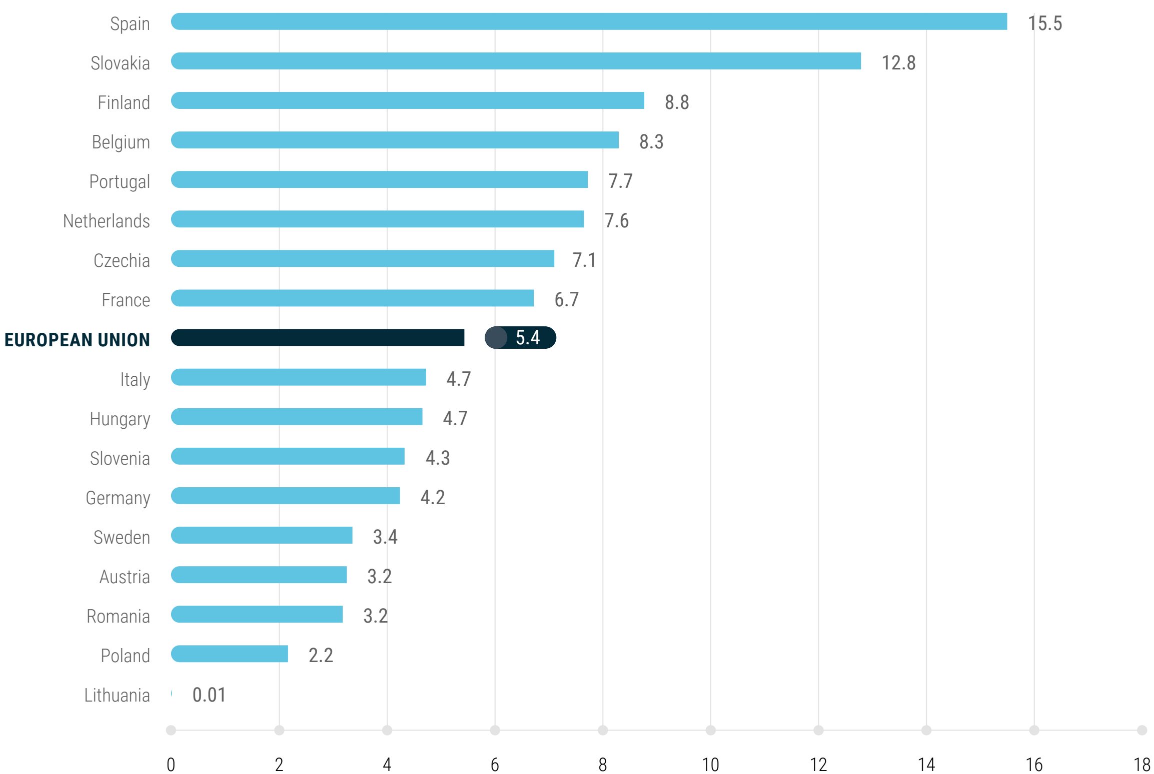


SOURCE: **EUROSTAT**

1. Provisional

VEHICLE PRODUCTION PER DIRECT AUTOMOTIVE MANUFACTURING EMPLOYEE

By country, 2022[1]



SOURCE: **EUROSTAT, S&P GLOBAL MOBILITY**

Each EU automotive manufacturing worker produces an average of five vehicles annually

1. Based on employment most recent data available

PRODUCTION

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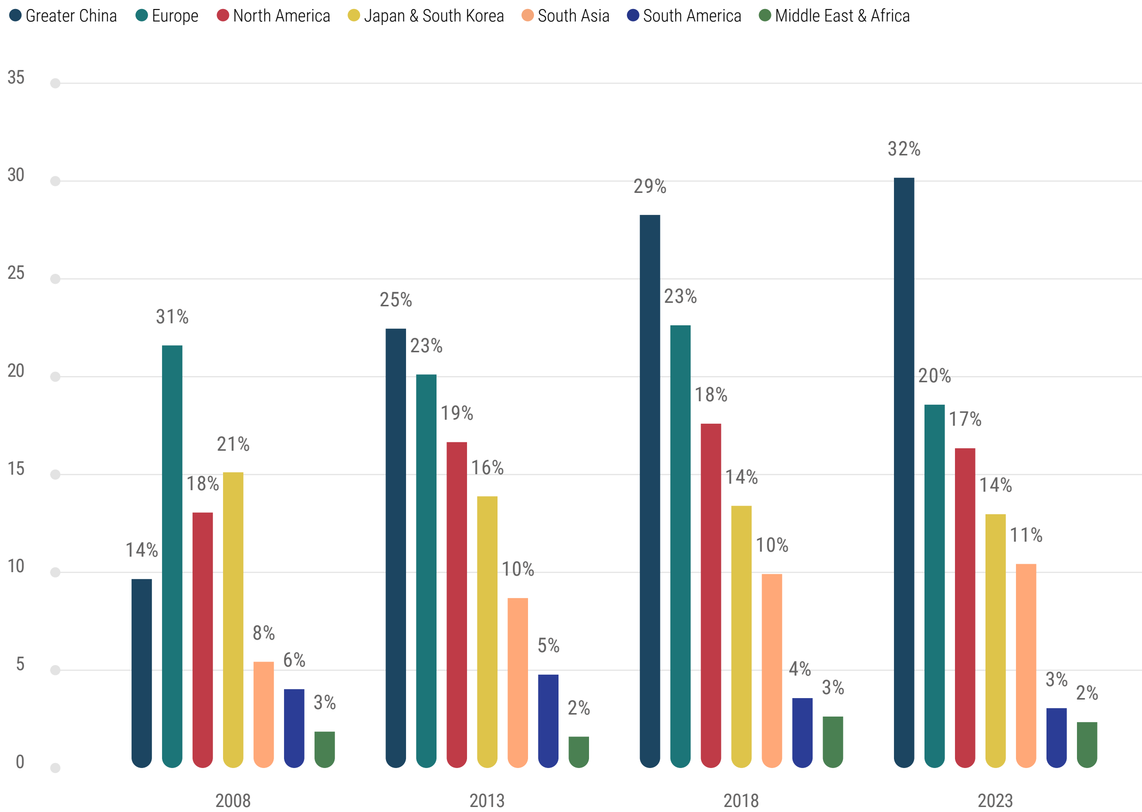
DRIVING MOBILITY FOR EUROPE

China is the world's top vehicle producer, manufacturing nearly one-third of vehicles globally

GLOBAL VEHICLE PRODUCTION

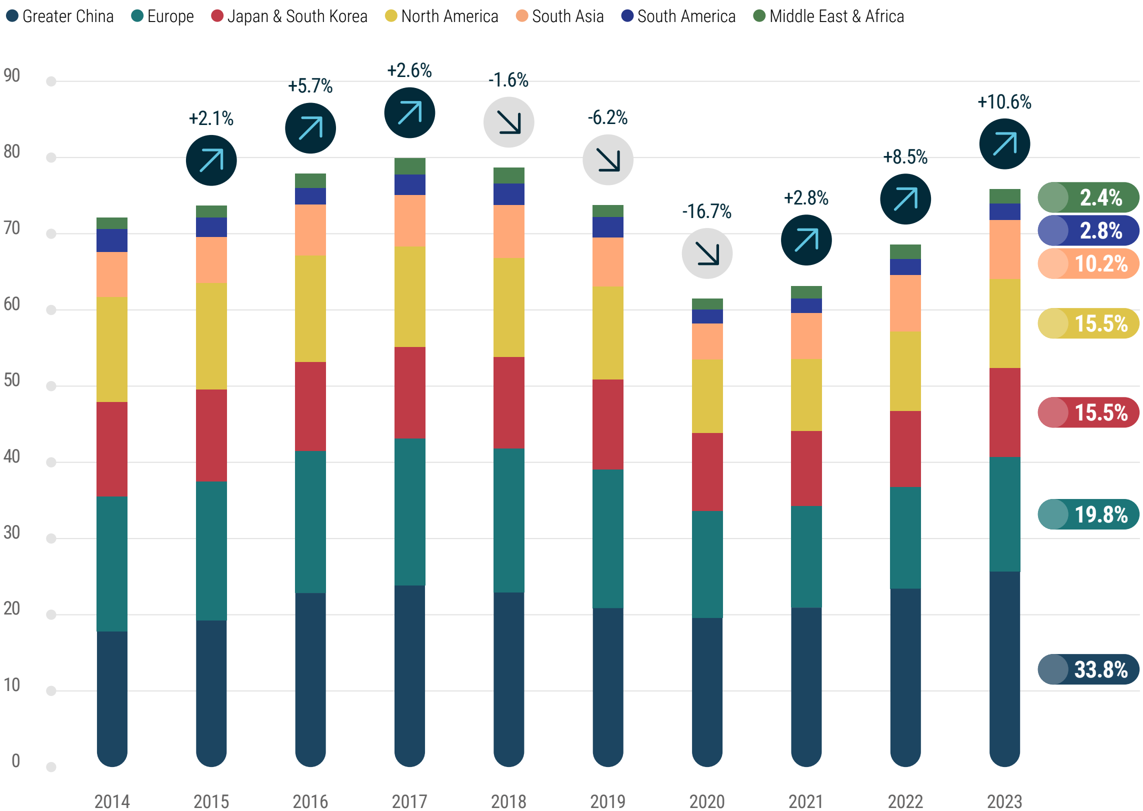
In million units, % share, 2008 – 2023



SOURCE: S&P GLOBAL MOBILITY

GLOBAL CAR PRODUCTION

In million units, % change, % share, 2014 – 2023



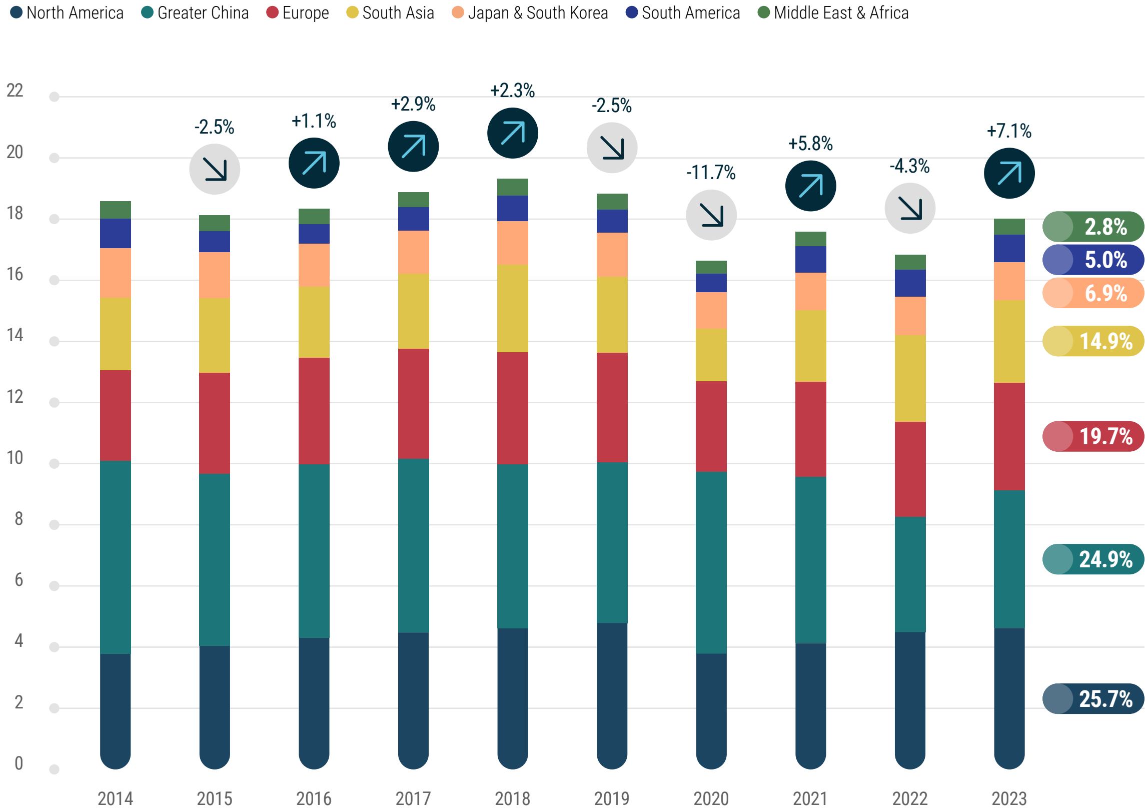
SOURCE: **S&P GLOBAL MOBILITY**

Global car production surged by around 11% in 2023, the highest year-on-year percentage increase since 2015

Global commercial vehicle production increased by over 7% in 2023

GLOBAL COMMERCIAL VEHICLE PRODUCTION [1]

In million units, % change, % share, 2014 – 2023

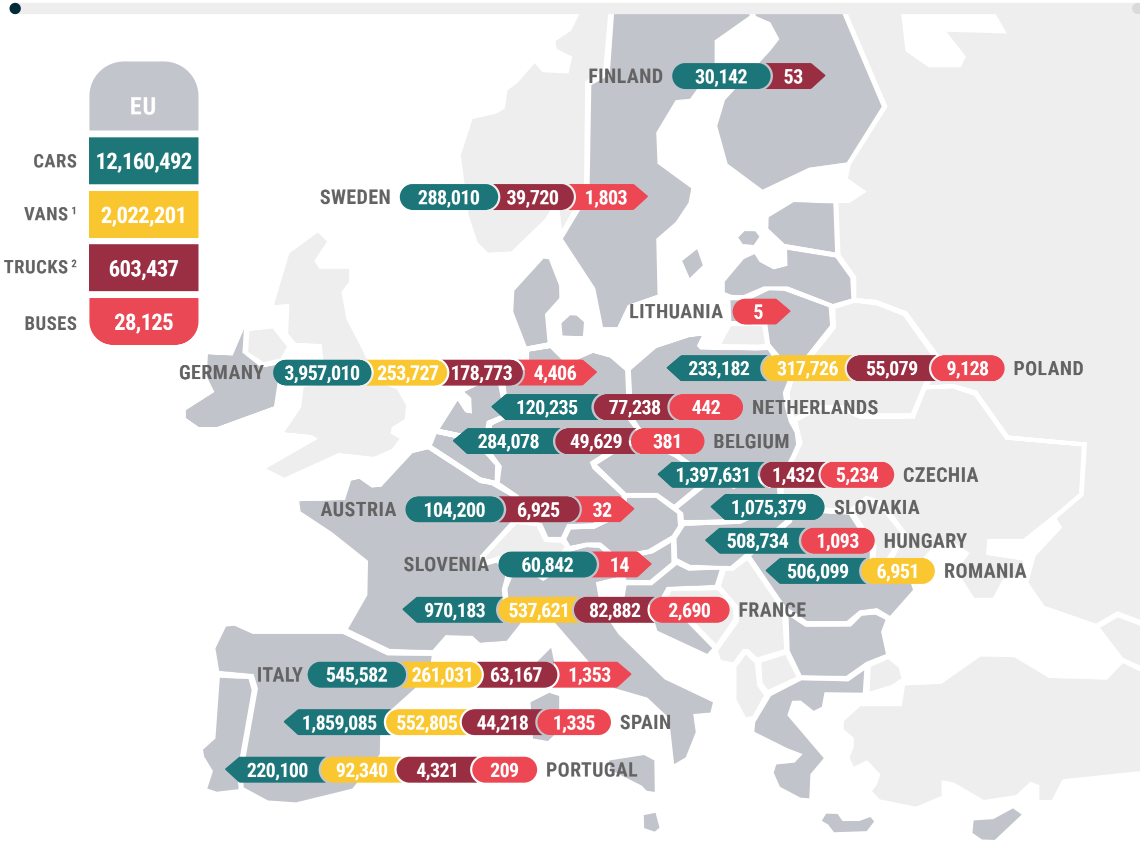


SOURCE: **S&P GLOBAL MOBILITY**

1. Includes buses

EU VEHICLE PRODUCTION

By country, 2023



SOURCE: **S&P GLOBAL MOBILITY**

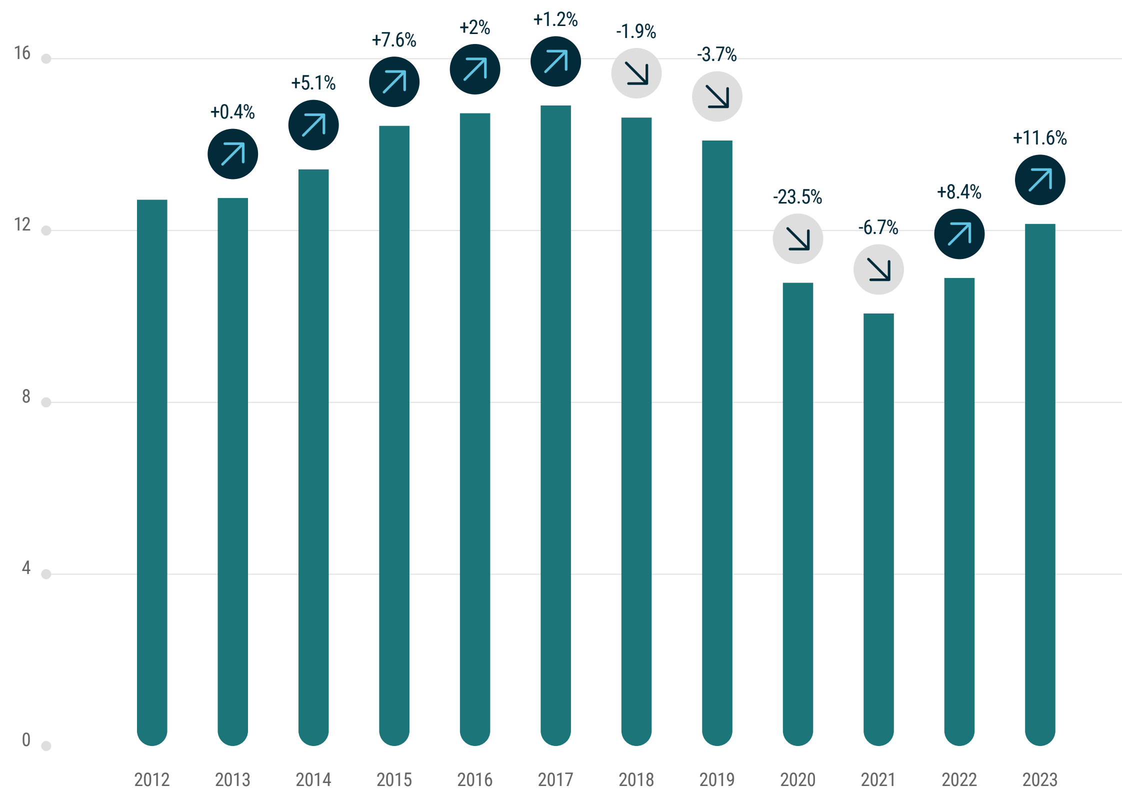
About 15 million vehicles were made in the EU in 2023, nearly 2 million more compared to 2022

