# THE AUTOMOBILE INDUSTRY

POCKET GUIDE 2025/2026

acea

DRIVING MOBILITY FOR EUROPE

# CONTENTS

# FOREWORD

ACEA's Pocket Guide is the must-have resource for the latest intelligence on the automotive industry and market, updated annually. Following last year's ambition to provide insight on the electric vehicle (EV) uptake, we have added a new chapter on infrastructure. The new edition paints a revealing picture for our industry as concerns about competitiveness rise in the context of an increasingly unpredictable trade environment.

Despite these challenges, our industry continues to lead the way in R&D investment, with a sizeable €85 billion spent in 2023. Not only is that €12 billion more than the preceding year, but it's double the amount invested by the next biggest sectoral investor – a demonstration of our commitment to delivering on zero-emission road transport while keeping Europe a technology leader.

EU car production slowed in 2024, reaching 11.5 million vehicles – approximately 750,000 fewer than in the previous year – a worrying signal as Europe struggles to maintain its appeal as a hub for automotive production. Commercial vehicle production also dropped by almost 10%. Overall, production remains far below pre-pandemic levels.

Global car sales experienced a 2.7% increase last year, with Europe's market share slightly rising to nearly 22%. EU car sales continued their ascending trend, with battery-electric models seeing their market share shrinking for the first time. Commercial vehicle registrations followed a similar trend, with electric vans and trucks remaining stagnant. Only buses sustained momentum, nearly doubling their share since 2021.

We have brought around 290 electrically-chargeable models to the EU market today, but 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. While most EU governments offer some form of incentive or tax scheme for EV buyers, less than half offer incentives for building charging infrastructure. With an average of five battery-electric cars per recharging point in the EU, three countries – France, Germany, and the Netherlands – account for almost 60% of all EU public recharging points.

In 2024, the EU experienced a notable decline in both the value and volume of vehicle trade. Despite this, the value of EU vehicle exports exceeded imports, resulting in a trade surplus of €94 billion for the European economy. The US and the UK remain the top two destinations in both units and value, underscoring the importance of safeguarding smooth trade with our top two partners. 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 the way in global road safety, with road fatalities decreasing by 1.3% compared to the previous period, with drops recorded in 16 member states. Our industry's continued investment in vehicle automation and safety will bring further road safety benefits as newer models hit the road. The sector also made strides in improving our environmental footprint. $CO_2$ production emissions per vehicle hit new lows and have now fallen by a significant 53% since 2005. Production water usage per vehicle also sank, having now fallen by more than 54% for the same period.

While there are some positive takeaways from this year's edition, the challenges our industry faces are unprecedented. Not only do we face an electric vehicle market struggling to progress as expected, but also a 'perfect storm' of fierce competition, soaring trade tensions, rising business costs, and a complex EU regulatory framework. The ACEA Pocket Guide emphasises the importance of ensuring that critical industries thrive by allowing for investment and trade to occur freely.

The upcoming Strategic Dialogue meetings with EU leaders will be a game-changer in ensuring that the right conditions are in place to maintain our industry's competitiveness, while delivering on climate goals. Whether it's trade, investment, road safety, employment, or beyond, our industry touches many facets of our everyday lives, keeping businesses and society on the move. Amongst the flux in the world, our ambition remains the same: ACEA's Pocket Guide continues to act as a reliable and trustworthy resource in guiding both law makers and industry on the road to a more competitive and sustainable shared future.

> **"The ACEA Pocket Guide underlines 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) | 2.5 million jobs = 8.1% of EU manufacturing employment | 2023 |
| | Total (EU manufacturing, services, and construction) | 13.6 million jobs = 6.9% of EU employment | 2023 |
| **PRODUCTION** | Motor vehicles (global) | 92.8 million units | 2024 |
| | Motor vehicles (EU) | 13.8 million units = 14.9% of global vehicle production | 2024 |
| | Passenger cars (global) | 75.5 million units | 2024 |
| | Passenger cars (EU) | 11.4 million units = 15.1% of global car production | 2024 |
| **REGISTRATIONS** | Motor vehicles (global) | 92 million units | 2024 |
| | Motor vehicles (EU) | 10.6 million units = 13.7% of global vehicle registrations | 2024 |
| | Passenger cars (global) | 74.8 million units | 2024 |
| | Passenger cars (EU) | 9.3 million units = 14.2% of global car registrations | 2024 |
| | New cars by power source (EU) | battery electric 13.6%, petrol 33.3% market share | 2024 |
| | New vans by power source (EU) | electric 6.1%, diesel 84.5% market share | 2024 |
| | New trucks by power source (EU) | electric 2.3%, diesel 95.1% market share | 2024 |
| | New buses by power source (EU) | electric 18.5%, diesel 63.1% market share | 2024 |
| **TRADE** | Motor vehicle exports (extra-EU) | €178.2 billion | 2024 |
| | Motor vehicle imports (extra-EU) | €84.3 billion | 2024 |
| | Trade balance (extra-EU) | €93.9 billion | 2024 |

| | | | |
|---|---|---|---|
| VEHICLES ON ROADS | Motor vehicles (EU) | 285.6 million units | 2023 |
| | Passenger cars (EU) | 248.8 million units | 2023 |
| | Motorisation rate (EU) | 646 vehicles per 1,000 inhabitants | 2023 |
| | Average age of cars (EU) | 12.5 years | 2023 |
| | Average age of vans (EU) | 12.7 years | 2023 |
| | Average age of trucks (EU) | 14.1 years | 2023 |
| | Average age of buses (EU) | 12.2 years | 2023 |
| INFRASTRUCTURE | Recharging points (EU) | 882,020 units | 2024 |
| ROAD SAFETY | Road fatalities per million inhabitants (EU) | 46 people | 2023 |
| | Road fatalities (EU) | -15.4% since 2014 | 2023 |
| ENVIRONMENT | CO2 emissions from new cars (EU) | 108g CO2/km | 2024 |
| | CO2 emissions from car production | -62.1% since 2005 | 2024 |
| INNOVATION | Automobiles and parts sector (EU) | €84.6 billion = 34% of the EU’s total R&D spending | 2023 |
| TAXATION | Fiscal income from motor vehicles (EU major markets) | €414.7 billion | 2024 |

# EMPLOYMENT

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# The EU auto sector employs about 14 million across the value chain

## EU AUTOMOTIVE SECTOR: DIRECT AND INDIRECT EMPLOYMENT

In thousands, 2023[1]

**13.6 m** jobs

**2.5 m** direct jobs | **11.1 m** indirect jobs

**3.1 m** manufacturing jobs | **10.4 m** non-manufacturing jobs

| DIRECT MANUFACTURING | 2,452 |
|---|---|
| Motor vehicles | 1,094 |
| Bodies (coachwork), trailers, and semi-trailers | 165 |
| Parts and accessories | 1,193 |

**2.5 m** jobs

| INDIRECT MANUFACTURING | 687 |
|---|---|
| Computers and peripheral equipment | 61 |
| Electric motors, generators, and transformers | 626 |

**0.7 m** jobs

| AUTOMOBILE USE | 4,187 |
|---|---|
| Sale of vehicles | 1,465 |
| Maintenance and repair of vehicles | 1,434 |
| Sale of vehicle parts and accessories | 658 |
| Retail sale of automotive fuel in specialised stores | 418 |
| Renting and leasing of vehicles | 213 |

**4.2 m** jobs

| TRANSPORT | 5,350 |
|---|---|
| Freight transport by road | 3,490 |
| Other passenger land transport | 1,860 |

**5.4 m** jobs

| CONSTRUCTION | 887 |
|---|---|
| Roads, bridges, and tunnels[2] | 887 |

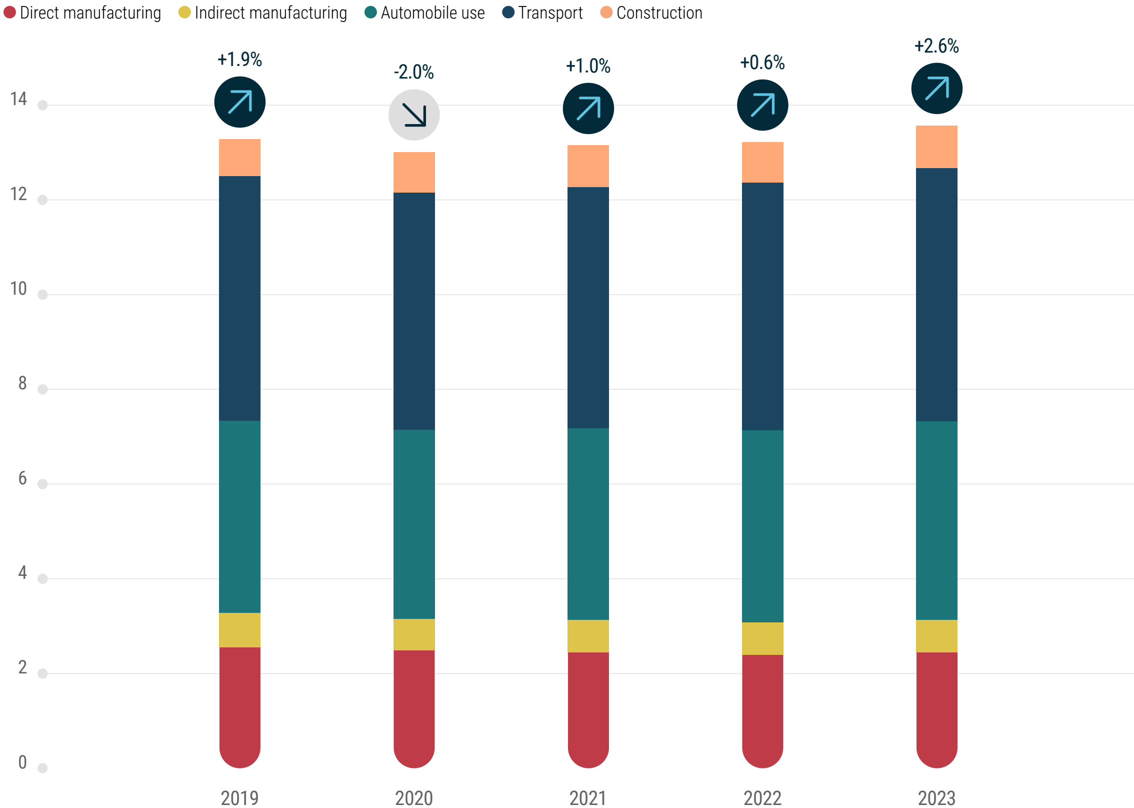
**0.9 m** jobs

1. Provisional
2. Including railways

SOURCE: **EUROSTAT**

## EU AUTOMOTIVE SECTOR EMPLOYMENT

In million jobs, 2019 – 2023[1]




SOURCE: **EUROSTAT**

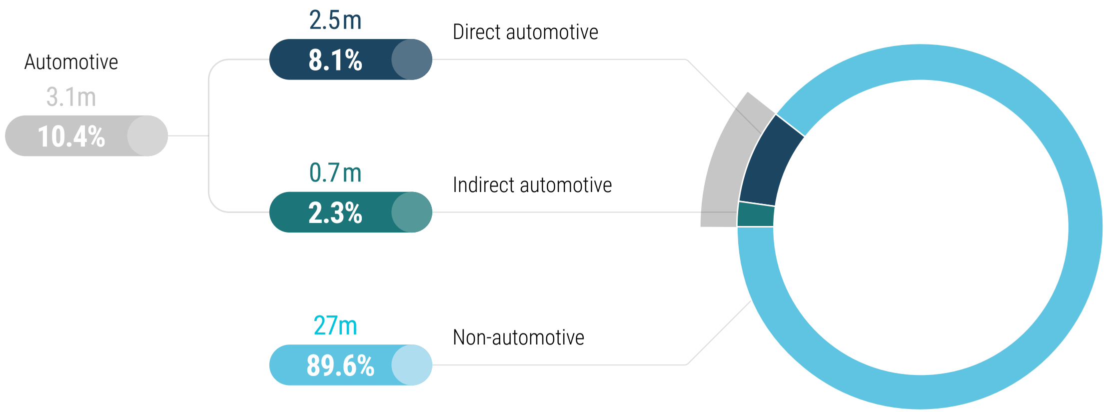
# The EU auto sector accounts for around 7% of the bloc's employment

1. Provisional data for 2023. 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, 2023[1]

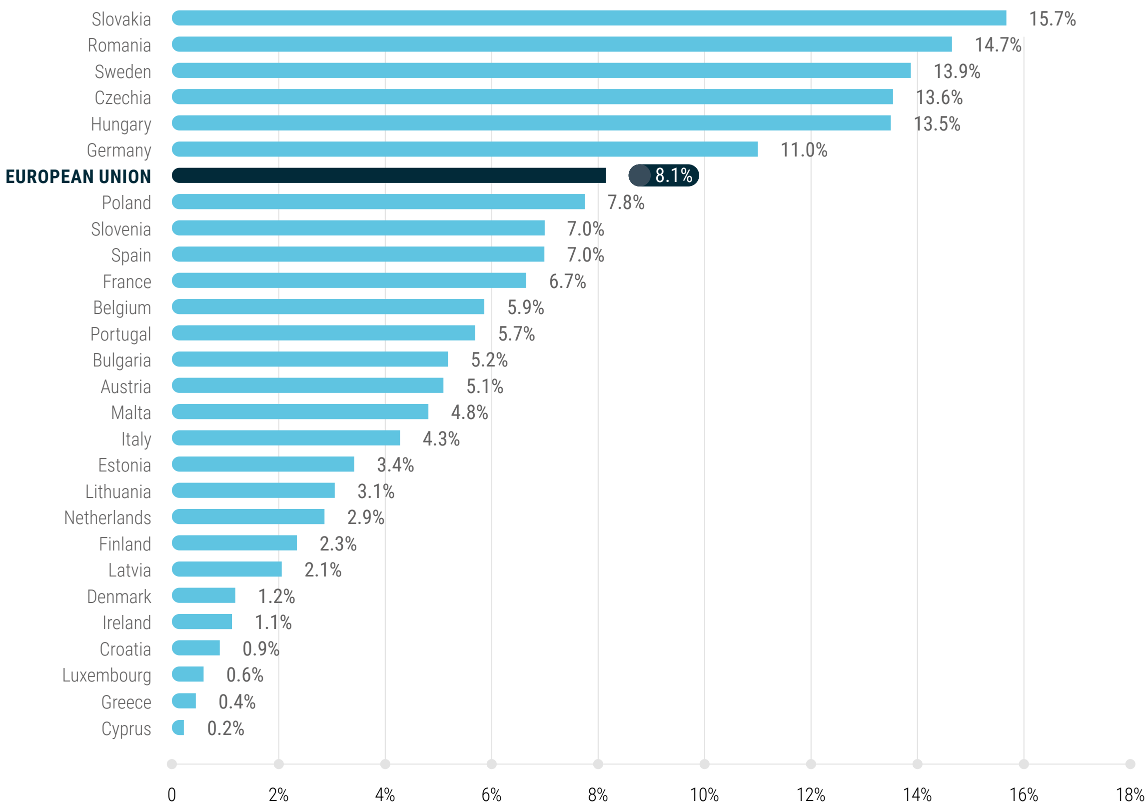



SOURCE: **EUROSTAT**

1. Provisional

# EU DIRECT AUTOMOTIVE EMPLOYMENT

Share of total manufacturing by country, 2023[1]




SOURCE: **EUROSTAT**

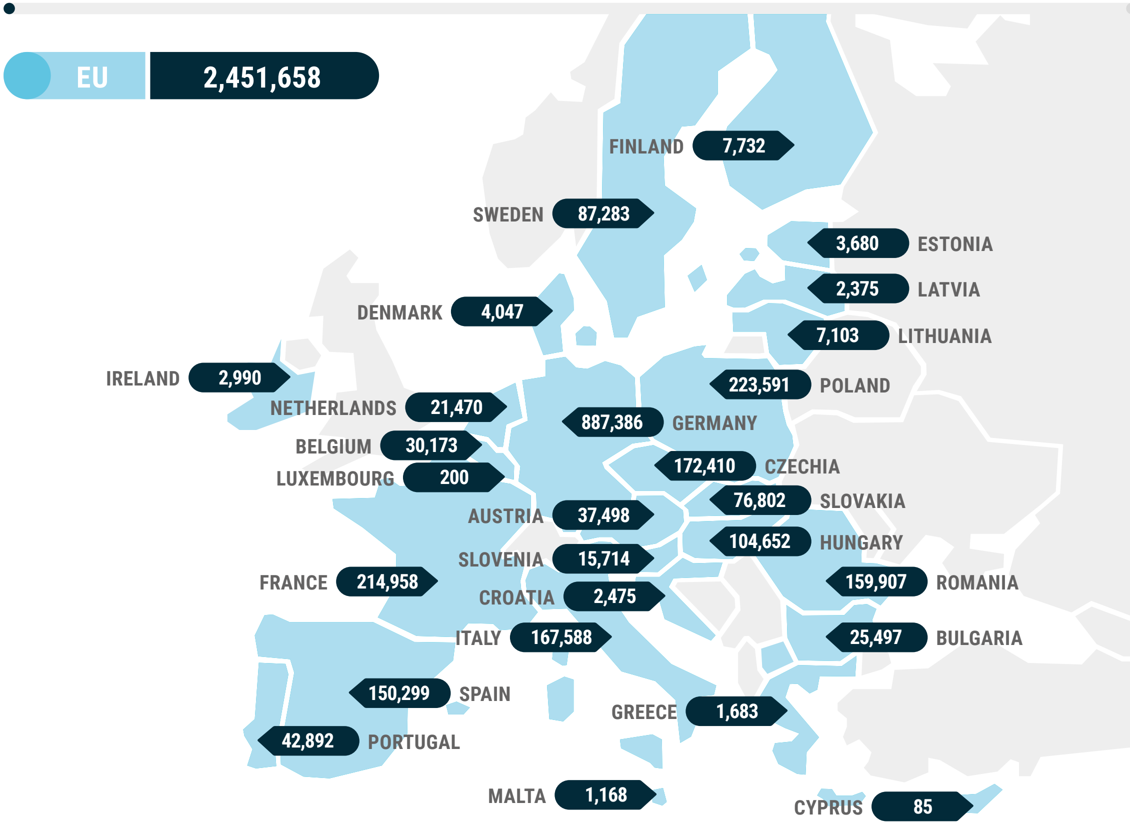
## The EU auto industry accounts for over 10% of manufacturing jobs in six member states

1. Provisional

# EU auto makers directly employ around 2.5 million Europeans in automotive manufacturing

## DIRECT EU AUTOMOTIVE MANUFACTURING EMPLOYMENT

2023[1]

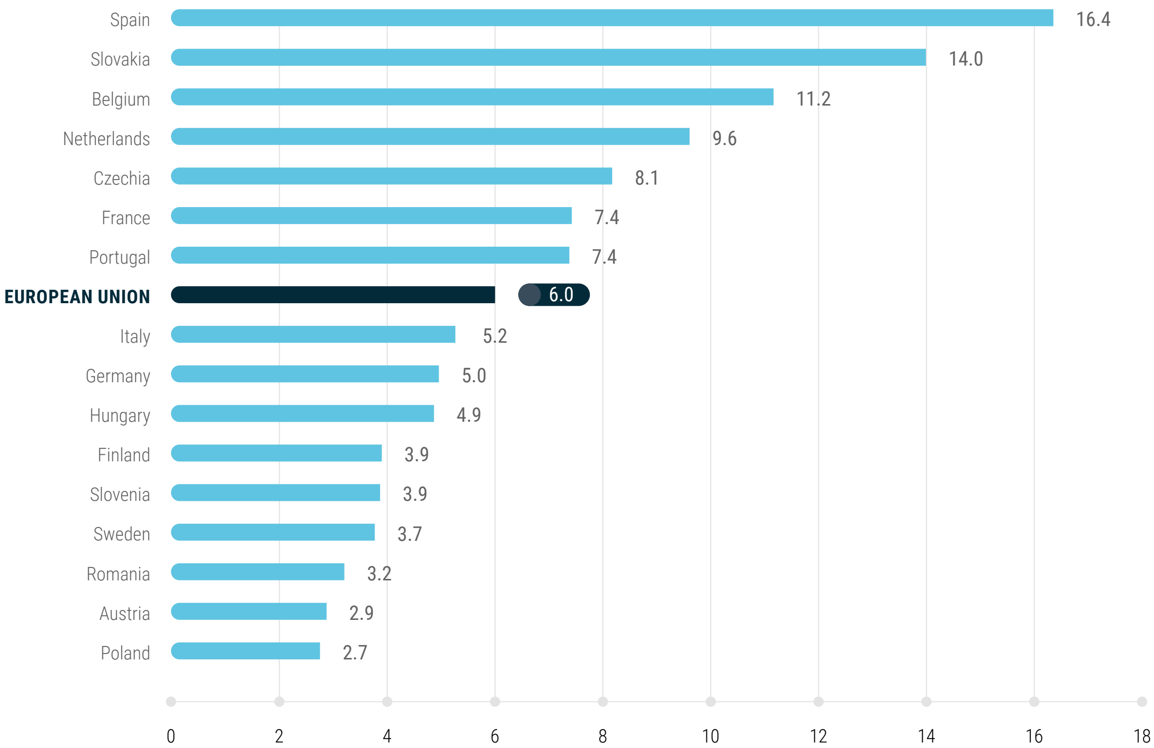



SOURCE: EUROSTAT

1. Provisional

## VEHICLE PRODUCTION PER DIRECT AUTOMOTIVE MANUFACTURING EMPLOYEE

By country, 2023[1]




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

## Each EU automotive manufacturing worker produces an average of six vehicles annually

1. Based on employment most recent data available

# PRODUCTION

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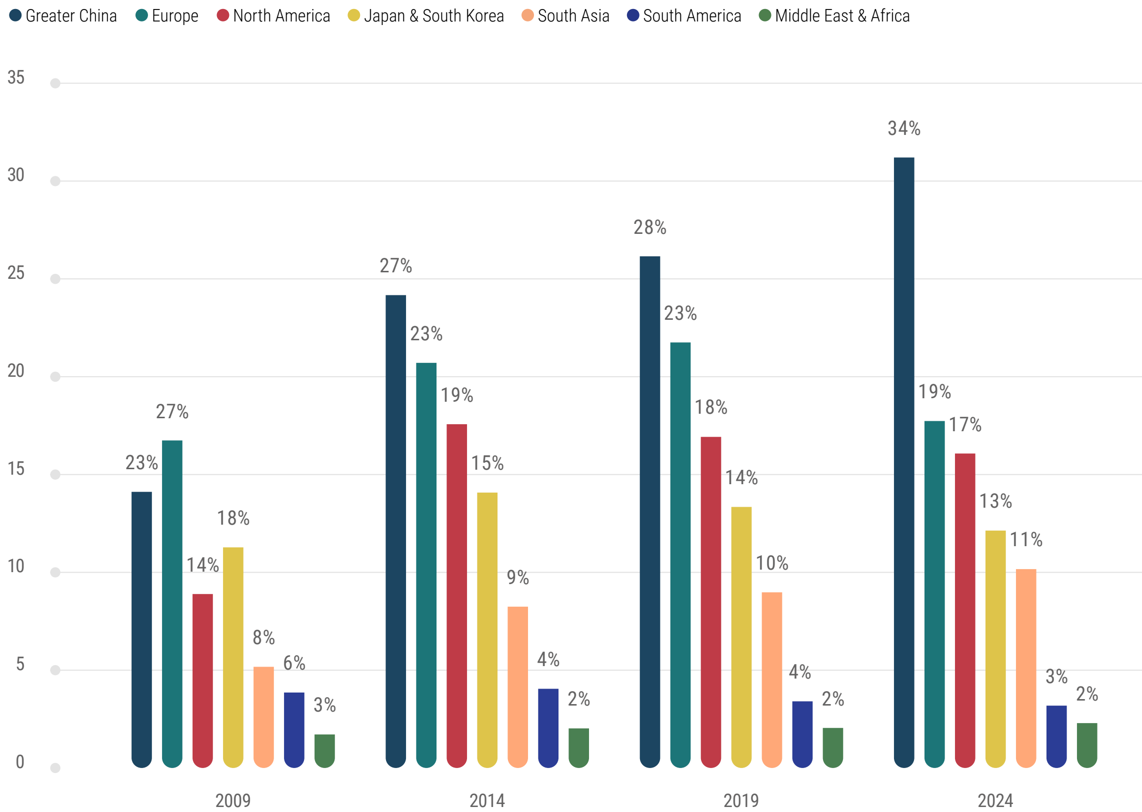
# China is the world's top vehicle producer, manufacturing one-third of vehicles globally

