



Press release

THE EUROPEAN CAR MARKET CONTINUED TO GROW AT A DOUBLE-DIGIT RATE IN MARCH (+26.1%). THIS WAS HELPED BY THE COMPARISON WITH THE SHARP DOWNTURN IN THE THIRD MONTH OF 2002, WHICH WAS WEIGHED DOWN BY SUPPLY CHAIN DISRUPTIONS

European and national measures need to be planned to address demand and supply, taking all appropriate measures to accelerate the energy transition and strengthen the competitiveness of the European automotive industry, as envisaged by the Green Deal's Industrial Plan

Turin, 19 April 2023 - According to figures released today by ACEA, the European Union as a whole enlarged to include EFTA and the United Kingdom¹ car registrations in March totalled 1,422,147 units, 26.1% more than in March 2022.

In the first quarter of 2023, registered volumes reached 3,235,951 units, a positive change of 17.5% compared to last year.

"In March 2023, the European car market remained on a double-digit growth path, with the eighth consecutive growth (+26.1%) - says Paolo Scudieri, President of ANFIA - also thanks to the comparison with the heavy drop in March 2022 (-18.8%), impacted by disruptions along the supply chain of raw materials and components.

All five major markets (including the UK) contribute to this good performance: Spain (+66.1%) and Italy (+40.7%) achieve the most significant increases, followed by France (+24.2%), the UK (+18.2%) and Germany (+16.6%).

In the month, there was again a significant increase in volumes for both electric cars (BEVs) and traditional hybrids (HEVs): +43.2% for the former, with a market share of 15.5%, and +35.8% for the latter (25.7% share); registrations of plug-in hybrids (PHEVs) also recovered, at +5.4% and 7% share.

In Italy, BEVs grew by 82%, albeit with still low overall volumes, while HEVs grew by 47.8%, with 57,960 units registered. It should be remembered that, for our country, refinancing of the incentive measures for the purchase of zero and ultra-low-emission cars is expected by the end of April, and on this occasion, it will be crucial to provide for a reshaping of the incentives currently in force, significantly to push for a wider diffusion of electric cars.

To fulfil the objectives of the EU Green Deal, measures must be taken at both European and national levels to address the demand and supply aspects. This involves implementing crucial measures to accelerate the shift to clean energy and augment the competitiveness of the European automotive industry, as delineated in the Green Deal business plan.

¹EU 27 + EFTA + UK (remember that as of 1 February 2020, the UK is no longer part of the European Union). Data for Malta are currently not available.



Renegotiating investment support in Brussels through an alternate instrument rather than the development contract is a potential solution that must be pursued".

In Italy, total volumes in March 2023 amounted to 168,259 (+40.7%). In the first three months of 2023, total registrations amounted to 427,067 units, up 26.2% compared to volumes in the same period of 2022.

According to ISTAT data, in March, the national consumer price index recorded a 0.4% decrease on a monthly basis and a 7.6% increase on an annual basis (from +9.1% in the previous month). The slowdown in inflation was due to the year-on-year deceleration in the prices of non-regulated energy goods (from +40.8% to +18.9%) and the more pronounced decline in regulated energy goods (from -16.4% to -20.3%). In the non-regulated energy sector, prices for electricity on the free market slowed (from +101.3% to +44%), followed by those for city gas and natural gas on the free market (from +72.9% to +42%), heating oil (which reversed the trend from +13.2% to -2.7%), transport diesel (from +8.8% to -6.9%, -3% on a monthly basis), petrol (from +1.6% to -6.6%; -0.6% from February) and Other Fuels (from +4.2% to -5%; -2% month-on-month change).

In March, petrol cars had a 45.5% increase in registrations, with a market share of 28.6%. Diesel passenger cars also saw a rise (+38.2% compared to March 2022) and had a market share of 20.1%. For the quarter, petrol car registrations increased by 26.7% (with a 27.4% market share) and diesel car registrations increased by 20.6% (with a 19.2% market share for the year). Alternative-fuelled cars made up 51.4% of the March market, which was a 39.1% increase compared to the same month in 2022. Over the cumulative period, alternative-fuelled cars increased by 282.1% and maintained a higher market share than the same period in 2022 (53.4% compared to 52.6% last year). Electrified cars made up 43.6% of the March market and had a 44.1% share cumulatively, with a 31.1% increase in volume. Mild and full hybrids saw a 47.8% increase in registrations for the month and had a market share of 34.4%. In cumulative terms, they were up 32.2% with a share of 35.8%. Registrations of rechargeable cars grew by 48.5% in the month (market share: 9.2%) and by 26.3% cumulatively (with an 8.3% share).

