FACT SHEET EUROPE

MARCH 2021

MARKET MONITOR

EUROPEAN PASSENGER CAR REGISTRATIONS: JANUARY 2021

icct
THE INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION

In January 2021, new passenger car registrations were 29% lower than compared to one year earlier. The decrease was strongest for Hyundai (-37%) and lowest for BMW (-18%). The total share of electric vehicles was 14%, split between 6% battery-electric and 8% plug-in hybrid electric vehicles. Kia (12%) and Hyundai (11%) led with respect to battery-electric vehicles, and BMW (23%) and Daimler (20%) with respect to plug-in hybrid vehicles. Compared to December 2020 (23%), the share of electric vehicles decreased in January but was still higher than the monthly average in 2020 (11%). According to the current estimate, passenger car manufacturers, on average, are still 7 g/km away from their 2021 CO_2 target.

Table 1. New passenger car registrations, by manufacturer.

New car registrations				
	Jan 2021	Jan 2020	YTD 2021	YTD 2020
VW Group	205,118	-30%	205,118	-30%
PSA-Opel	126,556	-30%	126,556	-30%
Renault-Mitsubishi	95,721	-33%	95,721	-33%
Ford-Volvo	68,928	-22%	68,928	-22%
Toyota-Mazda	62,086	-26%	62,086	-26%
BMW	60,970	-18%	60,970	-18%
FCA-Tesla-Honda	51,030	-35%	51,030	-35%
Daimler	50,042	-24%	50,042	-24%
Kia	29,223	-24%	29,223	-24%
Hyundai	25,771	-37%	25,771	-37%
Other	24,728	-32%	24,728	-32%
ALL	**800,173**	**-29%**	**800,173**	**-29%**

Table 2. Share of electric passenger cars, by manufacturer.

Share of electric cars						
	Jan 2021		2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Kia	12%	10%	12%	10%	9%	8%
Hyundai	11%	2%	11%	2%	14%	1%
Daimler	8%	20%	8%	20%	6%	15%
Other	8%	6%	8%	6%	6%	4%
FCA-Tesla-Honda	6%	3%	6%	3%	12%	1%
Renault-Mitsubishi	6%	4%	6%	4%	9%	3%
VW Group	6%	6%	6%	6%	7%	4%
PSA-Opel	6%	4%	6%	4%	4%	3%
AVERAGE	**6%**	**8%**	**6%**	**8%**	**6%**	**5%**
BMW	4%	23%	4%	23%	5%	12%
Ford-Volvo	1%	16%	1%	16%	1%	11%
Toyota-Mazda	1%	2%	1%	2%	1%	1%

Table 3. New passenger car fleet average CO_2 emission level, by manufacturer.

	Target gap	New car fleet average CO_2 (in g/km)								
		Jan 2021		YTD 2021		Compliance credits		Status 2021	Target 2021	Target gap
		WLTP	NEDC	WLTP	NEDC	EC	SC	NEDC	NEDC	NEDC
BMW	-3%	121	100	121	100	0.9	0.0	99	103	-4
Toyota-Mazda	-1%	117	95	117	95	0.1	1.6	93	95	-2
Kia	1%	109	95	109	95	0.0	0.0	95	94	1
PSA-Opel	2%	120	96	120	96	0.1	2.0	94	92	2
Ford-Volvo	5%	126	106	126	106	0.1	0.0	106	101	5
Daimler	5%	127	108	127	108	0.7	0.0	107	102	5
AVERAGE	**7%**	**125**	**103**	**125**	**103**	**0.2**	**0.5**	**103**	**96**	**7**
Hyundai	7%	115	101	115	101	0.0	0.0	101	94	7
Renault-Mitsubishi	10%	121	103	121	103	0.1	0.0	103	93	10
VW Group	13%	134	110	134	110	0.0	0.0	110	97	13
FCA-Tesla-Honda	14%	128	108	128	108	0.1	0.0	108	94	14

Notes: EC = eco-innovations, SC = super-credits; all CO2 values are estimates, see methodology section.

The registration share of electric vehicles in January 2021 was the highest in Norway (81%), with two-thirds of being battery electric vehicles. Iceland (54%), Sweden (34%), Finland (23%), Germany (22%), Denmark (20%), Luxembourg (17%), and Austria (16%) also currently have electric vehicle registration shares above the European average of 14%.