1. Light commercial vehicles up to 3.5 tonnes
2. Medium and heavy commercial vehicles over 3.5 tonnes

EU car production grew at its fastest rate in the last decade

EU CAR PRODUCTION

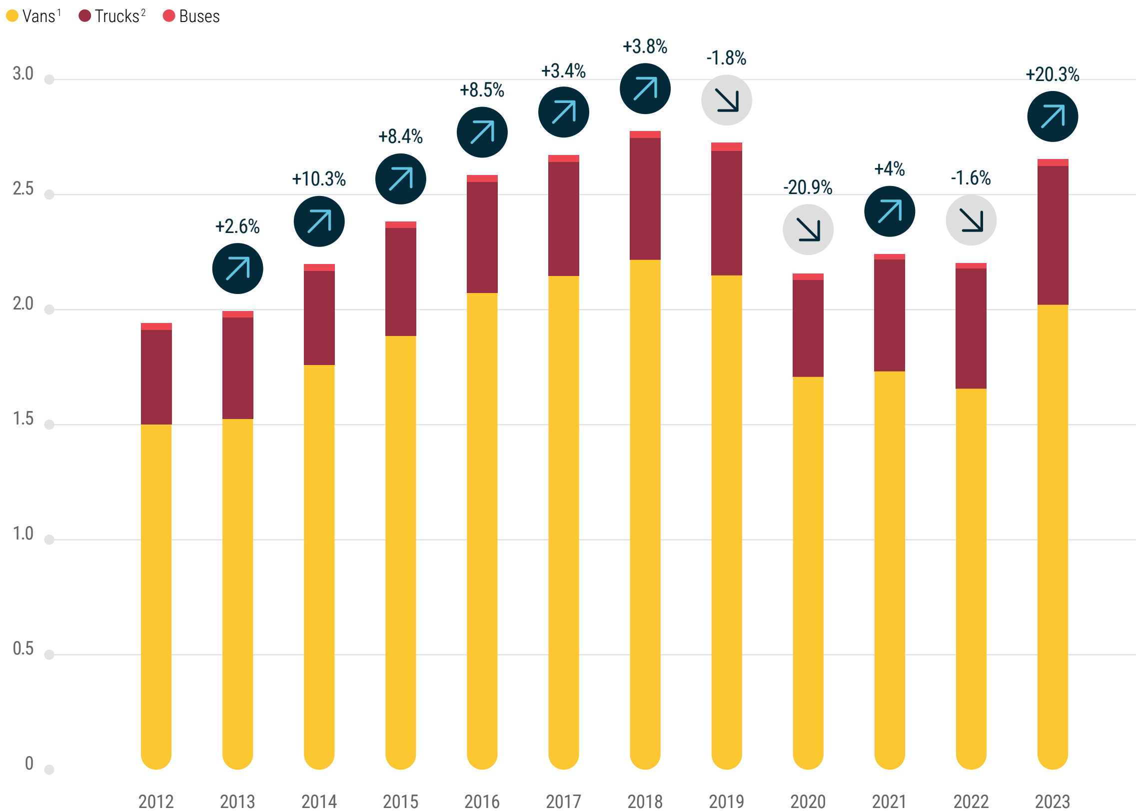
In million units, % change, 2012 – 2023



SOURCE: **S&P GLOBAL MOBILITY**

EU COMMERCIAL VEHICLE PRODUCTION

In million units, % change, 2012 – 2023



SOURCE: **S&P GLOBAL MOBILITY**

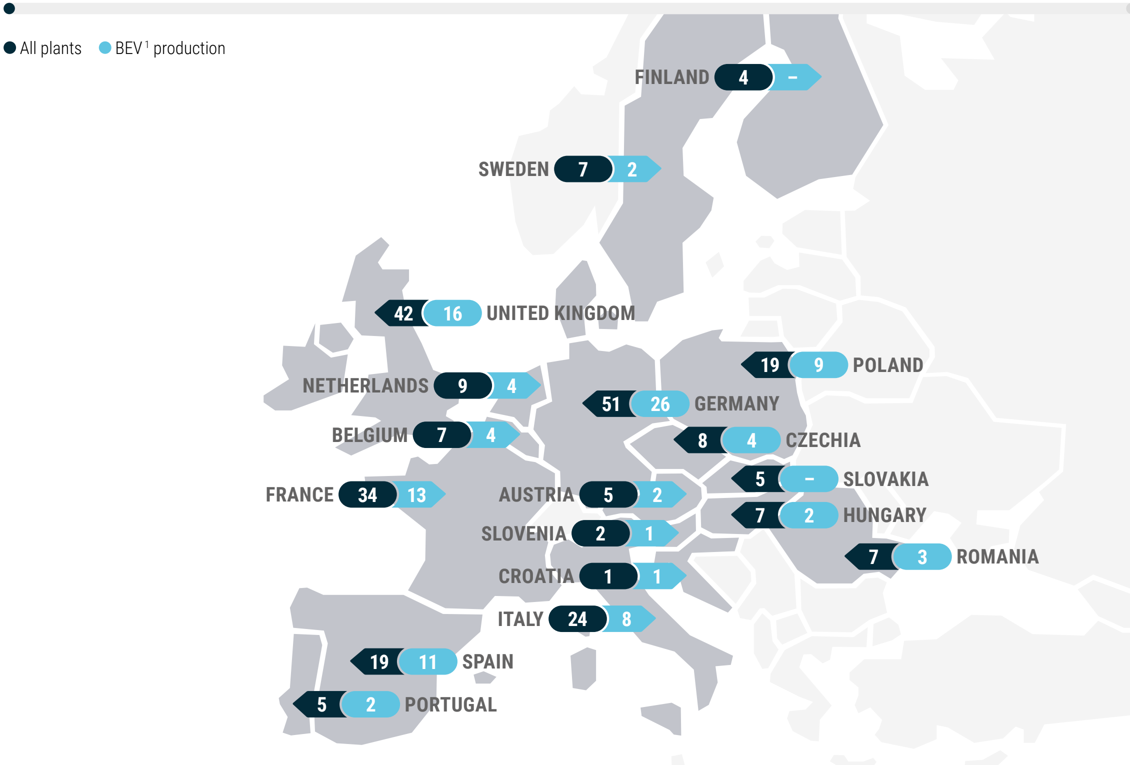
EU commercial vehicle production surged by 20% in 2023

1. Light commercial vehicles up to 3.5t
2. Medium and heavy commercial vehicles over 3.5t

255 automotive plants operate in the EU

AUTOMOBILE ASSEMBLY, BATTERY, AND ENGINE PLANTS

2024



	CARS	VANS	TRUCKS	BUSES	ENGINES	BATTERIES	TOTAL
EU+UK	98	30	32	44	56	65	255

SOURCE: **S&P GLOBAL MOBILITY**

1. Battery-electric vehicle

REGISTRATIONS

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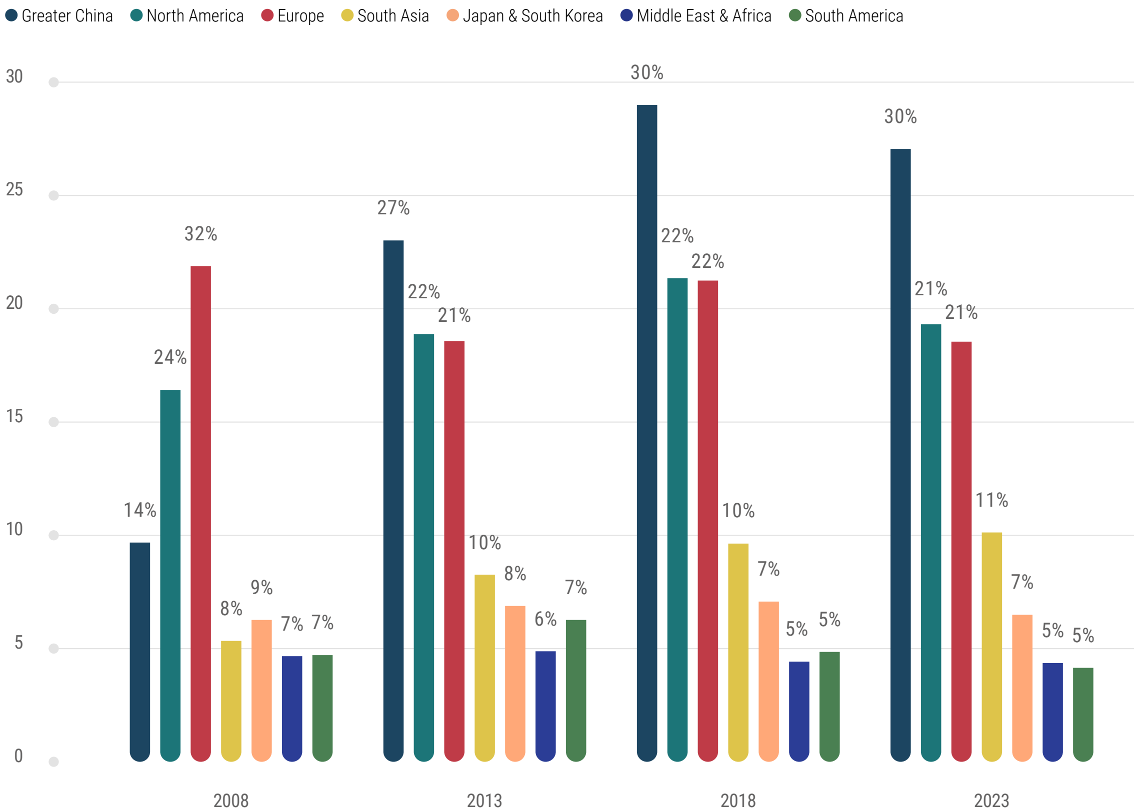
DRIVING MOBILITY FOR EUROPE

Europe accounts for a fifth of global vehicle sales, down from a third in 2008

GLOBAL NEW VEHICLE REGISTRATIONS

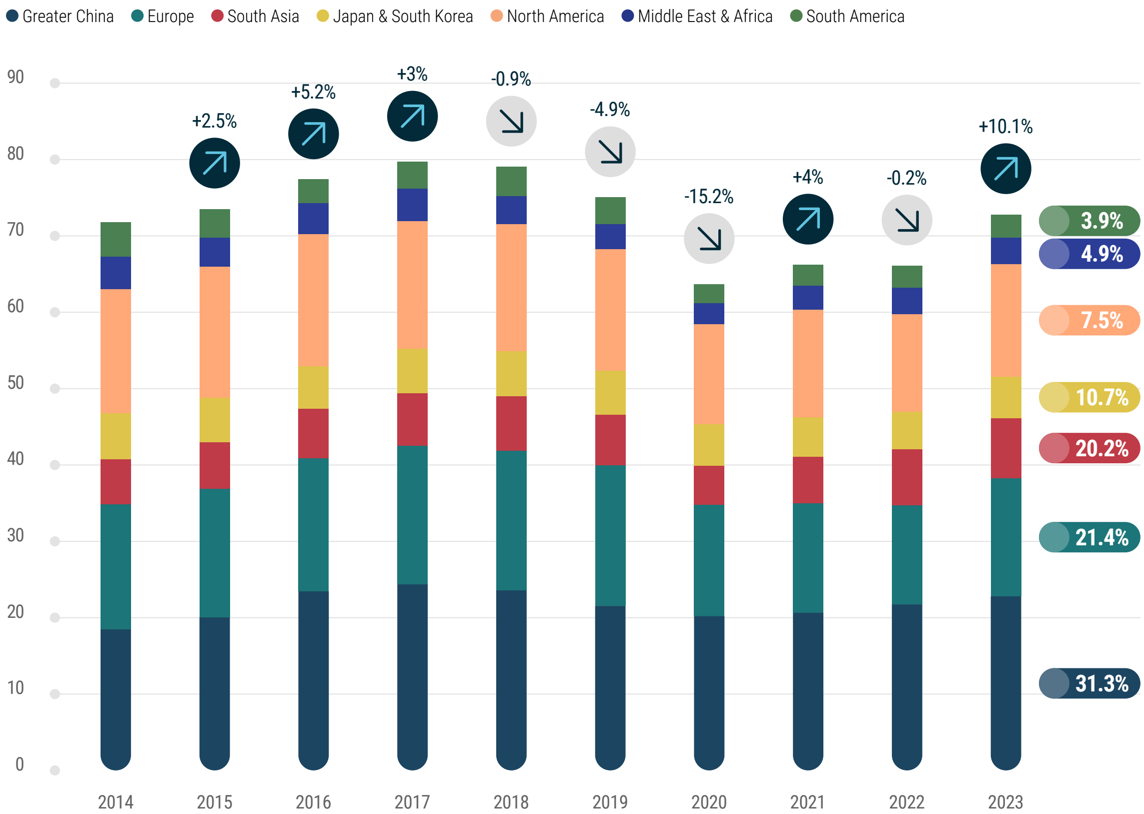
In million units, % share, 2008 – 2023



SOURCE: **S&P GLOBAL MOBILITY**

GLOBAL NEW CAR REGISTRATIONS

In million units, % change, % share, 2014 – 2023



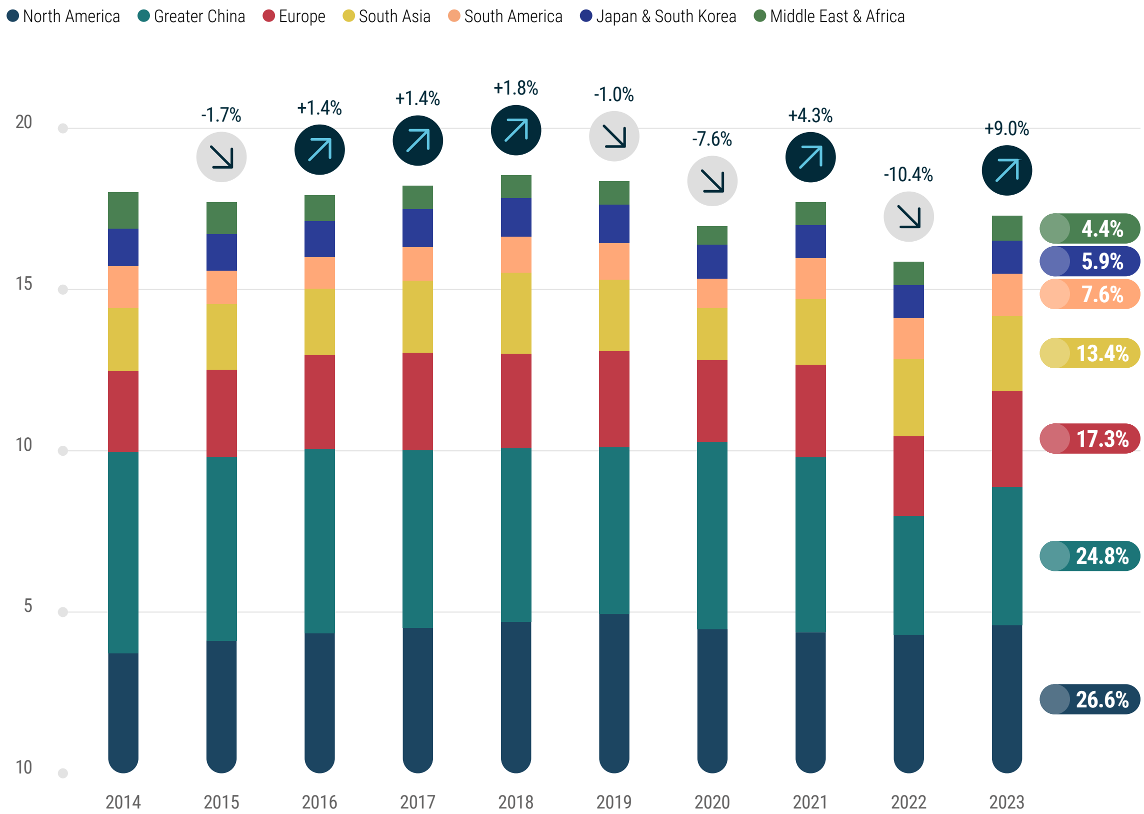
SOURCE: **S&P GLOBAL MOBILITY**

Europe accounts for more than 21% of global car sales, up from 20% in 2022

Europe accounts for more than 17% of global commercial vehicles sales

GLOBAL NEW COMMERCIAL VEHICLE[1] REGISTRATIONS

In million units, % change, % share, 2014 – 2023

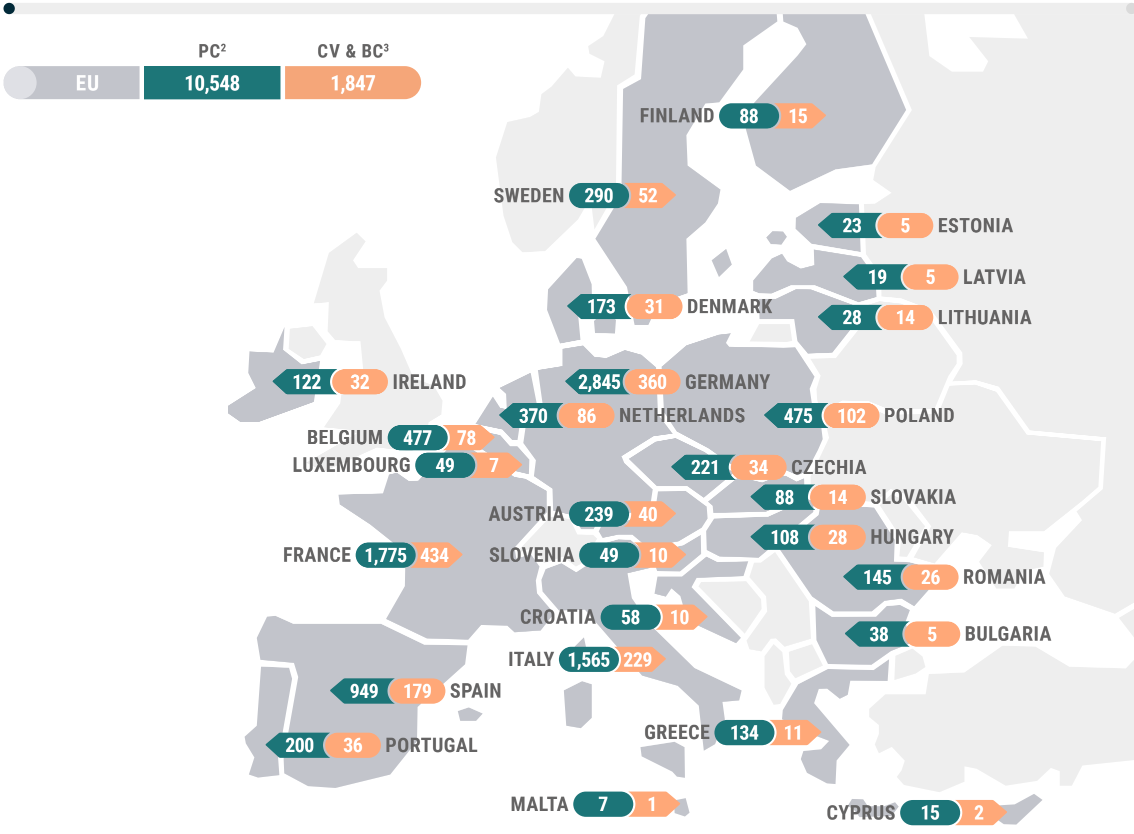


SOURCE: **S&P GLOBAL MOBILITY**

1. Includes buses

NEW EU VEHICLE REGISTRATIONS [1]

By country, in thousand units, 2023



SOURCE: **ACEA, S&P GLOBAL MOBILITY**

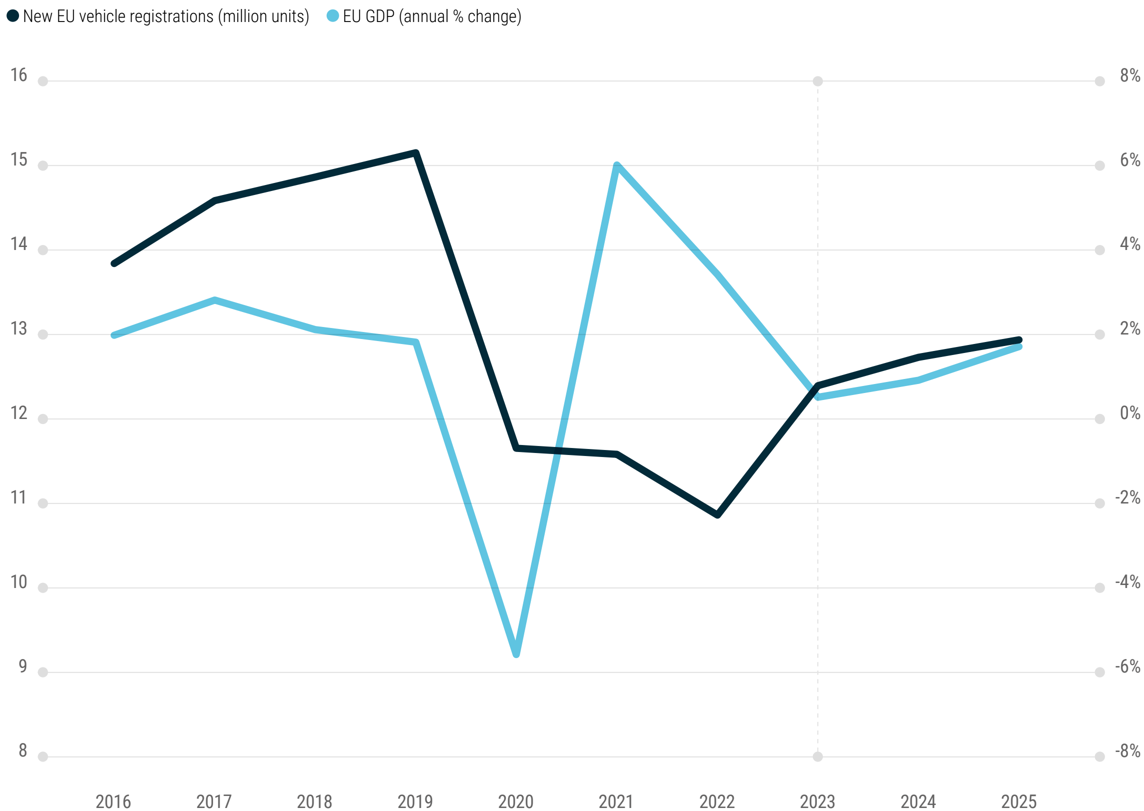
Auto makers sold over 12 million new vehicles in the EU in 2023, 1.5 million more than in 2022

