

MARKET MONITOR

EUROPEAN PASSENGER CAR AND LIGHT COMMERCIAL VEHICLE REGISTRATIONS: JANUARY-SEPTEMBER 2021



In September 2021, there were about 0.7 million passenger cars newly registered in Europe. Year-to-date, new registrations reached 7.7 million which is 7% more than during the same time period in 2020. However, new car registrations are still less than in past years, due to many vehicle factories throughout Europe running at reduced capacity because of the current shortage of semiconductors and other crucial manufacturing materials. While overall registration figures remain relatively low, the market share of electric vehicles keeps increasing. Europe-wide, battery electric vehicles accounted for 14% of new car registrations in September. Year-to-date, about 8% of new cars were battery electric, compared to 6% in 2020. If also counting plug-in hybrid vehicles, the total share of electric cars year-to-date is at around 17%, compared to 11% in 2020. In September, leaving aside the Honda-Tesla pool, VW took the lead in terms of battery electric car registrations share (16%), followed by Hyundai (15%) and Daimler (15%). Estimates regarding the CO₂ performance by manufacturer remain largely unchanged compared to the previous month. On average, vehicle manufacturers are expected to already be aligned with their 2021 CO₂ targets. The outlier is FCA, which is currently still about 11 g/km away from the group's 2021 WLTP CO₂ target.

Table 1. New passenger car registrations, by manufacturer.

New car registrations				
	Sep 2021	Sep 2020	YTD 2021	YTD 2020
VW Group	161,243	-27%	2,001,423	9%
Renault-Mitsubishi	104,392	-24%	939,591	-9%
PSA-Opel	104,336	-27%	1,181,557	7%
Toyota-Mazda	58,023	-17%	592,295	20%
Ford-Volvo	47,278	-37%	527,204	-4%
BMW	46,750	-19%	517,126	11%
FCA	44,714	-36%	512,114	11%
Hyundai	39,034	6%	321,117	22%
Kia	37,592	13%	307,182	20%
Daimler	34,950	-42%	418,894	-5%
Tesla-Honda	29,647	68%	117,122	45%
Other	28,091	1%	240,344	24%
ALL	736,050	-23%	7,675,969	7%

Table 2. Share of plug-in hybrid and battery electric passenger cars, by manufacturer.

Share of plug-in hybrid and battery electric cars						
	Sep 2021		YTD 2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Tesla-Honda	87%	0%	76%	0%	60%	0%
VW Group	16%	9%	9%	9%	7%	5%
Hyundai	15%	8%	12%	5%	14%	1%
Daimler	15%	28%	11%	23%	6%	16%
AVERAGE	14%	9%	8%	9%	6%	5%
Renault-Mitsubishi	12%	4%	9%	4%	8%	3%
Kia	12%	12%	10%	12%	9%	9%
BMW	10%	19%	7%	18%	5%	13%
PSA-Opel	9%	6%	6%	5%	4%	3%
FCA	9%	6%	6%	5%	1%	1%
Ford-Volvo	8%	18%	6%	19%	2%	13%
Toyota-Mazda	3%	3%	1%	3%	1%	1%
Other	1%	10%	2%	6%	2%	3%

Table 3. New passenger car fleet average CO₂ emission level, by manufacturer.

	Target gap	New car fleet average CO ₂ (in g/km)								
		Sep 2021		YTD 2021		Compliance credits		Status 2021	Target 2021	Target gap
		WLTP	NEDC	WLTP	NEDC	EC	SC	WLTP	WLTP	WLTP
Tesla-Honda	-76%	16	13	30	24	0.2	0.0	30	126	-96
Ford-Volvo	-6%	114	92	117	95	0.2	0.0	117	124	-7
PSA-Opel	-5%	111	86	117	91	0.0	3.3	114	120	-6
BMW	-4%	116	99	119	102	0.2	0.0	119	124	-5
Toyota-Mazda	-3%	118	93	117	93	0.0	2.7	115	119	-4
Daimler	-2%	108	97	119	107	0.0	0.0	119	122	-3
Kia	-2%	104	90	108	93	0.0	0.0	108	110	-2
AVERAGE	-2%	107	89	117	97	0.0	1.2	116	118	-2
Hyundai	0%	103	89	110	95	0.0	0.0	110	110	0
VW Group	2%	111	93	122	101	0.0	0.0	122	120	2
Renault-Mitsubishi	4%	108	91	115	97	0.0	0.0	115	111	4
FCA	10%	119	97	129	106	0.0	7.2	122	111	11