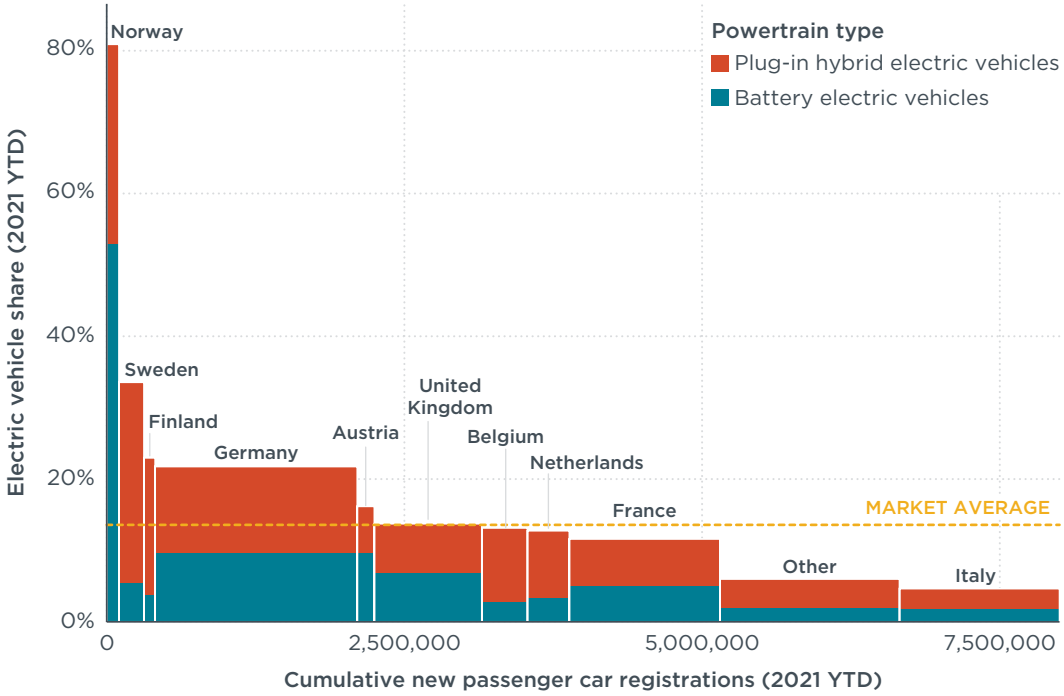

Figure 1. Share of electric vehicles, by country, including information on market size (cumulative car registrations).

Table 4. New passenger car registrations, by country.

New car registrations				
	Jan 2021	Jan 2020	YTD 2021	YTD 2020
Germany	169,754	-31%	169,754	-31%
Italy	134,405	-14%	134,405	-14%
France	126,380	-6%	126,380	-6%
United Kingdom	90,249	-40%	90,249	-40%
Spain	43,345	-52%	43,345	-52%
Belgium	38,320	-27%	38,320	-27%
Netherlands	35,193	-20%	35,193	-20%
Poland	32,263	-18%	32,263	-18%
Sweden	21,001	21%	21,001	21%
Austria	14,334	-38%	14,334	-38%
Other	94,929	-44%	94,929	-44%
ALL	**800,173**	**-29%**	**800,173**	**-29%**

Table 5. Share of electric passenger cars by country.

Share of electric cars						
	Jan 2021		2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Germany	10%	12%	10%	12%	7%	7%
Austria	10%	7%	10%	7%	6%	3%
Other	9%	9%	9%	9%	8%	6%
United Kingdom	7%	7%	7%	7%	7%	4%
AVERAGE	**6%**	**8%**	**6%**	**8%**	**6%**	**5%**
Sweden	5%	28%	5%	28%	10%	23%
France	5%	6%	5%	6%	7%	5%
Netherlands	3%	9%	3%	9%	20%	4%
Belgium	3%	10%	3%	10%	3%	7%
Italy	2%	3%	2%	3%	2%	2%
Spain	1%	3%	1%	3%	2%	3%
Poland	0%	2%	0%	2%	1%	1%

For light-commercial vehicles (vans), the new registrations in January 2021 were about 8% lower than one year before. On average, 3% of new vans were electric, all of them battery-electric vehicles. According to the current estimate, van manufacturers are already compliant with their 2021 CO_2 targets.

Table 6. New vans registrations, by manufacturer.