1. Data for Malta not available
2. Passenger cars
3. Commercial vehicles, and buses and coaches

Vehicle sales largely mirror economic trends

NEW VEHICLE REGISTRATIONS AND GDP IN THE EU

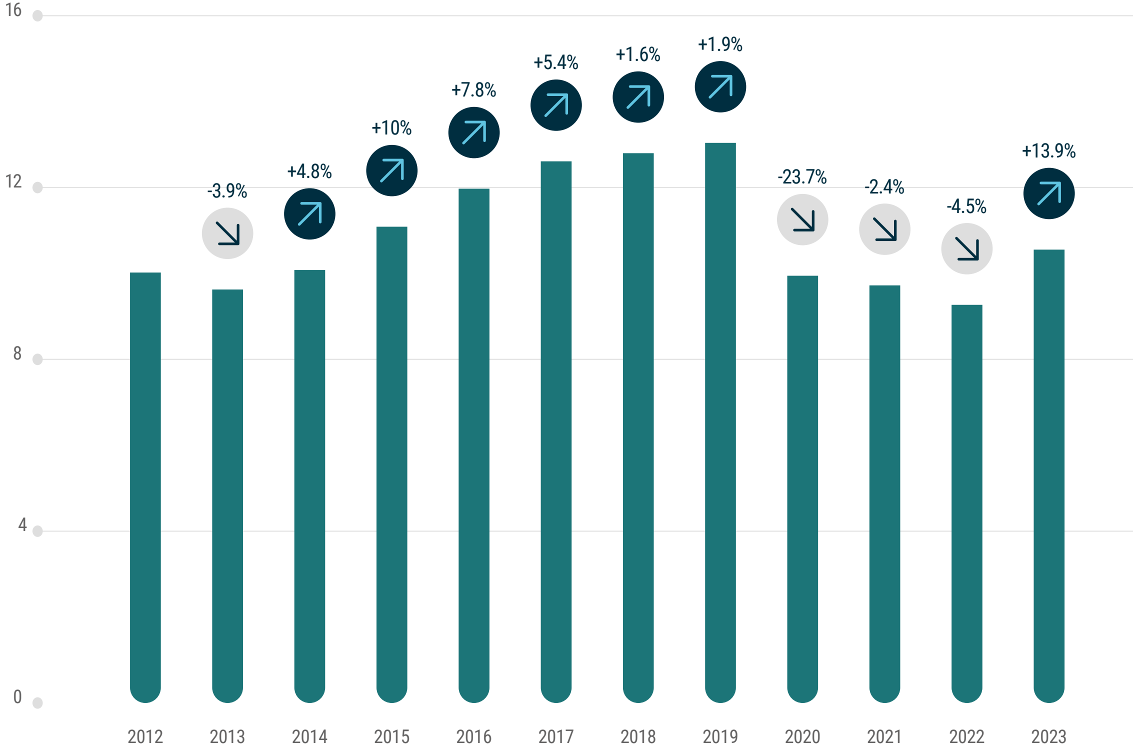
2016 – 2025



SOURCE: **ACEA, DG ECFIN, S&P GLOBAL MOBILITY**

NEW EU CAR REGISTRATIONS

In million units, % change, 2012 – 2023



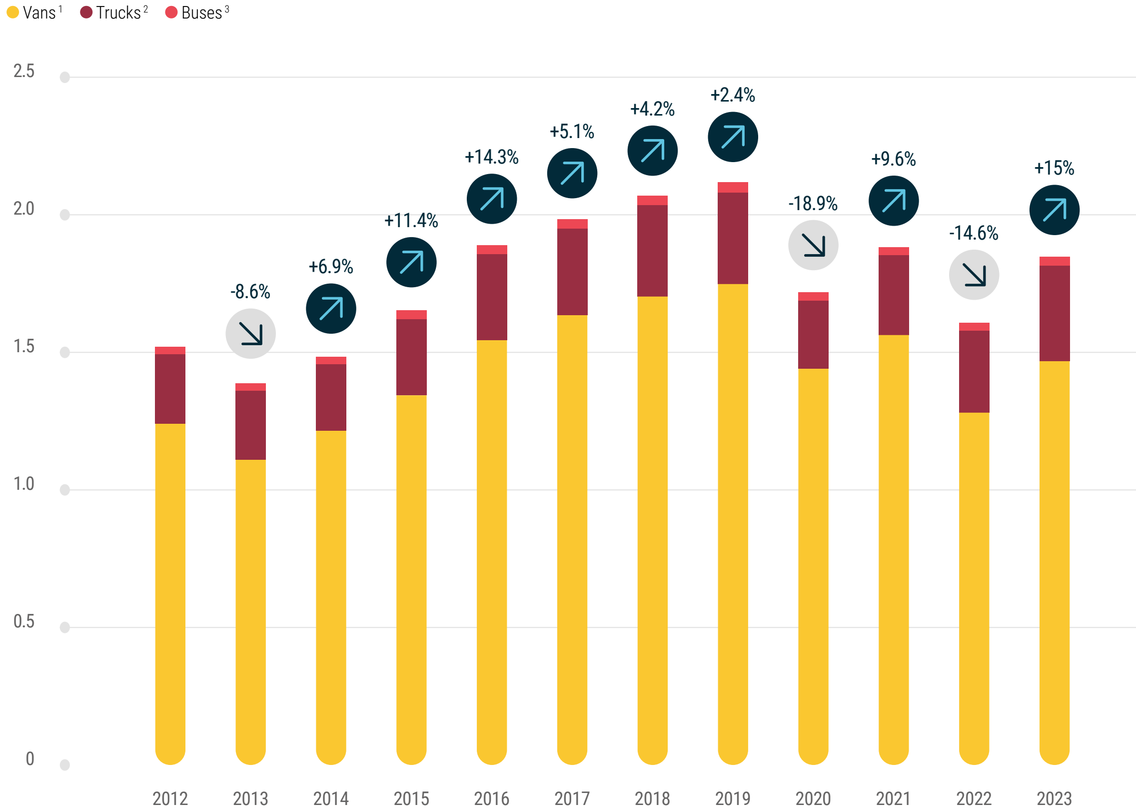
SOURCE: **ACEA**

EU car sales climbed for the first time since 2019

EU commercial vehicle sales rose by 15% in 2023

NEW EU COMMERCIAL VEHICLE REGISTRATIONS

In million units, % change, 2012 – 2023

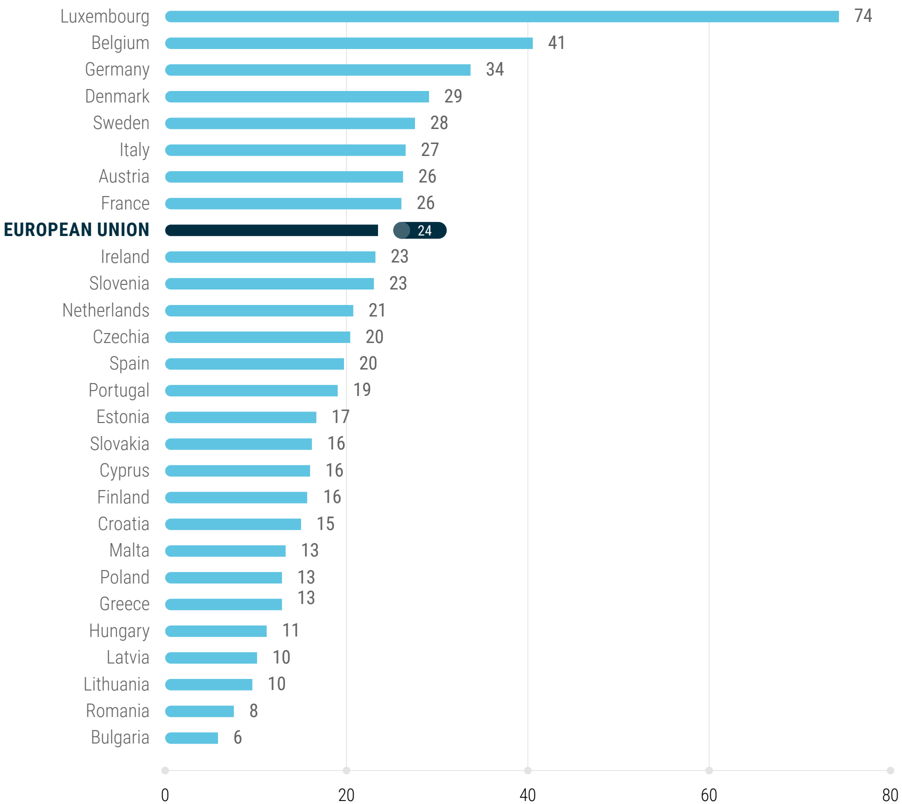


SOURCE: **ACEA**

1. Light commercial vehicles up to 3.5 tonnes
2. Commercial vehicles over 3.5 tonnes
3. Buses and coaches over 3.5 tonnes

NEW CARS PER 1,000 INHABITANTS

By country, in units, 2023



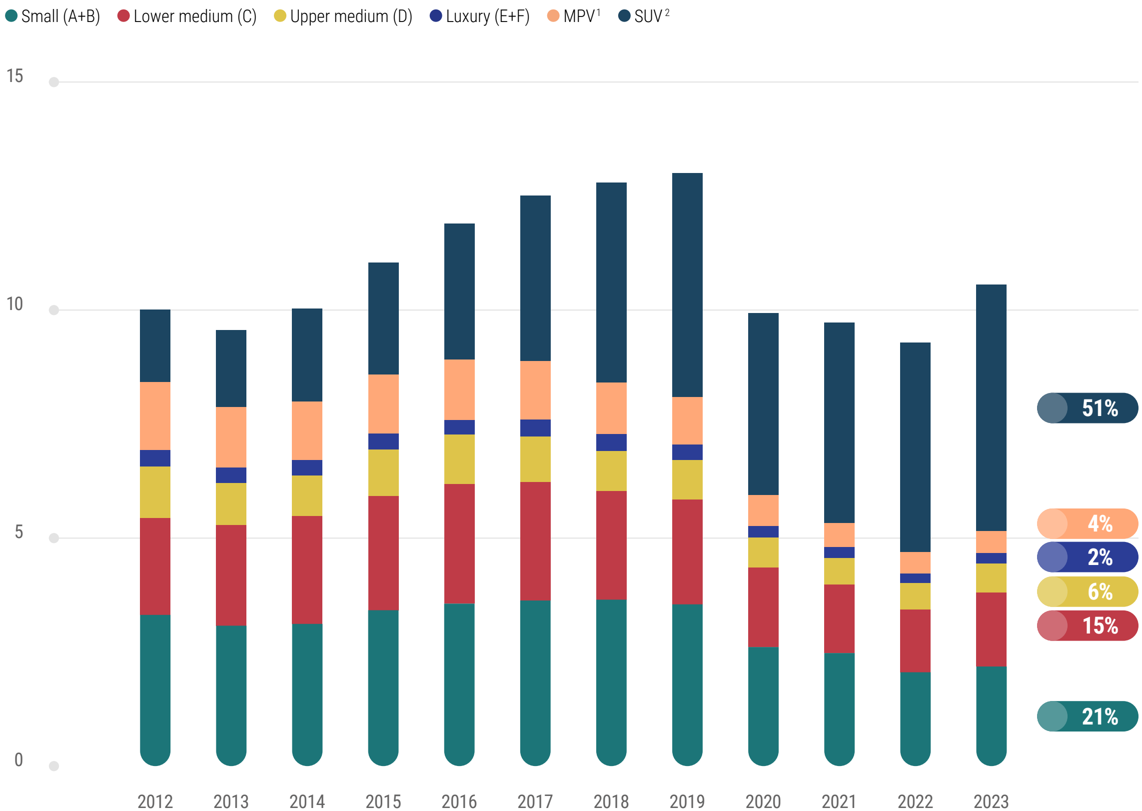
SOURCE: **ACEA, EUROSTAT**

One car is sold for every 50 persons in the EU annually

Small and medium cars make up around 42% of EU sales

NEW CARS IN THE EU BY SEGMENT

In million units, % share, 2012 – 2023

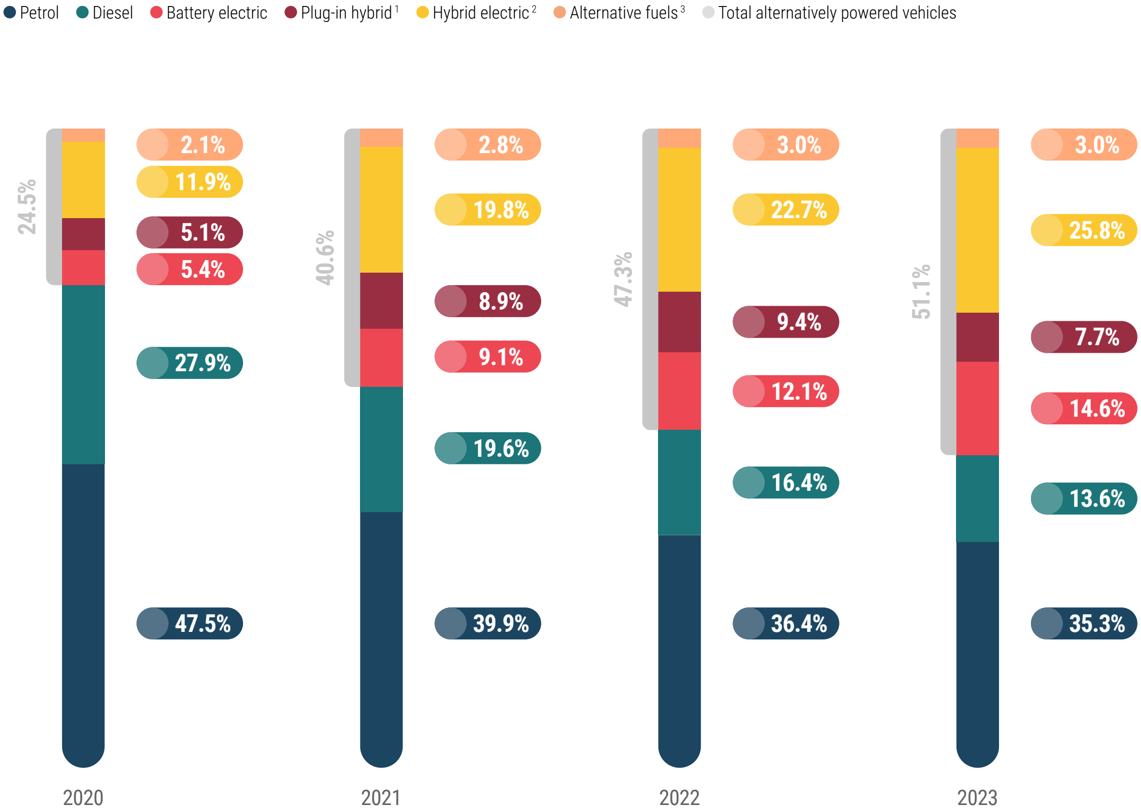


SOURCE: **S&P GLOBAL MOBILITY**

1. Multi-purpose vehicles
2. Sport utility vehicles

NEW EU CAR SALES BY POWER SOURCE

Market share, 2020 – 2023



SOURCE: **ACEA**

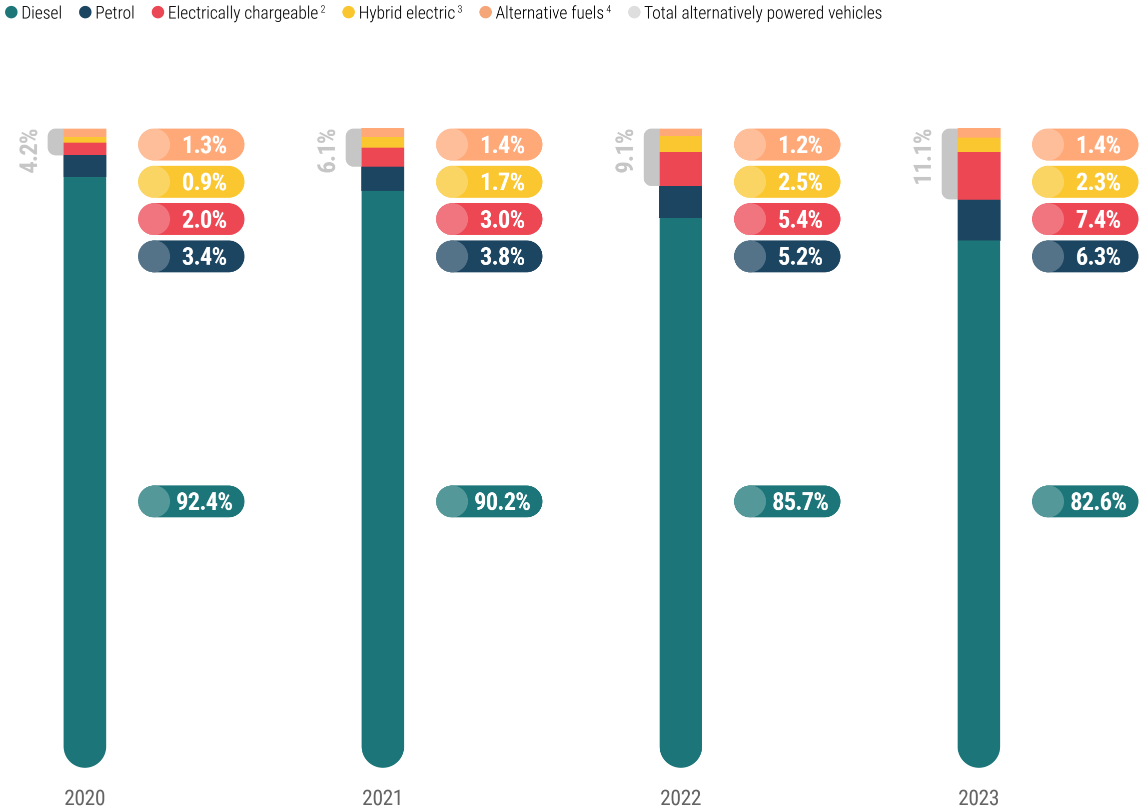
The EU market share of battery-electric cars has surged around three-fold in four years

1. Includes extended-range electric vehicle
2. Includes full and mild hybrids
3. Includes natural gas, LPG, ethanol and fuel cell electric vehicles

The EU market share of electrically chargeable vans has almost quadrupled in four years

NEW EU VAN[1] SALES BY POWER SOURCE

Market share, 2020 – 2023



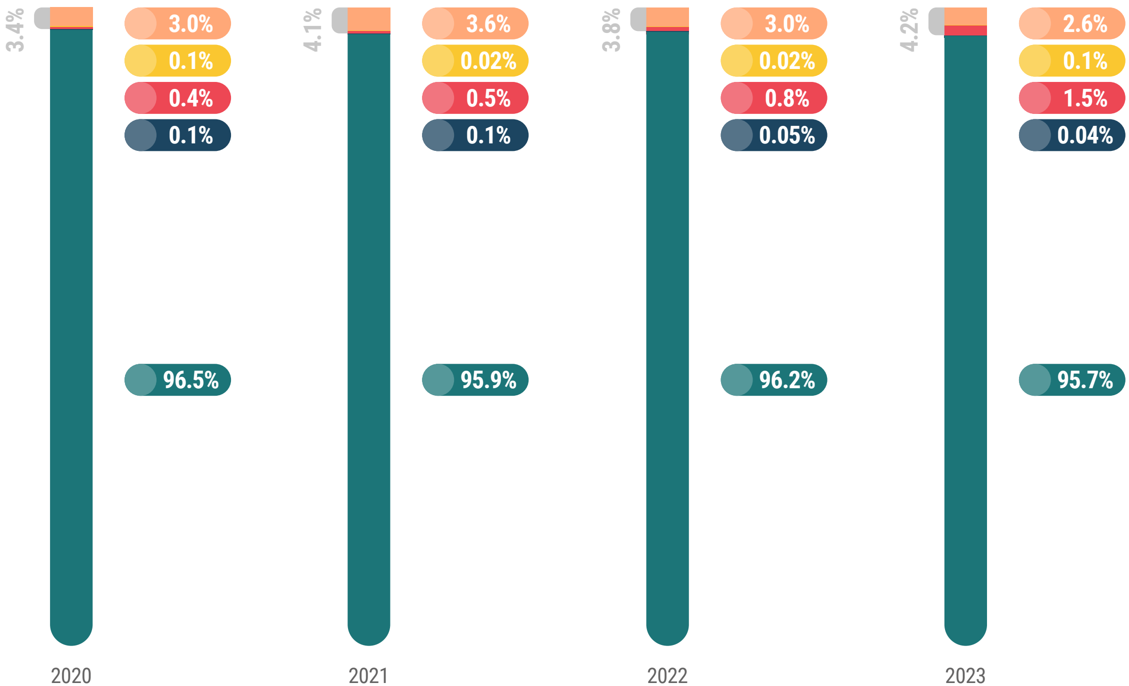
SOURCE: **ACEA**

1. 1Light commercial vehicles up to 3.5 tonnes
2. Includes battery and plug-in hybrid vehicles
3. Includes full and mild hybrids
4. Includes natural gas, LPG, ethanol and fuel cell electric vehicles