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

During the first half of 2021, the registration share of plug-in hybrid and battery electric vehicles was the highest in Norway (85%), with two-thirds being battery electric vehicles. Iceland (51%), Sweden (41%), Denmark (30%), Finland (28%), Germany (24%), the Netherlands (23%), Luxembourg (19%), and Austria (18%) also currently have electric vehicle registration shares above the European average of 17%.

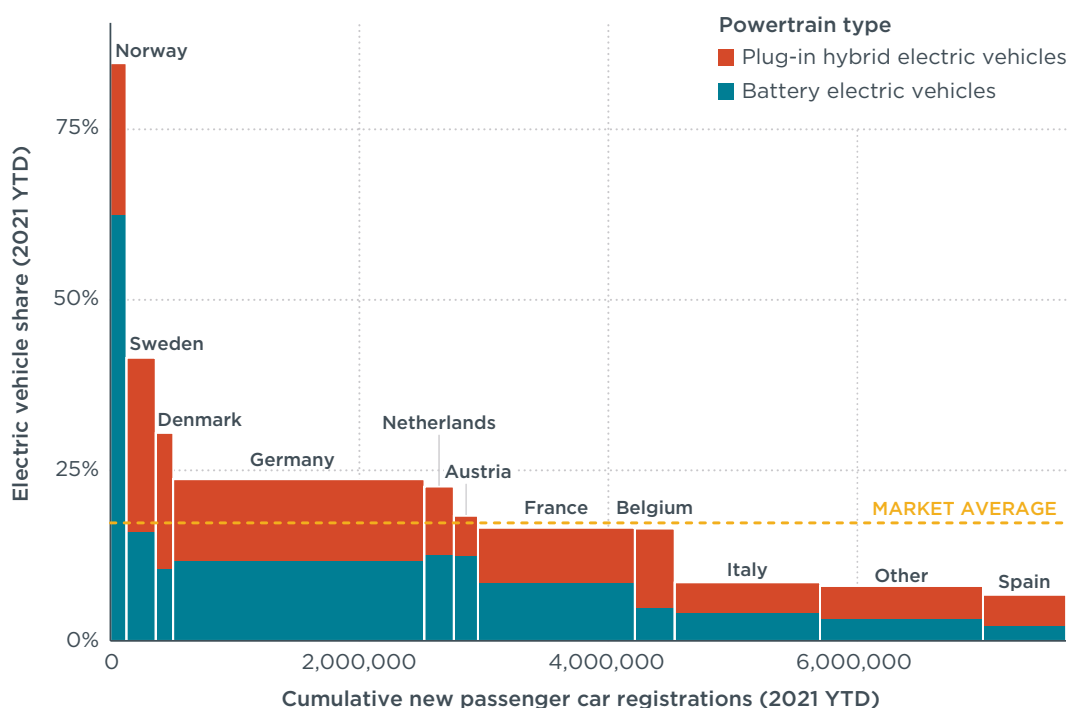


Figure 1. Share of electric vehicles, by country, including information on market size (cumulative car registrations).

Table 4. New passenger car registrations, by country.

New car registrations				
	Sep 2021	Sep 2020	YTD 2021	YTD 2020
Germany	196,972	-26%	2,017,561	-1%
France	133,830	-20%	1,260,373	8%
Italy	105,256	-33%	1,168,789	21%
Spain	60,901	-18%	667,791	7%
Poland	33,093	-13%	347,025	18%
Belgium	26,894	-26%	319,913	-5%
Netherlands	24,663	-16%	235,980	-5%
Sweden	22,788	-21%	234,384	15%
Austria	18,109	-20%	193,618	6%
Czechia	14,164	-16%	161,823	9%
Other	99,380	-13%	1,068,712	12%
ALL	736,050	-23%	7,675,969	7%

Table 5. Share of plug-in hybrid and battery electric passenger cars, by country.