New vans registrations				
	Jan 2021	Jan 2020	YTD 2021	YTD 2020
FCA-PSA	45,860	-11%	45,860	-11%
Ford-VW	37,887	-11%	37,887	-11%
Renault-Mitsubishi	27,179	-3%	27,179	-3%
Daimler	12,445	-9%	12,445	-9%
Other	13,939	4%	13,939	4%
ALL	**137,310**	**-8%**	**137,310**	**-8%**

Table 7. Share of electric vans, by manufacturer.

Share of electric vans						
	Jan 2021		2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Other	7%	0%	7%	0%	4%	1%
Renault-Mitsubishi	7%	0%	7%	0%	6%	0%
AVERAGE	**3%**	**0%**	**3%**	**0%**	**2%**	**0%**
FCA-PSA	1%	0%	1%	0%	1%	0%
Daimler	1%	0%	1%	0%	2%	0%
Ford-VW	0%	0%	0%	0%	1%	0%

Table 8. New vans fleet average CO_2 emission level, by manufacturer.

	Target gap	New vans fleet average CO_2 (in g/km)							
		Jan 2021		YTD 2021		Credits	Status 2021	Target 2021	Target gap
		WLTP	NEDC	WLTP	NEDC	EC	NEDC	NEDC	NEDC
FCA-PSA	-3%	182	136	182	136	0.0	136	139	-3
Ford-VW	-2%	200	165	200	165	0.0	165	169	-4
AVERAGE	**-2%**	**190**	**150**	**190**	**150**	**0.0**	**150**	**153**	**-3**
Daimler	-1%	215	181	215	181	0.0	181	183	-2
Renault-Mitsubishi	1%	179	141	179	141	0.0	141	140	1

Table 9. New vans registrations, by country.

New vans registrations				
	Jan 2021	Jan 2020	YTD 2021	YTD 2020
France	34,642	7%	34,642	7%
United Kingdom	24,046	1%	24,046	1%
Germany	17,480	-19%	17,480	-19%
Italy	10,905	-13%	10,905	-13%
Spain	8,253	-14%	8,253	-14%
Other	41,984	-15%	41,984	-15%
ALL	**137,310**	**-8%**	**137,310**	**-8%**

Table 10. Share of electric vans by country.

Share of electric vans						
	Jan 2021		2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Germany	4%	0%	4%	0%	3%	0%
France	3%	0%	3%	0%	2%	0%
AVERAGE	**3%**	**0%**	**3%**	**0%**	**2%**	**0%**
Other	2%	0%	2%	0%	2%	0%
United Kingdom	2%	1%	2%	1%	2%	1%
Spain	1%	0%	1%	0%	1%	0%
Italy	1%	0%	1%	0%	1%	0%

Norway has been leading on the uptake of electric vehicles for many years. The government's goal is for only fully electric passenger cars to be sold in 2025. In January 2021, about 81% of all new passenger cars in Norway were electric, the majority of them battery-electric vehicles. A number of national and local incentives provide a strong pull for electric vehicles. Most prominent are the exemption of battery-electric vehicles from 25% VAT and waiver from registration tax when purchasing a new car. Tax breaks for owning a vehicle, low fueling costs relative to conventional cars, and reduced charges on toll roads are some additional benefits for owners of a battery-electric car.

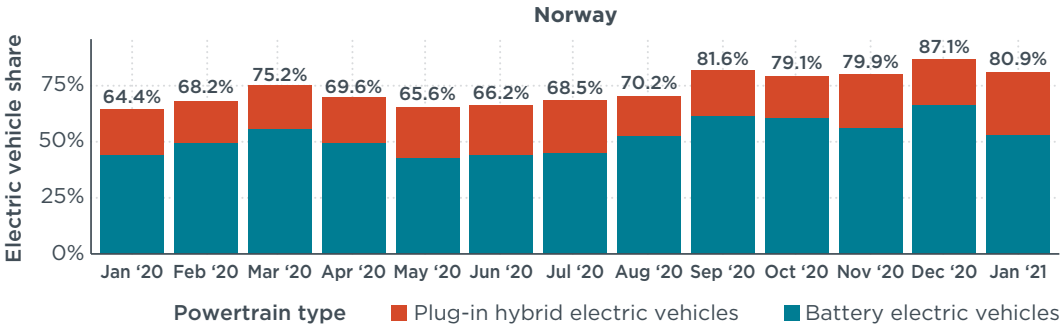

Figure 2. Share of electric vehicles in Norway (spotlight of the month).