NEW EU[1] TRUCK[2] SALES BY POWER SOURCE

Market share, 2020 – 2023

Diesel · Petrol · Electrically chargeable[3] · Hybrid electric[4] · Alternative fuels[5] · Total alternatively powered vehicles



SOURCE: **ACEA**

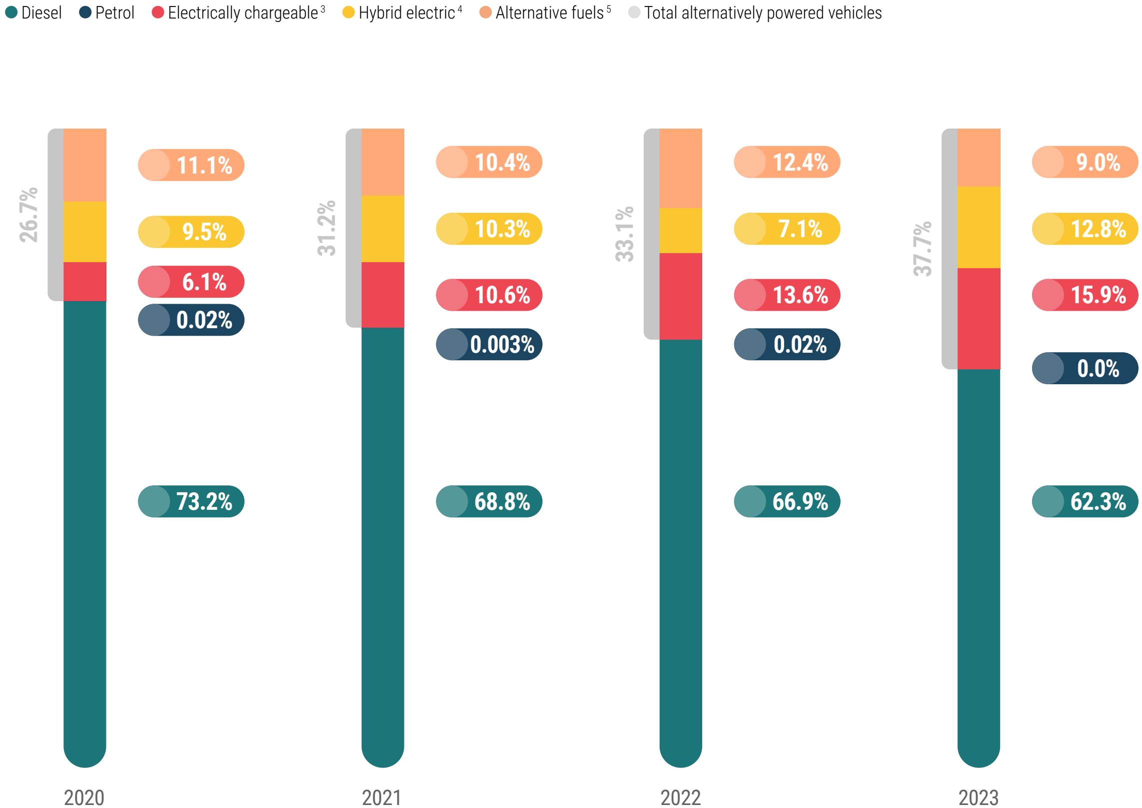
The market share of alternatively powered trucks was relatively stable at around 4%

1. Data for Bulgaria and Malta not available
2. Commercial vehicles over 3.5 tonnes
3. Includes battery and plug-in hybrid vehicles
4. Includes full and mild hybrids
5. Includes natural gas, LPG, ethanol and fuel cell electric vehicles

The market share of electrically chargeable buses has nearly trebled in four years

NEW EU[1] BUS[2] SALES BY POWER SOURCE

Market share, 2020 – 2023



SOURCE: ACEA

1. Data for Bulgaria and Malta not available
2. Buses and coaches over 3.5 tonnes
3. Includes battery and plug-in hybrid vehicles
4. Includes full and mild hybrids
5. Includes natural gas, LPG, ethanol and fuel cell electric vehicles

TRADE

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DRIVING MOBILITY FOR EUROPE

The trade surplus generated by the EU auto industry rose by 5% in 2023

EU VEHICLE TRADE

By type, in million €, 2023

Trade in value	Cars	Vans [1]	Trucks [2]	Buses	TOTAL
2023					
Imports	78,415	6,661	781	2,544	88,401
Exports	176,639	9,757	7,652	1,086	195,134
Trade balance	98,224	3,096	6,871	-1,458	106,733
2022					
Imports	61,836	5,551	645	1,763	69,795
Exports	157,532	6,936	6,199	796	171,464
Trade balance	95,697	1,385	5,554	-966	101,669
% change 23/22					
Imports	+26.8%	+20.0%	+21.0%	+44.3%	+26.7%
Exports	+12.1%	+40.7%	+23.4%	+36.4%	+13.8%
Trade balance	+2.6%	+123.6%	+23.7%	+50.9%	+5.0%

1. Commercial vehicles up to 5t
2. Commercial vehicles over 5t

SOURCE: **EUROSTAT**

EU VEHICLE TRADE

By type, in units, 2023

Trade in volume	Cars	Vans[1]	Trucks[2]	Buses	TOTAL
2023					
Imports	3,847,522	360,886	13,941	17,237	4,239,586
Exports	5,836,492	578,482	166,030	53,368	6,634,372
2022					
Imports	3,198,464	342,009	108,742	13,084	3,662,299
Exports	5,363,491	434,928	202,386	13,825	6,014,630
% change 23/22					
Imports	+20.3%	+5.5%	-87.2%	+31.7%	+15.8%
Exports	+8.8%	+33.0%	-18.0%	+286.0%	+10.3%

SOURCE: **EUROSTAT**

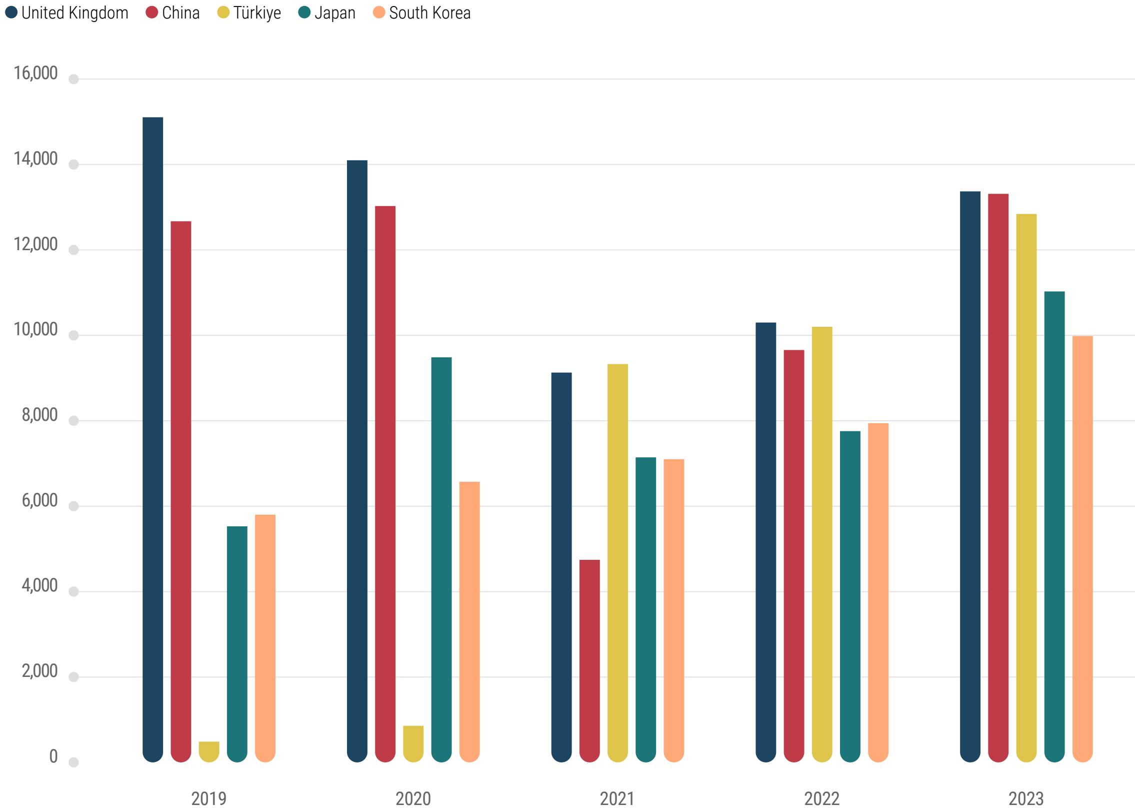
EU vehicle imports and exports grew by 16% and 10% respectively

1. Commercial vehicles up to 5t
2. Commercial vehicles over 5t

The value of EU vehicle imports has increased from all top five countries of origin compared to 2022

MAIN COUNTRIES OF ORIGIN OF EU VEHICLE IMPORTS

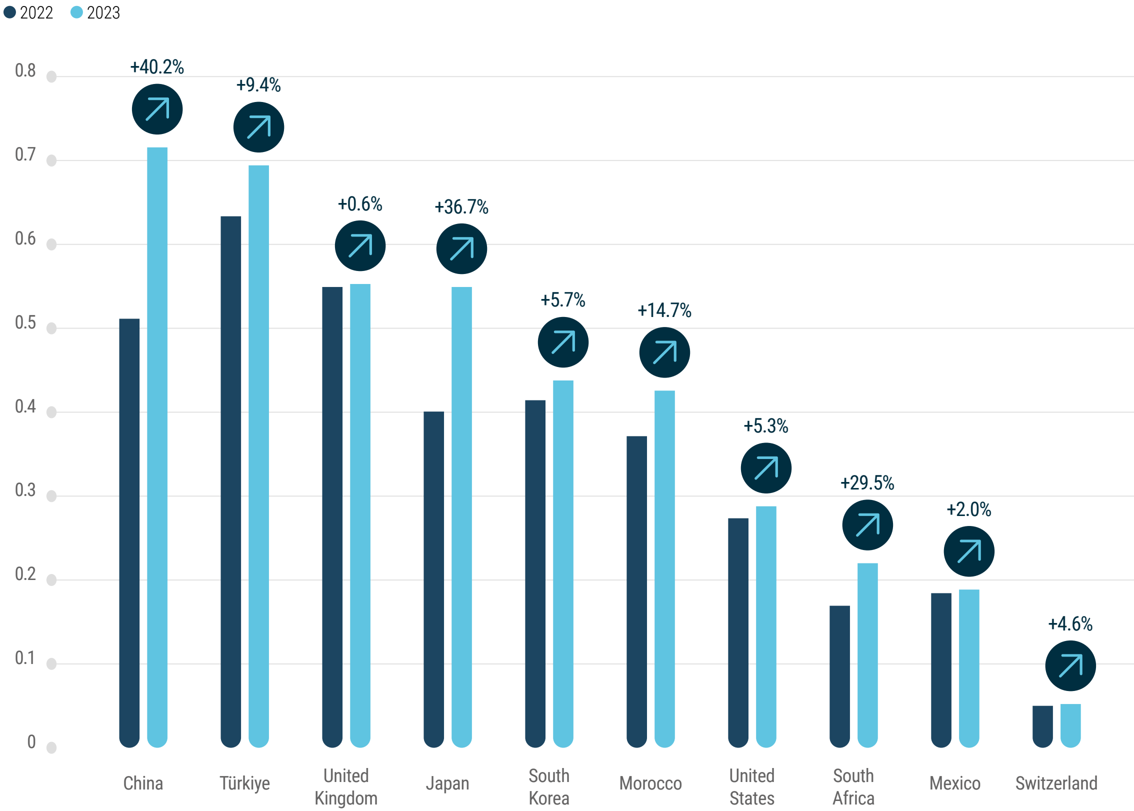
In million €, 2019 – 2023



SOURCE: **EUROSTAT**

MAIN COUNTRIES OF ORIGIN OF EU VEHICLE IMPORTS

In million units, 2023



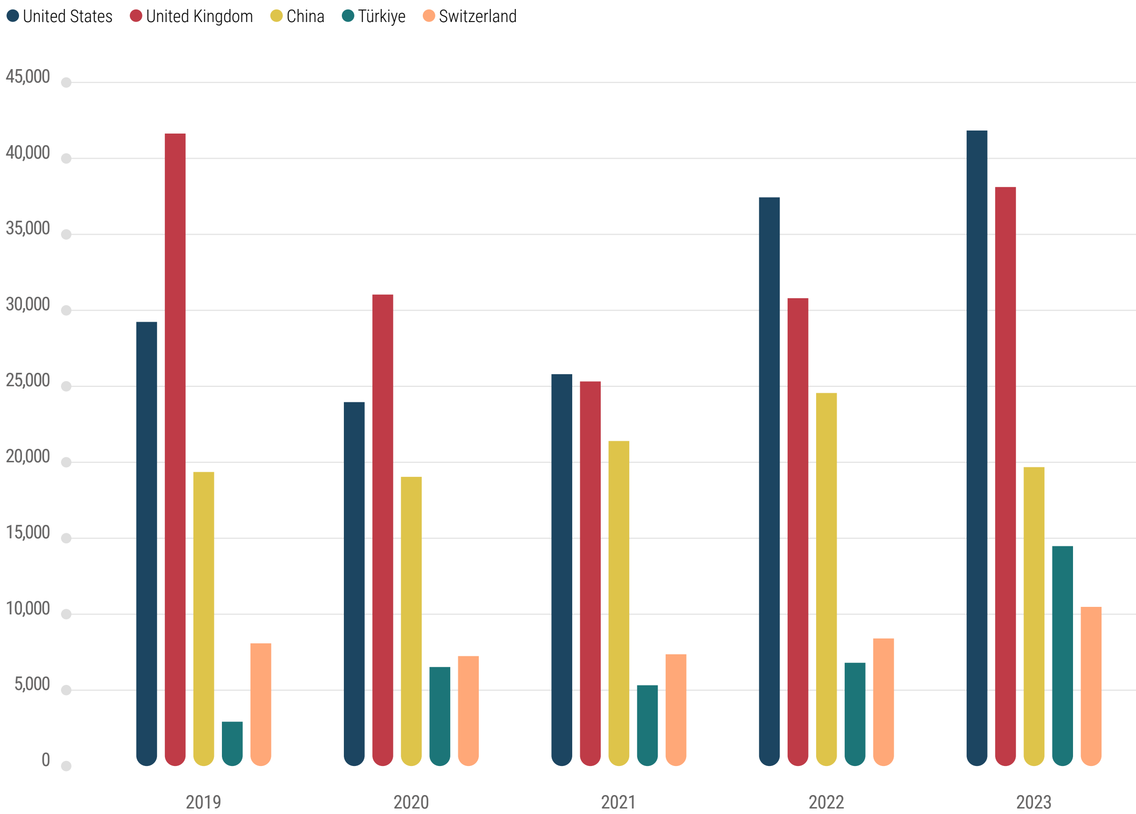
SOURCE: **EUROSTAT**

China, Türkiye, and the UK are the top three countries of origin for EU vehicle imports (in units)

The US and the UK are the two most valuable markets for EU vehicle exports

MAIN DESTINATIONS FOR EU VEHICLE EXPORTS

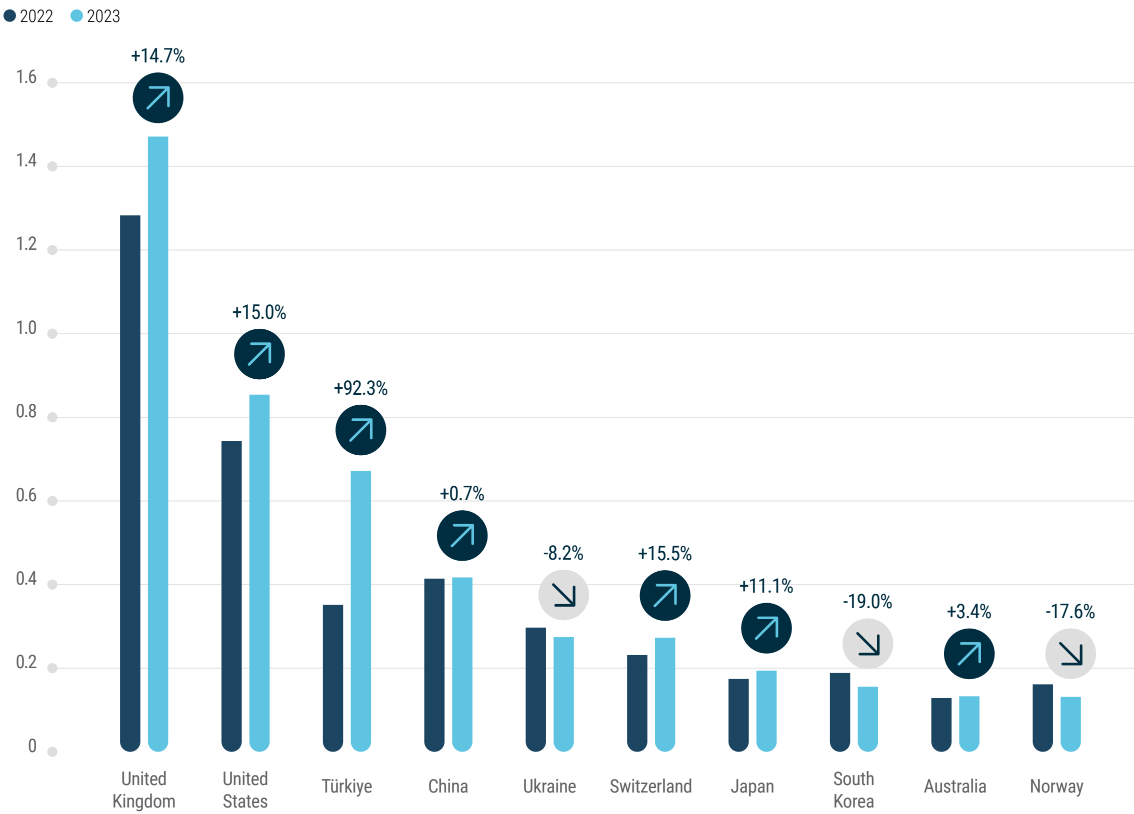
In million €, 2019 – 2023



SOURCE: **EUROSTAT**

MAIN DESTINATIONS FOR EU VEHICLE EXPORTS

In million units, 2023



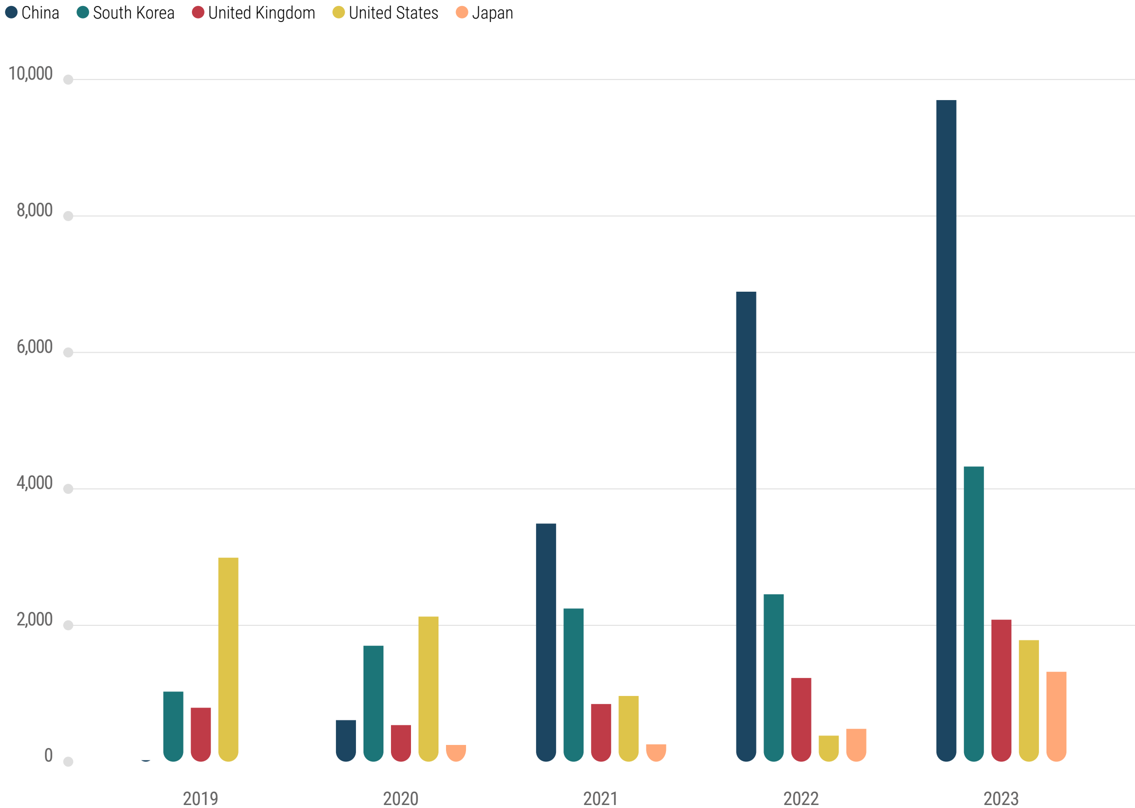
SOURCE: **EUROSTAT**

The UK, the US, and Türkiye are the top three destinations for EU vehicle exports (in units)

