

MARKET MONITOR

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



In June 2021, there were about one million passenger cars newly registered in Europe. This is approximately the same amount as in May, and about 8% higher than in June 2020. During the first half of 2021, about 5.4 million new passenger cars were registered, roughly one quarter more than during the first half of the year 2020. In June, the share of battery electric vehicles increased slightly, to a level of 9%, and the share of plug-in hybrid electric vehicles increased to 10%. Due to a change in the pools that manufacturers can form for compliance with the EU CO₂ regulation, Tesla-Honda is now leading with a battery electric vehicle share of 84%. Former pool partner FCA falls back to a share of 6% battery electric and 6% plug-in hybrid electric vehicles. During the first half of 2021, the average share of new battery electric vehicles was 7% versus 6% in all of 2021. In the case of plug-in hybrid electric vehicles, the share was 9% versus 5% in 2021.

Estimates regarding the CO₂ performance by manufacturer were updated to take into account the latest available 2020 monitoring data from the European Environmental Agency and are now based on WLTP rather than NEDC values. On average, vehicle manufacturers are expected to already be aligned with their 2021 CO₂ targets. Outlier is FCA, currently still being 14 g/km away from the group's 2021 WLTP CO₂ target. On the other side of the spectrum, the Tesla-Honda pool is estimated to over-comply with its CO₂ target by 93 g/km.

Table 1. New passenger car registrations, by manufacturer.

New car registrations				
	Jun 2021	Jun 2020	YTD 2021	YTD 2020
VW Group	284,141	22%	1,429,285	26%
PSA-Opel	156,529	3%	870,764	26%
Renault-Mitsubishi	137,359	-19%	648,254	3%
Toyota-Mazda	80,019	35%	405,051	37%
FCA	70,881	16%	376,726	36%
BMW	63,756	14%	363,632	30%
Ford-Volvo	61,283	-20%	386,323	18%
Daimler	47,413	-15%	300,636	18%
Hyundai	44,908	48%	203,135	33%
Kia	41,496	36%	196,688	29%
Tesla-Honda	22,542	133%	69,399	48%
Other	31,814	19%	163,306	36%
ALL	1,042,141	8%	5,413,199	24%

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

Share of plug-in hybrid and battery electric cars						
	Jun 2021		YTD 2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Tesla-Honda	84%	0%	74%	0%	60%	0%
Daimler	12%	17%	10%	22%	6%	16%
Hyundai	11%	8%	11%	4%	14%	1%
Renault-Mitsubishi	10%	4%	8%	4%	8%	3%
VW Group	10%	10%	8%	8%	7%	5%
AVERAGE	10%	9%	7%	9%	6%	5%
Kia	9%	11%	9%	12%	9%	9%
BMW	8%	17%	6%	18%	5%	13%
Ford-Volvo	8%	23%	4%	19%	2%	13%
PSA-Opel	7%	5%	6%	5%	4%	3%
FCA	6%	6%	5%	4%	1%	1%
Toyota-Mazda	1%	3%	1%	3%	1%	1%
Other	1%	5%	2%	5%	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)								
		Jun 2021		YTD 2021		Compliance credits		Status 2021	Target 2021	Target gap
		WLTP	NEDC	WLTP	NEDC	EC	SC	WLTP	WLTP	WLTP
Tesla-Honda	-74%	20	16	33	27	0.2	0.0	33	126	-93
PSA-Opel	-4%	117	91	118	92	0.0	3.3	115	120	-5
Ford-Volvo	-4%	112	91	119	97	0.2	0.0	119	124	-5
BMW	-3%	119	102	120	103	0.2	0.0	120	124	-4
Toyota-Mazda	-3%	117	93	117	93	0.0	2.5	115	119	-4
Daimler	-1%	124	111	122	109	0.0	0.0	122	122	0
Kia	0%	110	95	110	95	0.0	0.0	110	110	0
AVERAGE	0%	115	95	119	98	0.0	1.2	118	118	0
Hyundai	3%	108	93	113	97	0.0	0.0	113	110	3
VW Group	4%	118	99	124	103	0.0	0.0	124	120	4
Renault-Mitsubishi	4%	112	95	116	98	0.0	0.0	116	111	5
FCA	12%	126	103	131	107	0.0	6.4	125	111	14

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

From 2021 onwards, the performance of vehicle manufacturers in the UK does not count towards their EU CO₂ targets. Starting with this edition of the Market Monitor, data for the UK is no longer incorporated. During the first half of 2021, the registration share of plug-in hybrid and battery electric vehicles was the highest in Norway (83%), with two-thirds being battery electric vehicles. Iceland (48%), Sweden (40%), Denmark (27%), Finland (28%), Germany (22%), the Netherlands (20%), Luxembourg (18%), Portugal (17%), and Austria (17%) also currently have electric vehicle registration shares above the European average of 16%.