DEFINITIONS, DATA SOURCES, METHODOLOGY, AND ASSUMPTIONS

Manufacturer pools: Automakers are allowed to form pools to jointly comply with CO_2 targets. For this factsheet, the definition of pools according to the European Commission, "M1 pooling list", version of 1 January 2021 applies (main brands listed here): BMW (BMW, Mini), Daimler (Mercedes-Benz, Smart), FCA-Tesla-Honda (Alfa Romeo, Fiat, Honda, Jeep, Lancia, Tesla), Ford-Volvo (Ford, Volvo), Hyundai (Hyundai), Kia (Kia), PSA-Opel (Citroën, DS Automobiles, Opel, Peugeot, Vauxhall), Renault-Misubishi (Dacia, Mitsubishi, Nissan, Renault), Toyota-Mazda (Lexus, Mazda, Toyota), and VW Group (Audi, Porsche, SEAT, Škoda, VW). For light commercial vehicles, the "N1 pooling list", version 1 January 2021, applies: Daimler (Mercedes-Benz), FCA-PSA (Citroën, Fiat, Opel, Peugeot, Vauxhall), Ford-VW (Ford, VW), Renault-Mitsubishi (Dacia, Mitsubishi, Nissan, Renault).

Abbreviations: CO_2 = carbon dioxide emissions; **g/km** = grams per kilometer; **YTD** = year to date.

Technical scope: This factsheet focuses on new **passenger car** and **light commercial vehicle** registrations. **Electric vehicles** here include battery electric (BEV), plug-in hybrid electric (PHEV), and fuel cell vehicles.

Geographic scope: The European CO_2 regulation for vehicle manufacturers applies to all countries of the European Economic Area (EEA). This includes the 27 member states of the European Union, plus Iceland, Liechtenstein, Norway, and the United Kingdom (UK). Data for new car registrations and shares of electric vehicles in this factsheet cover all of these countries, with the exception of Bulgaria, Liechtenstein, and Malta. Data for CO_2 emission levels additionally omit Hungary, Lithuania, Poland (until April 2020), Portugal, and Romania (together less than 10% of the total market).

Data sources: AAA DATA (France), Dataforce (all other markets).

Results may change over time: Registrations and/or CO_2 data may be retrospectively updated by some of the national type approval authorities. Historical values are regularly updated to reflect all latest data available.

Test procedures: For the conversion of CO_2 values from the New European Drive Cycle (**NEDC**) to the Worldwide harmonized Light vehicles Test Procedure (**WLTP**), manufacturer-specific factors based on 2019 market data are applied.[1]

Flexible compliance mechanisms: To facilitate meeting their CO_2 targets, manufacturers can make use of a number of compliance mechanisms: (1) Manufacturers can reduce their CO_2 level by up to 7 g/km by deploying **eco-innovation** technologies. As a conservative estimate, we apply the 2019 level of eco-innovation CO_2 emission reductions per manufacturer[2], (2) New passenger cars with less than 50 g/km CO_2/km (NEDC) are counted 1.67 times in 2021 (**super-credit**). The impact of super-credits for complying with the CO_2 targets is capped at 7.5 g/km per manufacturer for the years 2020-2022 together.

Mass-based targets: For each manufacturer pool, a specific **2021 CO_2 target value** applies, depending on the average mass of the new cars registered. For this factsheet, we assume the average mass per manufacturer pool to remain constant with respect to the market situation in 2019.[3]

1 Applying the methodology outlined in: Jan Dornoff, Uwe Tietge, and Peter Mock, *On the way to "real-world" CO_2 values: The European passenger car market in its first year after introducing the WLTP*, (ICCT: Washington, DC, 2020), https://theicct.org/publications/way-real-world-co2-values-european-passenger-car-market-its-first-year-after

2 Applying the methodology outlined in: Uwe Tietge, Peter Mock, and Jan Dornoff, *Overview and evaluation of eco-innovations in European passenger car CO_2 standards*, (ICCT: Washington, DC, 2018), https://theicct.org/publications/eco-innovations-european-passenger-car-co2-standards.

3 Uwe Tietge, Peter Mock, and Jan Dornoff, *CO_2 emissions from new passenger cars in Europe: Car manufacturers' performance in 2019* (ICCT: Washington, DC, 2020), https://theicct.org/publications/co2-new-passenger-cars-europe-aug2020.

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