China is the top country of origin by value for EU battery-electric car imports

MAIN COUNTRIES OF ORIGIN OF EU BATTERY-ELECTRIC CAR IMPORTS

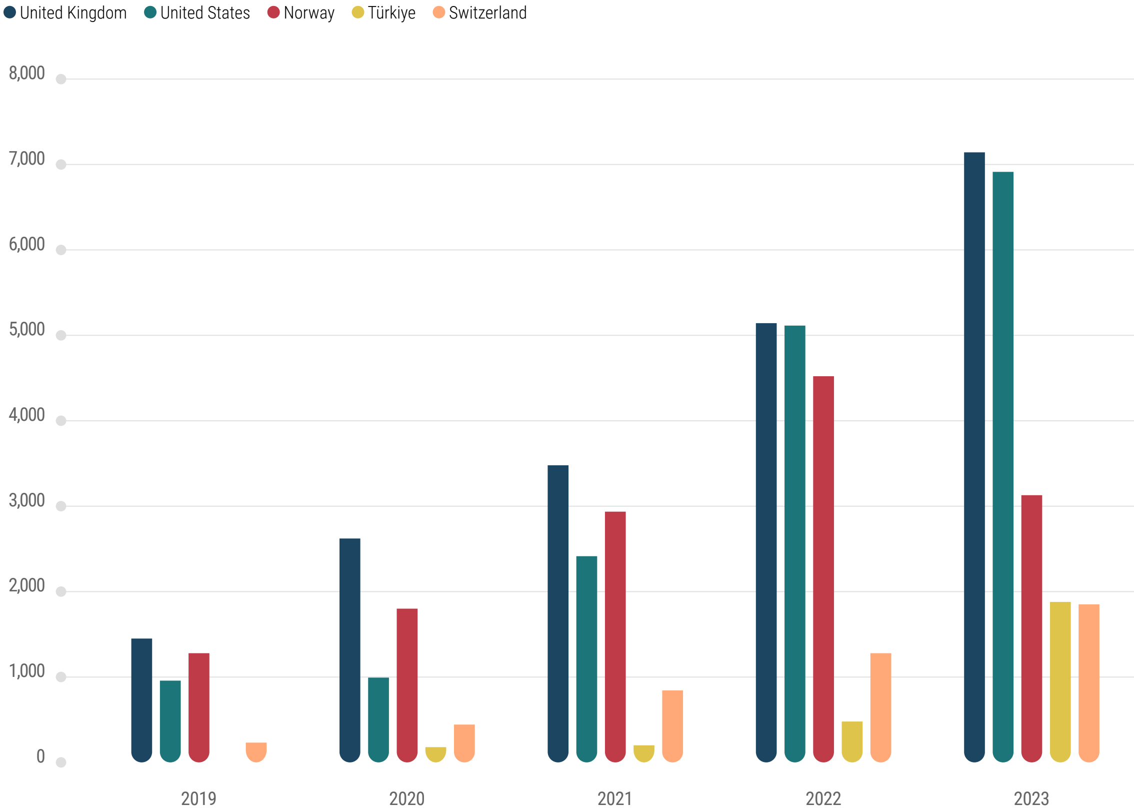
In million €, 2019 – 2023



SOURCE: **EUROSTAT**

MAIN DESTINATIONS OF EU BATTERY-ELECTRIC CAR EXPORTS

In million €, 2019 – 2023



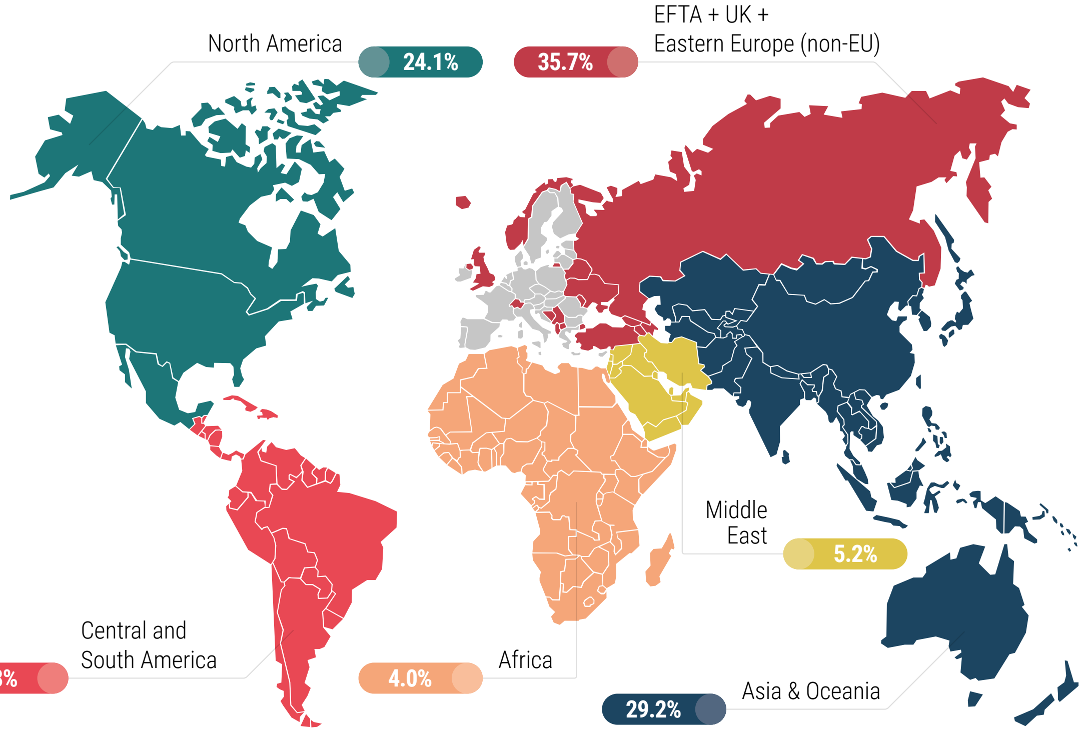
SOURCE: **EUROSTAT**

The UK and the US are the most valuable markets for EU battery-electric car exports

More than one-third of EU vehicle exports go to other European (non-EU) countries

MAIN DESTINATIONS FOR EU VEHICLE EXPORTS

Value market share, 2023



SOURCE: **EUROSTAT**

VEHICLES ON ROADS

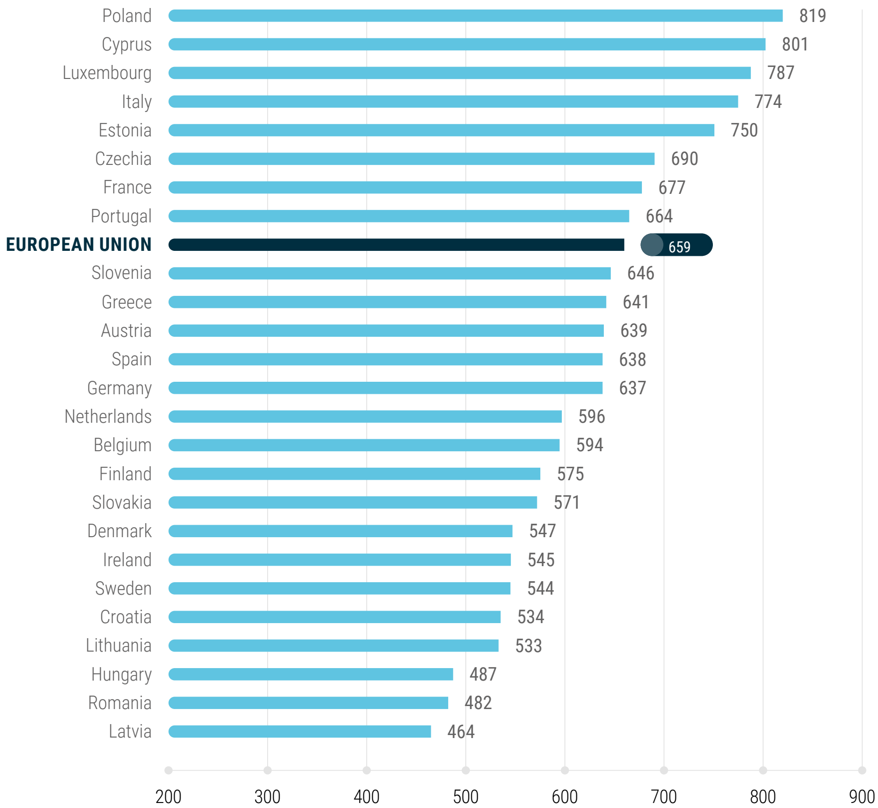
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2024/2025

acea
DRIVING MOBILITY FOR EUROPE

There are 659 vehicles per 1,000 inhabitants in the EU

VEHICLES PER 1,000 EU INHABITANTS[1]

2022

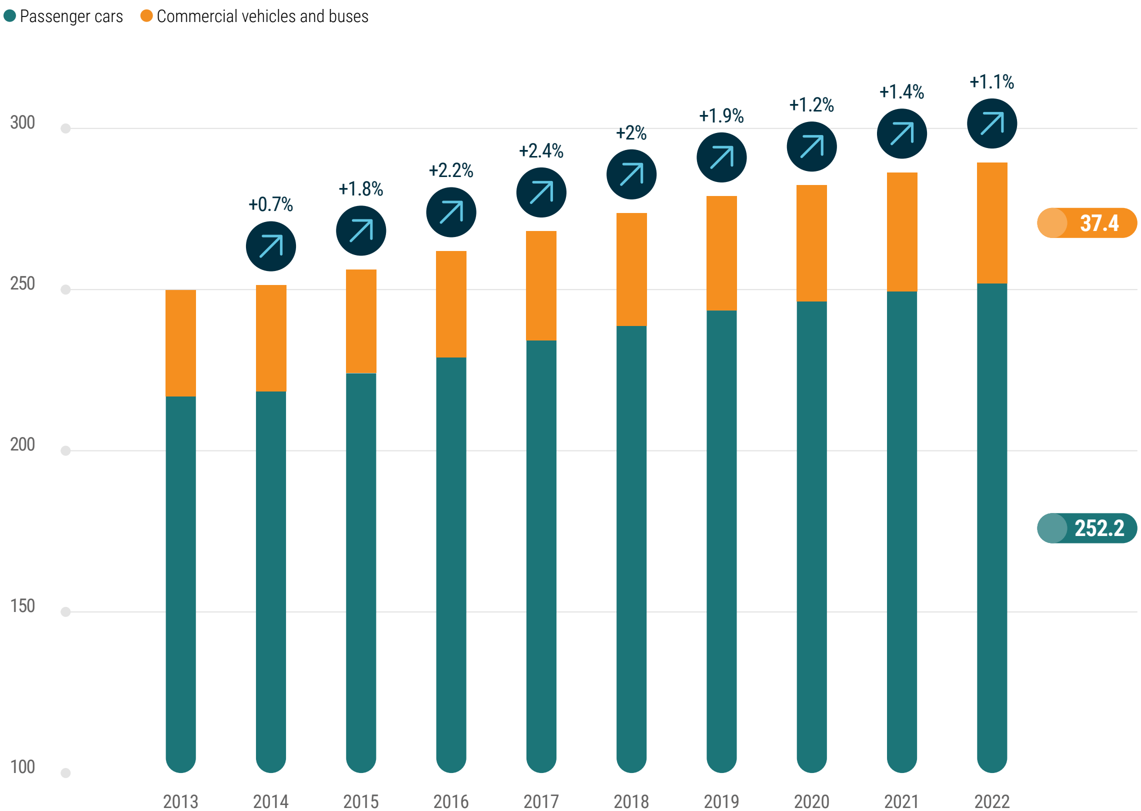


SOURCE: ACEA

1. Data for Bulgaria and Malta not available

EU VEHICLE FLEET: SIZE AND SEGMENT DISTRIBUTION

In million units, 2013 – 2022



SOURCE: **ACEA**

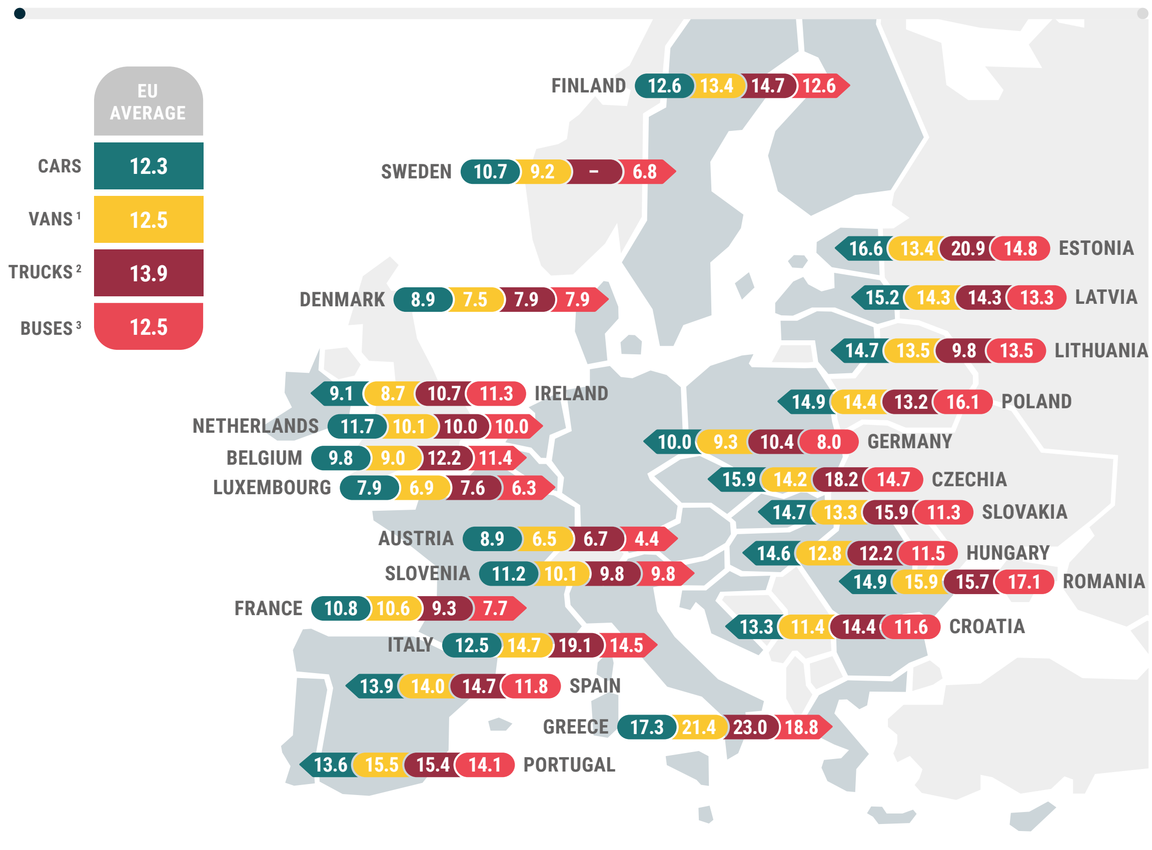
There are almost 290 million vehicles on EU roads

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

Trucks have the highest average age of all vehicle types

AVERAGE AGE OF EU VEHICLE FLEET

By country, in years, 2022

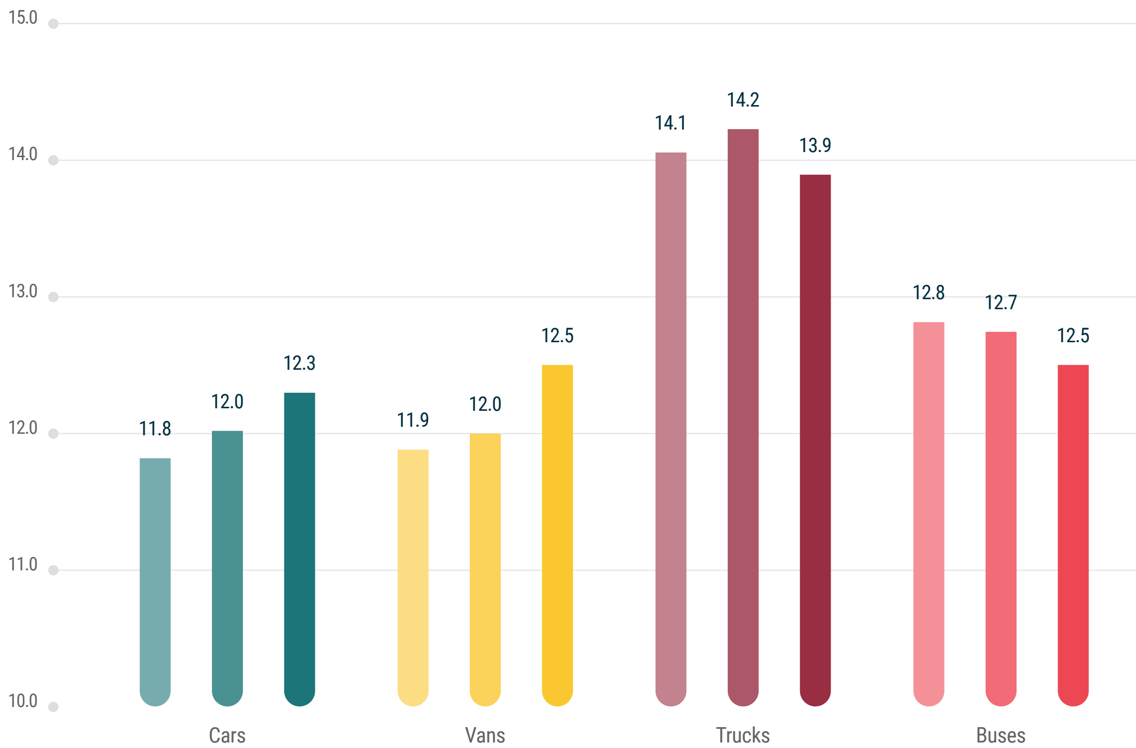


SOURCE: ACEA

1. Light commercial vehicles up to 3.5t
2. Medium and heavy commercial vehicles over 3.5t
3. Buses and coaches over 3.5t

EVOLUTION OF AVERAGE AGE OF EU FLEET

By vehicle type, in years, 2020 – 2022



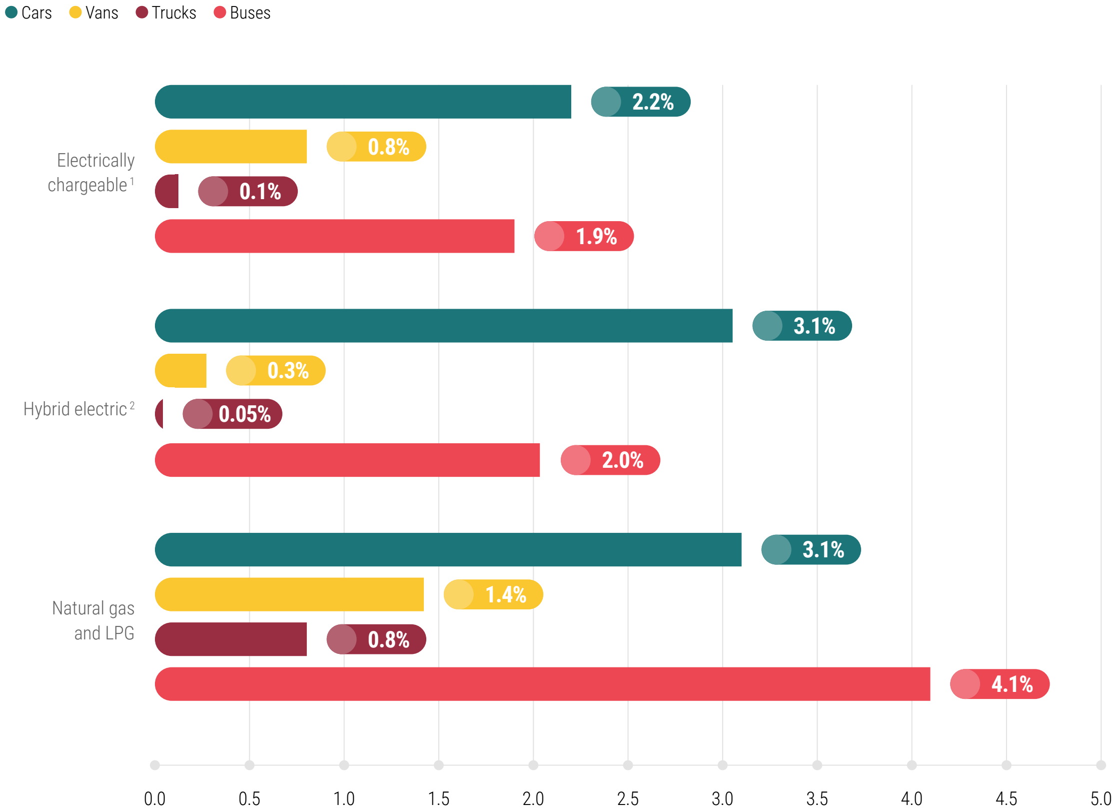
SOURCE: **ACEA**

The average age of cars and vans is rising, while that of trucks and buses is declining