## GLOBAL VEHICLE PRODUCTION

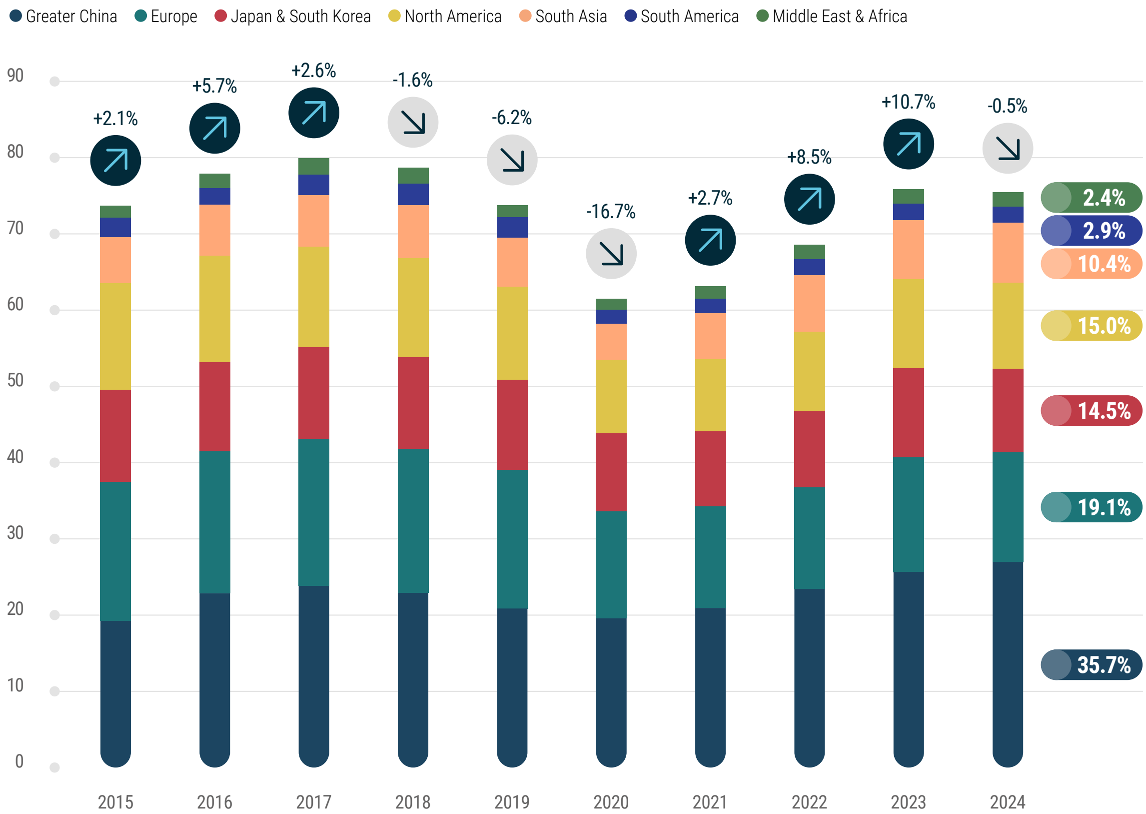
In million units, % share, 2009 – 2024




SOURCE: **S&P GLOBAL MOBILITY**

## GLOBAL CAR PRODUCTION

In million units, % change, % share, 2015 – 2024



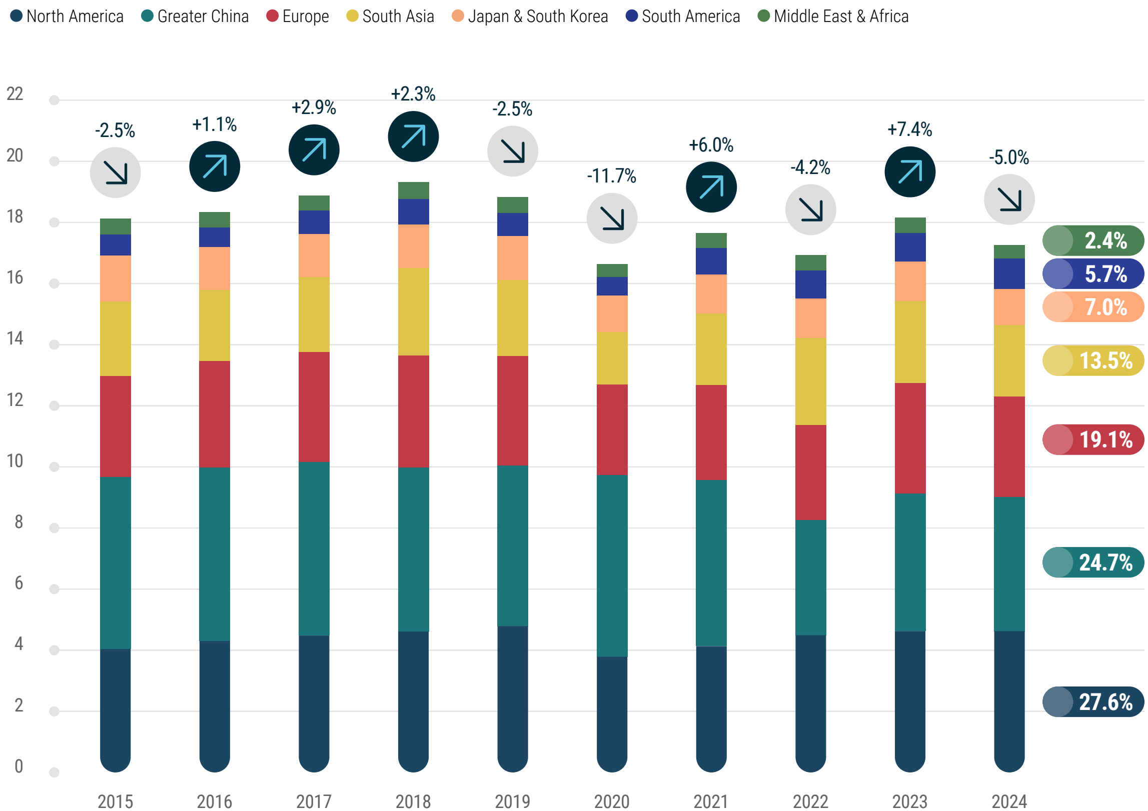

SOURCE: **S&P GLOBAL MOBILITY**

# Global car production slightly contracted in 2024 compared to the previous year

# Global commercial vehicle production decreased by 5% in 2024

## GLOBAL COMMERCIAL VEHICLE[1] PRODUCTION

In million units, % change, % share, 2015 – 2024

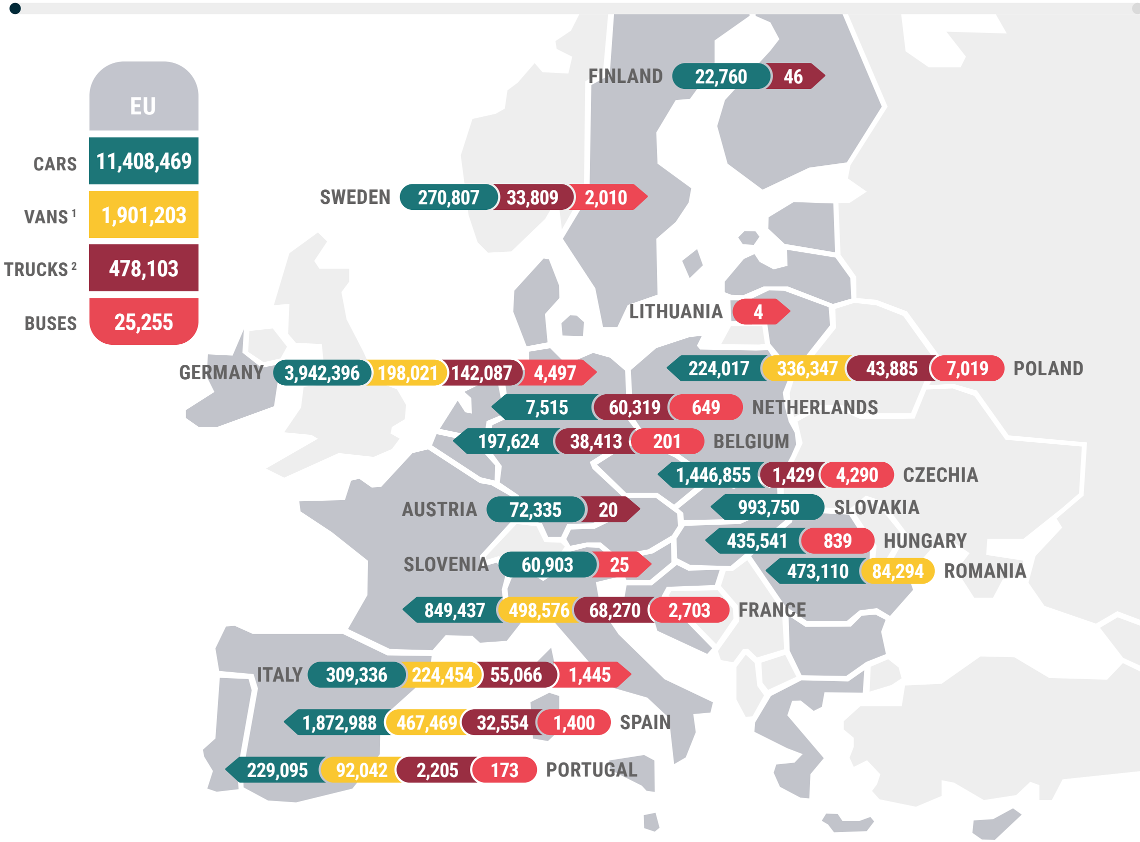



SOURCE: **S&P GLOBAL MOBILITY**

1. Includes buses

## EU VEHICLE PRODUCTION

2024




SOURCE: **S&P GLOBAL MOBILITY**

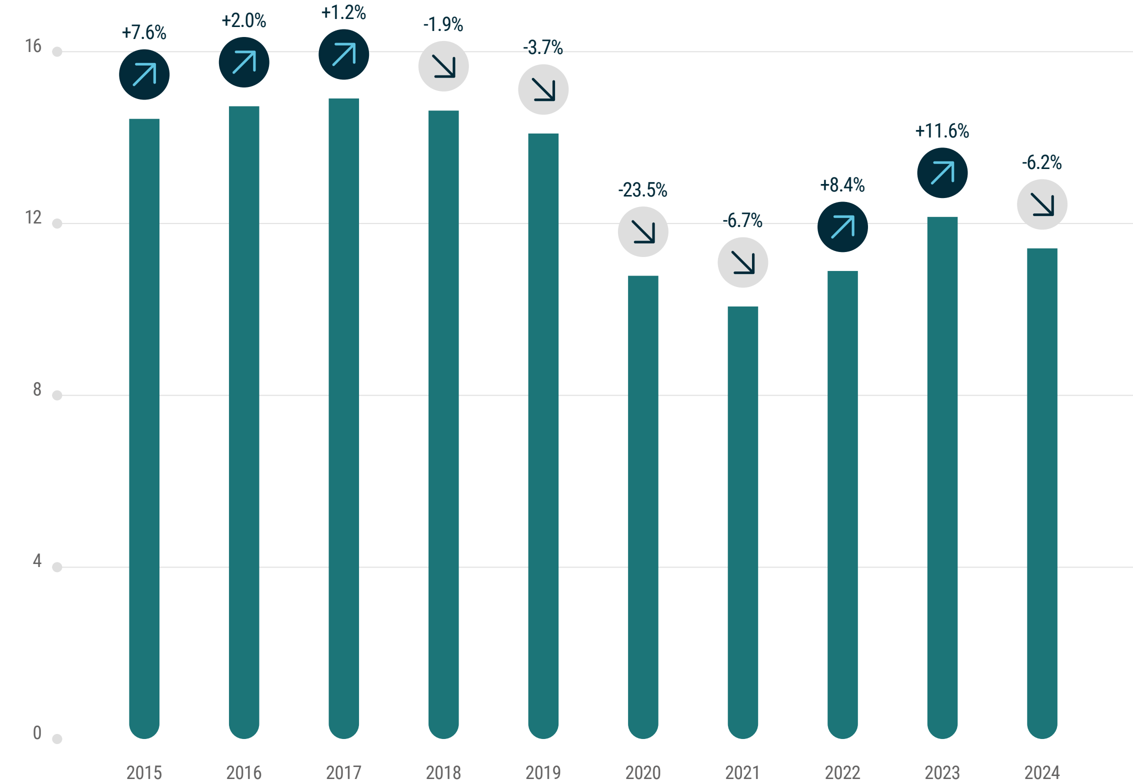
# About 14 million vehicles were made in the EU in 2024, about 1 million less compared to 2023

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

# EU car production fall substancially in 2024 compared to the previous year

## EU CAR PRODUCTION

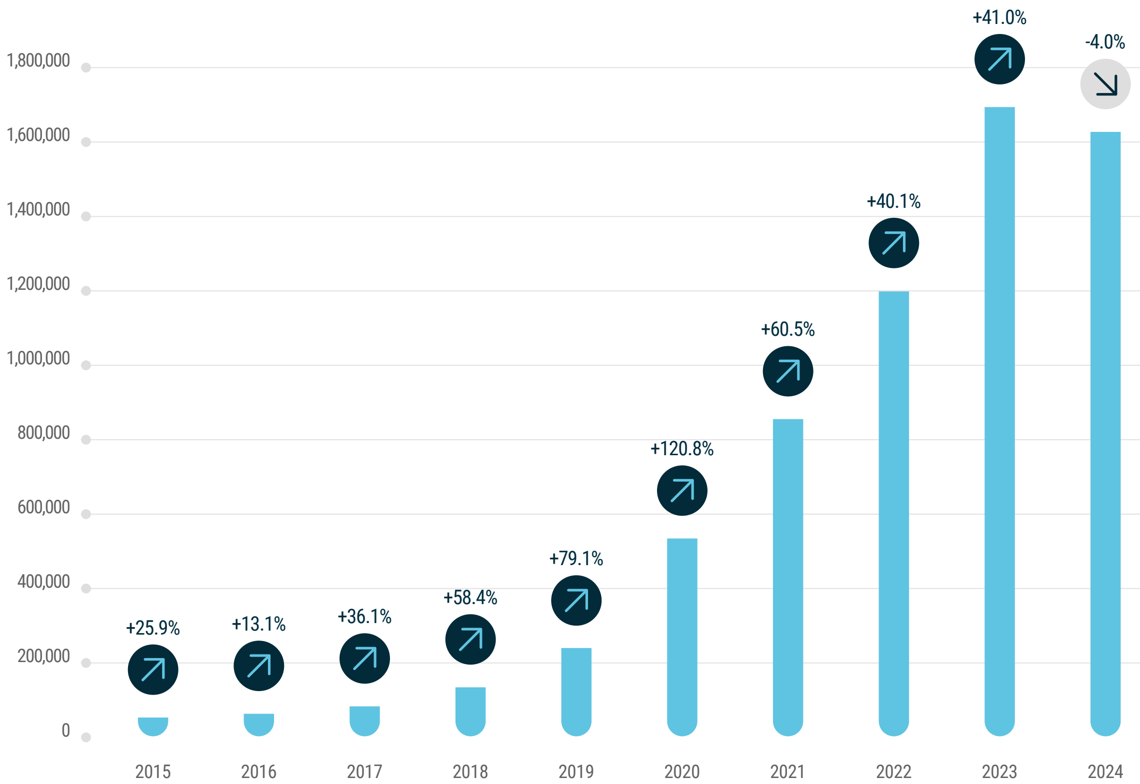
In million units, % change, 2015 – 2024




SOURCE: **S&P GLOBAL MOBILITY**

## EU BATTERY-ELECTRIC CAR PRODUCTION

In units, % change, 2015-2024



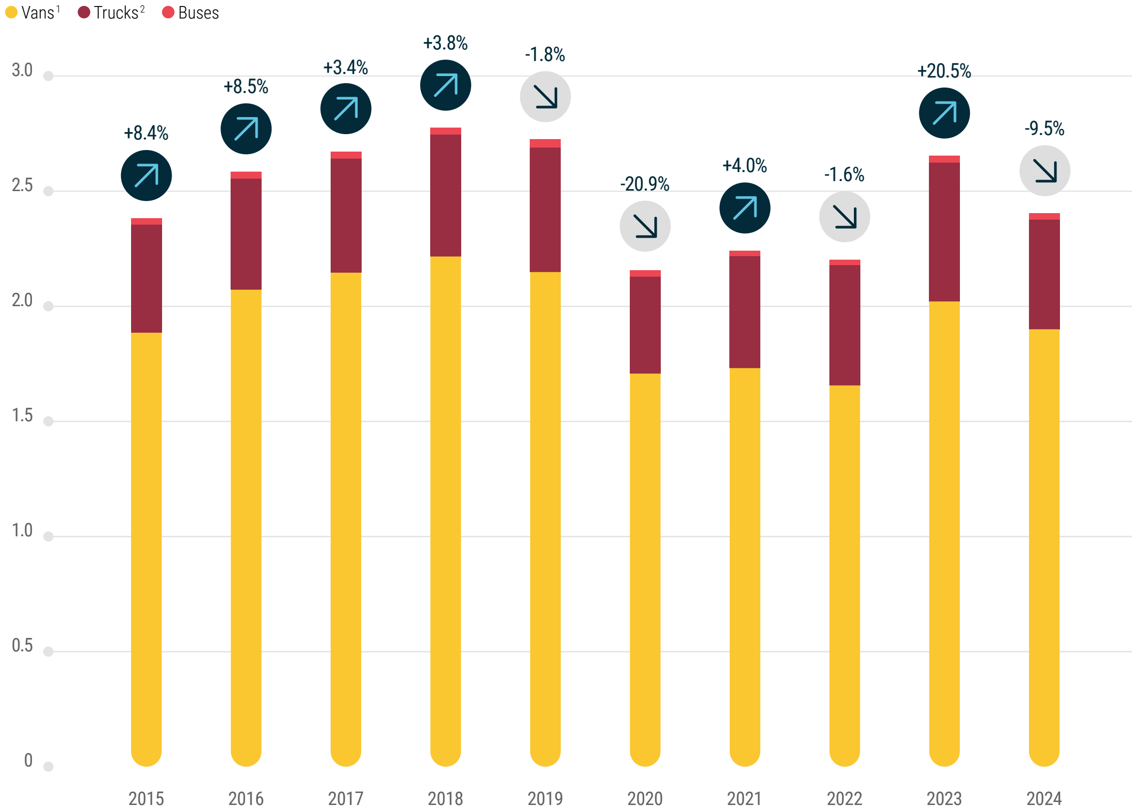

SOURCE: **S&P GLOBAL MOBILITY**

# The EU battery-electric car production increased exponentially these past ten years

# EU commercial vehicle production slipped dramatically in 2024

## EU COMMERCIAL VEHICLE PRODUCTION

In million units, % change, 2015 – 2024



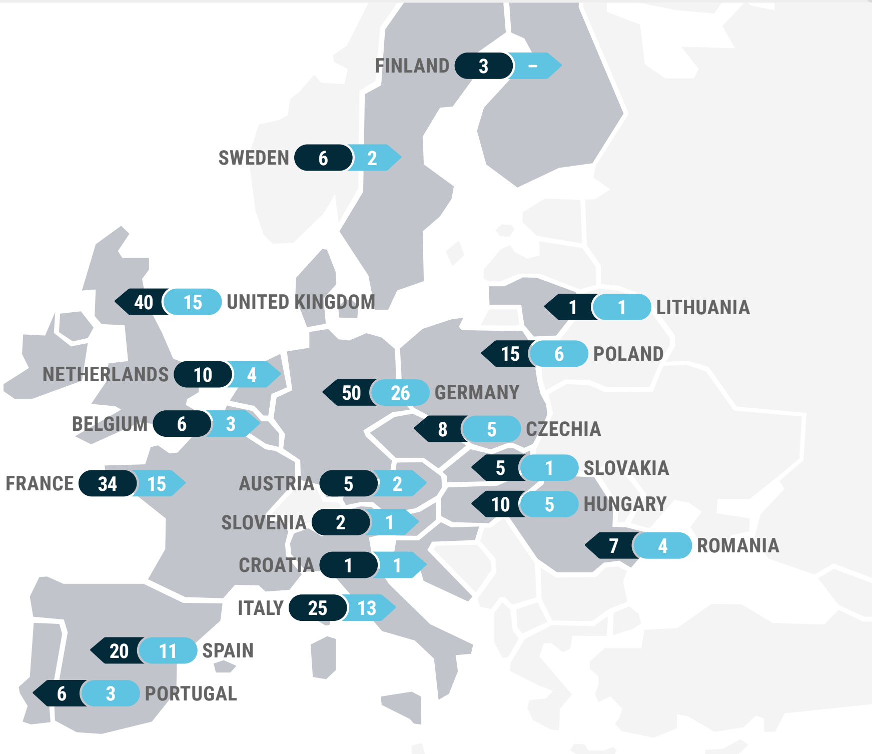

SOURCE: **S&P GLOBAL MOBILITY**

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

## AUTOMOBILE ASSEMBLY, BATTERY, AND POWERTRAIN PLANTS

2025

● All plants ● BEV[1] production




| | CARS | VANS | TRUCKS | BUSES | POWERTRAINS | BATTERIES | TOTAL |
|---|---|---|---|---|---|---|---|
| EU+UK | 102 | 29 | 30 | 42 | 60 | 65 | 254 |

SOURCE: **ACEA**

# 254 automotive plants operate in the EU

1. Battery-electric vehicle

# REGISTRATIONS

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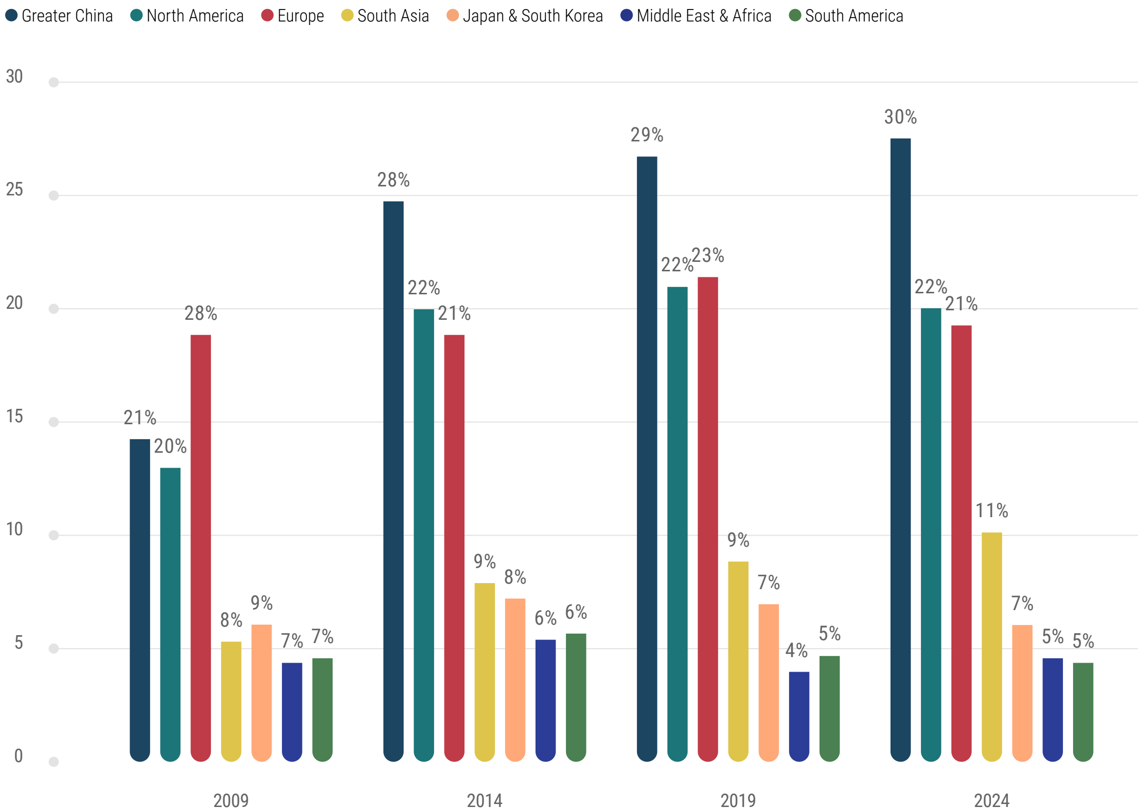
# Europe accounts for a fifth of global vehicle sales