The Stellantis Group recorded 251,122 registrations in Europe in March 2023 (+23.3%), with a market share of 17.7%. In January-March 2023, volumes amounted to 574,879 units (+9.7%), with a share of 17.8%.

Spain totalled 99,524 registrations in March 2023, 66.1% more than in the same month last year (but -19% compared to March 2019). In January-March 2023, the market grew by 44.5%, with 237,563 units registered.

According to ANFAC, the Spanish automotive association, new car sales in the first quarter of this year have shown positive growth, marking a return to pre-pandemic levels. March alone saw nearly 100,000 registrations. The stability in the supply chain and logistics has enabled accumulated orders to be fulfilled, benefiting the corporate channel. However,

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the private segment continues to lag behind 2019 figures with over 15,000 fewer vehicles sold per month. There is still uncertainty regarding the use and disposal of personal vehicles. Institutions need to educate consumers that low- and zero-emission vehicles are part of the solution to achieve decarbonisation of transport.

In detail, according to sales channels, the March market breaks down as follows: 36,061 sales to private individuals (+36%), 38,656 sales to companies (+44.8%) and 24,807 sales for hire (+269.4%).

Petrol cars accounted for 45.2% of the March market (+66.1%). Next, non-rechargeable hybrid vehicles accounted for 28.9% of the month's market (+75.3%). Next, diesel cars accounted for 13.9% of the March market (+21.1%), followed by plug-in hybrids (6% share for the month and +80.1% over last year), electric cars (3.3% share for the month +39.9% over March 2022) and gas cars (1.7% share).

The average CO₂ emissions in March remained almost stable at 119.8 g/km, 0.3 per cent less than in March 2022.

In France, 182,712 new registrations were recorded in March 2023, up 24.2% compared to March 2022. In the first three months of 2023, the increase is 15.2%, totalling 420,887 registrations.

Compared to the same month last year, diesel and super ethanol-powered cars are still falling. All other fuels, however, are on the rise. As a result, Electrics had a market share in the month of 16.8%, whereas 12 months ago, they had 13.5%.

In the German market, 281,361 units were registered in March, up 16.6 per cent. In Q1 2023, registrations stand at 666,818, up 6.5 per cent compared to the same period in 2022.

Domestic orders in March 2023 were down again, -31% year-on-year, while in January-March 2023, the drop was 35% compared to the same period in 2022.

Regarding fuels, hybrid cars (+11%) account for 29.9% of the market, of which 6% are plug-in hybrids (-38.5%). With a 15.7% share, electric cars (BEVs) are up 28%. Finally, LPG cars (-33.5%) accounted for 0.4% and natural gas cars for 0.1% in the month.

The average CO₂ emissions of newly registered cars increased by 1.1 per cent to 120.6 g/km in March 2023.

Finally, the UK market totalled 287,825 new passenger cars registered in March, up 18.2% compared to last year. In the first three months of the year, registrations stood at 494,260 units, 18.4% more than in January-March 2022.

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The British Automotive Association SMMT notes that the 'number plate change month' usually sets the trend for the year, so March's result may help to instil more confidence in the industry and consumers. With eight consecutive months of growth, the automotive industry is recovering, bucking the general climate, and can support the country's economic growth. March 2023 is also the best month ever for sales of zero-emission vehicles, reflecting the choice of the majority of consumers and the wide range of green cars on offer. Still, investment in the development of charging infrastructure remains necessary to meet the ambitions of the electric vehicle market and the European decarbonisation targets.

In the month, fleet registrations grew by 40.9 per cent, cars registered in the name of private individuals increased by 1.4 per cent, and those registered in the name of companies rose slightly by 26 per cent.

Sales of electric vehicles maintained a positive trend: +18.6% and a market share of 16.2% in March. Plug-in hybrids (PHEVs) grew by 11.8% but held a 6.2% share, 6.6% lower than in March 2022. There is no stopping the decline in diesel cars (-19.9% in the month, with a share dropping to 3.8%), while petrol cars are up 16.5% in volume compared to March 2022, holding the same market share of 41.4%.