Just over 2% of cars on EU roads are electrically chargeable

SHARE OF ALTERNATIVELY POWERED VEHICLES IN THE EU FLEET

By segment, % share, 2022



SOURCE: **ACEA**

1. Includes battery and plug-in hybrid electric vehicles
2. Includes full and mild hybrids

ROAD SAFETY

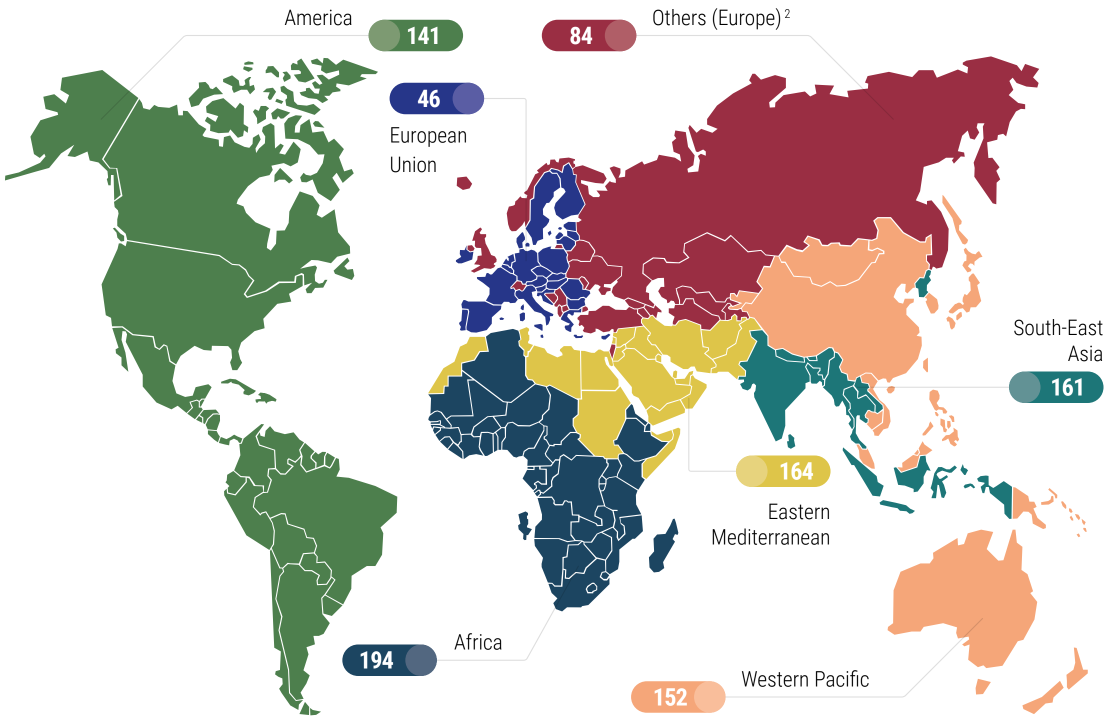
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2024/2025

DRIVING MOBILITY FOR EUROPE

The EU has by far the best road safety record in the world

ROAD FATALITIES PER MILLION INHABITANTS

By region[1], 2021, 2022



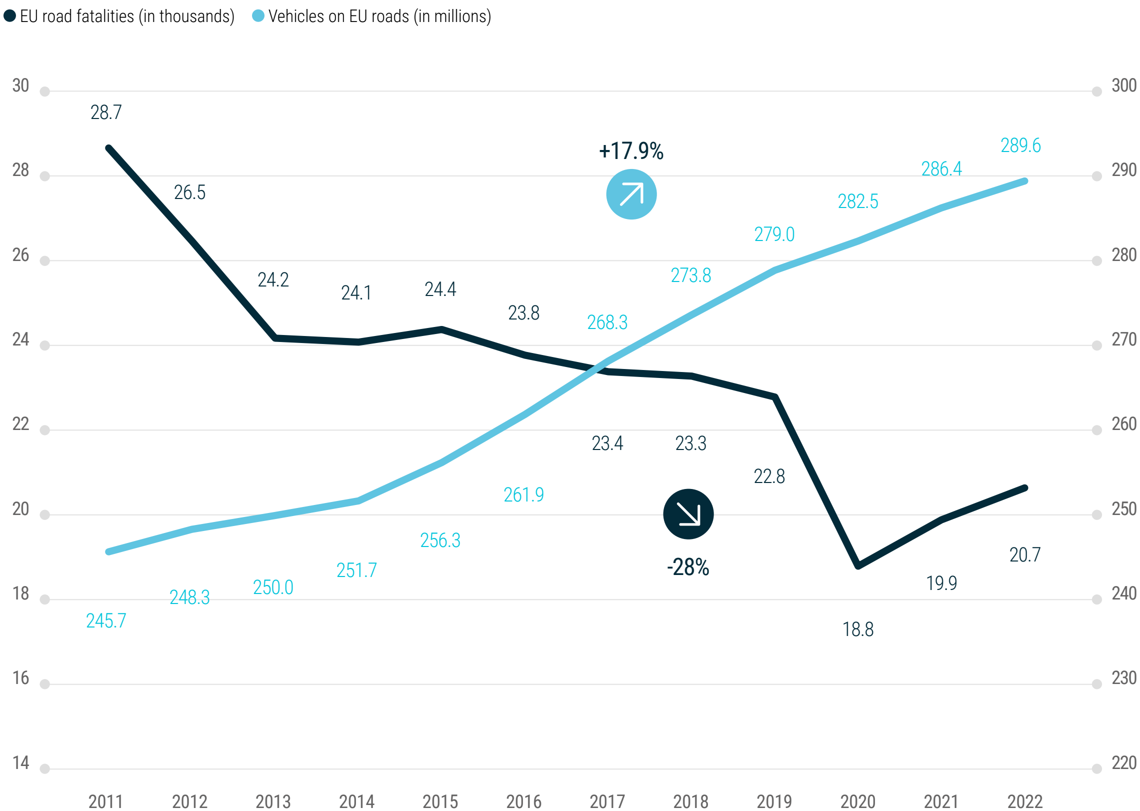
WORLD **147 road fatalities per million inhabitants**

SOURCE: **CARE (COMMUNITY ROAD ACCIDENT) DATABASE, WHO GLOBAL HEALTH OBSERVATORY**

1. WHO regions
2. Calculated by ACEA using data by country

NUMBER OF EU VEHICLES AND ROAD FATALITIES

2011 – 2022



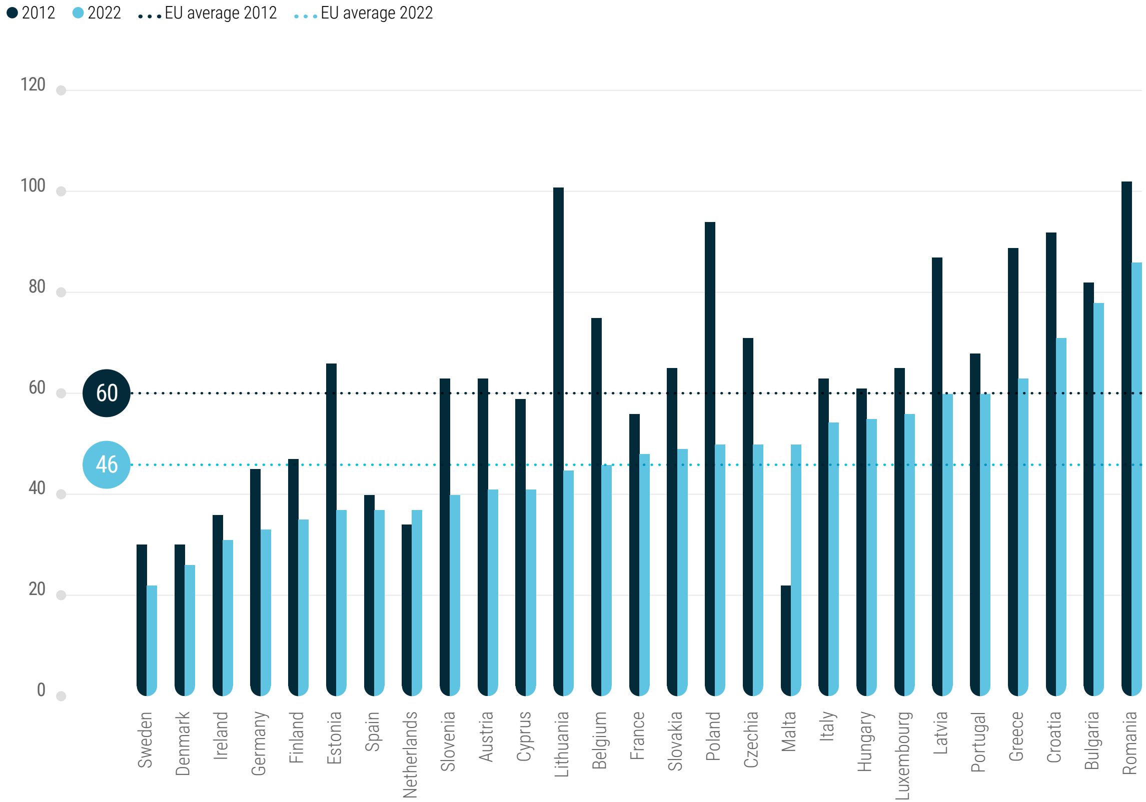
SOURCE: ACEA, CARE (COMMUNITY ROAD ACCIDENT) DATABASE

Road fatalities have fallen significantly since 2011 despite an increase in the number of cars on EU roads

Average EU road fatalities have plummeted by around a quarter since 2012

ROAD FATALITIES PER MILLION INHABITANTS

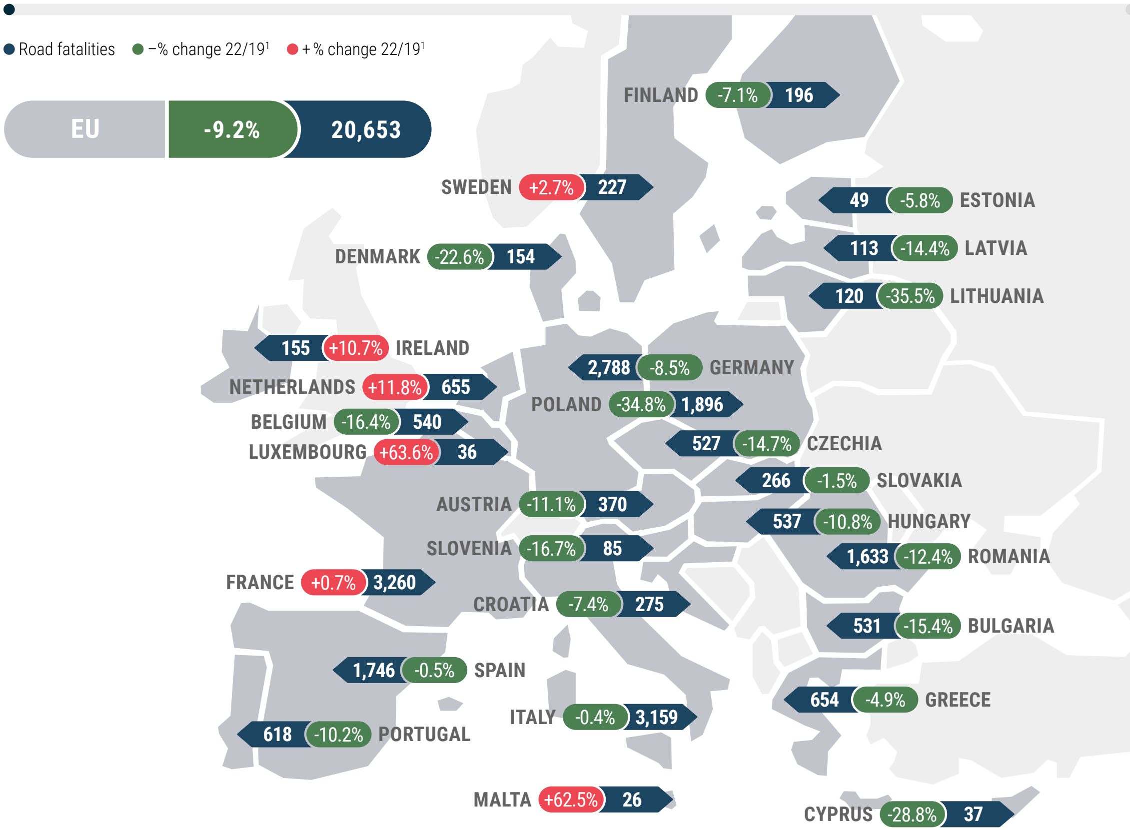
By country, 2012, 2022



SOURCE: **CARE (COMMUNITY ROAD ACCIDENT) DATABASE**

ROAD FATALITIES IN THE EU

By country, 2022



SOURCE: **CARE (COMMUNITY ROAD ACCIDENT) DATABASE**

EU road fatalities declined by 9% in 2022

1. The reference year for comparison is 2019 since the traffic levels of 2020 and 2021 were significantly impacted by the COVID-19 pandemic

ENVIRONMENT

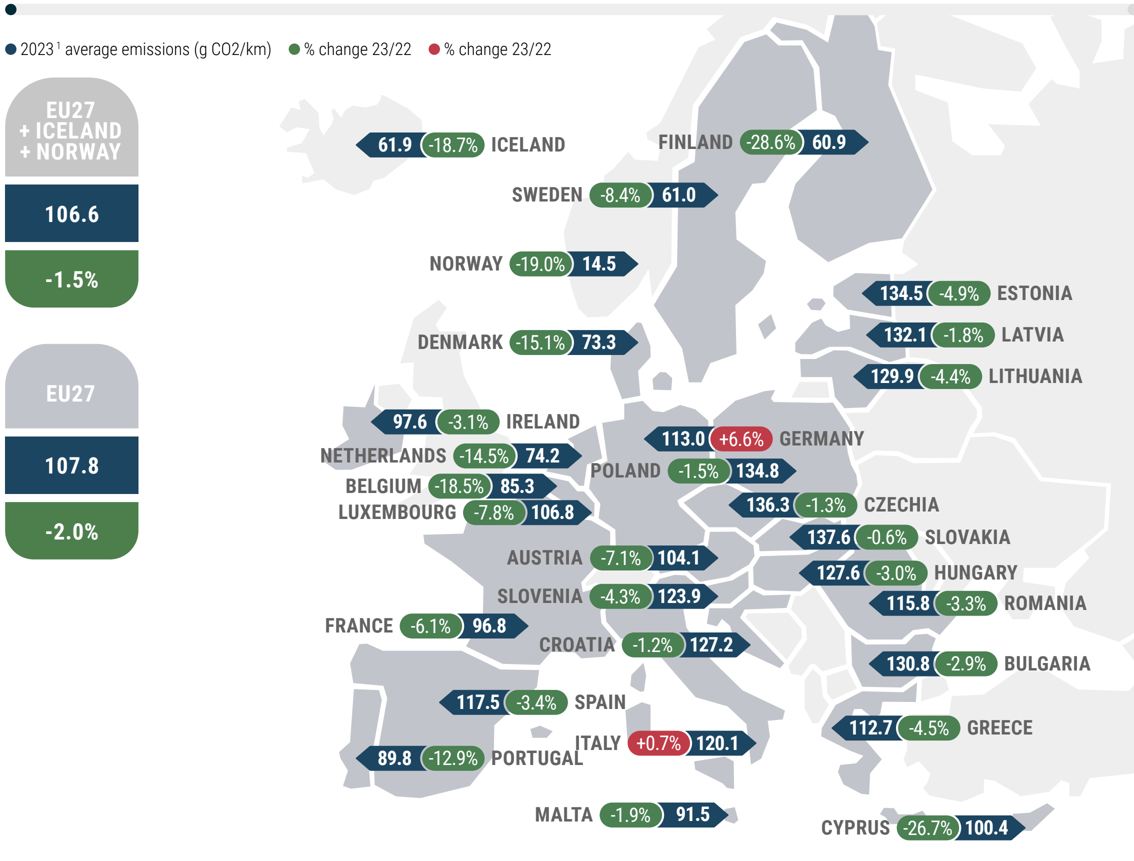
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2024/2025

DRIVING MOBILITY FOR EUROPE

The average new car in the EU emits 2% less CO2/km than in 2022

CO2 EMISSIONS FROM NEW CARS BY COUNTRY

In g CO2/km, 2023[1]

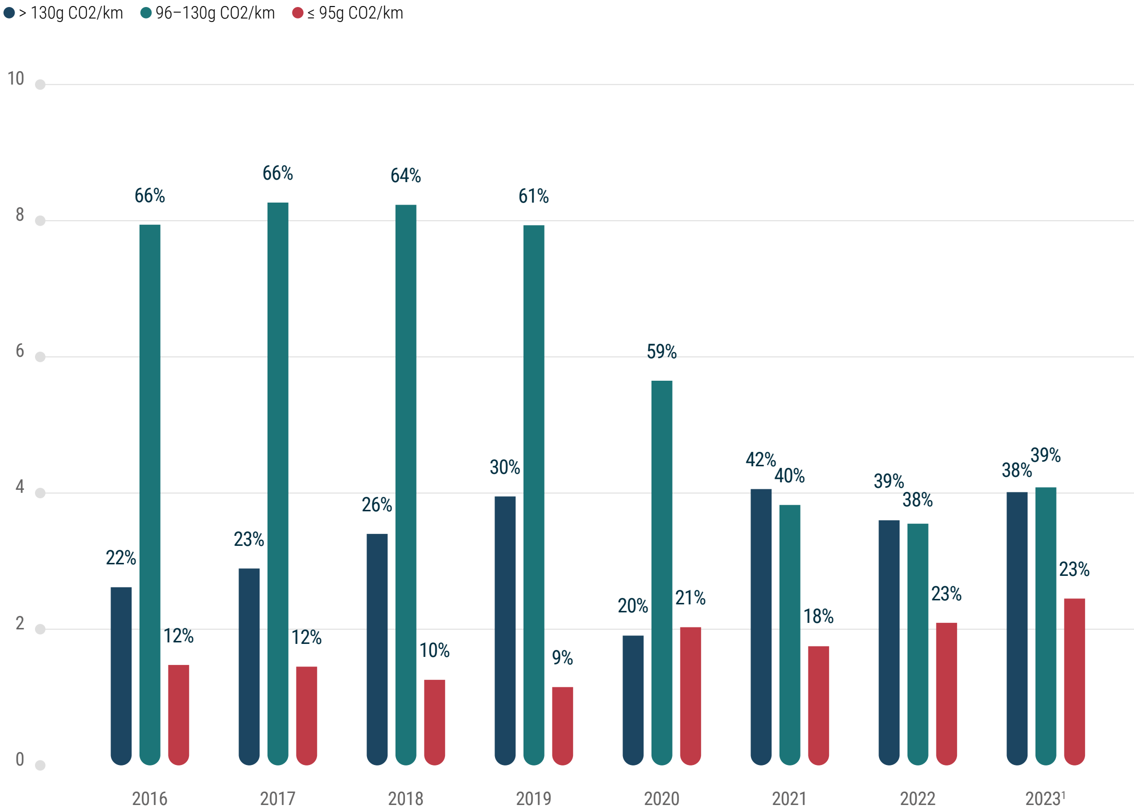


SOURCE: EEA

1. Provisional; from 2021 onwards the WLTP will replace fully the NEDC for the purpose of the CO2 emission standards

NEW CARS BY EMISSION CLASSES IN THE EU

In million units, % share, 2016 – 2023[1]