## GLOBAL NEW VEHICLE REGISTRATIONS

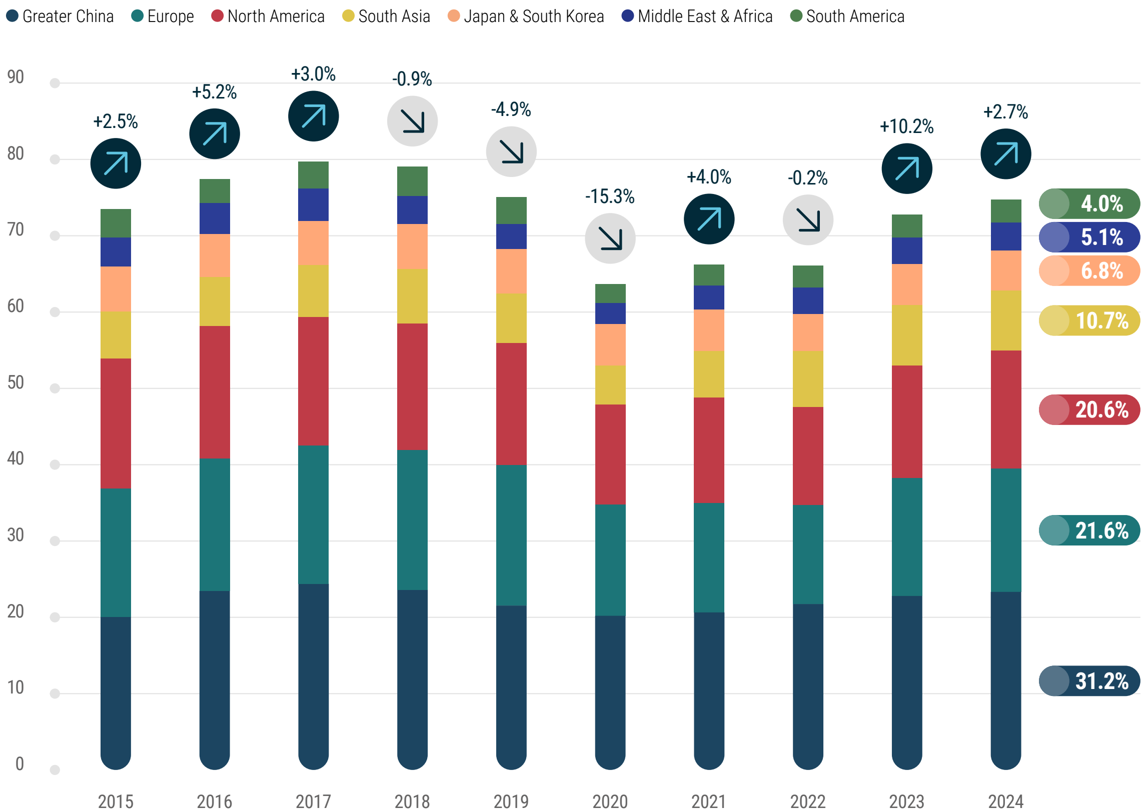
In million units, % share, 2009 – 2024




SOURCE: **S&P GLOBAL MOBILITY**

## GLOBAL NEW CAR REGISTRATIONS

In million units, % change, % share, 2015 – 2024



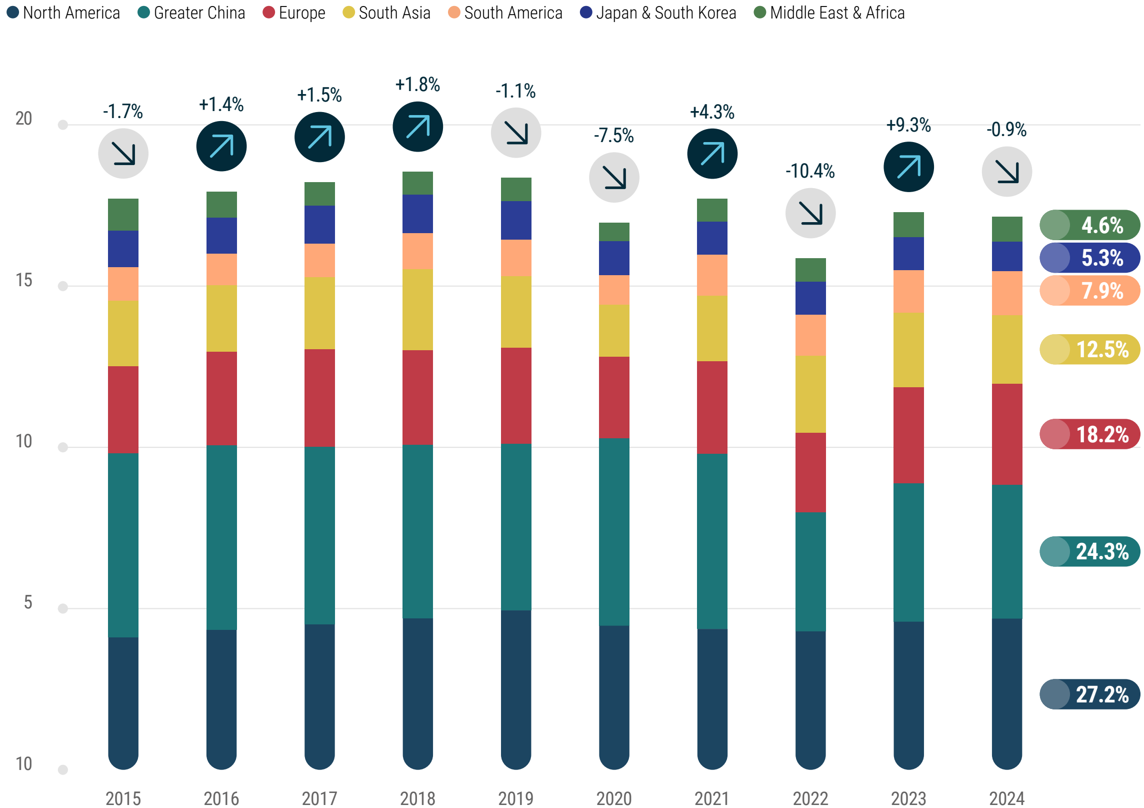

SOURCE: **S&P GLOBAL MOBILITY**

# Europe accounts for about 22% of global car sales, up from 21% in 2022

# Europe accounts for more than 18% of global commercial vehicles sales

## GLOBAL NEW COMMERCIAL VEHICLE[1] REGISTRATIONS

In million units, % change, % share, 2015 – 2024

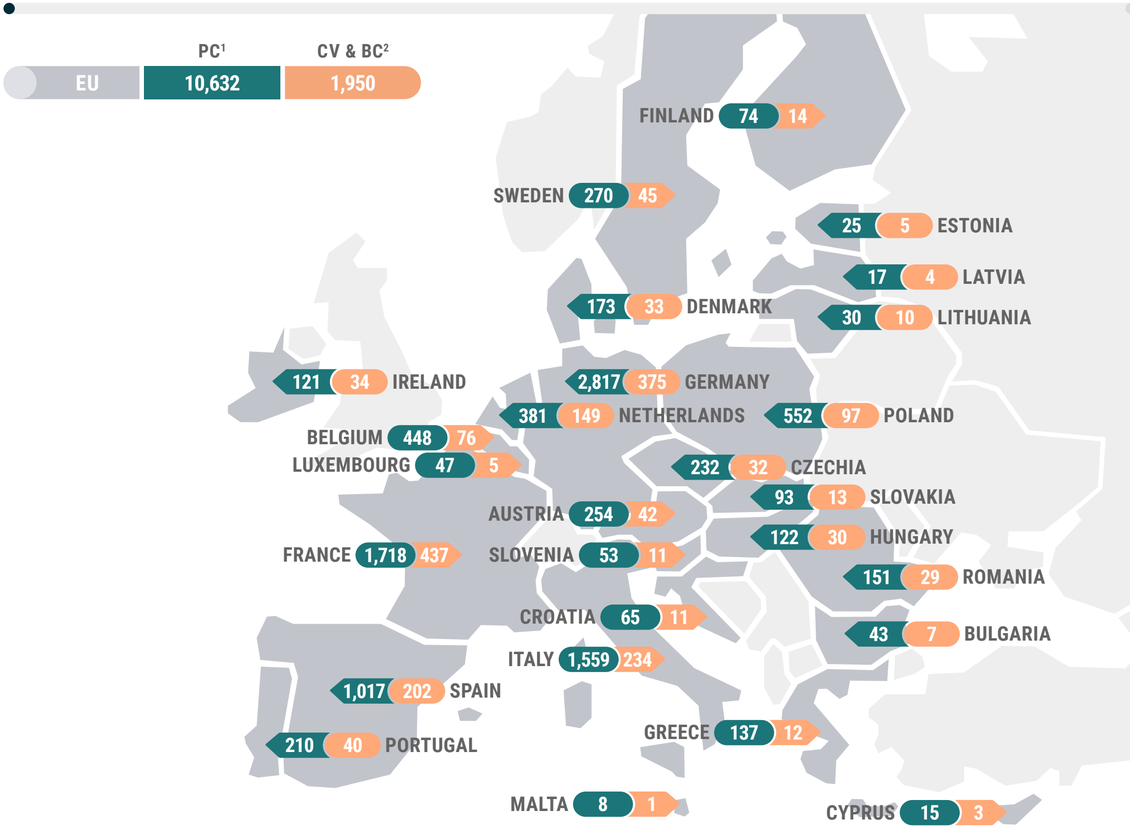



SOURCE: **S&P GLOBAL MOBILITY**

1. Includes buses

## NEW EU VEHICLE REGISTRATIONS

By country, in thousand units, 2024




SOURCE: ACEA

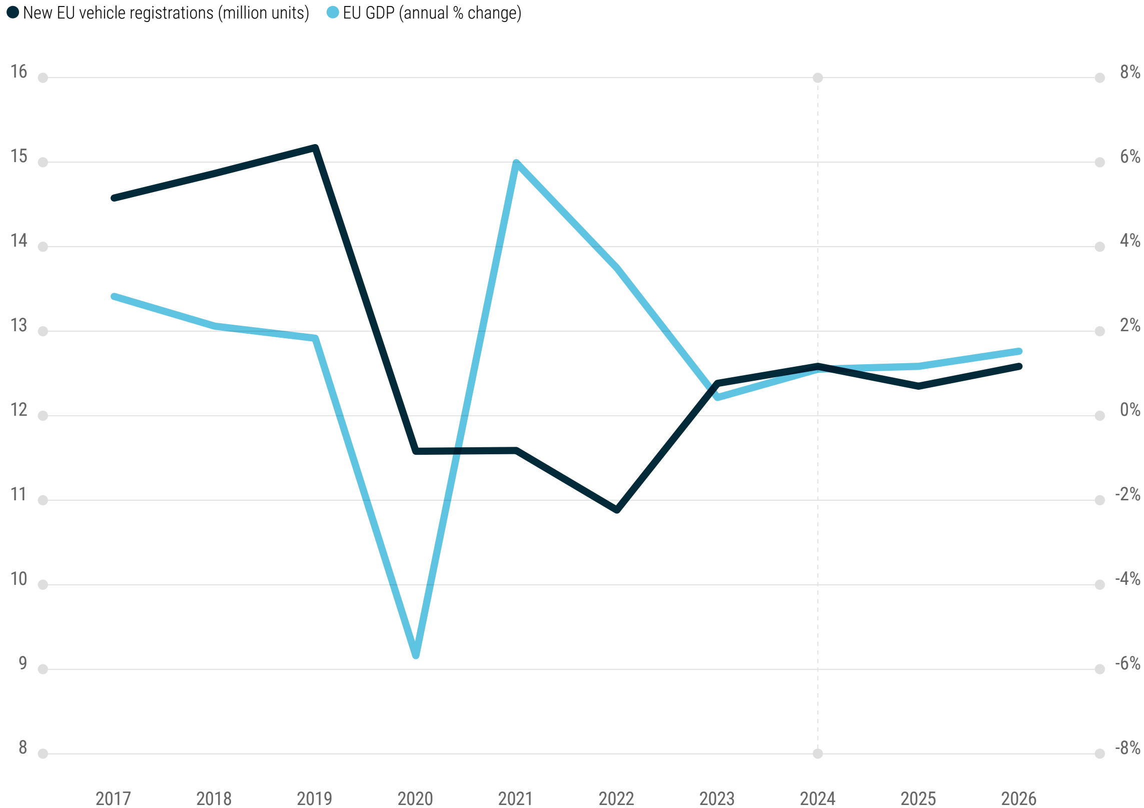
# Auto makers sold around 12.6 million new vehicles in the EU in 2024