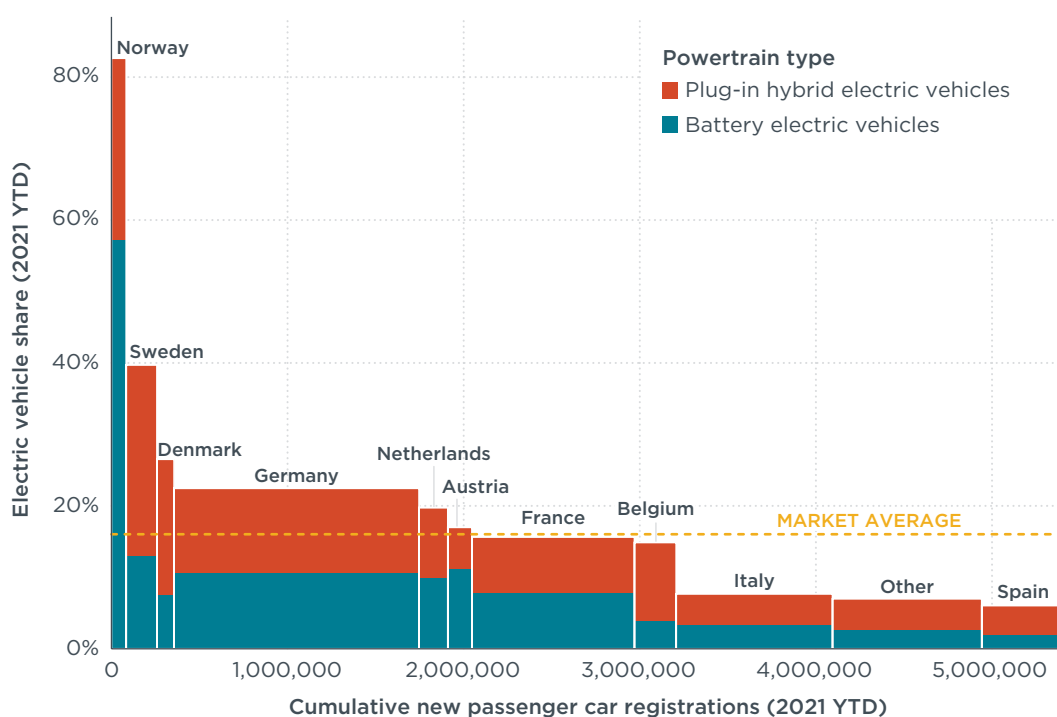


Figure 1. Share of electric vehicles, by country, including information on market size (cumulative car registrations).

Table 4. New passenger car registrations, by country.

New car registrations				
	Jun 2021	Jun 2020	YTD 2021	YTD 2020
Germany	274,152	24%	1,390,889	15%
France	199,508	-15%	922,765	29%
Italy	149,986	13%	887,561	51%
Spain	98,871	14%	471,600	32%
Poland	43,721	22%	242,863	35%
Belgium	42,046	-16%	236,974	8%
Sweden	36,339	46%	174,601	38%
Netherlands	33,318	35%	163,186	3%
Austria	26,666	-1%	137,024	20%
Czechia	22,561	9%	112,805	19%
Other	114,973	11%	672,931	13%
ALL	1,042,141	8%	5,413,199	24%

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

Share of plug-in hybrid and battery electric cars						
	Jun 2021		YTD 2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Sweden	24%	25%	13%	27%	10%	23%
Netherlands	18%	9%	10%	10%	20%	4%
Other	16%	10%	11%	10%	9%	7%
Austria	14%	5%	11%	6%	6%	3%
Germany	12%	11%	11%	12%	7%	7%
France	10%	8%	8%	8%	7%	5%
AVERAGE	10%	9%	7%	9%	6%	5%
Belgium	5%	12%	4%	11%	3%	7%
Italy	5%	5%	3%	4%	2%	2%
Spain	3%	5%	2%	4%	2%	3%
Czechia	1%	2%	1%	2%	2%	1%
Poland	1%	2%	1%	2%	1%	1%