SOURCE: **EEA**

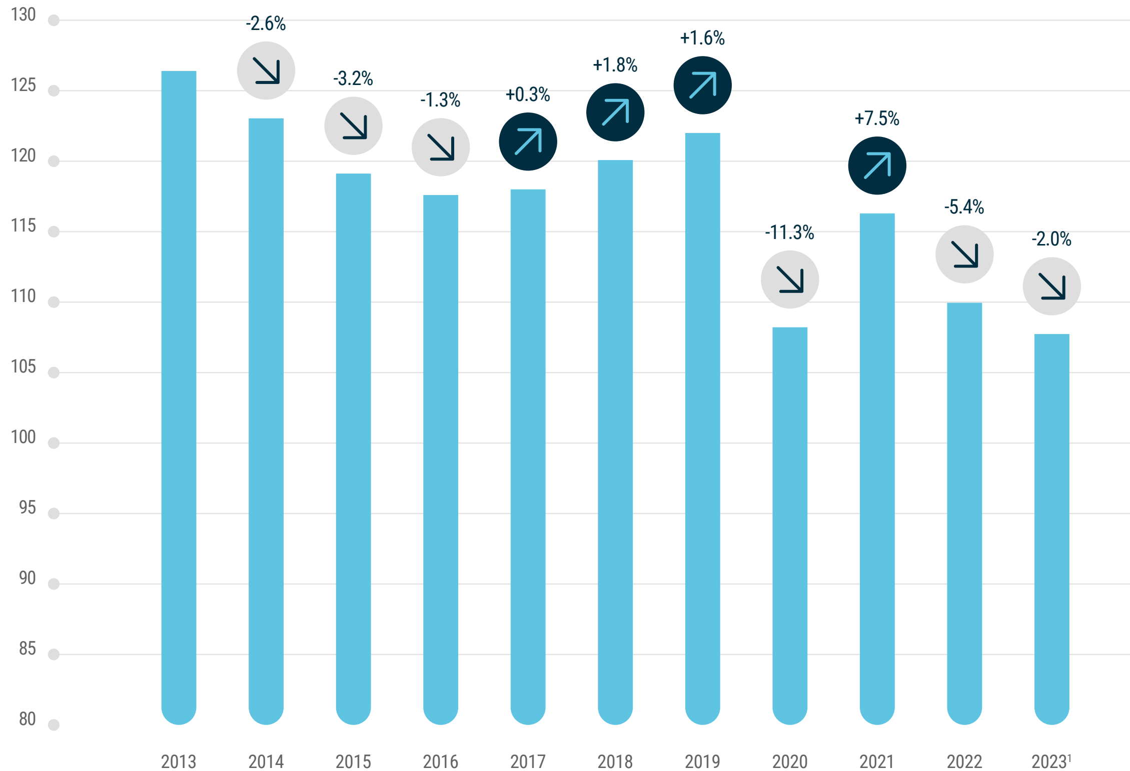
Almost a quarter of new cars emit 95g CO2/ km or less

1. Provisional; from 2021 onwards the WLTP will replace fully the NEDC for the purpose of the CO2 emission standards

CO2 emissions from new cars are down by 15% since 2013

CO2 EMISSIONS FROM NEW CARS IN THE EU

In g CO2/km, % change, 2013 – 2023[1]

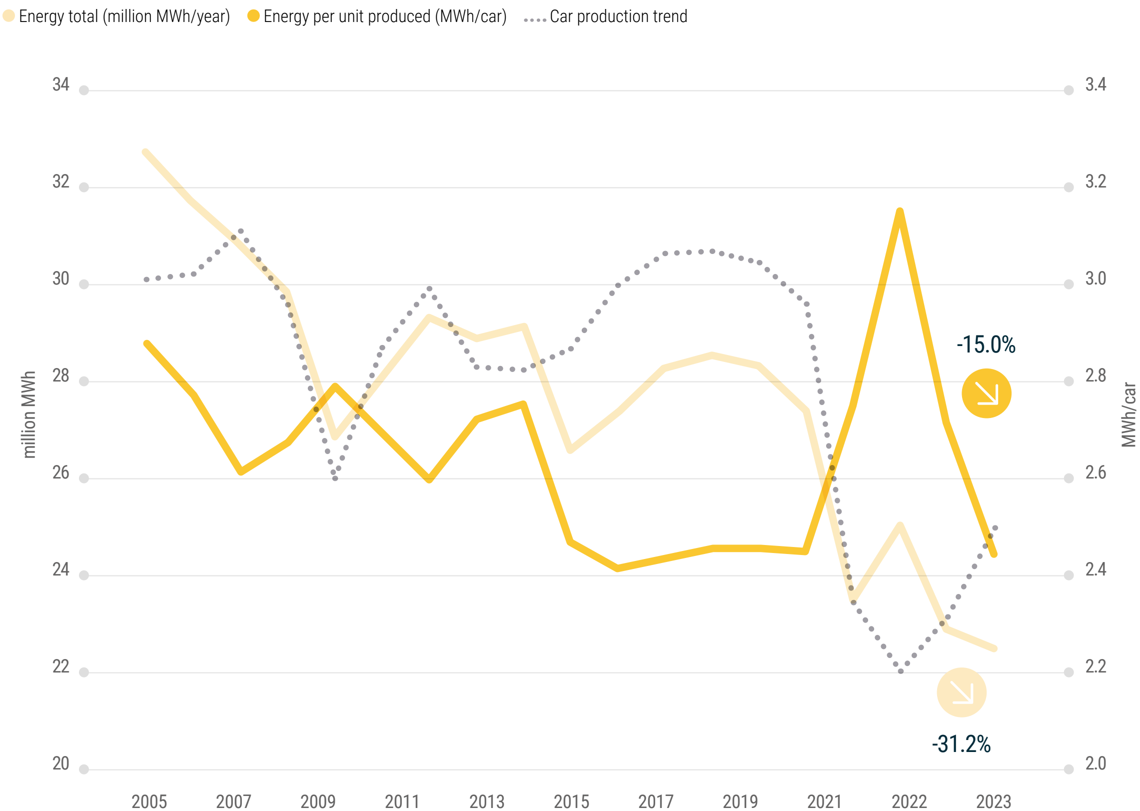


SOURCE: **EEA**

1. Provisional; NECD (2013-2020), WLTP (2021-2023)

CAR PRODUCTION: ENERGY CONSUMPTION

2005 – 2023



SOURCE: **ACEA**

Car makers have slashed production energy use per unit by 15% since 2005

Car makers have cut production CO2 emissions per unit by over half since 2005

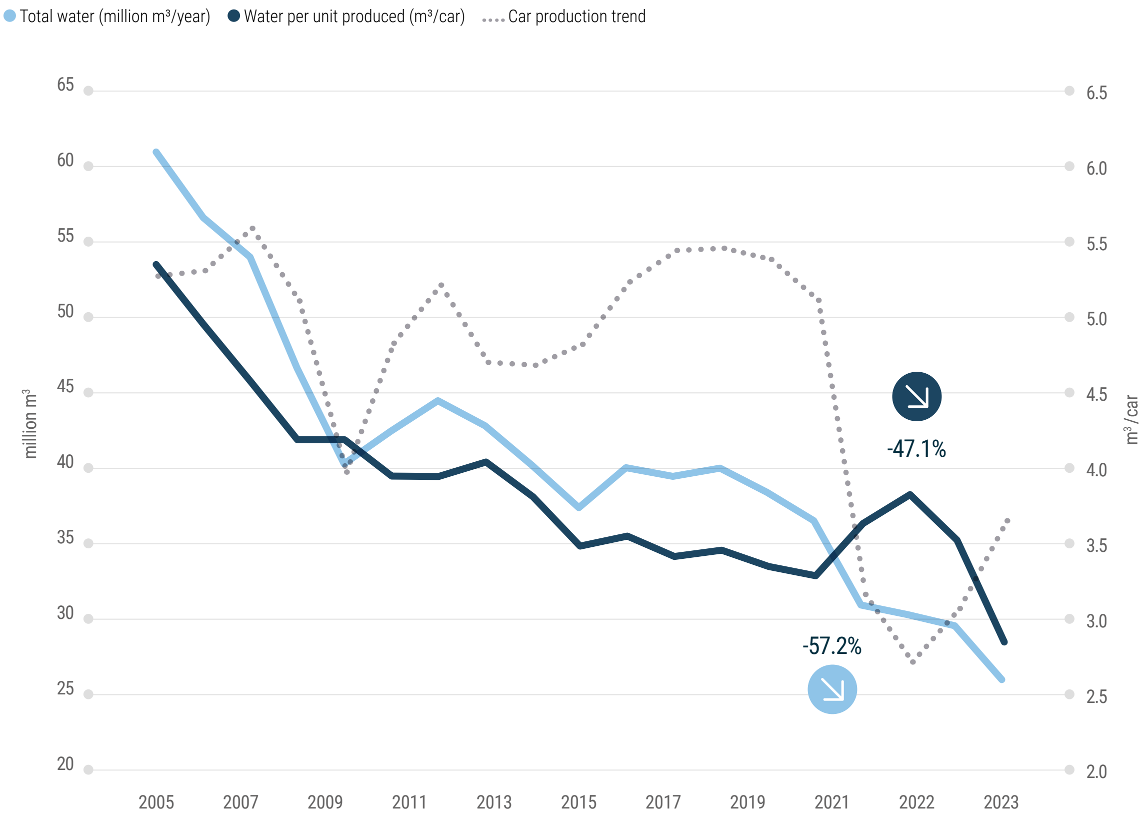
CAR PRODUCTION: CO2 EMISSIONS

2005 – 2023

SOURCE: **ACEA**

CAR PRODUCTION: WATER CONSUMPTION

2005 – 2023



SOURCE: **ACEA**

Car makers have reduced production water use per unit by almost half since 2005

Levels of car manufacturing waste largely follow production trends

CAR PRODUCTION: WASTE[1]

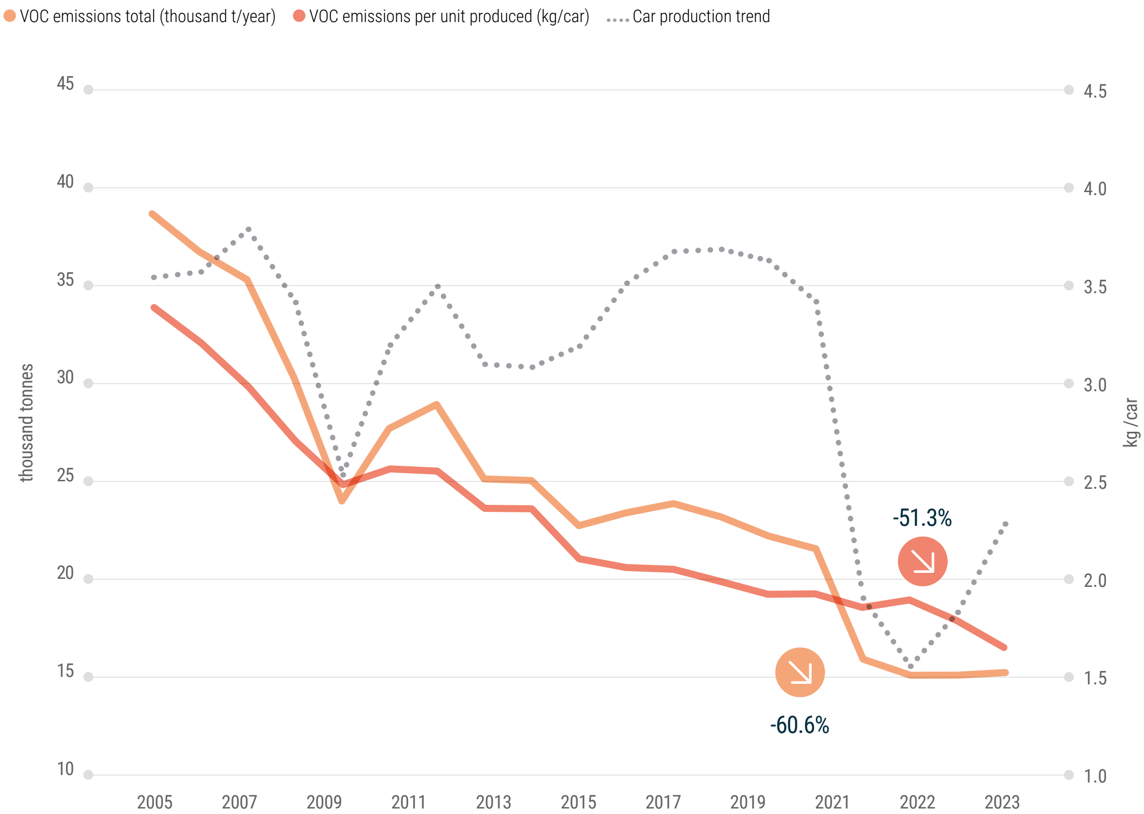
2005 – 2022

SOURCE: **ACEA**

1. Excluding scrap metal and demolition waste

CAR PRODUCTION: VOC[1] EMISSIONS

2005 – 2023



SOURCE: **ACEA**

Car makers have reduced production VOC emissions per unit by over half since 2005

1. Volatile organic compounds

INNOVATION

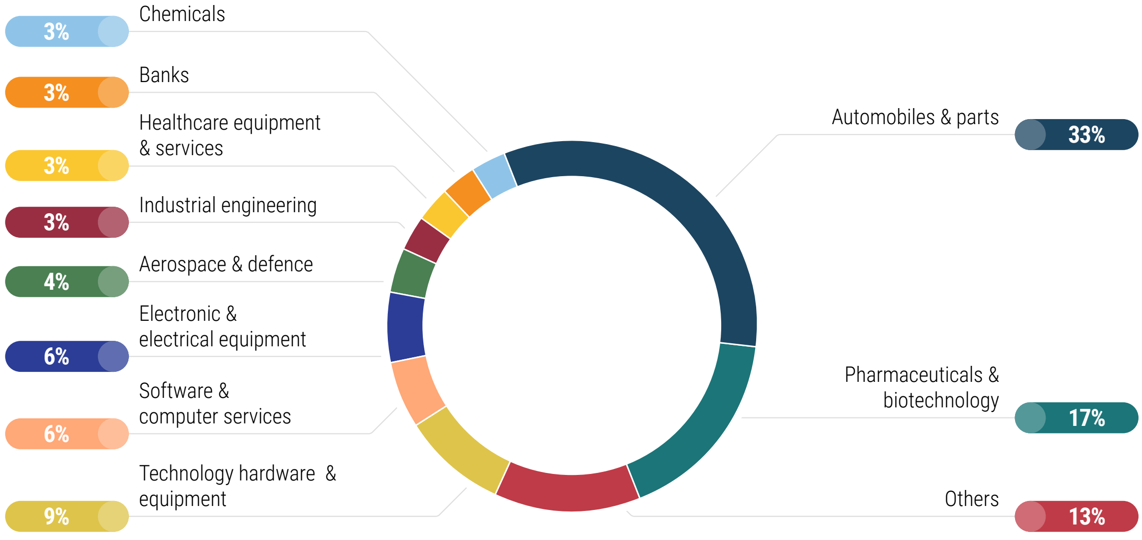
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2024/2025

DRIVING MOBILITY FOR EUROPE

EU auto makers account for a third of all EU R&D investment

SECTORAL R&D SHARE IN THE EU

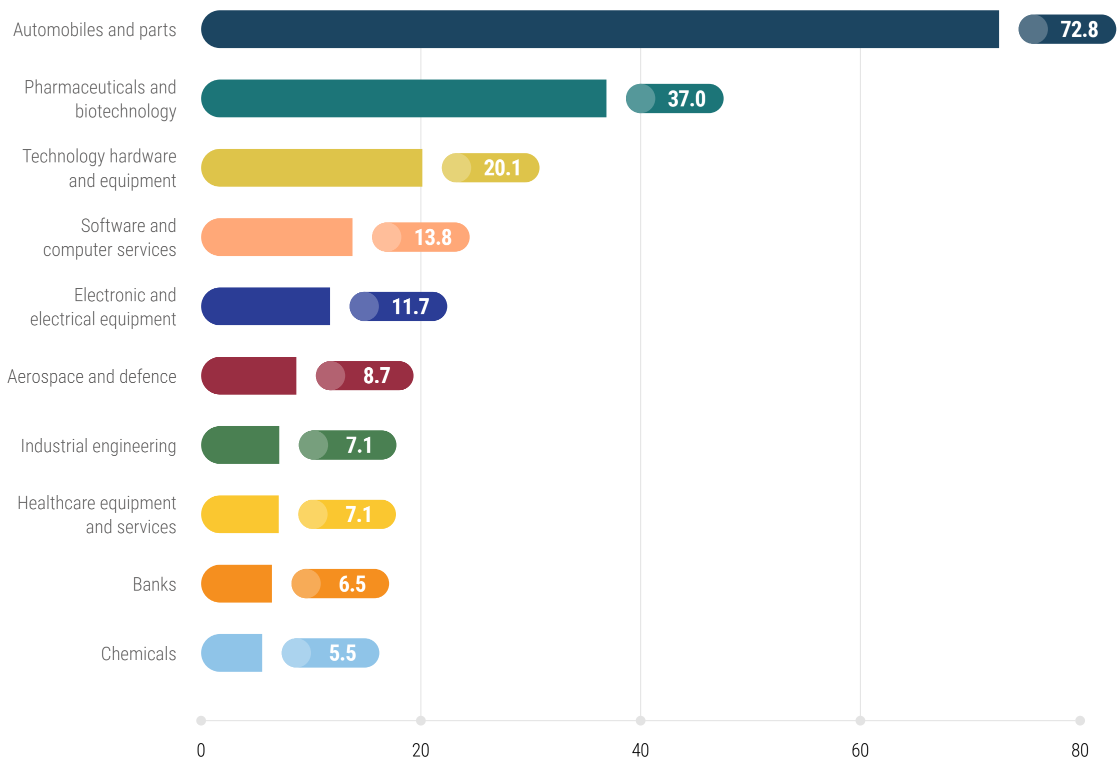
% share, 2022



SOURCE: THE 2023 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD

EU R&D INVESTMENT IN THE TOP 10 INDUSTRIAL SECTORS

In billion €, 2022



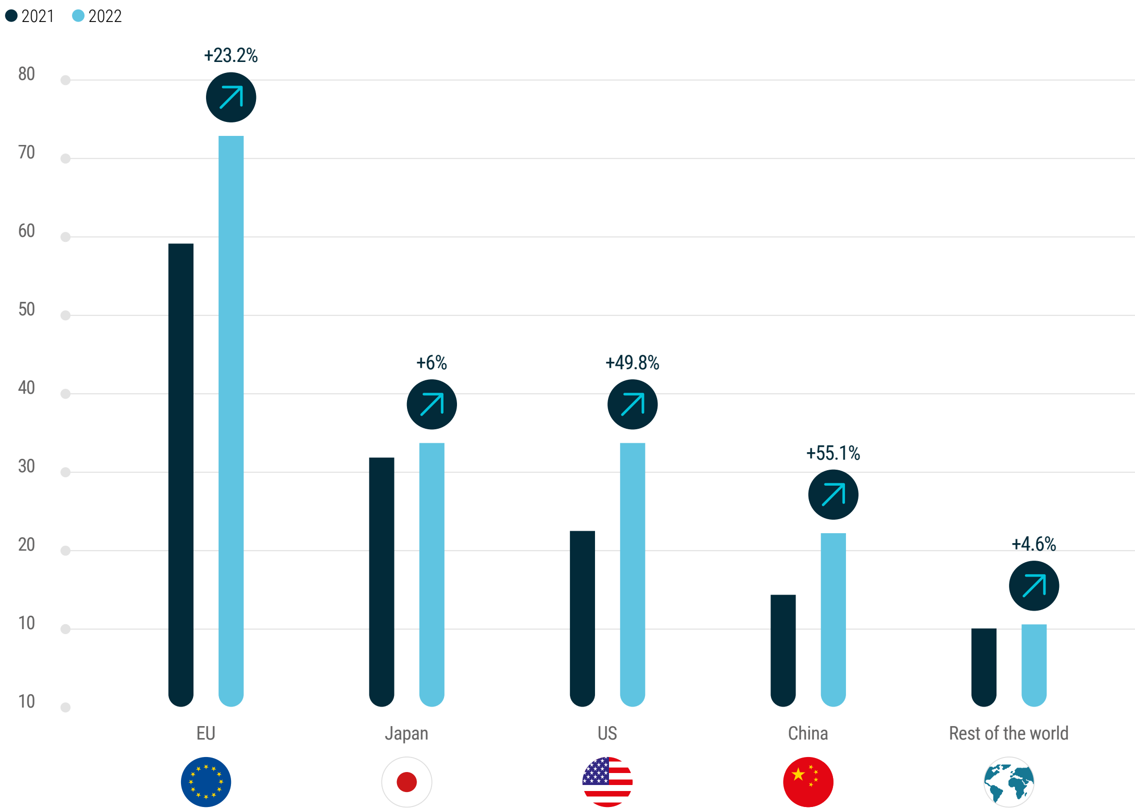
SOURCE: **THE 2023 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD**