Share of plug-in hybrid and battery electric cars						
	Sep 2021		YTD 2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Sweden	33%	21%	16%	26%	10%	23%
Other	23%	10%	12%	10%	9%	7%
Netherlands	21%	11%	13%	10%	20%	4%
Austria	20%	6%	12%	6%	6%	3%
Germany	17%	12%	12%	12%	7%	7%
AVERAGE	14%	9%	8%	9%	6%	5%
France	13%	9%	8%	8%	7%	5%
Belgium	10%	13%	5%	12%	3%	7%
Italy	8%	5%	4%	5%	2%	2%
Spain	5%	6%	2%	4%	2%	3%
Poland	2%	2%	1%	2%	1%	1%
Czechia	2%	2%	1%	2%	2%	1%

For light commercial vehicles (vans), new registrations in September 2021 were about 12% lower than in September 2020. During the first nine months of 2021, approximately 20% more vehicles were newly registered than during the same time period in 2020. On average, 3% of new vans were electric, with all of them being battery electric vehicles. Year-to-date, Daimler currently is the manufacturer pool with the highest share of electric vans (6%), and Germany is the countries with the highest share (5%). On average, van manufacturer pools are currently about 8 g/km away from complying with their respective 2021 CO₂ targets.

Table 6. New van registrations, by manufacturer.

New vans registrations				
	Sep 2021	Sep 2020	YTD 2021	YTD 2020
FCA-PSA	39,582	-18%	410,503	20%
Ford-VW	26,209	-17%	271,962	10%
Renault-Mitsubishi	25,647	-7%	248,063	23%
Daimler	11,309	-23%	112,863	6%
Other	16,232	21%	147,452	51%
ALL	118,979	-12%	1,190,843	20%

Table 7. Share of plug-in hybrid and battery electric vans, by manufacturer.

Share of plug-in hybrid and battery electric vans						
	Sep 2021		YTD 2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Other	7%	0%	7%	0%	5%	0%
Daimler	6%	0%	3%	0%	2%	0%
Renault-Mitsubishi	5%	0%	5%	0%	5%	0%
AVERAGE	3%	0%	3%	0%	2%	0%
FCA-PSA	2%	0%	2%	0%	1%	0%
Ford-VW	1%	0%	1%	0%	1%	0%

Table 8. New vans fleet average CO₂ emission level, by manufacturer.

	Target gap	New vans fleet average CO ₂ (in g/km)							
		Sep 2021		YTD 2021		Credits	Status 2021	Target 2021	Target gap
		WLTP	NEDC	WLTP	NEDC				
FCA-PSA	2%	184	137	185	137	0.0	185	182	3
Daimler	4%	221	182	224	185	0.0	224	215	9
AVERAGE	4%	195	153	195	153	0.0	195	187	8
Ford-VW	5%	197	164	201	168	0.0	201	192	9
Renault-Mitsubishi	7%	196	151	192	148	0.0	192	179	13

Table 9. New van registrations, by country.

New vans registrations				
	Sep 2021	Sep 2020	YTD 2021	YTD 2020
France	34,859	-17%	330,377	17%
Germany	19,977	-18%	201,045	8%
Italy	13,312	-14%	127,680	31%
Spain	8,771	-18%	101,043	27%
Other	42,060	-3%	430,698	24%
ALL	118,979	-12%	1,190,843	20%

Table 10. Share of plug-in hybrid and battery electric vans by country.

Share of plug-in hybrid and battery electric vans						
	Sep 2021		2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Germany	5%	0%	4%	0%	3%	0%
Other	4%	0%	3%	0%	2%	0%
AVERAGE	3%	0%	3%	0%	2%	0%
France	3%	0%	2%	0%	2%	0%
Italy	2%	0%	1%	0%	1%	0%
Spain	2%	0%	2%	0%	1%	0%

In September, plug-in hybrid and battery electric vehicles in Sweden accounted for more than 50% of new passenger car registrations. Throughout the past year, the market share fluctuated between 33% and 49% but never exceeded the 50% threshold. Year-to-date, 41% of new cars in Sweden were either battery or plug-in hybrid electric vehicles, with plug-in hybrid electric vehicles exceeding the battery electric vehicle share (25% vs. 16%). In September, battery-electric vehicles caught up and made up more registrations than plug-in hybrid vehicles.