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ANFIA - Italian Association of the Automotive Industry

Born in March 1912, over these one hundred years, ANFIA mission has always been to represent the interests of its associate members and ensure effective communication between the Italian motor vehicle industries on the one hand, and the Public Administration and Italian political bodies on the other, with regard to all technical, economic, fiscal, legal, statistical and quality-related issues referred to the automotive sector. The Association is structured in three product-based Groups, each one chaired by a President. Components: motor vehicle parts and components manufacturers; Car Coachbuilders and Designers: companies working in the sector of design, engineering and style of motor vehicles and/or parts and components for the automotive sector; Motor vehicles: motor vehicles manufacturers in general, including trucks, trailers, camper vans, special means of transport.

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The Automotive Production Chain in Italy

5,156 companies

268,300 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector

92.7 billion Euros of turnover, which means 9.3% of the Italian manufacturing sector turnover and of 5.2% the Italian GDP

76.3 billion Euros of tax levy of motorisation

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UNIONE EUROPEA - IMMATRICOLAZIONI AUTOVETTURE PER PAESE
EUROPEAN UNION - NEW PASSENGER CAR REGISTRATIONS BY COUNTRY

dati provvisori/provisional data

	Marzo/March		% Chg 23/22	Gennaio-Marzo/January-March		% Chg 23/22
	2023	2022		2023	2022	
Austria	26.307	20.653	+27,4	63.052	52.375	+20,4
Belgium	51.754	36.998	+39,9	131.484	103.146	+27,5
Bulgaria	2.309	2.702	-14,5	7.123	6.662	+6,9
Croatia	6.157	3.812	+61,5	13.159	9.635	+36,6
Cyprus	1.771	848	+108,8	4.057	3.060	+32,6
Czech Republic	22.378	16.903	+32,4	56.341	47.389	+18,9
Denmark	17.960	14.612	+22,9	39.960	34.211	+16,8
Estonia	2.288	2.058	+11,2	5.658	5.191	+9,0
Finland	7.677	7.543	+1,8	20.966	21.729	-3,5
France	182.712	147.078	+24,2	420.887	365.360	+15,2
Germany	281.361	241.330	+16,6	666.818	625.954	+6,5
Greece	13.284	8.410	+58,0	33.772	22.427	+50,6
Hungary	11.498	11.149	+3,1	29.561	28.688	+3,0
Ireland	17.645	12.907	+36,7	58.085	49.905	+16,4
Italy	168.259	119.568	+40,7	427.067	338.383	+26,2
Latvia	1.756	1.395	+25,9	4.525	3.710	+22,0
Lithuania	2.545	2.350	+8,3	6.626	6.492	+2,1
Luxembourg	5.246	4.338	+20,9	13.149	11.347	+15,9
Malta	489	690	-29,1	1.336	1.548	-13,7
Netherlands	37.452	24.781	+51,1	98.425	78.345	+25,6
Poland	49.460	39.528	+25,1	123.031	102.041	+20,6
Portugal	21.472	13.409	+60,1	52.191	34.894	+49,6
Romania	12.251	11.025	+11,1	36.966	28.978	+27,6
Slovakia	8.852	7.476	+18,4	22.155	19.221	+15,3
Slovenia	5.271	4.627	+13,9	13.450	12.752	+5,5
Spain	99.524	59.919	+66,1	237.563	164.398	+44,5
Sweden	30.261	28.710	+5,4	63.304	69.739	-9,2
EUROPEAN UNION	1.087.939	844.819	+28,8	2.650.711	2.247.580	+17,9
EU14³	960.914	740.256	+29,8	2.326.723	1.972.213	+18,0
EU13⁴	127.025	104.563	+21,5	323.988	275.367	+17,7
<i>Iceland</i>	<i>1.833</i>	<i>1.451</i>	<i>+26,3</i>	<i>3.496</i>	<i>3.217</i>	<i>+8,7</i>
<i>Norway</i>	<i>19.366</i>	<i>16.238</i>	<i>+19,3</i>	<i>28.665</i>	<i>32.343</i>	<i>-11,4</i>
<i>Switzerland</i>	<i>25.184</i>	<i>21.722</i>	<i>+15,9</i>	<i>58.819</i>	<i>54.227</i>	<i>+8,5</i>
EFTA	46.383	39.411	+17,7	90.980	89.787	+1,3
United Kingdom	287.825	243.479	+18,2	494.260	417.560	+18,4
EU + EFTA + UK	1.422.147	1.127.709	+26,1	3.235.951	2.754.927	+17,5
EU14 + EFTA + UK	1.295.122	1.023.146	+26,6	2.911.963	2.479.560	+17,4