1. Passenger cars
2. Commercial vehicles, and buses and coaches

# Vehicle sales largely mirror economic trends

## NEW VEHICLE REGISTRATIONS AND GDP IN THE EU

2017 – 2026

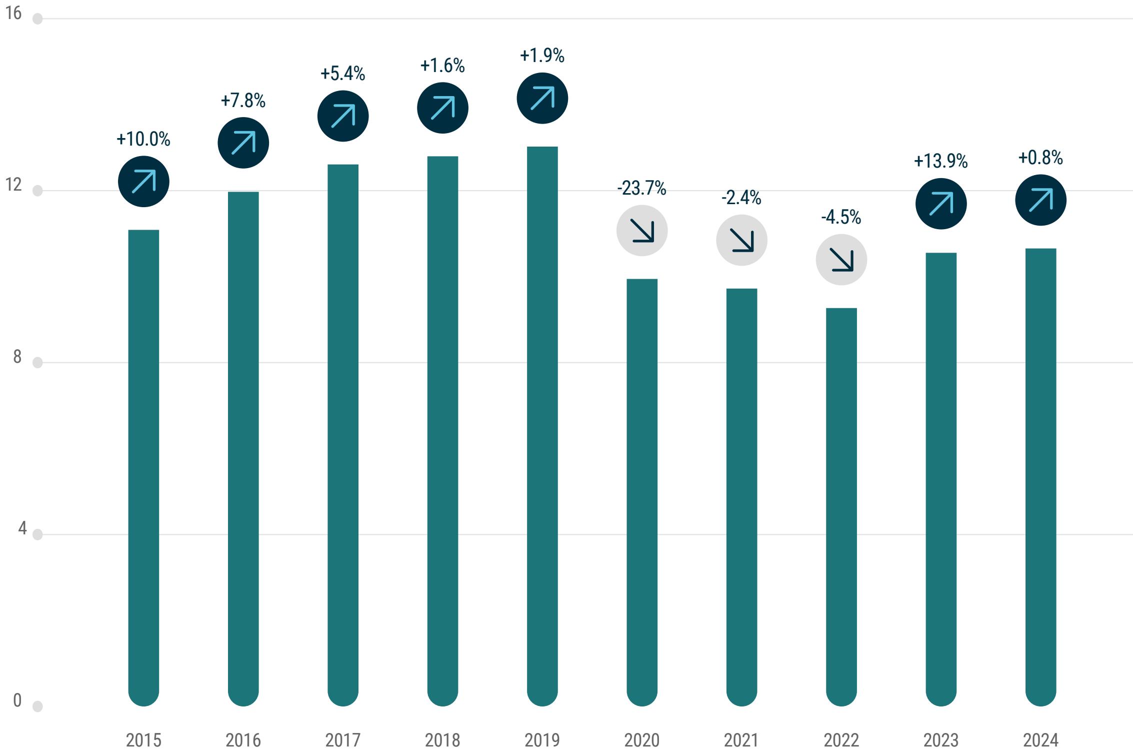



SOURCE: **EUROPEAN COMMISSION, S&P GLOBAL MOBILITY**

# EU car sales remained stable in 2024

## NEW EU CAR REGISTRATIONS

In million units, % change, 2015 – 2024

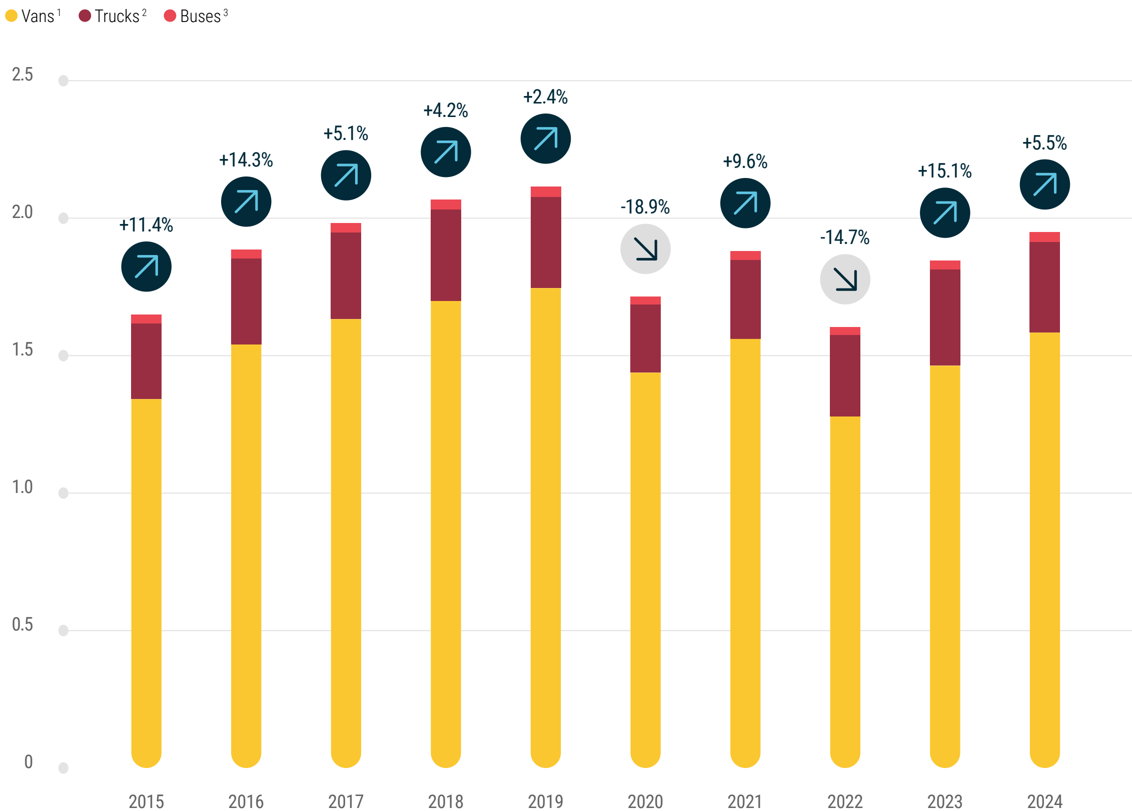



SOURCE: **ACEA**

# EU commercial vehicle sales rose again in 2024, by 5.5%

## NEW EU COMMERCIAL VEHICLE REGISTRATIONS

In million units, % change, 2015 – 2024

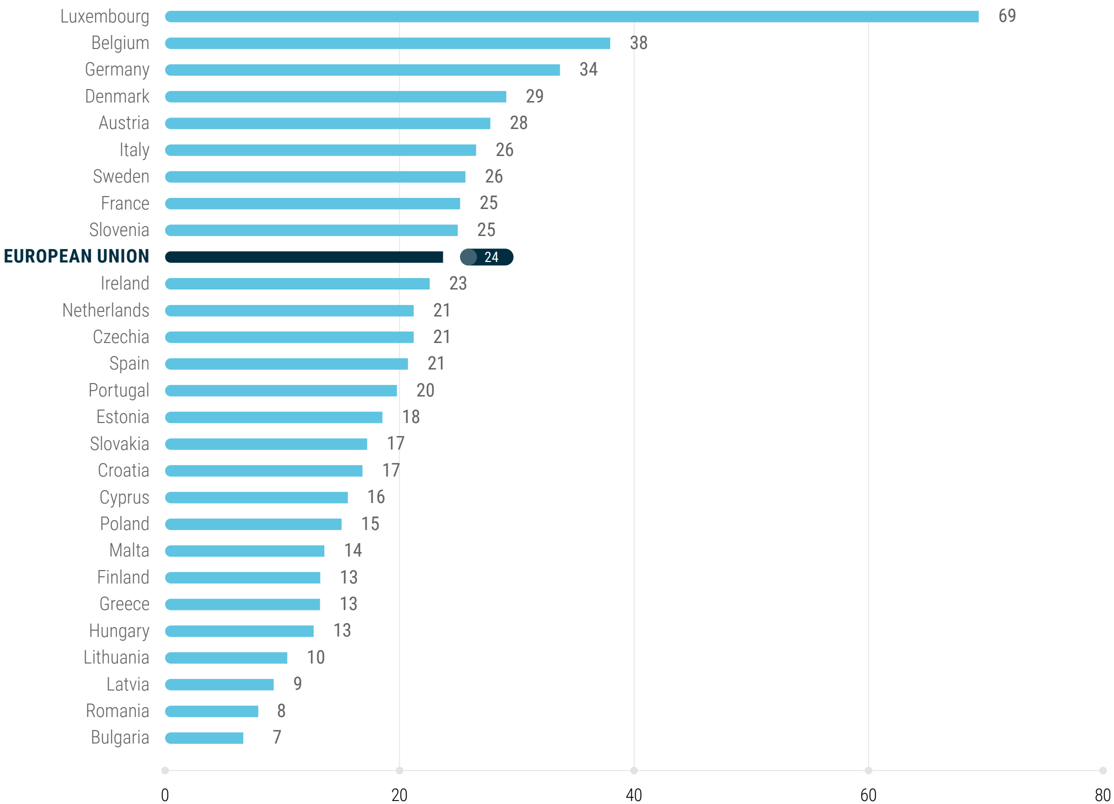



SOURCE: **ACEA**

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, 2024



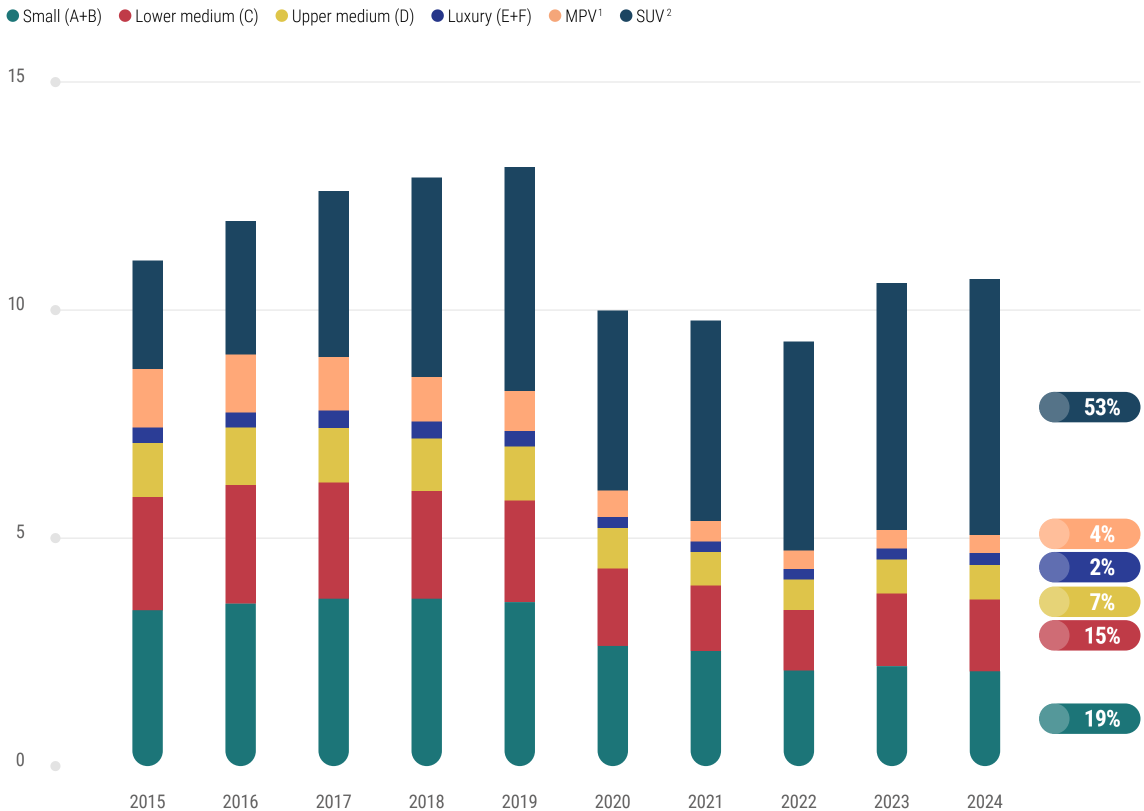

SOURCE: **ACEA, EUROSTAT**

## One car is sold for every 42 persons in the EU annually

# Small and medium cars make up around 41% of EU sales

## NEW EU CAR SALES BY SEGMENT

In million units, % share, 2015 – 2024

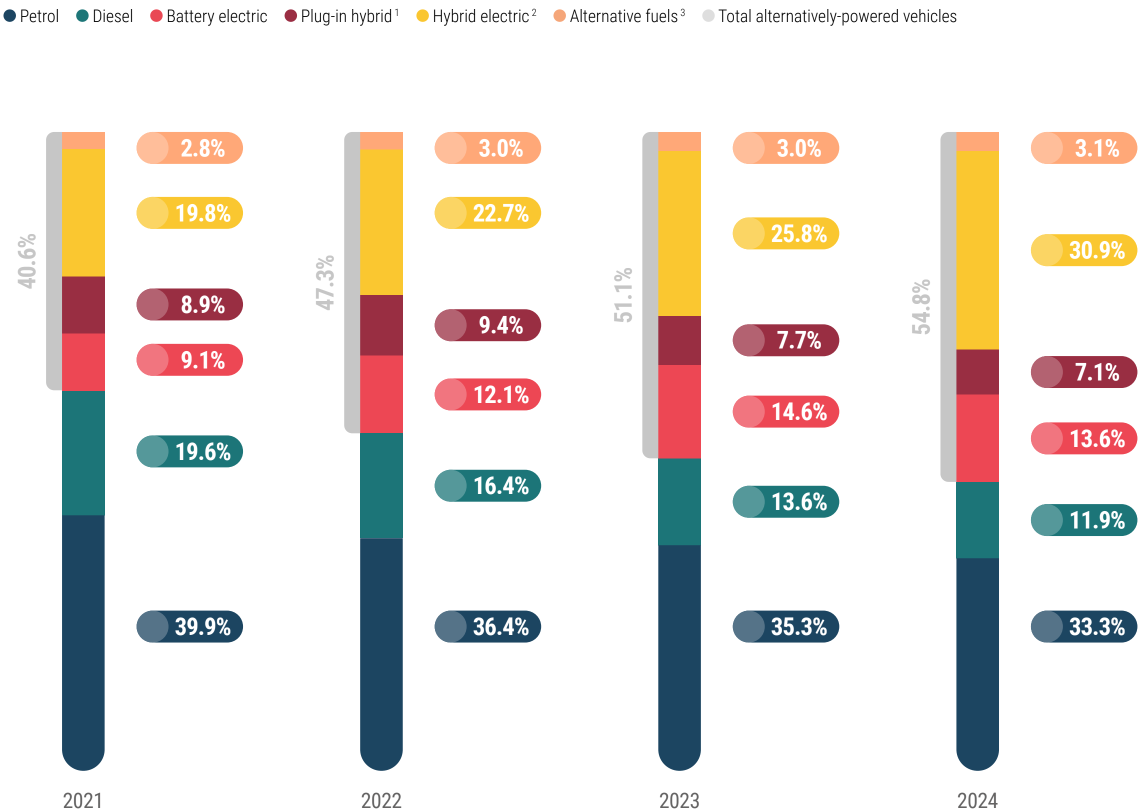



SOURCE: S&P GLOBAL MOBILITY

1. Multi-purpose vehicles
2. Sport utility vehicles

## NEW EU CAR SALES BY POWER SOURCE

Market share, 2021 – 2024




SOURCE: **ACEA**

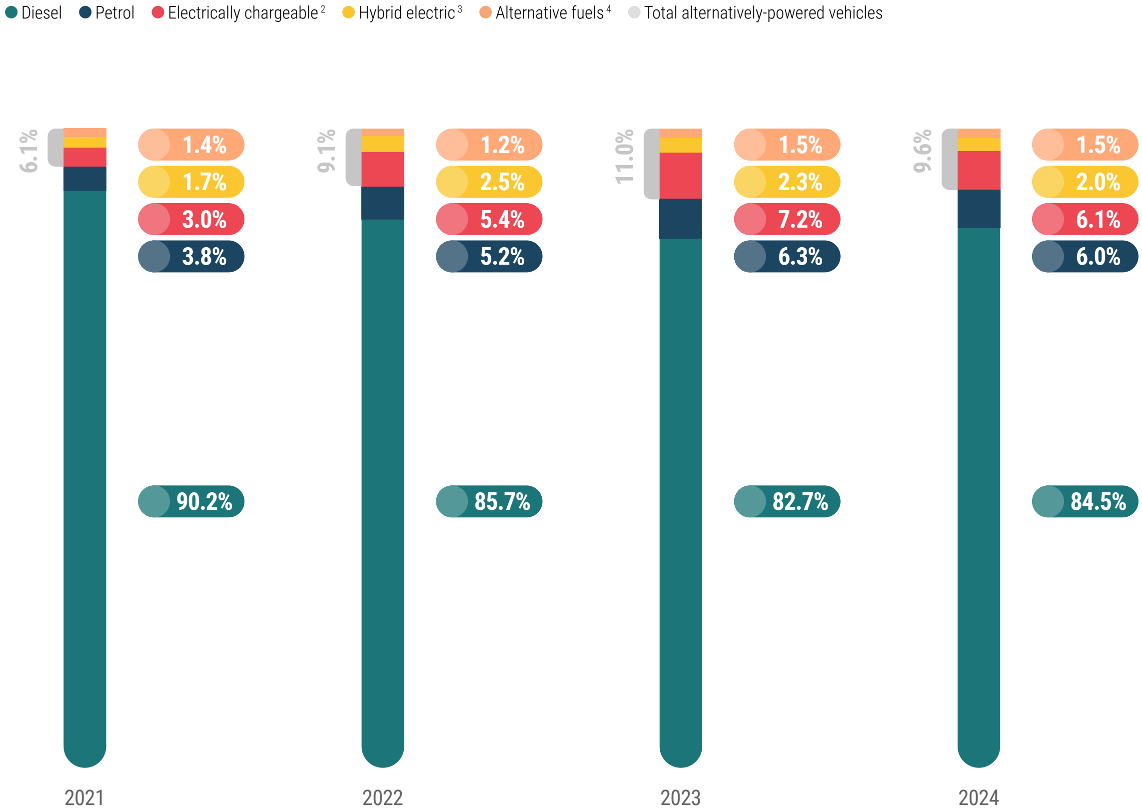
# The EU market share of battery-electric cars has contracted for the first time in 2024

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 declined to 6% in 2024

## NEW EU VAN[1] SALES BY POWER SOURCE

Market share, 2021 – 2024

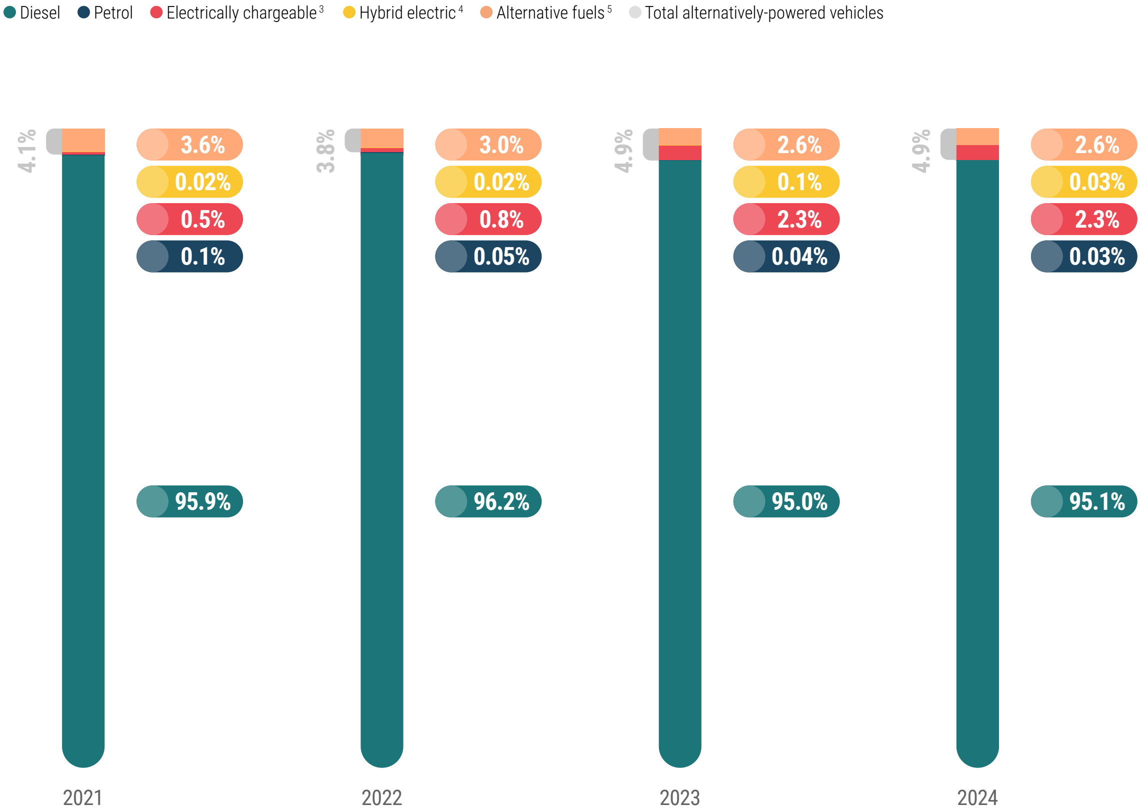



SOURCE: **ACEA**

1. Light 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, 2021 – 2024




SOURCE: **ACEA**

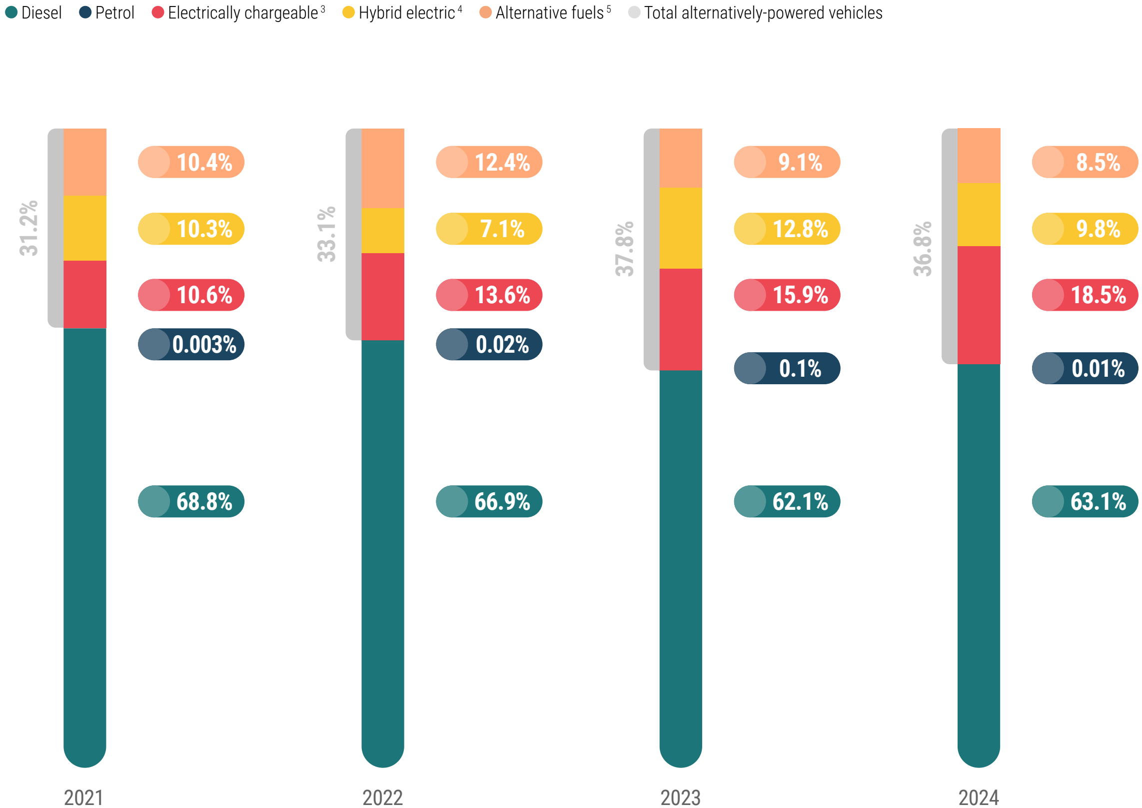
# The market share of alternatively-powered trucks was relatively stable at around 5%

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 doubled in four years

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

Market share, 2021 – 2024




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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# The trade surplus generated by the EU auto industry fell by 6% in 2024

## EU NEW VEHICLE TRADE

By type, in million €, 2024

| Trade in value | Cars | Vans [1] | Trucks [2] | Buses | TOTAL |
|---|---|---|---|---|---|
| **2024** | | | | | |
| Imports | 73,230 | 6,277 | 2,105 | 2,665 | 84,276 |
| Exports | 154,953 | 8,611 | 13,885 | 744 | 178,192 |
| Trade balance | 81,723 | 2,334 | 11,780 | -1,921 | 93,916 |
| **2023** | | | | | |
| Imports | 80,263 | 6,824 | 3,162 | 2,487 | 92,736 |
| Exports | 166,859 | 9,303 | 16,031 | 913 | 193,106 |
| Trade balance | 86,596 | 2,479 | 12,869 | -1,574 | 100,370 |
| **% change 24/23** | | | | | |
| Imports | -8.8% | -8.0% | -33.4% | +7.2% | -9.1% |
| Exports | -7.1% | -7.4% | -13.4% | -18.5% | -7.7% |
| Trade balance | -5.6% | -5.8% | -8.5% | +22.1% | -6.4% |

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

SOURCE: **EUROSTAT**

## EU NEW VEHICLE TRADE

By type, in units, 2024

| Trade in volume | Cars | Vans [1] | Trucks [2] | Buses | TOTAL |
|---|---|---|---|---|---|
| **2024** | | | | | |
| Imports | 3,421,231 | 303,969 | 137,061 | 45,527 | 3,907,788 |
| Exports | 4,559,785 | 407,453 | 173,930 | 17,859 | 5,159,027 |
| **2023** | | | | | |
| Imports | 3,612,113 | 359,908 | 116,420 | 15,442 | 4,103,883 |
| Exports | 4,874,209 | 461,065 | 220,805 | 13,420 | 5,569,499 |
| **% change 24/23** | | | | | |
| Imports | -5.3% | -15.5% | +17.7% | +194.8% | -4.8% |
| Exports | -6.5% | -11.6% | -21.2% | +33.1% | -7.4% |

SOURCE: **EUROSTAT**

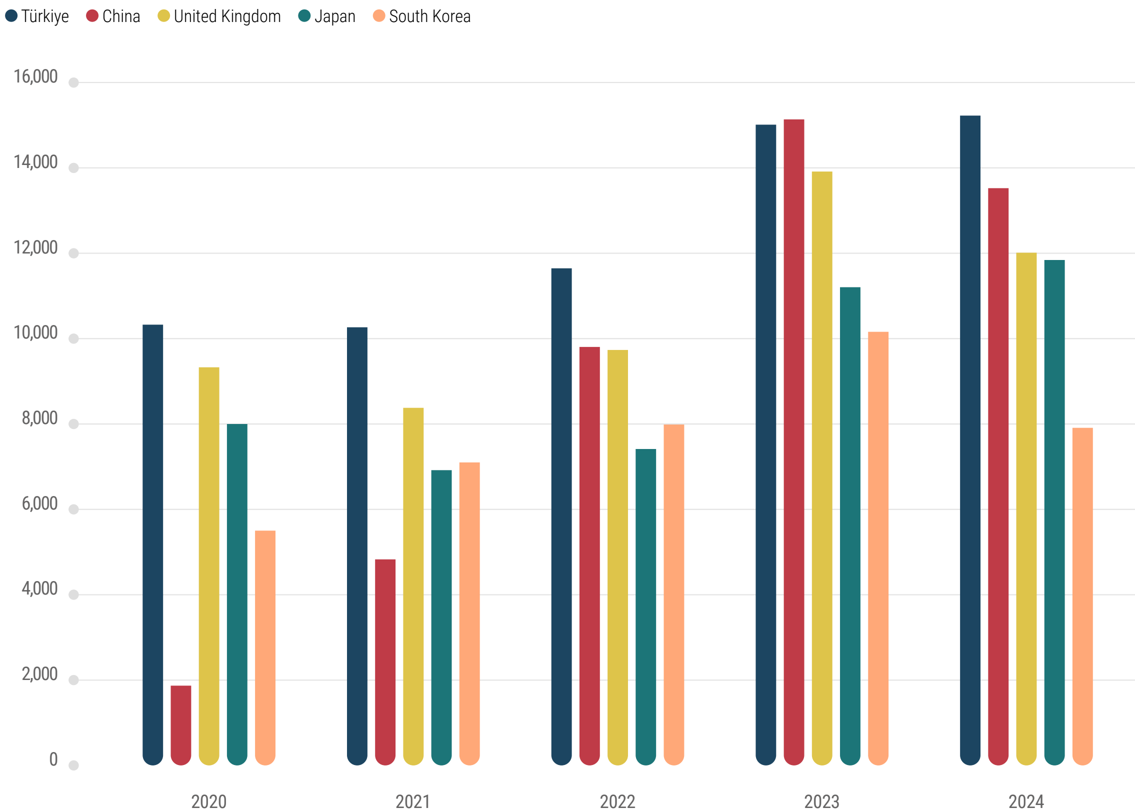
**EU vehicle imports and exports declined by 5% and 7% respectively**