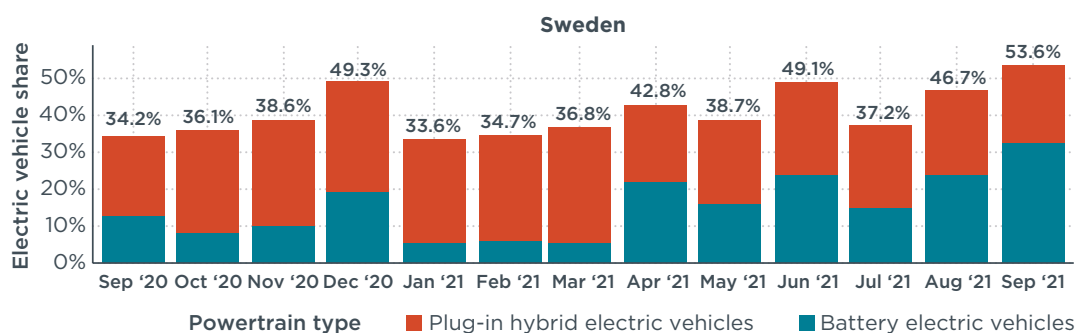


Figure 2. Share of electric vehicles in Sweden (spotlight of the month).

DEFINITIONS, DATA SOURCES, METHODOLOGY, AND ASSUMPTIONS

Manufacturer pools: Automakers are allowed to form pools to jointly comply with CO₂ targets. For this factsheet, the definition of pools according to the European Commission, “M1 pooling list”, version of 22 June 2021 applies (main brands listed here): BMW (BMW, Mini), Daimler (Mercedes-Benz, Smart), FCA (Alfa Romeo, Fiat, Jeep, Lancia), Ford-Volvo (Ford, Volvo), Hyundai (Hyundai), Kia (Kia), PSA-Opel (Citroën, DS Automobiles, Opel, Peugeot, Vauxhall), Renault-Mitsubishi (Dacia, Mitsubishi, Nissan, Renault), Tesla-Honda (Honda, Tesla), 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: CO₂ = 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.

Geographic scope: The European CO₂ 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, and Norway. 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 CO₂ 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 CO₂ 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 CO₂ values from the New European Drive Cycle (**NEDC**) to the Worldwide harmonized Light vehicles Test Procedure (**WLTP**), manufacturer-specific factors based on 2020 market data are applied.¹

Flexible compliance mechanisms: To facilitate meeting their CO₂ targets, manufacturers can make use of a number of compliance mechanisms: (1) Manufacturers can reduce their CO₂ level by up to 7 g/km by deploying **eco-innovation** technologies. As a conservative estimate, we apply the 2020 level of eco-innovation CO₂ emission reductions per manufacturer², (2) New passenger cars with less than 50 g/km CO₂/km (NEDC) are counted 1.67 times in 2021 (**super-credit**). The impact of super-credits for complying with the CO₂ 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 CO₂ 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 2020.³

1 Applying the methodology outlined in: Jan Dornoff, Uwe Tietge, and Peter Mock, *On the way to “real-world” CO₂ 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 CO₂ standards*, (ICCT: Washington, DC, 2018), <https://theicct.org/publications/eco-innovations-european-passenger-car-co2-standards>.

3 Uwe Tietge, Peter Mock, Sonsoles Díaz, and Jan Dornoff, *CO₂ emissions from new passenger cars in Europe: Car manufacturers’ performance in 2020*, (ICCT: Washington, DC, 2021), forthcoming

Contact: Peter Mock, +49 30 847129-102, peter@theicct.org

www.theicct.org

communications@theicct.org

[twitter @theicct](https://twitter.com/theicct)

icct
THE INTERNATIONAL COUNCIL
ON CLEAN TRANSPORTATION