SOURCE: NATIONAL AUTOMOBILE MANUFACTURERS' ASSOCIATIONS

¹ Member states before the 2004 enlargement

² Member states having joined the EU since 2004

EU 27¹ - IMMATRICOLAZIONI AUTOVETTURE PER MARCA
EU 27¹ - NEW PASSENGER CAR REGISTRATIONS BY MAKE
dati provvisori/provisional data

	Marzo/March					Gennaio-Marzo/January-March				
	quota % % share ¹		Unità Units		Var % % chg	quota % % share ¹		Unità Units		Var % % chg
	2023	2022	2023	2022	23/22	2023	2022	2023	2022	23/22
Volkswagen Group	25,3	24,2	275.757	204.296	+35,0	25,7	24,7	680.787	554.279	+22,8
Volkswagen	10,2	10,1	111.444	85.602	+30,2	10,7	10,4	283.273	234.121	+21,0
Skoda	5,2	4,4	56.811	37.249	+52,5	5,5	5,1	145.379	114.107	+27,4
Audi	5,5	5,6	60.329	47.096	+28,1	5,3	5,2	140.924	115.912	+21,6
Seat	2,1	2,1	23.357	17.447	+33,9	2,2	2,3	57.935	51.557	+12,4
Cupra	1,5	1,2	16.273	10.393	+56,6	1,2	0,9	32.790	21.327	+53,7
Porsche	0,7	0,7	7.126	6.167	+15,6	0,7	0,7	19.436	16.248	+19,6
Others ²	0,0	0,0	417	342	+21,9	0,0	0,0	1.050	1.007	+4,3
Stellantis	19,9	19,9	216.862	168.517	+28,7	19,3	20,5	511.910	459.822	+11,3
Peugeot	6,4	5,9	69.410	49.724	+39,6	6,1	6,4	162.164	143.508	+13,0
Fiat ³	3,4	4,0	37.064	33.440	+10,8	3,6	4,0	96.359	88.843	+8,5
Opel	3,8	3,7	41.188	31.179	+32,1	3,5	3,8	92.691	85.001	+9,0
Citroen	3,8	4,1	41.158	34.532	+19,2	3,5	3,9	92.443	88.059	+5,0
Jeep	1,1	1,1	11.697	9.229	+26,7	1,1	1,2	30.396	27.329	+11,2
DS	0,5	0,6	5.255	4.689	+12,1	0,5	0,5	12.761	10.725	+19,0
Alfa Romeo	0,5	0,2	5.249	1.767	+197,1	0,4	0,2	11.849	4.666	+153,9
Lancia/Chrysler	0,5	0,4	5.071	3.615	+40,3	0,4	0,5	11.121	10.785	+3,1
Others ⁴	0,1	0,0	770	342	+125,1	0,1	0,0	2.126	906	+134,7
Renault Group	10,2	10,0	110.496	84.759	+30,4	10,8	10,0	285.688	224.615	+27,2
Renault	5,6	5,7	61.327	48.126	+27,4	5,6	5,7	148.476	127.392	+16,6
Dacia	4,5	4,3	49.025	36.348	+34,9	5,2	4,3	136.829	96.678	+41,5
Alpine	0,0	0,0	144	285	-49,5	0,0	0,0	383	545	-29,7
Hyundai Group	7,7	9,1	83.376	76.546	+8,9	8,3	9,3	219.464	209.659	+4,7
Kia	3,9	4,7	42.128	39.963	+5,4	4,3	4,9	113.008	109.946	+2,8
Hyundai	3,8	4,3	41.248	36.583	+12,8	4,0	4,4	106.456	99.713	+6,8
Toyota Group	6,3	6,5	68.939	55.031	+25,3	7,3	7,2	192.869	160.977	+19,8
Toyota	6,1	6,2	65.940	52.690	+25,1	7,0	6,9	184.284	154.116	+19,6
Lexus	0,3	0,3	2.999	2.341	+28,1	0,3	0,3	8.585	6.861	+25,1
BMW Group	6,6	6,7	72.227	56.526	+27,8	6,2	6,9	164.963	154.648	+6,7
BMW	5,2	5,5	57.066	46.270	+23,3	5,0	5,4	133.014	122.188	+8,9
Mini	1,4	1,2	15.161	10.256	+47,8	1,2	1,4	31.949	32.460	-1,6
Mercedes-Benz	5,6	6,0	60.570	50.480	+20,0	5,8	5,9	153.009	131.852	+16,0
Mercedes	5,3	5,7	58.056	47.968	+21,0	5,6	5,6	147.700	125.773	+17,4
Smart	0,2	0,3	2.514	2.512	+0,1	0,2	0,3	5.309	6.079	-12,7
Ford	3,7	4,5	39.760	38.324	+3,7	3,7	4,5	99.337	101.175	-1,8
Tesla	3,7	2,7	40.777	22.917	+77,9	2,6	1,6	68.699	36.508	+88,2
Nissan	2,3	2,0	25.332	16.860	+50,2	2,1	1,8	54.784	40.234	+36,2
Volvo Cars	2,0	2,3	21.418	19.057	+12,4	2,0	2,3	53.843	51.041	+5,5
Mazda	1,6	1,5	17.845	12.704	+40,5	1,5	1,3	40.792	28.735	+42,0
Suzuki	1,4	1,3	14.840	10.621	+39,7	1,4	1,3	36.358	29.157	+24,7
Jaguar Land Rover Group	0,7	0,5	7.136	4.325	+65,0	0,6	0,5	17.021	11.419	+49,1
Land Rover	0,5	0,4	5.858	3.108	+88,5	0,5	0,4	14.347	8.484	+69,1
Jaguar	0,1	0,1	1.278	1.217	+5,0	0,1	0,1	2.674	2.935	-8,9
Mitsubishi	0,3	0,6	3.550	5.258	-32,5	0,3	0,6	8.255	13.349	-38,2
Honda	0,3	0,5	2.806	4.180	-32,9	0,3	0,5	7.490	10.730	-30,2