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

# The value of EU vehicle imports has decreased for three out of the five main countries of origin

## MAIN COUNTRIES OF ORIGIN OF EU NEW VEHICLE IMPORTS

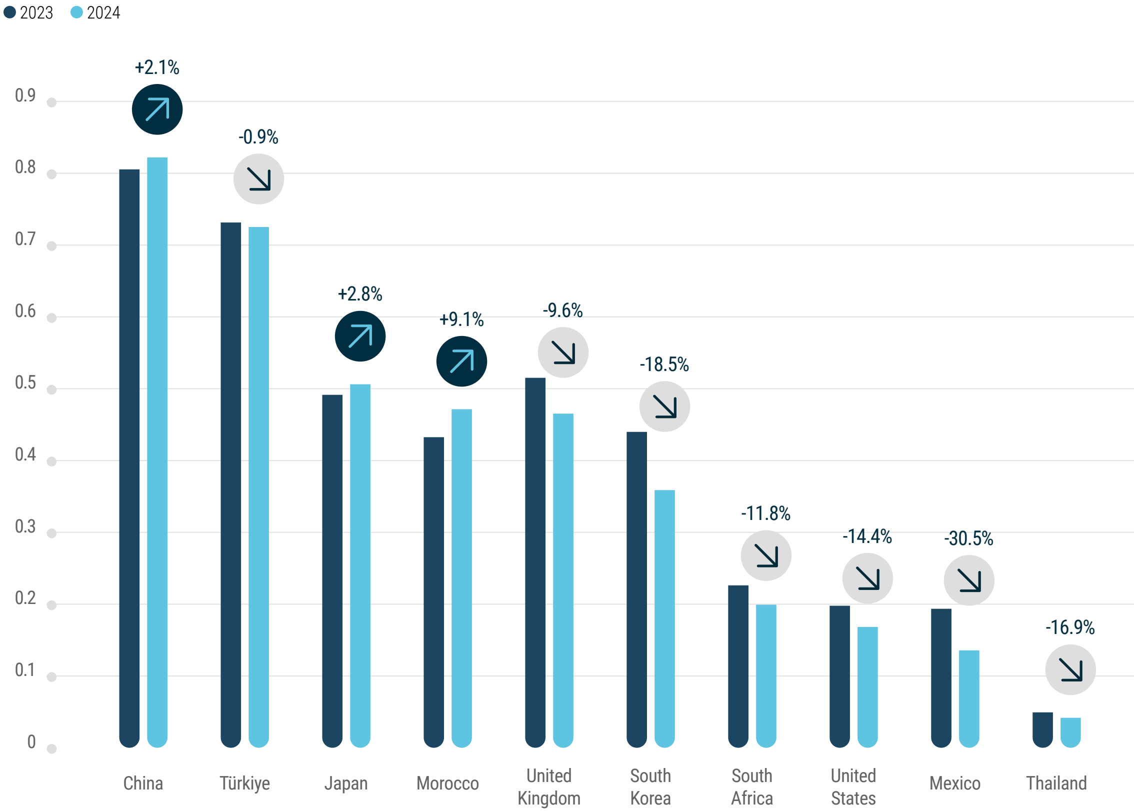
In million €, 2020 – 2024




SOURCE: **EUROSTAT**

# MAIN COUNTRIES OF ORIGIN OF EU NEW VEHICLE IMPORTS

In million units, 2024



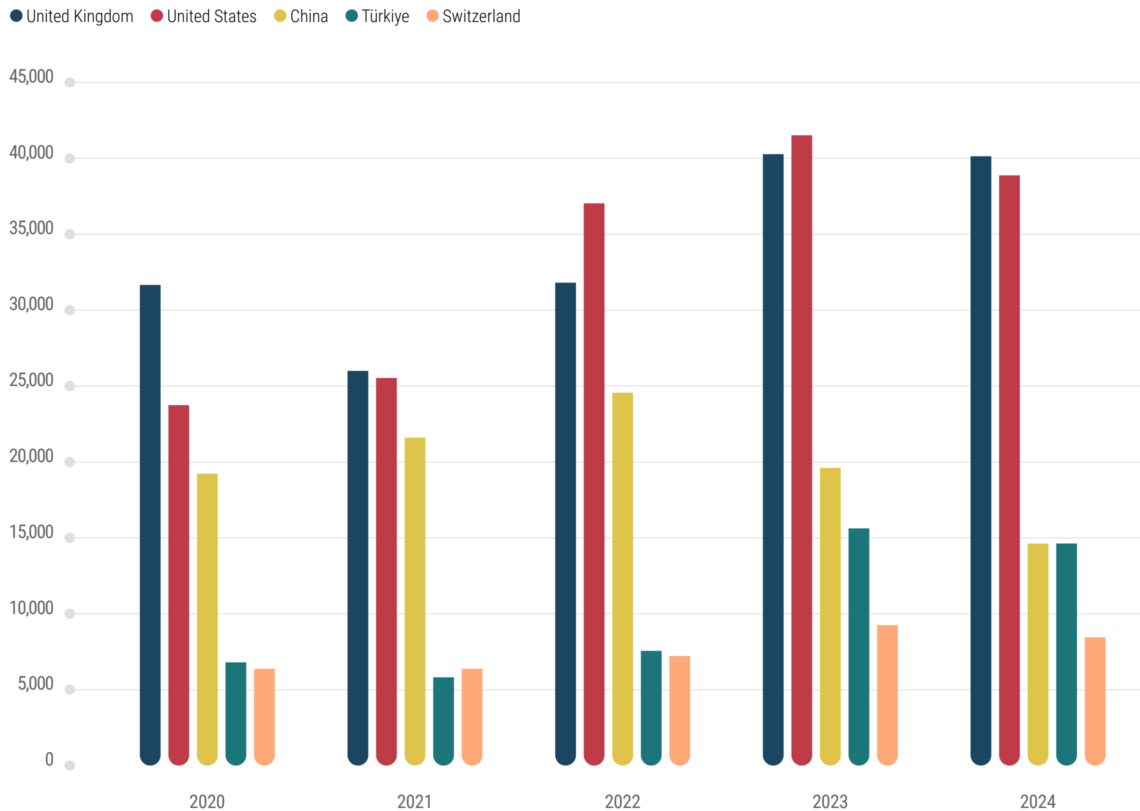

SOURCE: **EUROSTAT**

## 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 NEW VEHICLE EXPORTS

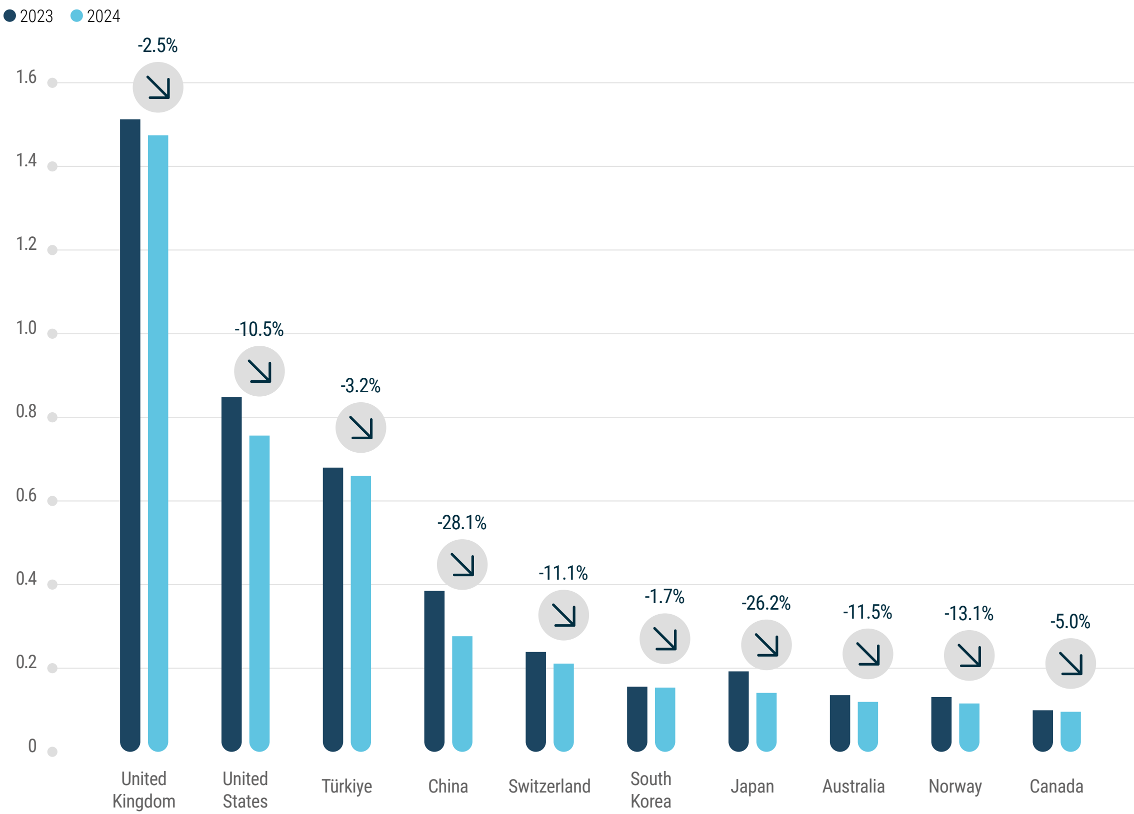
In million €, 2020 – 2024




SOURCE: **EUROSTAT**

## MAIN DESTINATIONS FOR EU NEW VEHICLE EXPORTS

In million units, 2024



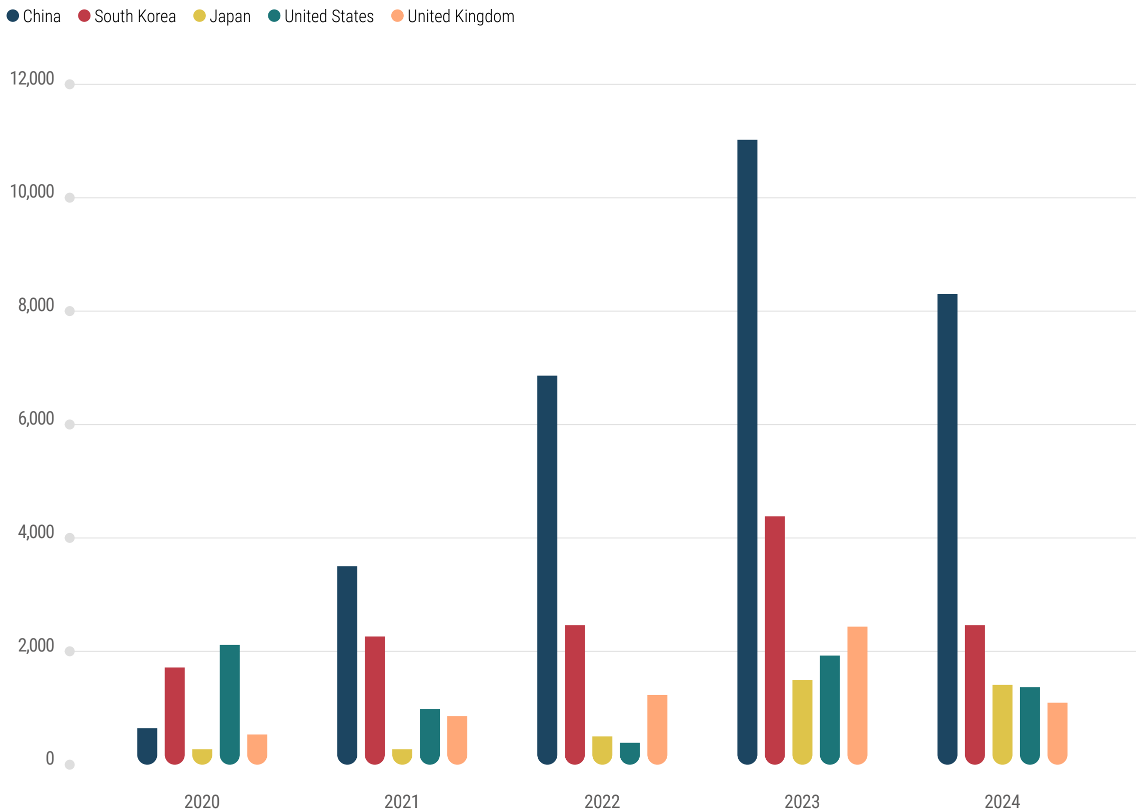

SOURCE: **EUROSTAT**

# 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

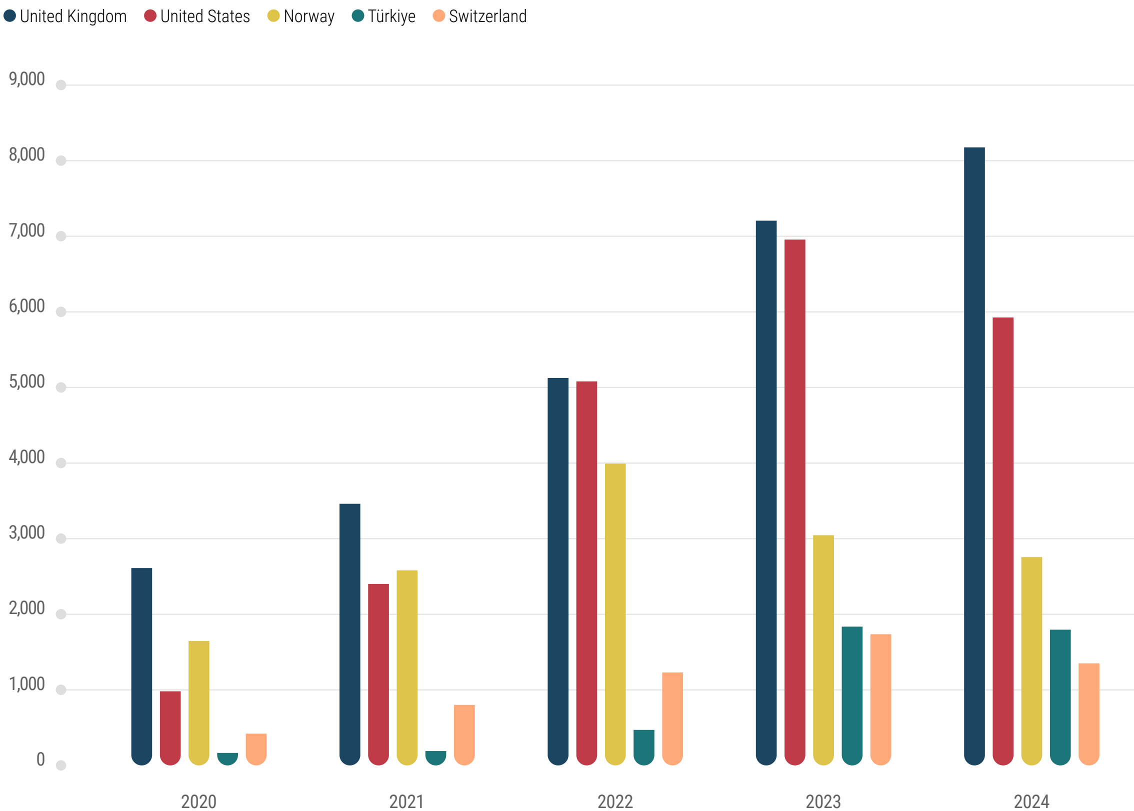
In million €, 2020 – 2024




SOURCE: **EUROSTAT**

# MAIN DESTINATIONS OF EU BATTERY-ELECTRIC CAR EXPORTS

In million €, 2020 – 2024



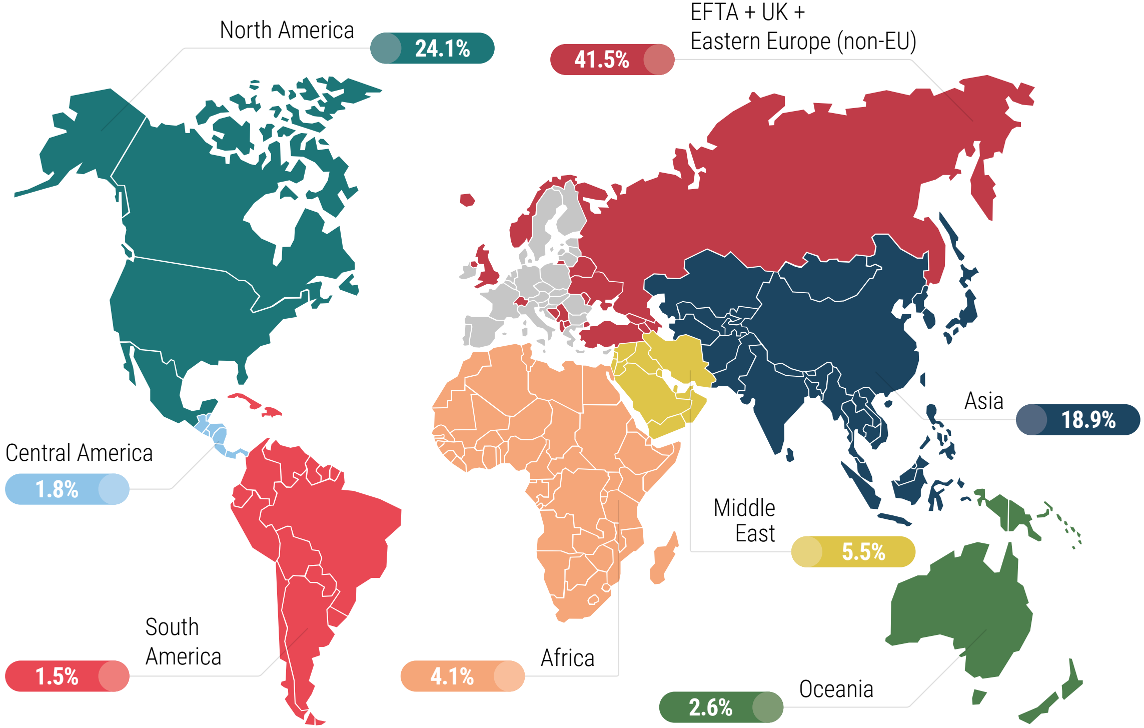

SOURCE: **EUROSTAT**

## 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

## DESTINATIONS FOR EU NEW VEHICLE EXPORTS

Value market share, 2024




SOURCE: **EUROSTAT**

# VEHICLES ON ROADS

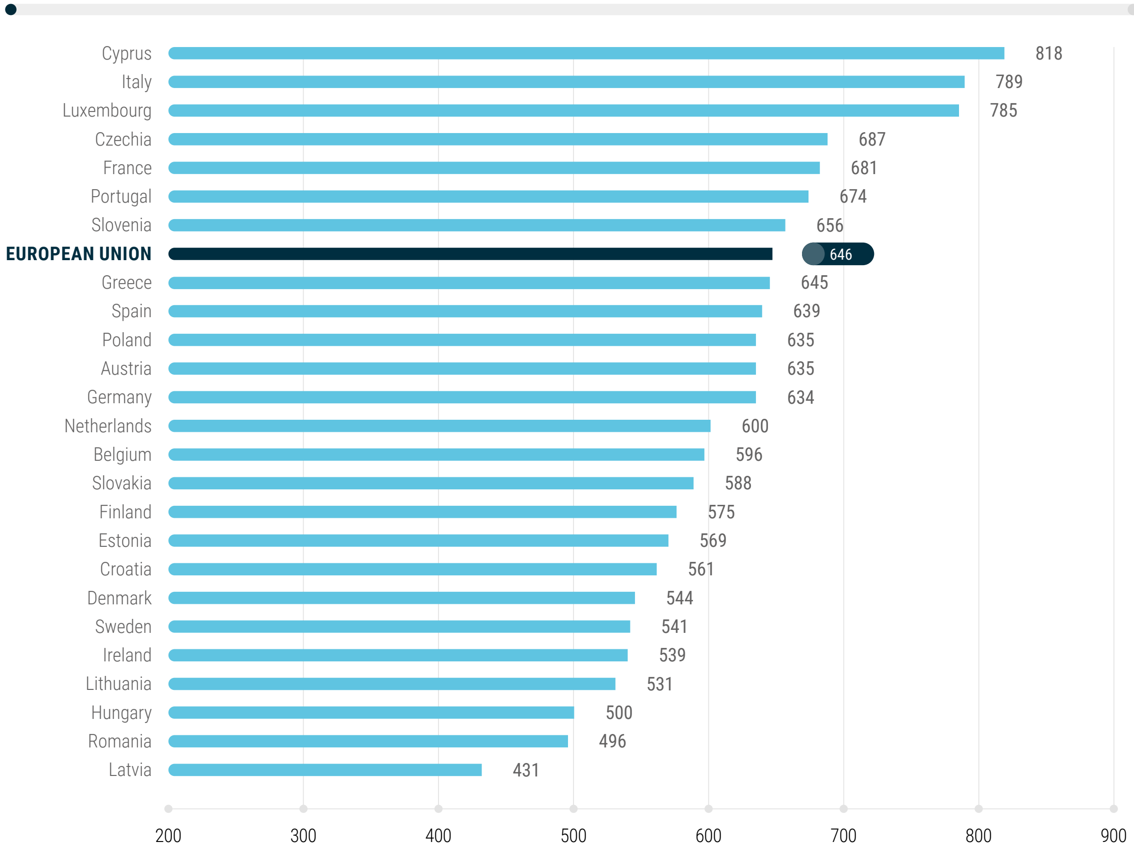
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2025/2026

DRIVING MOBILITY FOR EUROPE

# There are 646 vehicles per 1,000 inhabitants in the EU

## VEHICLES PER 1,000 EU INHABITANTS[1]

2023

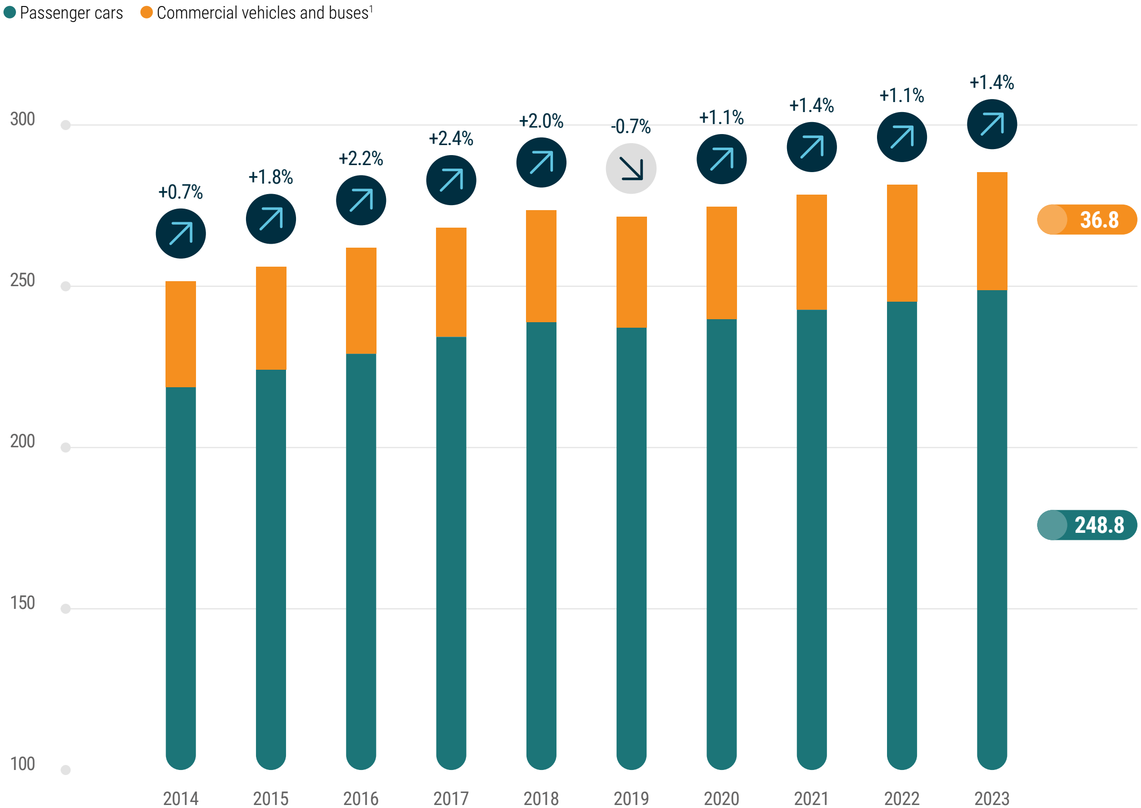



SOURCE: ACEA

1. Data for Bulgaria and Malta not available

## EU VEHICLE FLEET: SIZE AND SEGMENT DISTRIBUTION

In million units, 2014 – 2023




SOURCE: **ACEA**

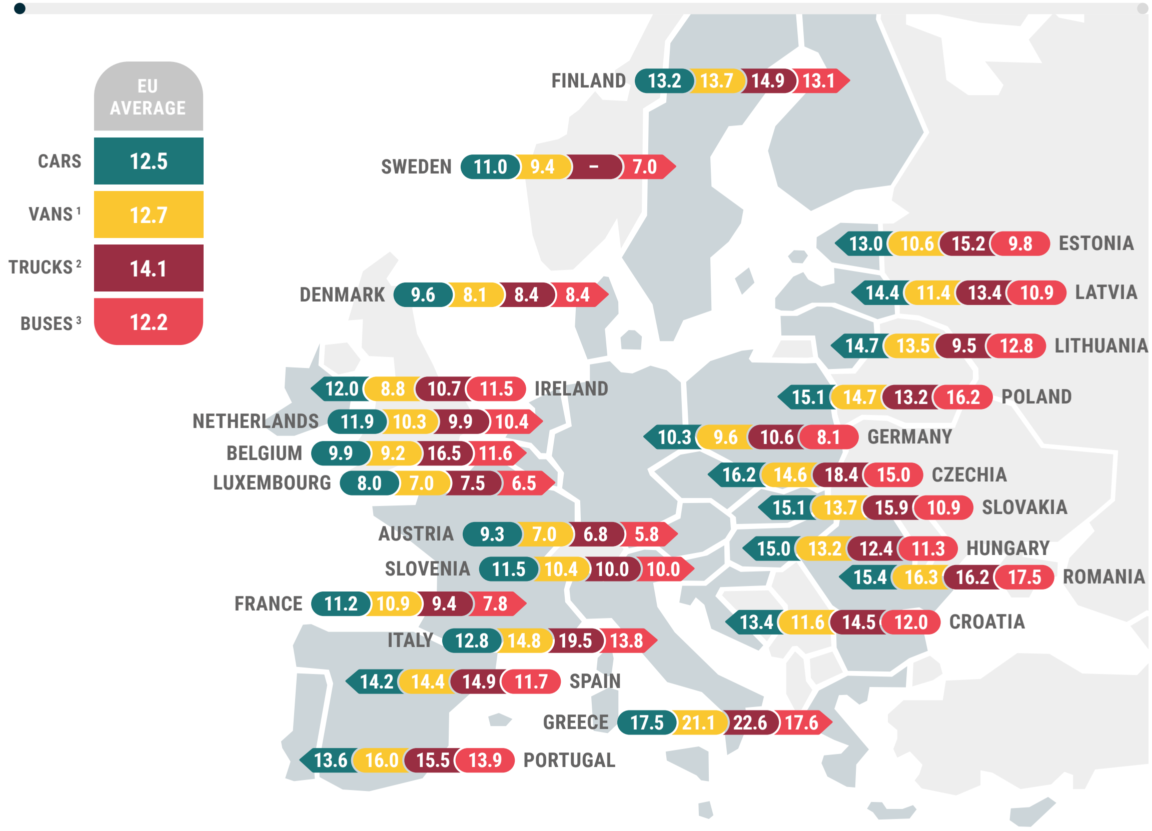
# There are almost 250 million vehicles on EU roads

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, 2023

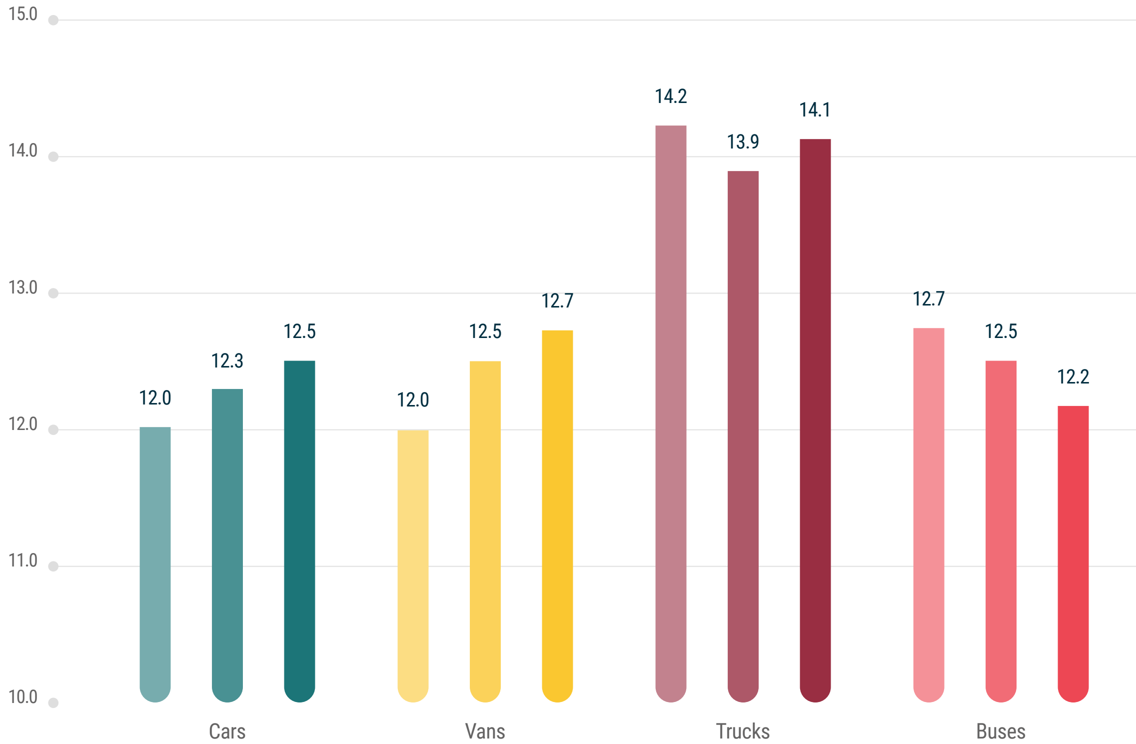



1. Light commercial vehicles up to 3.5 tonnes
2. Medium and heavy commercial vehicles over 3.5 tonnes
3. Buses and coaches over 3.5 tonnes