EU auto makers invest around €73 billion annually in R&D, about twice the amount as the pharmaceutical and biotech sector

Auto makers invest over €70 billion in R&D in the EU

AUTOMOTIVE R&D INVESTMENT BY REGION

In billion €, % change



SOURCE: **THE 2023 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD**

TAXATION

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2024/2025

DRIVING MOBILITY FOR EUROPE

TAX BENEFITS AND PURCHASE INCENTIVES: ELECTRIC CARS

2023

	TAX BENEFITS			INCENTIVES	
	Acquisition	Ownership	Company car	Purchase	Infrastructure
Austria	✓	✓	✓	✓	✓
Belgium	✓	✓	✓	✓	✓
Bulgaria	✗	✓	✗	✗	✗
Croatia	✓	✓	✗	✓	✗
Cyprus	✓	✓	✗	✓	✗
Czechia	✓	✓	✓	✓	✓
Denmark	✓	✓	✓	✗	✗
Estonia	✗	✗	✗	✓	✗
Finland	✓	✗	✓	✗	✗
France	✓	✗	✓	✓	✗
Germany	✗	✓	✓	✓	✗
Greece	✓	✓	✓	✓	✗
Hungary	✓	✓	✓	✓	✗

SOURCE: **ACEA**

TAX BENEFITS AND PURCHASE INCENTIVES: ELECTRIC CARS

2023

	TAX BENEFITS			INCENTIVES	
	Acquisition	Ownership	Company car	Purchase	Infrastructure
Ireland	✓	✓	✓	✓	✗
Italy	✗	✓	✗	✓	✓
Latvia	✓	✓	✓	✗	✗
Lithuania	✓	✓	✓	✓	✓
Luxembourg	✓	✓	✓	✓	✓
Malta	✓	✓	✗	✓	✗
Netherlands	✓	✓	✓	✓	✗
Poland	✓	✓	✗	✓	✗
Portugal	✓	✓	✓	✓	✗
Romania	✗	✓	✗	✓	✗
Slovakia	✓	✓	✗	✗	✗
Slovenia	✓	✗	✗	✓	✗
Spain	✓	✓	✓	✓	✓
Sweden	✗	✓	✓	✓	✓

SOURCE: **ACEA**

Only a handful of EU countries offer incentives for electric car charging infrastructure

TAX BENEFITS AND PURCHASE INCENTIVES: ELECTRIC COMMERCIAL VEHICLES

2023

	TAX BENEFITS		INCENTIVES	
	Acquisition	Ownership	Acquisition	Infrastructure
Austria	✓	✓	✓	✓
Belgium	✗	✓	✓	✗
Bulgaria	✗	✓	✗	✗
Croatia	✓	✓	✓	✗
Cyprus	✓	✓	✓	✗
Czechia	✓	✓	✓	✓
Denmark	✓	✓	✗	✗
Estonia	✗	✗	✓	✗
Finland	✓	✗	✓	✗
France	✓	✗	✓	✗
Germany	✗	✓	✗	✗
Greece	✓	✗	✓	✗
Hungary	✗	✗	✗	✗

SOURCE: **ACEA**

TAX BENEFITS AND PURCHASE INCENTIVES: ELECTRIC COMMERCIAL VEHICLES

2023

	TAX BENEFITS		INCENTIVES	
	Acquisition	Ownership	Acquisition	Infrastructure
Ireland	✓	✓	✓	✗
Italy	✗	✓	✓	✗
Latvia	✓	✓	✗	✗
Lithuania	✓	✗	✗	✗
Luxembourg	✓	✓	✓	✗
Malta	✓	✓	✓	✗
Netherlands	✗	✗	✓	✗
Poland	✓	✓	✗	✗
Portugal	✗	✓	✓	✗
Romania	✗	✓	✗	✗
Slovakia	✓	✓	✗	✗
Slovenia	✓	✗	✗	✗
Spain	✓	✓	✓	✓
Sweden	✗	✓	✓	✓

SOURCE: **ACEA**

Only four EU countries provide incentives for electric commercial vehicle infrastructure

FISCAL INCOME FROM VEHICLES IN MAJOR EU MARKETS [1]

	Austria	Belgium	Denmark	Finland	France	Germany	Greece
Purchase or transfer	€ bn 2022	€ bn 2020	DKK bn 2024[3]	€ bn 2021	€ bn 2022	€ bn 2022	€ bn 2022
1. VAT on vehicle sales servicing, repair & parts	3.2	7.6	–	1.6	20.2	30.1	0.8
2. Sales & registration taxes	0.4	0.5	10.1	0.5	1.9	–	0.4
3. Annual ownership taxes	2.8	1.7	10.9	1.1	0.7	9.5	1.2
4. Fuels & lubricants	5.6	7.3	19.3	4.0	41.7	34.9	4.8
5. Others:							
Driving license fees	–	0.0	–	–	0.01	0.2	0.03
Insurance taxes	0.4	1.0	1.4	0.4	5.7	5.5	0.5
Tolls	2.4	0.7	0.6	–	13.9	7.4	–
Customs duties	–	–	–	–	–	0.5	–
Other taxes	0.3	0.8	–	–	1.8	–	0.2
TOTAL (national currencies)	**15.2**	**19.6**	**42.3**	**7.6**	**85.9**	**88.2**	**7.9**
TOTAL (€)[2]	15.2	19.6	5.7	7.6	85.9	88.2	7.9

1. Latest available data; only country for which sourced data is available are listed
2. Euro foreign exchange reference rates at 26 March 2024; source: ECB
3. Estimates

SOURCE: **ACEA**

FISCAL INCOME FROM VEHICLES IN MAJOR EU MARKETS [1]

Purchase or transfer	Ireland € bn 2019	Italy € bn 2022	Netherlands € bn 2022	Portugal € bn 2021	Spain € bn 2023	Sweden SEK bn 2021
1. VAT on vehicle sales servicing, repair & parts	0.7	19.2	1.4	2.8	11.1	25.5
2. Sales & registration taxes	1.0	1.6	1.6	0.4	0.6	–
3. Annual ownership taxes	0.9	7.2	4.4	0.7	3.0	15.5
4. Fuels & lubricants	3.5	32.8	9.6	2.8	22.8	57.0
5. Others:						
Driving license fees	0.0	–	0.4	–	0.1	0.0
Insurance taxes	0.1	3.7	1.2	–	1.1	2.8
Tolls	–	2.2	–	0.2	–	2.8
Customs duties	–	–	–	–	–	–
Other taxes	–	4.3	0.6	1.5	0.8	1.3
TOTAL (national currencies)	**6.2**	**71.0**	**19.2**	**8.5**	**39.5**	**104.9**
TOTAL (€)[2]	6.2	71.0	19.2	8.5	39.5	9.2

SOURCE: **ACEA**

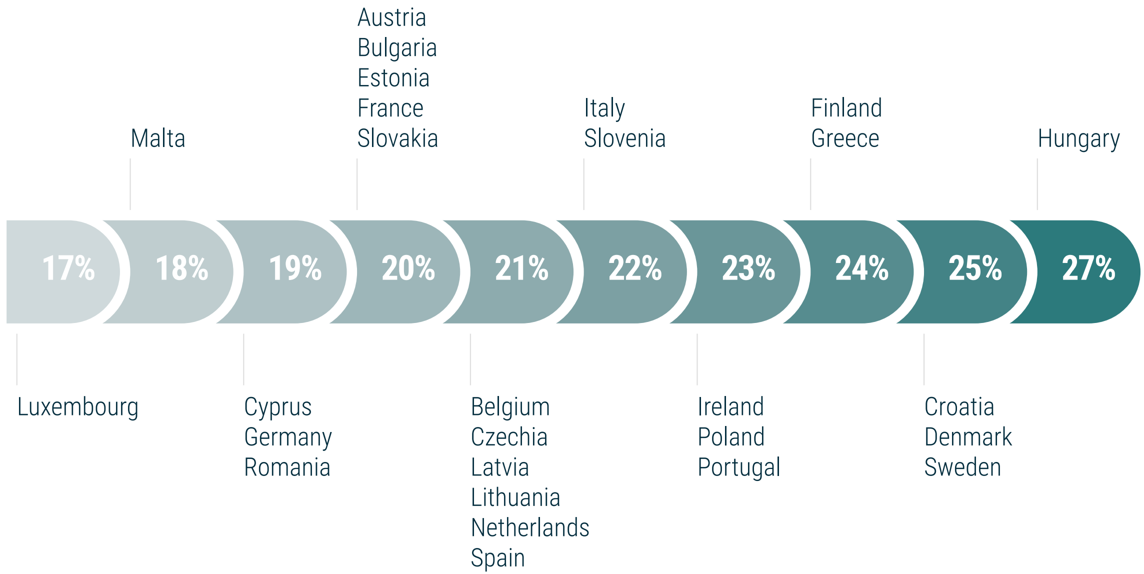
Vehicles contribute over €380 billion to public budgets in major EU markets

1. Latest available data; only country for which sourced data is available are listed
2. Euro foreign exchange reference rates at 26 March 2024; source: ECB
3. Estimates

Car VAT rates in the EU range from 17% to 27%

VAT SHARE IN NET CAR PRICES

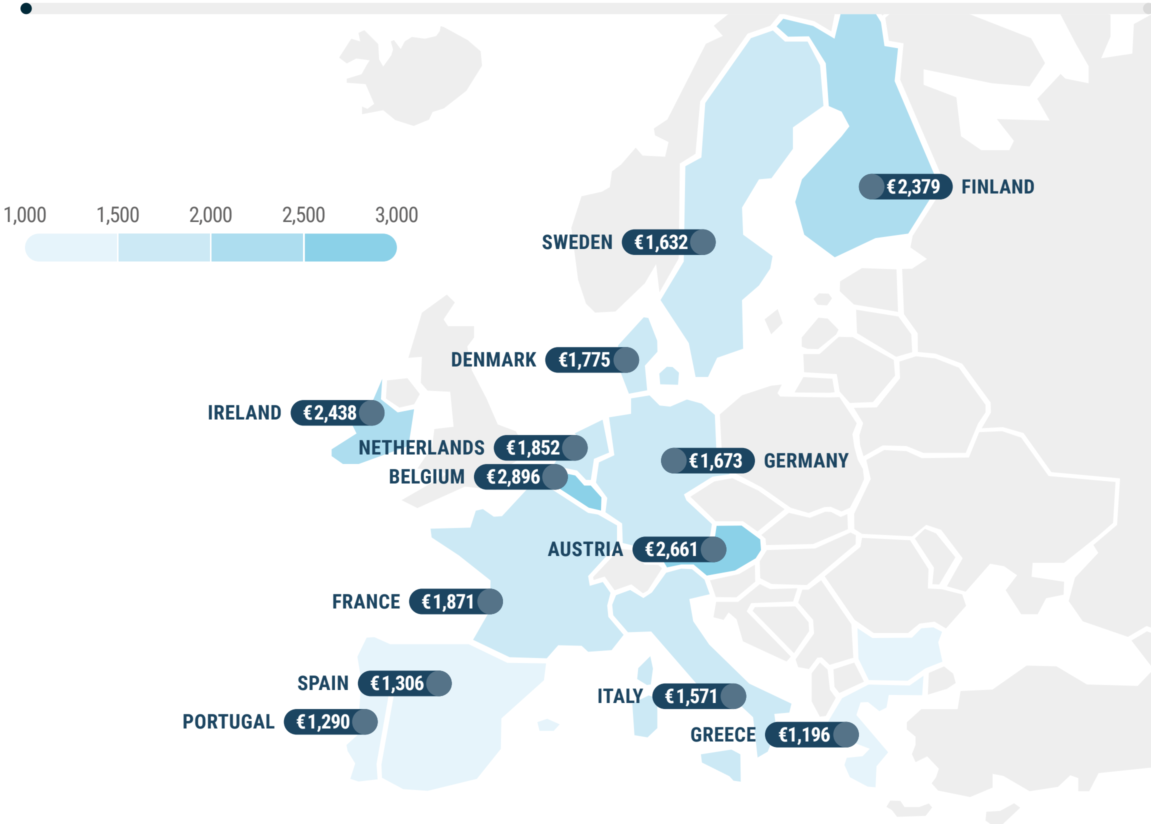
% share, 2024



SOURCE: **ACEA**

AVERAGE ANNUAL TAX PER VEHICLE IN MAJOR EU MARKETS[1]

In € per vehicle, 2023



SOURCE: **ACEA**

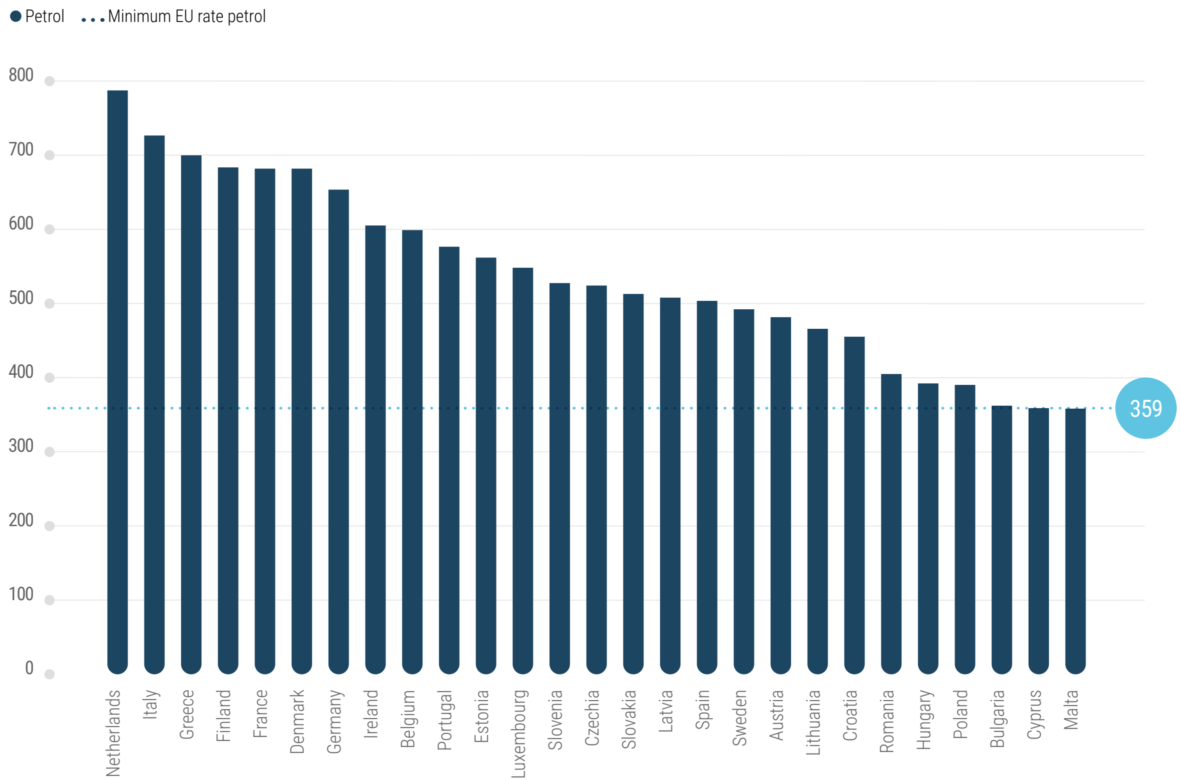
Annual tax income averages at €1,900 per vehicle in major EU markets

1. Per country estimates based on total number of vehicles on roads

The Netherlands, Italy, and Greece rank top for the highest petrol excise duties

EXCISE DUTIES ON UNLEADED PETROL

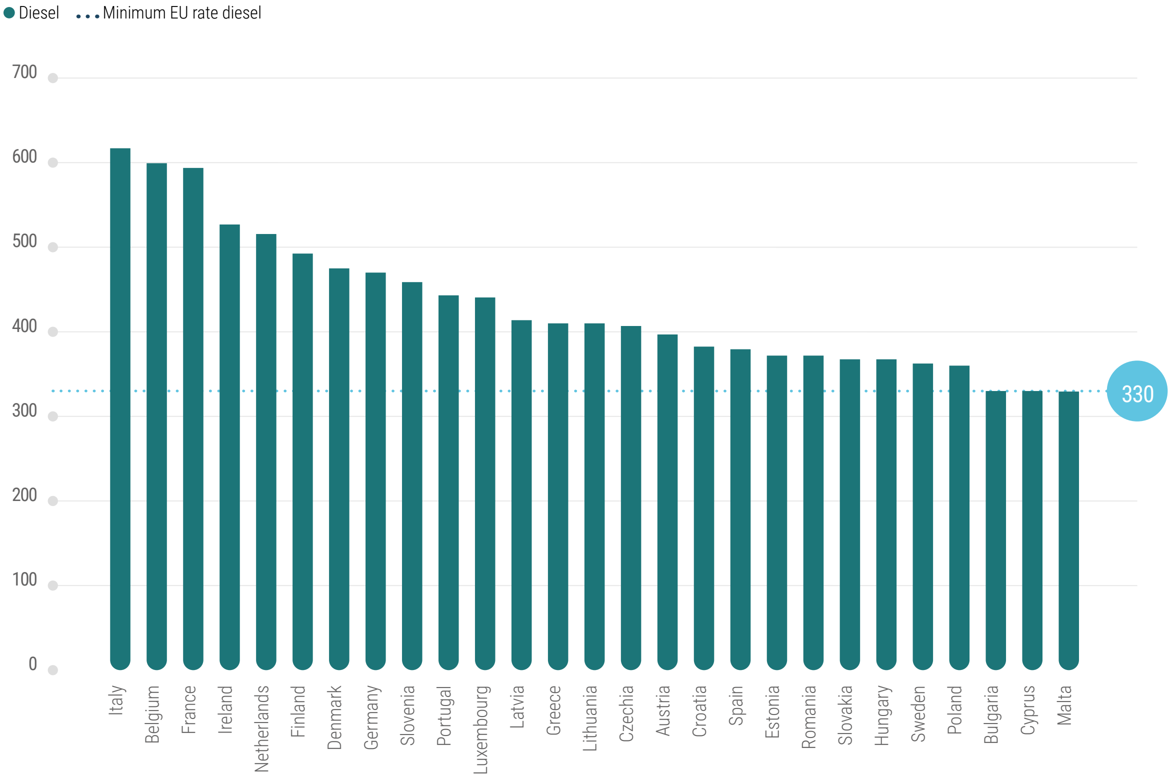
In €/1,000 litres, 2023



SOURCE: **ACEA**

EXCISE DUTIES ON DIESEL

In €/1,000 litres, 2023



SOURCE: **ACEA**

Italy, Belgium, and France rank top for the highest diesel excise duties

ACEA MEMBERS	BMW GROUP	DAF	DAIMLER TRUCK
	Ford	HONDA	HYUNDAI
IVECO • GROUP	JLR		NISSAN
Renault Group	TOYOTA	VOLKSWAGEN GROUP	VOLVO

ABOUT ACEA

DRIVING MOBILITY FOR EUROPE

The European Automobile Manufacturers' Association, or ACEA, unites Europe's 15 major car, truck, van and bus makers.

We are the voice of the auto industry: a technological world leader and the backbone of the EU economy. Our members keep Europe on the move, providing diverse solutions for moving people and goods from A to B.

Together, we are progressing on the road to zero-emission and zero-fatality transport. We are addressing major technology shifts and the changing mobility needs of Europeans.

ACEA is working towards a new era of mobility, where all Europeans can access affordable transport solutions that are:

- **Green & Clean**
- **Smart & Efficient**
- **Safe & Reliable**

Our aim is to drive Europe's mobility transformation – while at the same time ensuring that the auto industry remains a strong **Global & Competitive** player.

WHAT ACEA DOES

ACEA acts as one with common industry positions that also reflect the overarching interests of European citizens, transport users and operators, and auto industry workers.

We bring our collective expertise to policy makers, sharing a wealth of factual information to enable well-informed decisions.

We foster a societal debate around mobility, and are open to working with all interested parties to advance the common aim of clean, smart, and safe mobility.

DRIVING MOBILITY FOR EUROPE

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