SOURCE: ACEA MEMBERS

¹ACEA estimation based on total by market²Bentley and Lamborghini³Includes Abarth

EUROPA (EU27¹+EFTA+UK) - IMMATRICOLAZIONI AUTOVETTURE PER MARCA
EUROPE (EU27¹+EFTA+UK) - NEW PASSENGER CAR REGISTRATIONS BY MAKE
dati provvisori/provisional data

	Marzo/March					Gennaio-Marzo/January-March				
	quota % % share ¹		Unità Units		Var % % chg	quota % % share ¹		Unità Units		Var % % chg
	2023	2022	2023	2022	23/22	2023	2022	2023	2022	23/22
Volkswagen Group	24,4	22,8	346.314	257.418	+34,5	25,3	23,9	818.891	658.289	+24,4
Volkswagen	9,7	9,3	137.461	104.334	+31,8	10,3	9,8	334.026	269.594	+23,9
Audi	5,7	5,8	81.675	65.094	+25,5	5,5	5,5	179.272	150.219	+19,3
Skoda	4,7	3,9	66.529	44.345	+50,0	5,2	4,7	168.339	130.456	+29,0
Seat	2,0	1,9	28.650	21.643	+32,4	2,1	2,2	68.995	59.834	+15,3
Cupra	1,4	1,0	19.971	11.828	+68,8	1,2	0,9	39.716	24.133	+64,6
Porsche	0,8	0,8	11.315	9.443	+19,8	0,8	0,8	26.916	22.350	+20,4
Others ²	0,1	0,1	713	731	-2,5	0,1	0,1	1.627	1.703	-4,5
Stellantis	17,7	18,1	251.122	203.635	+23,3	17,8	19,0	574.879	524.110	+9,7
Peugeot	5,6	5,4	79.371	60.523	+31,1	5,6	5,9	179.723	163.016	+10,2
Opel/Vauxhall	3,8	4,0	53.887	44.796	+20,3	3,6	4,0	116.769	110.731	+5,5
Fiat ³	2,9	3,4	40.952	38.138	+7,4	3,2	3,5	103.312	96.107	+7,5
Citroen	3,3	3,5	47.024	39.174	+20,0	3,2	3,5	102.983	96.896	+6,3
Jeep	0,9	0,9	12.455	9.753	+27,7	1,0	1,0	32.107	28.495	+12,7
DS	0,4	0,5	5.696	5.083	+12,1	0,4	0,4	13.751	11.694	+17,6
Alfa Romeo	0,4	0,2	5.642	2.084	+170,7	0,4	0,2	12.518	5.221	+139,8
Lancia/Chrysler	0,4	0,3	5.072	3.616	+40,3	0,3	0,4	11.123	10.786	+3,1
Others ⁴	0,1	0,0	1.023	468	+118,6	0,1	0,0	2.593	1.164	+122,8
Renault Group	8,5	8,4	120.321	94.839	+26,9	9,5	8,8	306.336	242.272	+26,4