SOURCE: ACEA

## EVOLUTION OF AVERAGE AGE OF EU FLEET

By vehicle type, in years, 2021 – 2023




SOURCE: **ACEA**

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

# Less than 4% of cars on EU roads are electrically chargeable

## SHARE OF ALTERNATIVELY-POWERED VEHICLES IN THE EU FLEET

By segment, % share, 2023


SOURCE: **ACEA**

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

# INFRASTRUCTURE

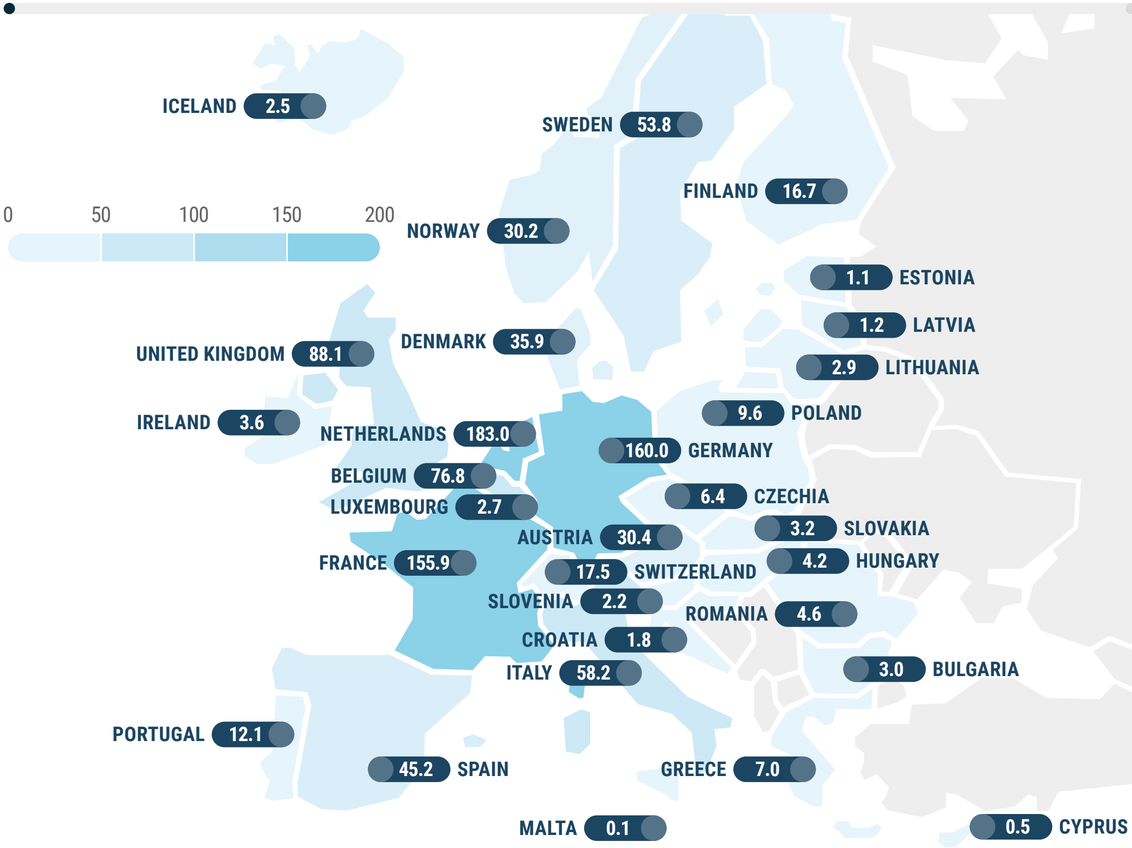
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2025/2026