For light commercial vehicles (vans), new registrations in June 2021 were about 9% higher than in June 2020. During the first half of 2021, approximately 38% more vehicles were newly registered than during the first half of 2020. On average, 3% of new vans were electric, with all of them being battery electric vehicles. Year-to-date, the Renault-Mitsubishi manufacturer pool currently has the highest share of electric vans (4%), and Germany is one of the countries with the highest share (4%). Similar as for passenger cars, CO₂ performance estimates for vans were updated using the latest 2020 monitoring data and switched to the WLTP metric. In addition, from 2021 onwards, a mass correction factor applied for van manufacturers' CO₂ targets. The strong increase in the average mass of new vans in recent years has led to significantly more stringent van CO₂ targets. On average, van manufacturer pools are currently about 7 g/km away from complying with their respective 2021 CO₂ targets.

Table 6. New van registrations, by manufacturer.

New vans registrations				
	Jun 2021	Jun 2020	YTD 2021	YTD 2020
FCA-PSA	52,276	8%	295,684	41%
Renault-Mitsubishi	35,135	5%	178,458	39%
Ford-VW	29,698	-2%	194,169	26%
Daimler	14,694	9%	77,000	24%
Other	20,033	56%	99,392	70%
ALL	151,836	9%	844,703	38%

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

Share of plug-in hybrid and battery electric vans						
	Jun 2021		YTD 2021		2020	
	BEV	PHEV	BEV	PHEV	BEV	PHEV
Other	8%	0%	7%	0%	5%	0%
Renault-Mitsubishi	4%	0%	5%	0%	5%	0%
AVERAGE	3%	0%	3%	0%	2%	0%
Daimler	3%	0%	2%	0%	2%	0%
FCA-PSA	2%	0%	1%	0%	1%	0%
Ford-VW	0%	0%	0%	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)							
		Jun 2021		YTD 2021		Credits	Status 2021	Target 2021	Target gap
		WLTP	NEDC	WLTP	NEDC				
FCA-PSA	2%	190	141	185	137	0.0	185	182	3
AVERAGE	4%	197	154	194	152	0.0	194	187	7
Daimler	4%	226	187	225	186	0.0	225	215	10
Ford-VW	5%	199	166	202	168	0.0	202	192	10
Renault-Mitsubishi	5%	194	149	189	145	0.0	189	179	10

Table 9. New van registrations, by country.

New vans registrations				
	Jun 2021	Jun 2020	YTD 2021	YTD 2020
France	46,514	-10%	241,900	39%
Germany	26,847	28%	140,131	23%
Italy	15,200	4%	90,391	58%
Spain	13,429	12%	73,856	63%
Other	49,846	26%	298,425	34%
ALL	151,836	9%	844,703	38%

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

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

In June, plug-in hybrid and battery electric vehicles accounted for more than 4% of new passenger car registrations in Romania. During the first half of 2021, the average share was 1.8% for battery electric vehicles and 1.8% for plug-in hybrid electric vehicles. The country provides purchase incentives for electric vehicles and in addition provides special incentives if replacing vehicles older than eight years with an electric vehicle.

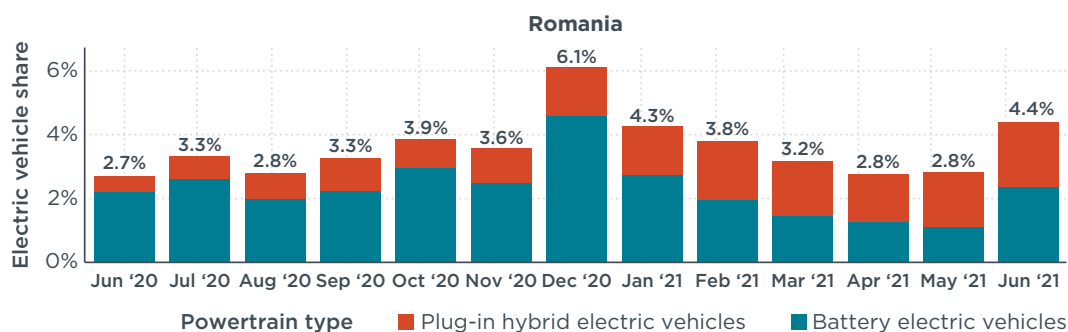


Figure 2. Share of electric vehicles in Romania (spotlight of the month).

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

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