Renault	4,6	4,8	65.927	54.192	+21,7	4,9	5,0	158.997	138.060	+15,2
Dacia	3,8	3,6	54.199	40.304	+34,5	4,5	3,8	146.858	103.566	+41,8
Alpine	0,0	0,0	195	343	-43,1	0,0	0,0	481	646	-25,5
Hyundai Group	8,4	9,6	119.394	108.427	+10,1	8,7	9,8	282.193	269.543	+4,7
Kia	4,4	5,2	63.053	58.994	+6,9	4,6	5,3	148.571	145.333	+2,2
Hyundai	4,0	4,4	56.341	49.433	+14,0	4,1	4,5	133.622	124.210	+7,6
Toyota Group	6,6	6,7	94.264	75.098	+25,5	7,3	7,2	235.841	197.658	+19,3
Toyota	6,3	6,3	89.678	70.575	+27,1	6,9	6,8	224.337	187.122	+19,9
Lexus	0,3	0,4	4.586	4.523	+1,4	0,4	0,4	11.504	10.536	+9,2
BMW Group	6,9	7,1	97.440	80.064	+21,7	6,5	7,3	209.613	201.737	+3,9
BMW	5,2	5,7	74.311	64.324	+15,5	5,1	5,7	164.669	157.046	+4,9
Mini	1,6	1,4	23.129	15.740	+46,9	1,4	1,6	44.944	44.691	+0,6
Mercedes-Benz	5,6	6,1	79.520	68.336	+16,4	5,6	5,9	182.341	163.629	+11,4
Mercedes	5,4	5,8	76.955	65.496	+17,5	5,5	5,7	176.914	157.039	+12,7
Smart	0,2	0,3	2.565	2.840	-9,7	0,2	0,2	5.427	6.590	-17,6
Ford	4,3	5,0	61.545	56.795	+8,4	4,3	4,8	138.473	133.038	+4,1
Tesla	4,3	3,8	60.866	42.654	+42,7	3,4	2,2	93.714	59.426	+57,7
Nissan	3,0	2,4	43.145	27.596	+56,3	2,5	2,1	82.009	57.579	+42,4
Volvo Cars	2,0	2,4	29.134	26.945	+8,1	2,2	2,4	69.996	65.925	+6,2
Mazda	1,7	1,5	23.618	16.757	+40,9	1,6	1,3	51.091	37.022	+38,0
Suzuki	1,4	1,3	19.718	14.966	+31,8	1,4	1,3	44.298	36.080	+22,8
Jaguar Land Rover Group	1,5	1,3	21.691	14.156	+53,2	1,2	1,0	38.440	26.857	+43,1
Land Rover	1,3	0,9	18.411	10.523	+75,0	1,0	0,7	32.325	20.329	+59,0
Jaguar	0,2	0,3	3.280	3.633	-9,7	0,2	0,2	6.115	6.528	-6,3
Honda	0,5	0,7	7.775	7.364	+5,6	0,5	0,7	16.146	18.542	-12,9
Mitsubishi	0,3	0,5	3.779	5.559	-32,0	0,3	0,5	8.672	14.063	-38,3

SOURCE: ACEA MEMBERS

¹ACEA estimation based on total by market²Bentley and Lamborghini³Includes Abarth