acea
DRIVING MOBILITY FOR EUROPE

# Three EU countries (France, Germany, and the Netherlands) account for almost 60% of all EU public charging points

## RECHARGING POINTS ACROSS EUROPE

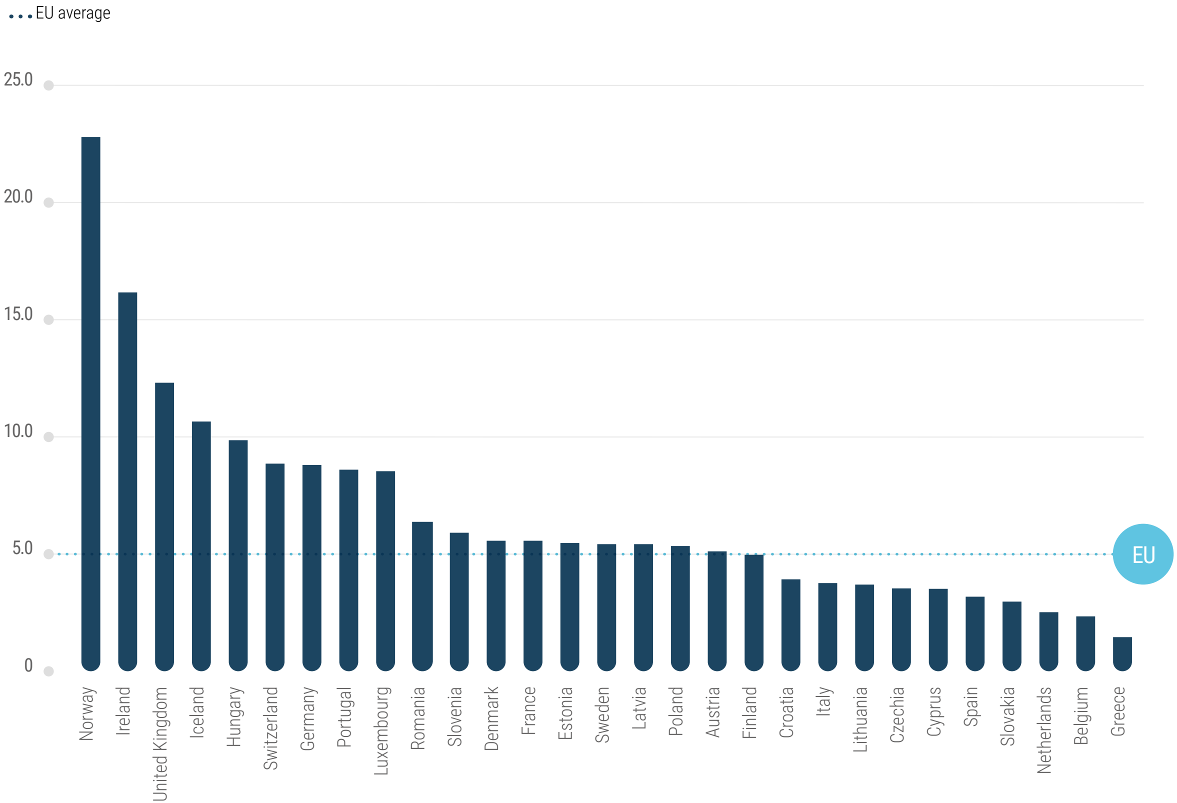
In thousand units, 2024




SOURCE: EAFO

## BATTERY-ELECTRIC CARS ON ROADS PER RECHARGING POINT

2023



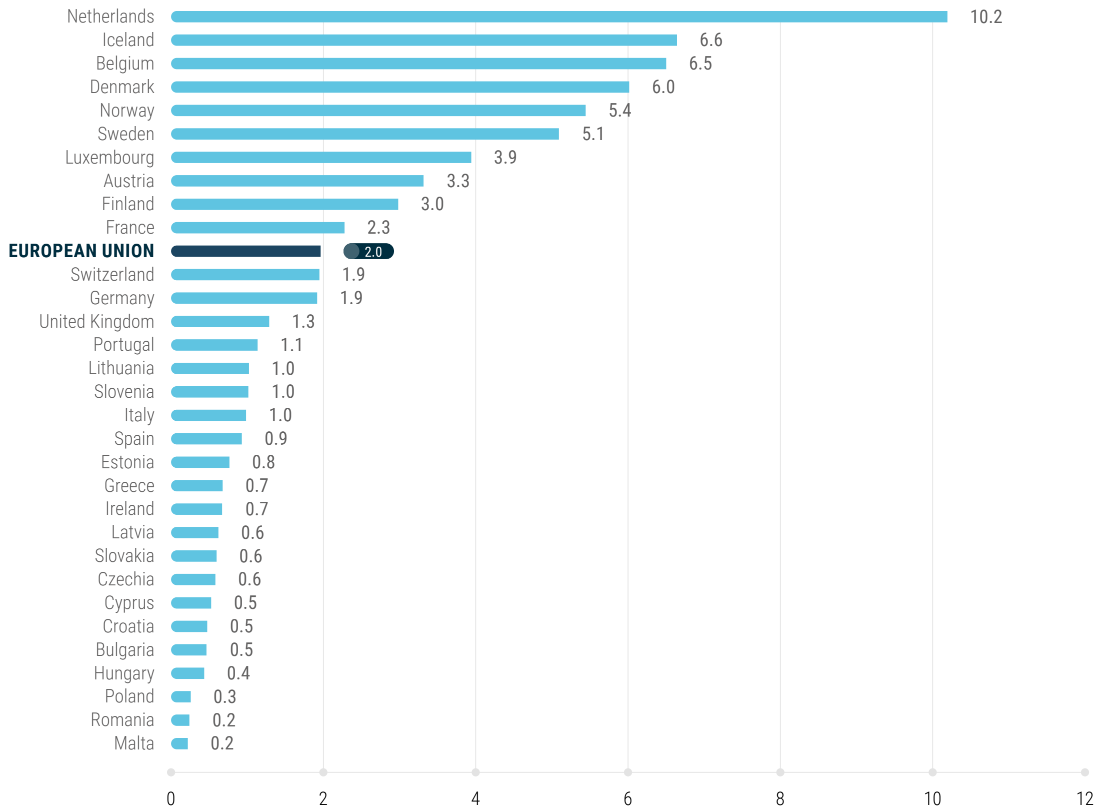

SOURCE: **ACEA, EAFO**

**On average, there is one public charging point per every five cars in the EU**

# There is less than one public charging point per 1,000 inhabitants in over half of EU member states

## RECHARGING POINTS PER 1,000 INHABITANTS

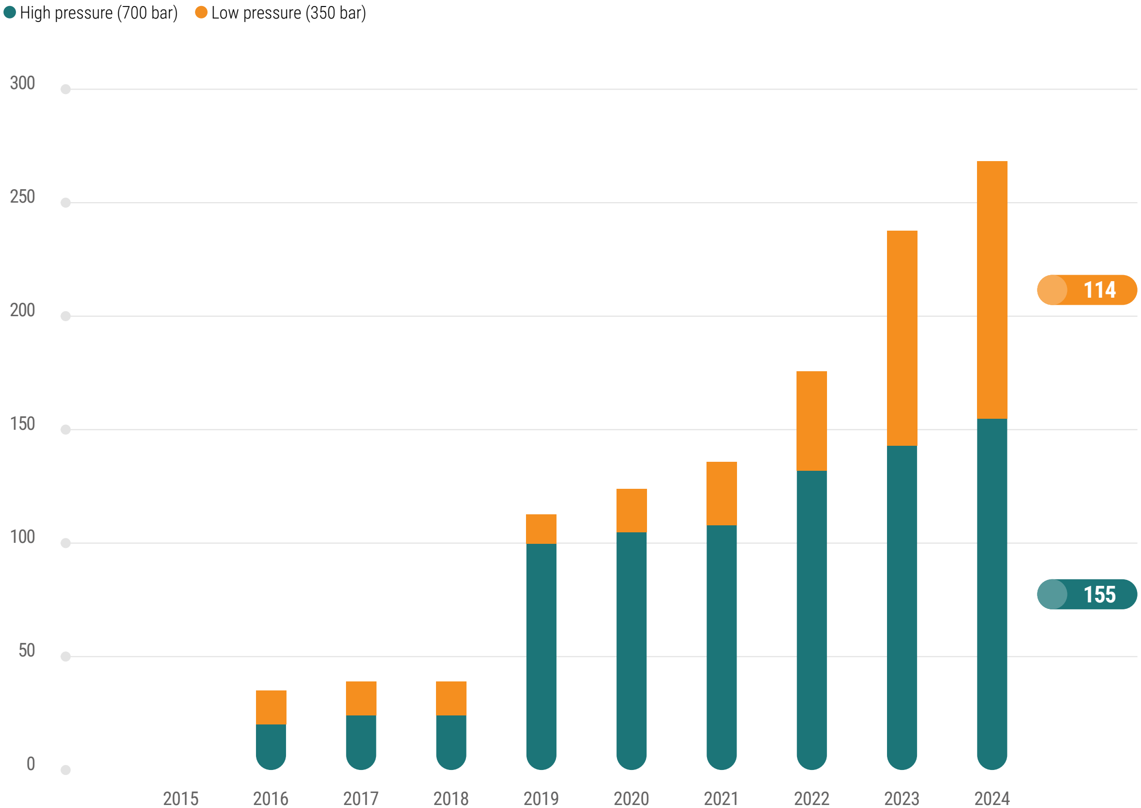
2024




SOURCE: **EAFO, EUROSTAT**

## HYDROGEN (H2) REFILLING POINTS IN THE EU

2024




SOURCE: **EAFO**

## There are less than 300 hydrogen refilling points in the EU

# ROAD SAFETY

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2025/2026

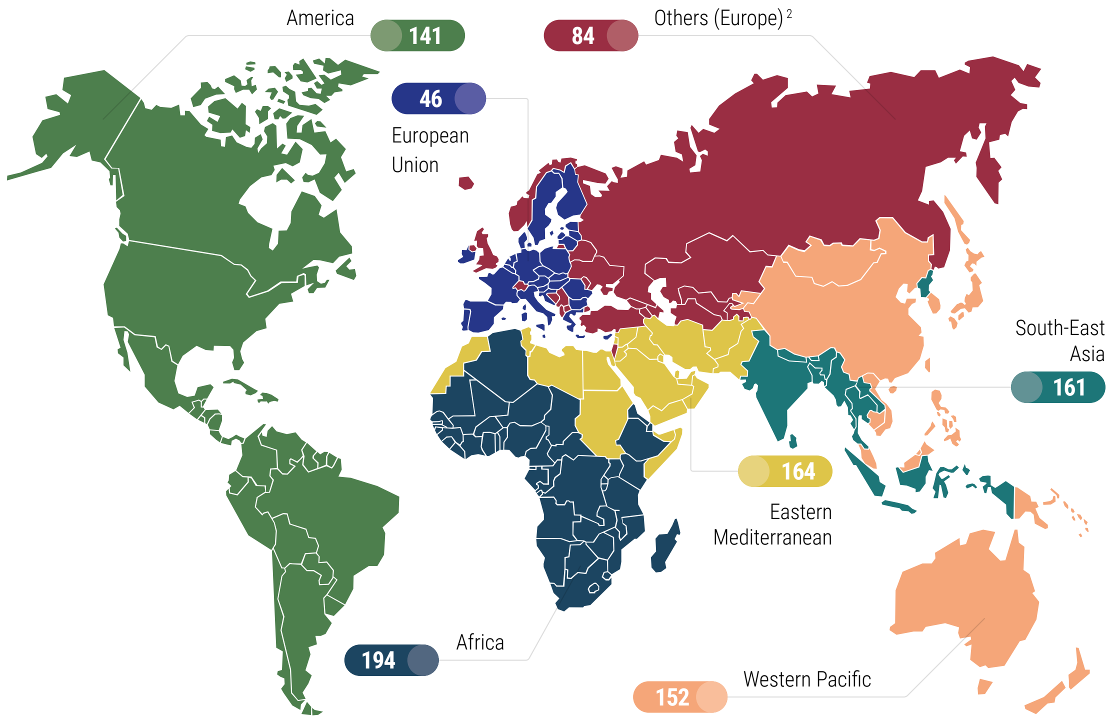
DRIVING MOBILITY FOR EUROPE

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

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

## ROAD FATALITIES PER MILLION INHABITANTS

By region[1], 2021, 2023

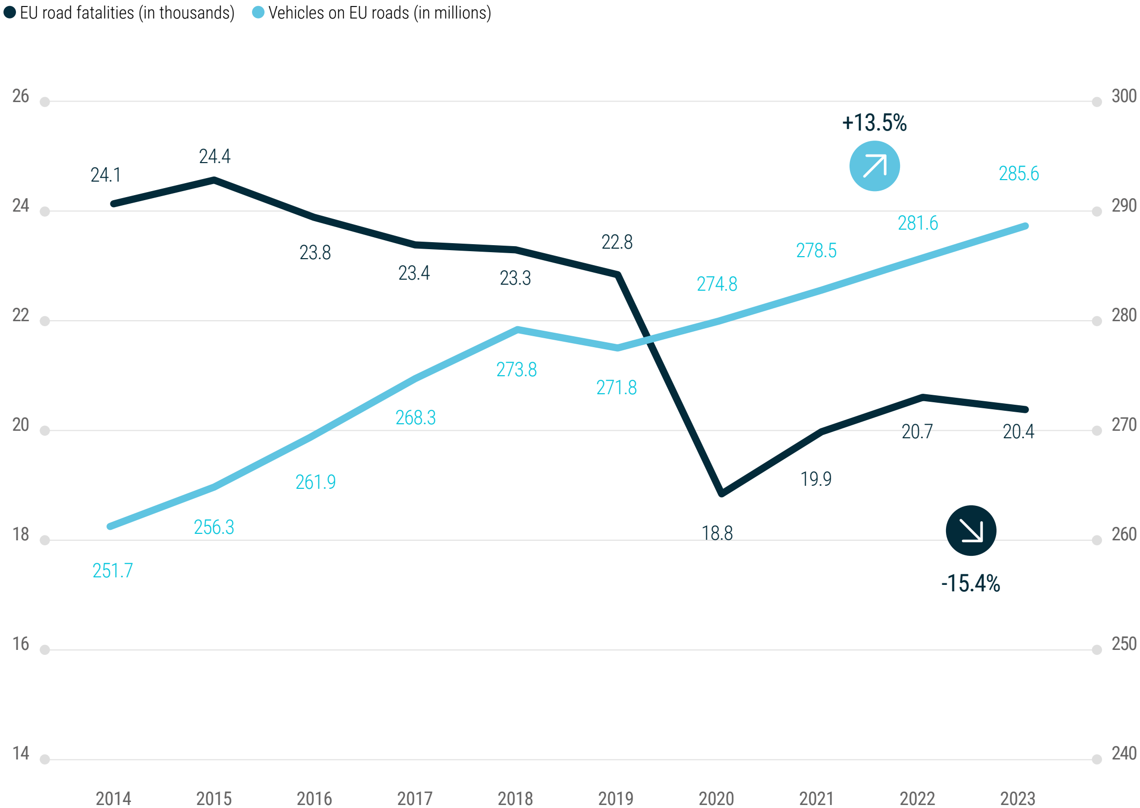



WORLD | 147 road fatalities per million inhabitants

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

## NUMBER OF EU VEHICLES AND ROAD FATALITIES

2014 – 2023



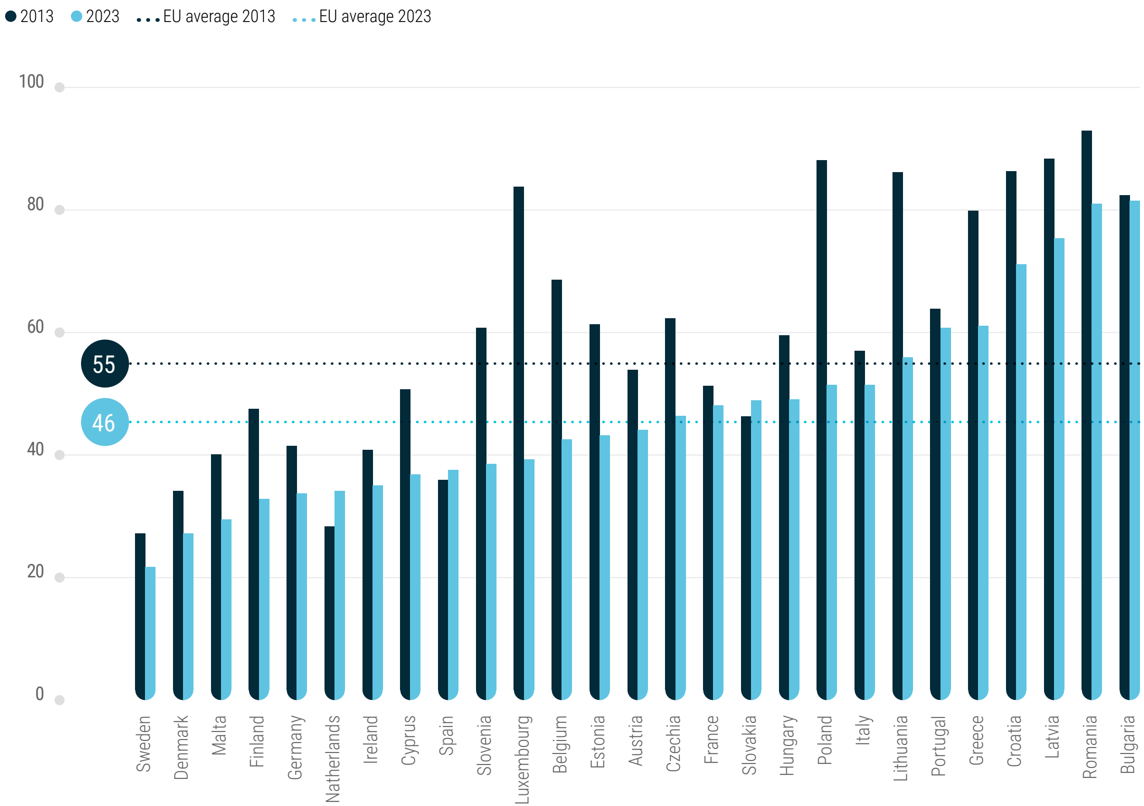

SOURCE: **ACEA, CARE (COMMUNITY ROAD ACCIDENT) DATABASE**

# 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 2013

## ROAD FATALITIES PER MILLION INHABITANTS

By country, 2013, 2023

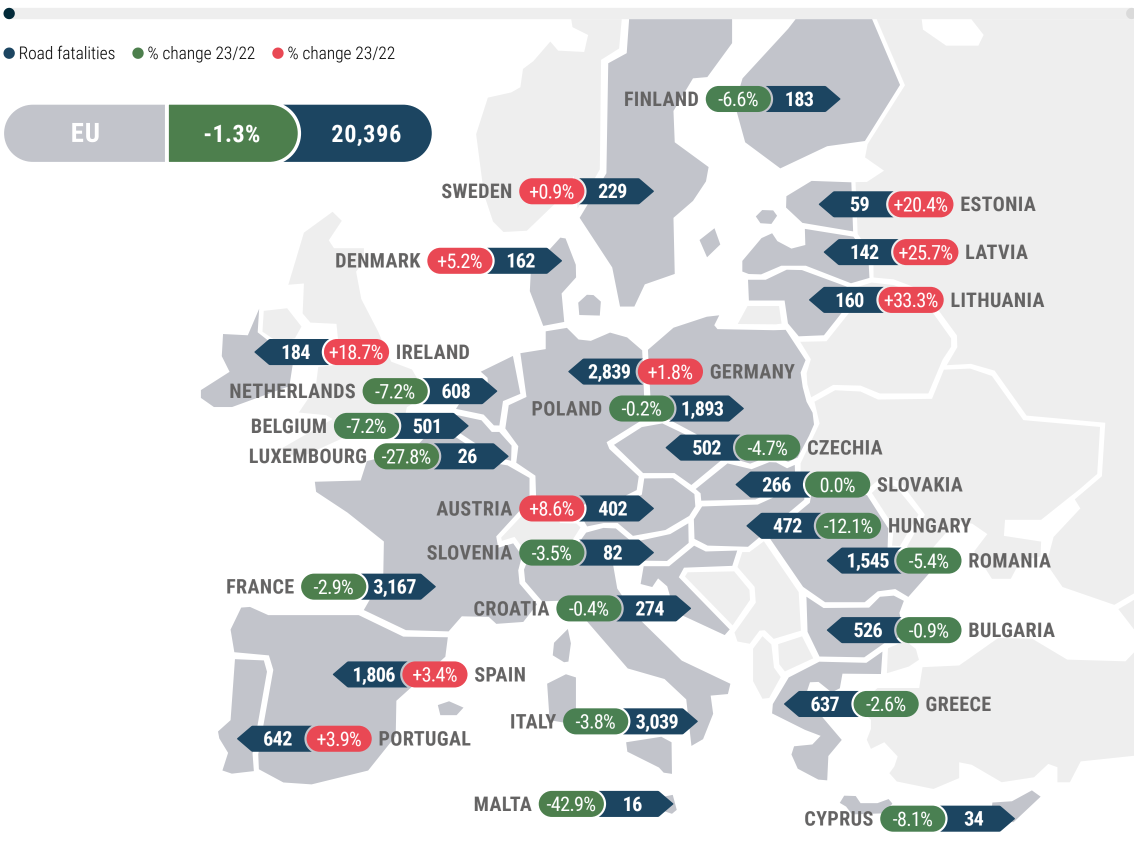



SOURCE: **CARE (COMMUNITY ROAD ACCIDENT) DATABASE**

# EU road fatalities declined by 1% in 2023

## ROAD FATALITIES IN THE EU

By country, 2023




SOURCE: CARE (COMMUNITY ROAD ACCIDENT) DATABASE

# ENVIRONMENT

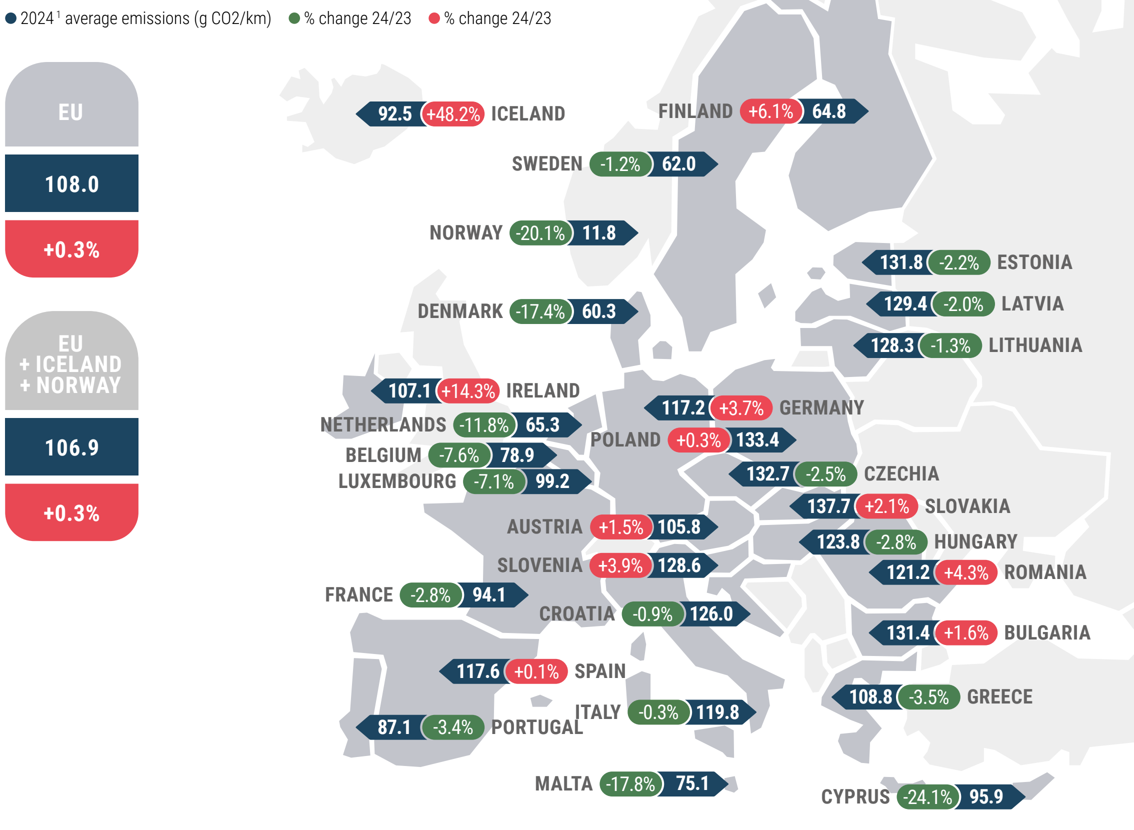
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2025/2026

DRIVING MOBILITY FOR EUROPE

# In almost two-thirds of European countries, cars have emitted less CO2 than in 2023

## CO2 EMISSIONS FROM NEW CARS BY COUNTRY

In g CO2/km, 2024[1]

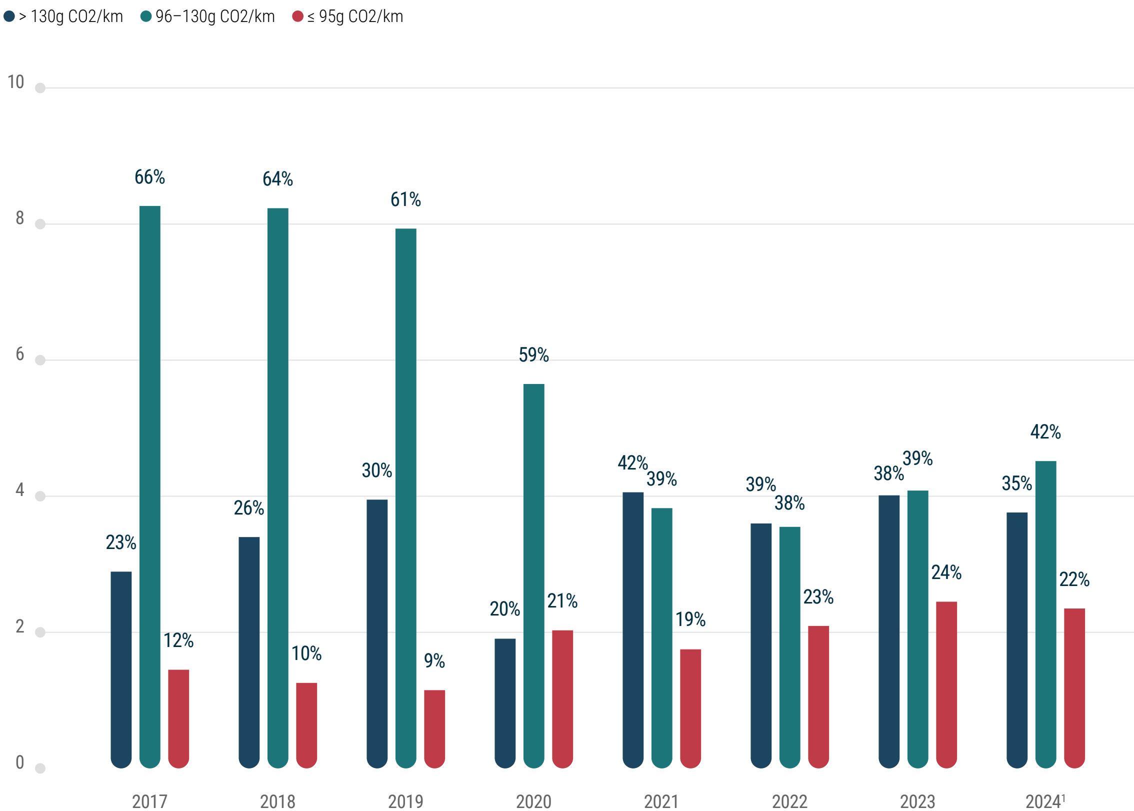



SOURCE: EEA

1. Provisional

## NEW CARS BY EMISSION CLASSES IN THE EU

In million units, % share, 2017 – 2024[1]




SOURCE: EEA

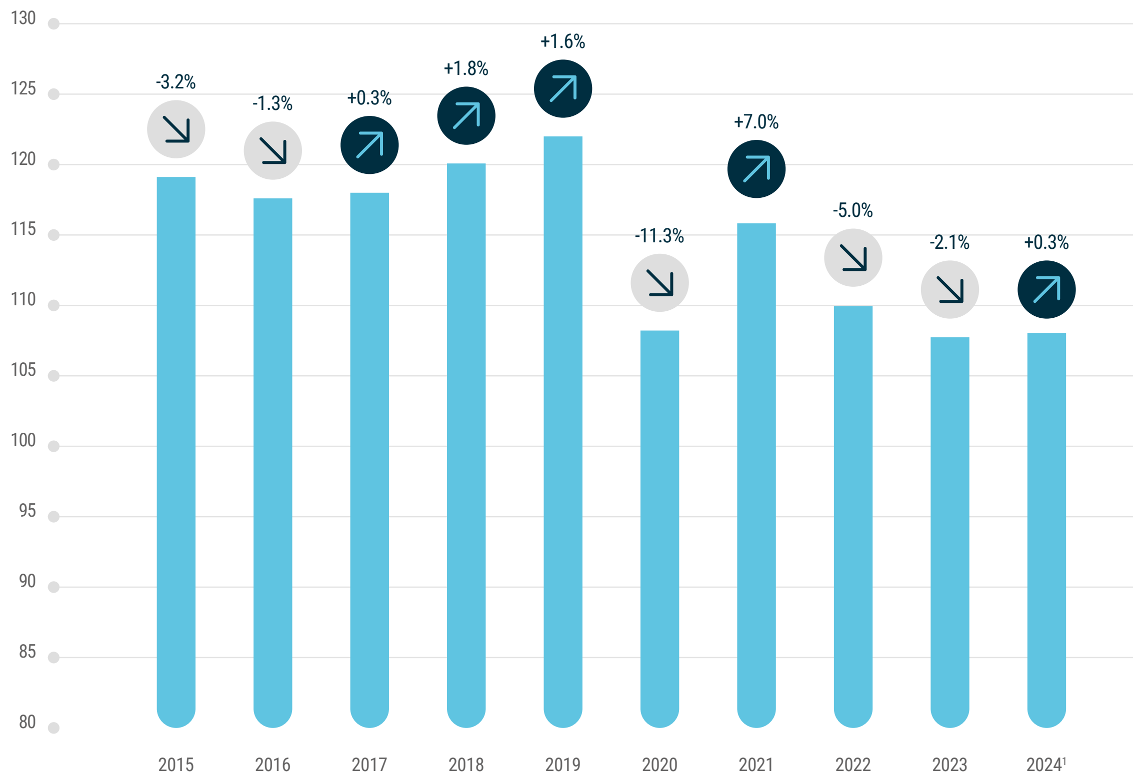
# Less than a quarter of new cars emit 95g CO2/km or less

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 7% since 2021

## CO2 EMISSIONS FROM NEW CARS IN THE EU

In g CO2/km, % change, 2015 – 2024[1]

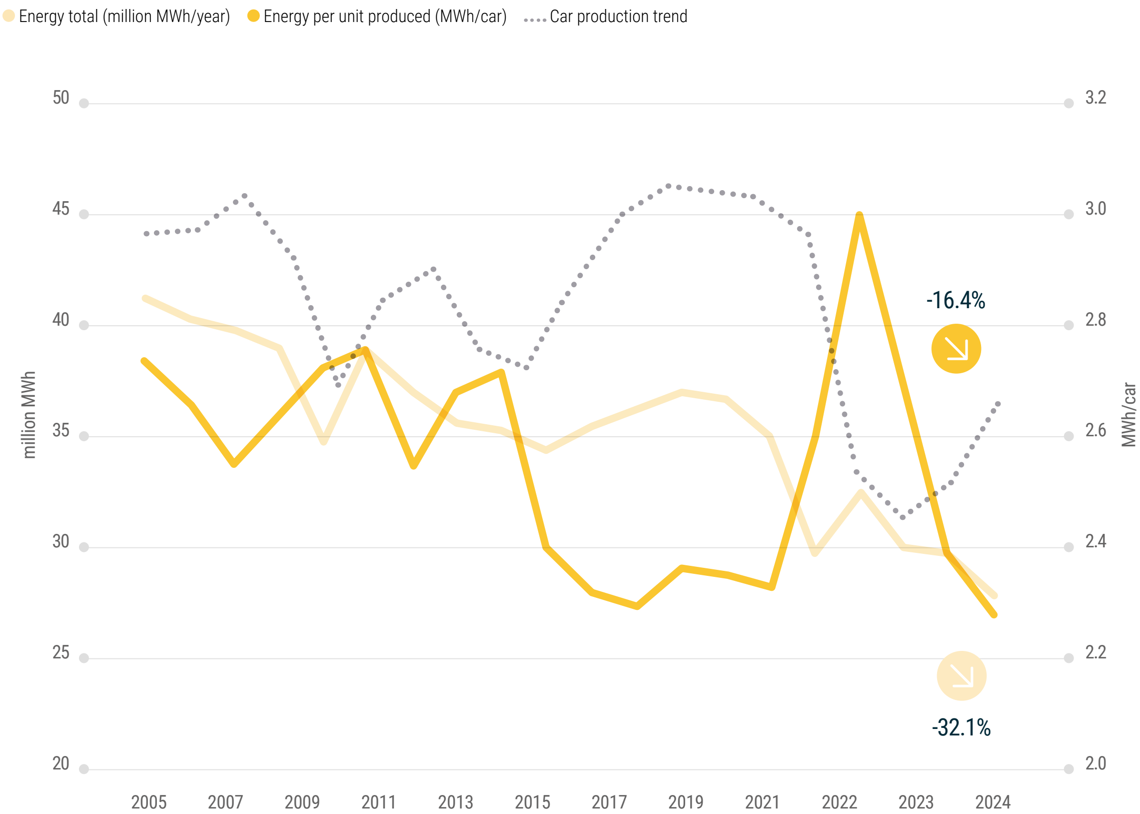



SOURCE: EEA

1. Provisional; NEDC (2015-2020), WLTP (2021-2024)

## CAR PRODUCTION: ENERGY CONSUMPTION

2005 – 2024



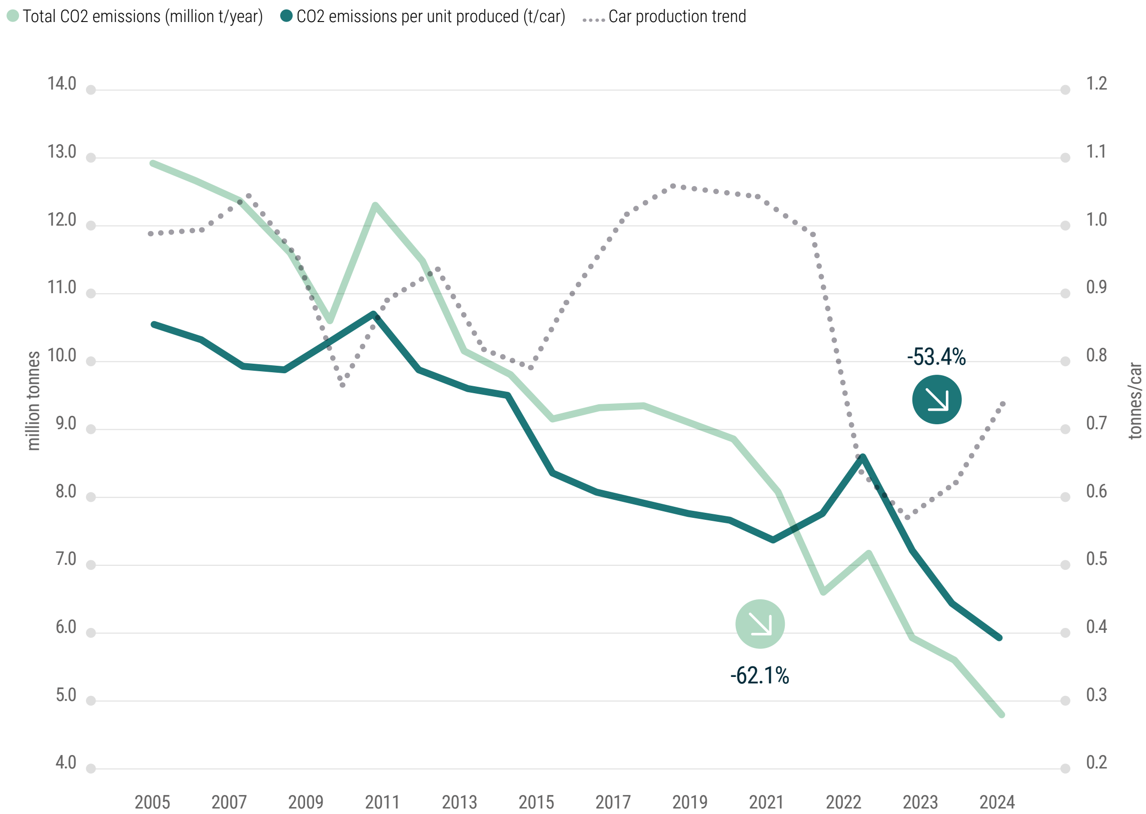

SOURCE: **ACEA**

# Car makers have slashed production energy use per unit by over 16% since 2005

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

## CAR PRODUCTION: CO2 EMISSIONS

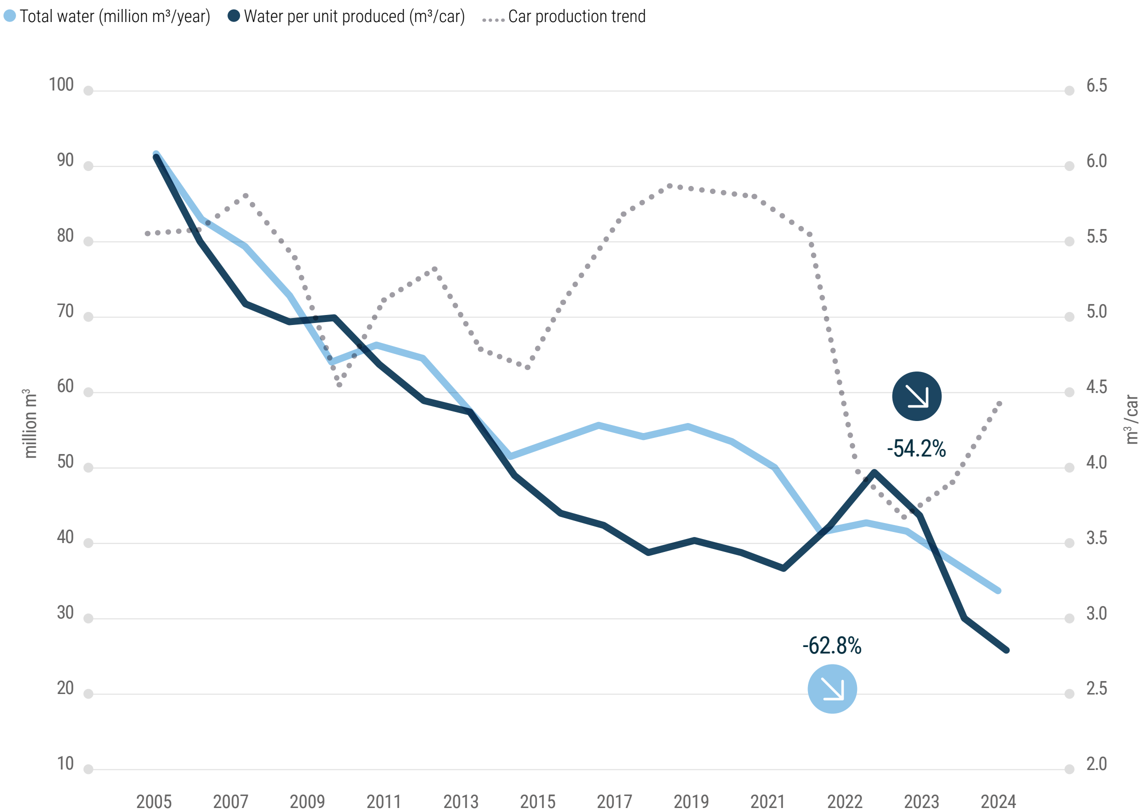
2005 – 2024




SOURCE: **ACEA**

## CAR PRODUCTION: WATER CONSUMPTION

2005 – 2024




SOURCE: **ACEA**

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

# Levels of car manufacturing waste largely follow production trends

## CAR PRODUCTION: WASTE[1]

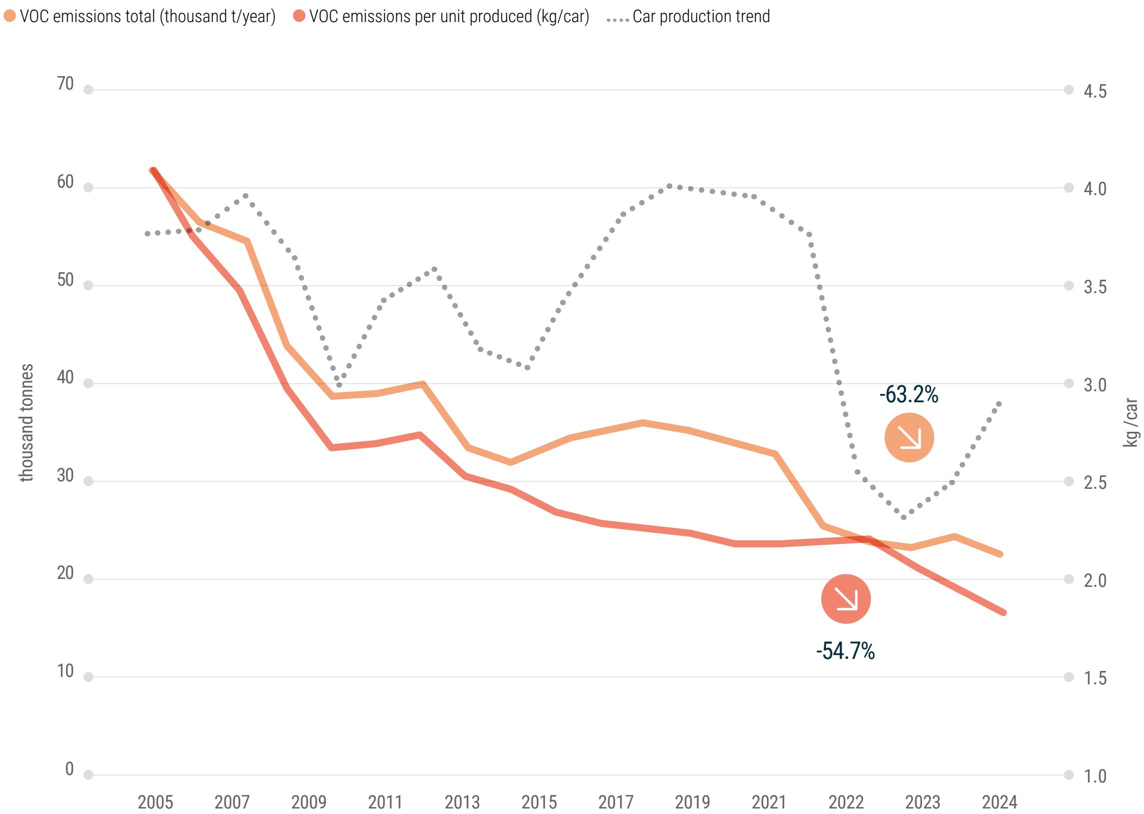
2005 – 2024


SOURCE: **ACEA**

1. Excluding scrap metal and demolition waste

## CAR PRODUCTION: VOC[1] EMISSIONS

2005 – 2024




SOURCE: **ACEA**

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

1. Volatile organic compounds

# INNOVATION

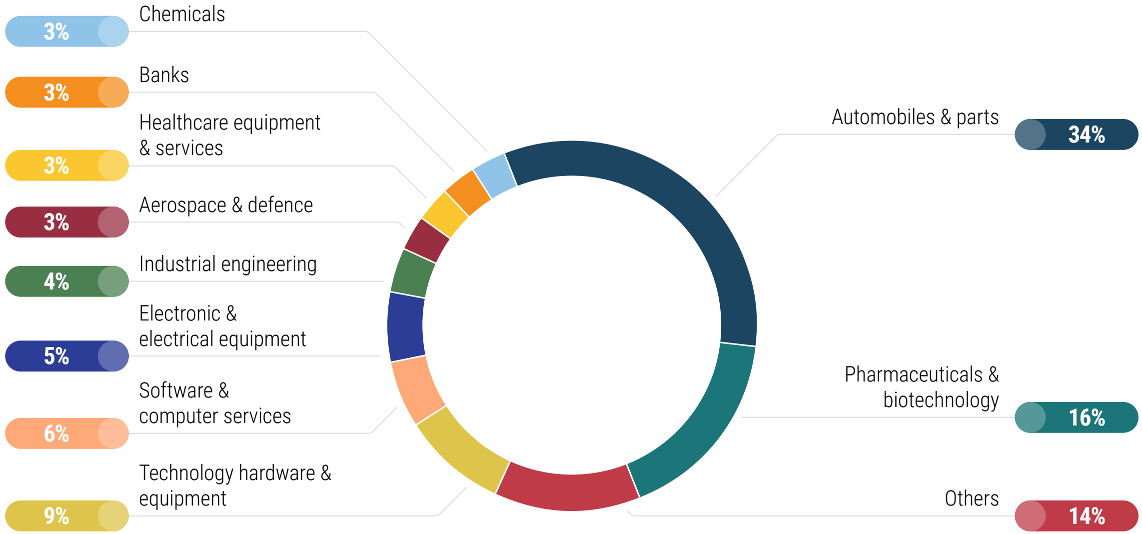
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2025/2026

DRIVING MOBILITY FOR EUROPE

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

## SECTORAL R&D SHARE IN THE EU

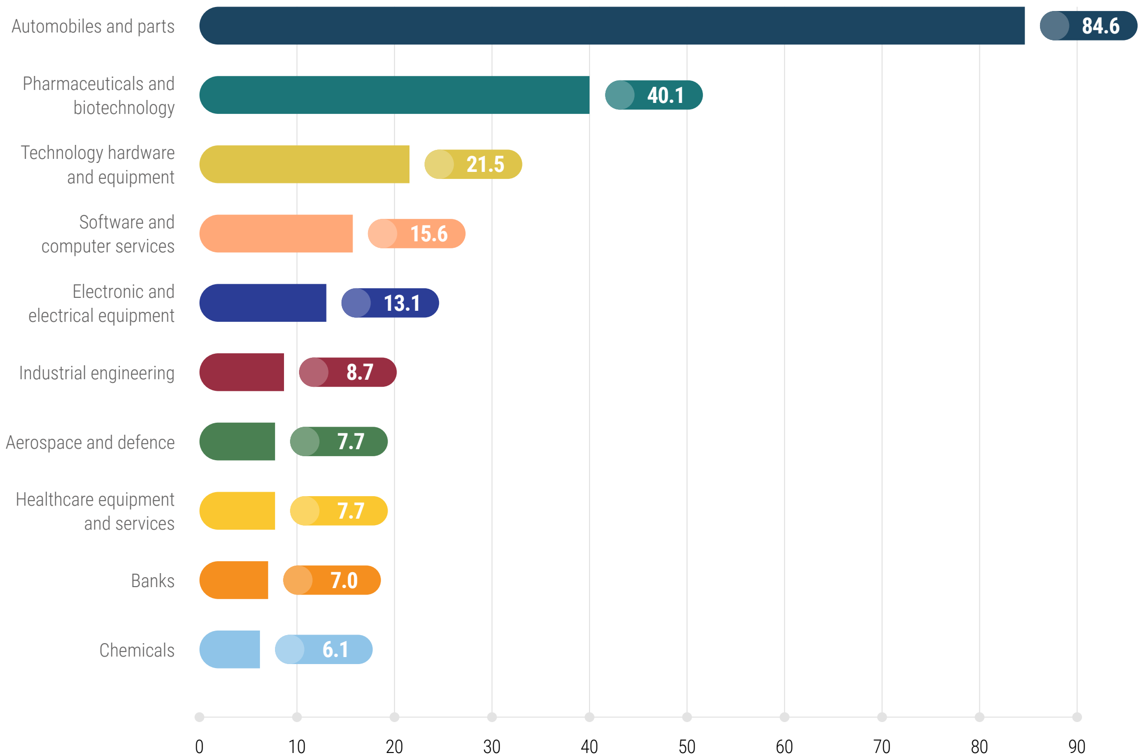
% share, 2023




SOURCE: THE 2024 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD

## EU R&D INVESTMENT IN THE TOP 10 INDUSTRIAL SECTORS

In billion €, 2023



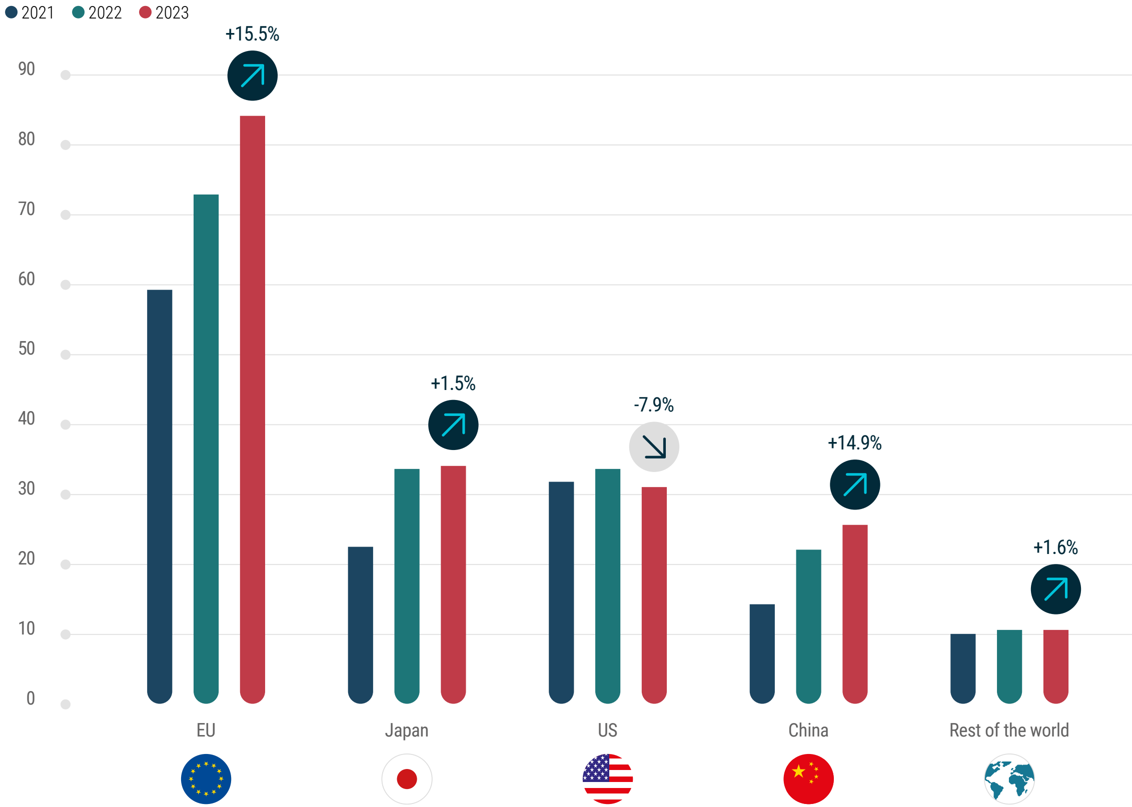

SOURCE: **THE 2024 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD**

**EU auto makers invest around €85 billion annually in R&D, more than twice the amount as the pharmaceutical and biotech sector**

# Auto makers invest €85 billion in R&D in the EU

## AUTOMOTIVE R&D INVESTMENT BY REGION

In billion €, % change




SOURCE: **THE 2024 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD**

# TAXATION

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2025/2026

DRIVING MOBILITY FOR EUROPE

# TAX BENEFITS AND PURCHASE INCENTIVES: ELECTRIC CARS

2025

| | 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

2025

| | 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 half of EU countries offer incentives for electric car charging infrastructure**

# TAX BENEFITS AND PURCHASE INCENTIVES: ZERO-EMISSION COMMERCIAL VEHICLES

2025

| | 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: ZERO-EMISSION COMMERCIAL VEHICLES

2025

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

SOURCE: **ACEA**

**Less than half of 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 2024 | DKK bn 2025[3] | € bn 2024 | € bn 2023 | € bn 2023 | € bn 2025[3] |
| 1. VAT on vehicle sales servicing, repair & parts | 3.2 | 8.9 | – | 1.6 | 22.9 | 31.8 | 0.6 |
| 2. Sales & registration taxes | 0.4 | 0.5 | 9.1 | 0.3 | 2.0 | – | 0.5 |
| 3. Annual ownership taxes | 2.8 | 2.1 | 10.2 | 1.1 | 0.6 | 9.5 | 1.3 |
| 4. Fuels & lubricants | 5.6 | 8.6 | 12.0 | 4.1 | 46.3 | 38.2 | 4.5 |
| 5. Others: | | | | | | | |
| Driving license fees | – | 0.0 | – | – | 0.01 | 0.2 | 0.03 |
| Insurance taxes | 0.4 | 1.2 | 1.4 | 0.5 | 6.0 | 9.5 | 0.5 |
| Tolls | 2.4 | 1.0 | 0.02 | – | 14.8 | 7.4 | – |
| Customs duties | – | – | – | – | – | 0.5 | – |
| Other taxes | 0.3 | 1.2 | – | – | 2.0 | – | 0.2 |
| **TOTAL (national currencies)** | **15.2** | **23.5** | **32.7** | **7.6** | **94.6** | **97.1** | **7.6** |
| TOTAL (€)[2] | 15.2 | 23.5 | 4.4 | 7.6 | 94.6 | 97.1 | 7.6 |

1. Latest available data; only country for which sourced data is available are listed
2. Euro foreign exchange reference rates on 17 April 2025; source: ECB
3. Estimates

SOURCE: **ACEA**

## FISCAL INCOME FROM VEHICLES IN MAJOR EU MARKETS [1]

| Purchase or transfer | Ireland<br>€ bn<br>2024 | Italy<br>€ bn<br>2023 | Netherlands<br>€ bn<br>2024 | Portugal<br>€ bn<br>2024 | Spain<br>€ bn<br>2024 | Sweden<br>SEK bn<br>2021 |
|---|---|---|---|---|---|---|
| 1. VAT on vehicle sales servicing, repair & parts | 1.0 | 20.0 | 4.0 | 4.6 | 11.3 | 25.5 |
| 2. Sales & registration taxes | 1.0 | 1.7 | 1.3 | 0.5 | 0.7 | – |
| 3. Annual ownership taxes | 0.9 | 7.4 | 5.1 | 0.9 | 3.0 | 15.5 |
| 4. Fuels & lubricants | 3.3 | 37.4 | 7.8 | 2.9 | 22.7 | 57.0 |
| 5. Others: | | | | | | |
| Driving license fees | 0.03 | – | 0.6 | – | 0.1 | 0.01 |
| Insurance taxes | 0.1 | 3.8 | 1.3 | – | 1.3 | 2.8 |
| Tolls | 0.2 | 2.3 | – | 0.3 | – | 2.8 |
| Customs duties | 0.1 | – | – | – | – | – |
| Other taxes | – | 4.4 | 0.8 | 1.8 | 0.8 | 1.3 |
| **TOTAL (national currencies)** | **6.6** | **77.0** | **20.9** | **10.9** | **39.8** | **104.9** |
| TOTAL (€)[2] | 6.6 | 77.0 | 20.9 | 10.9 | 39.8 | 9.5 |

SOURCE: **ACEA**

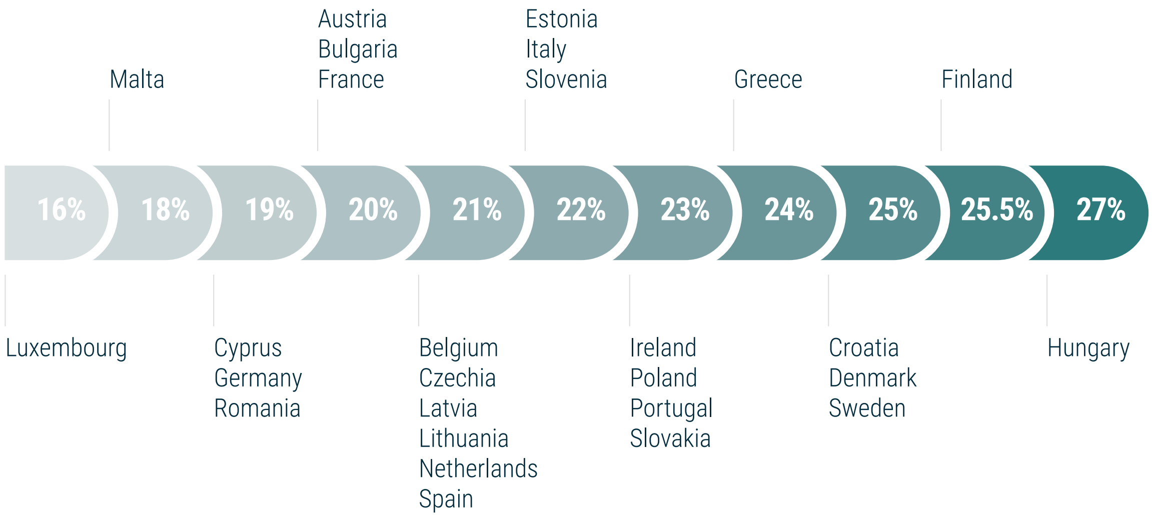
## Vehicles contribute about €415 billion to public budgets in major EU markets

1. Latest available data; only country for which sourced data is available are listed
2. Euro foreign exchange reference rates on 17 April 2025; source: ECB

# Car VAT rates in the EU range from 16% to 27%

## VAT SHARE IN NET CAR PRICES

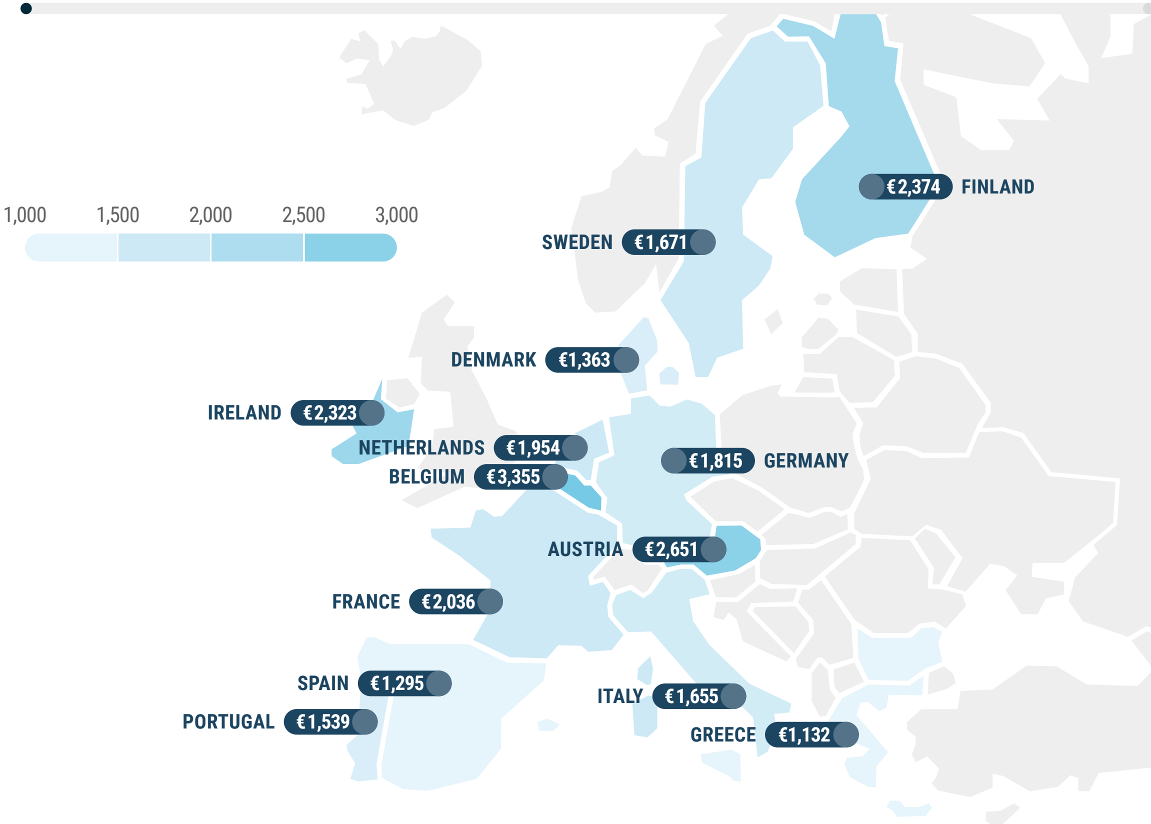
% share, 2025




SOURCE: **ACEA**

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

In € per vehicle, 2025




SOURCE: **ACEA**

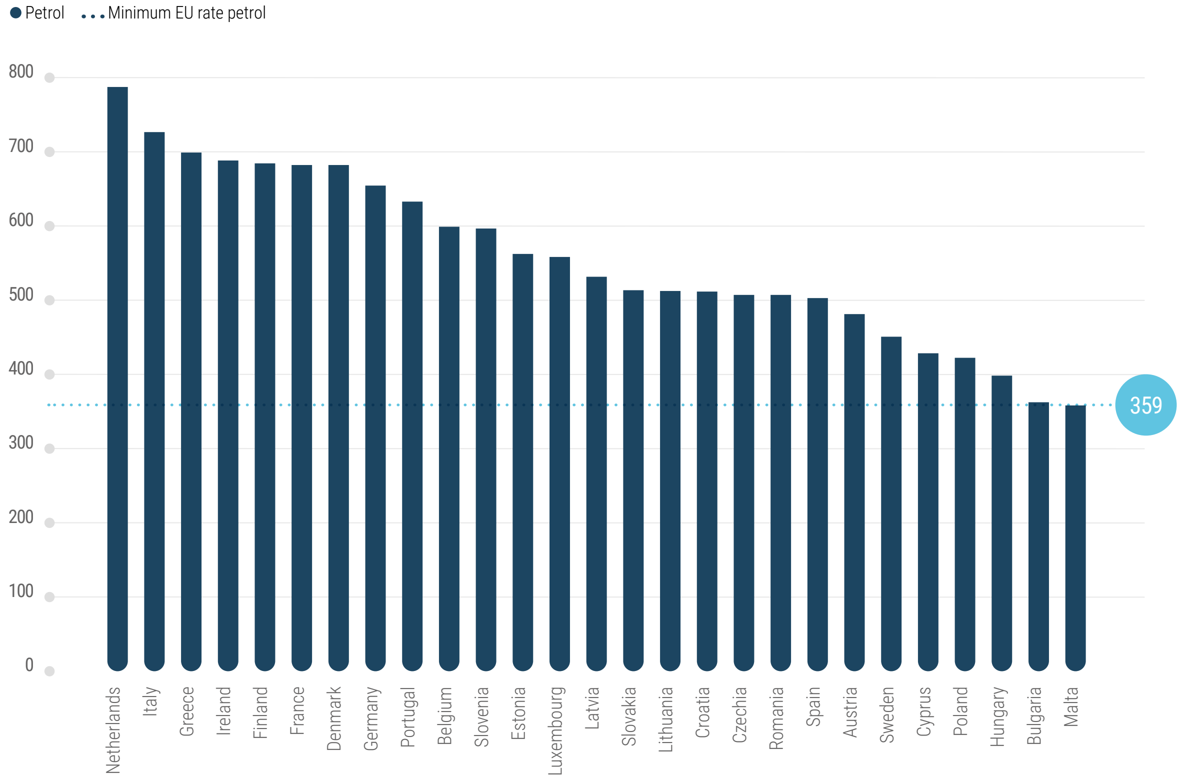
# Annual tax income averages at €1,900 per vehicle in major EU markets

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

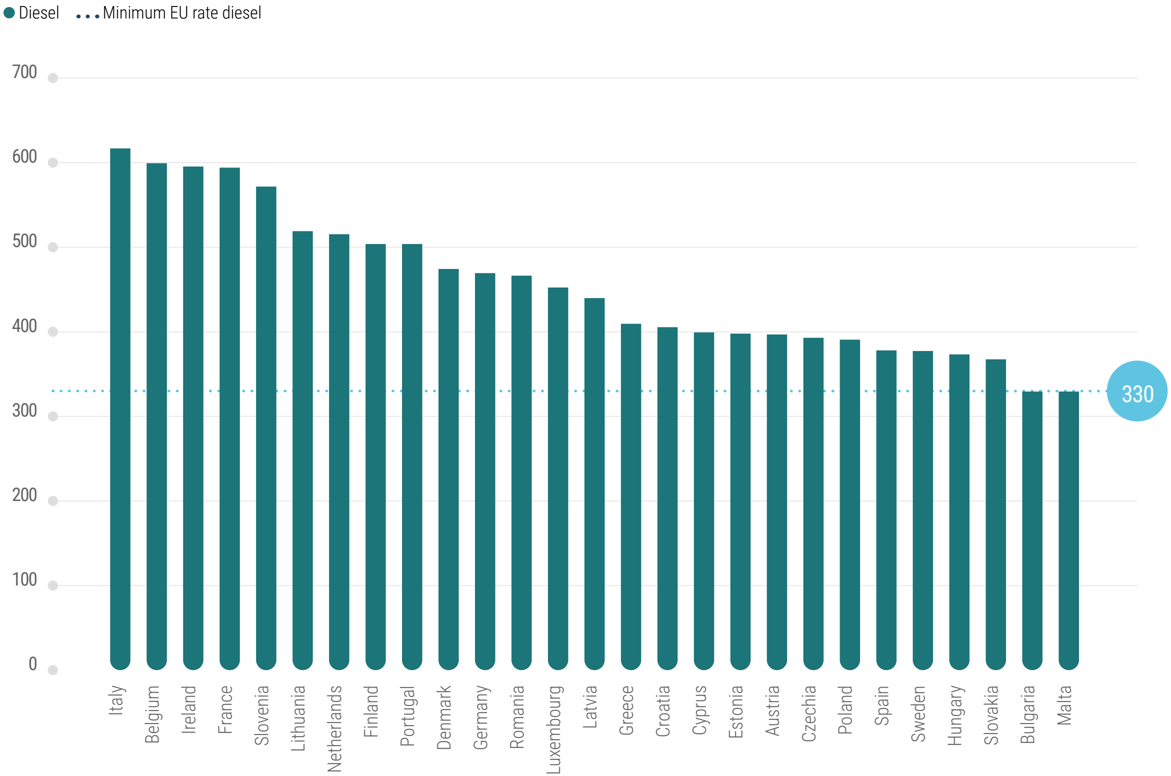
In €/1,000 litres, 2024




SOURCE: **ACEA**

## EXCISE DUTIES ON DIESEL

In €/1,000 litres, 2024




SOURCE: **ACEA**

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

| | | | |
|---|---|---|---|
| BMW GROUP MINI | DAF | DAIMLER TRUCK | |
| Ford | HONDA | HYUNDAI | IVECO • GROUP |
| JLR | | NISSAN | Renault Group |
| STELLANTIS | TOYOTA | VOLKSWAGEN GROUP | VOLVO |

# ABOUT ACEA

## DRIVING MOBILITY FOR EUROPE

The European Automobile Manufacturers' Association, or ACEA, unites Europe's 16 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

ACEA
European Automobile
Manufacturers' Association

+32 2 732 55 50
communications@acea.auto
**www.acea.auto**

x.com/ACEA_auto
linkedin.com/company/ACEA
youtube.com/ACEAauto