THE AUTOMOBILE INDUSTRY

POCKET GUIDE 2026

DRIVING MOBILITY FOR EUROPE

CONTENTS

FOREWORD

ACEA's Pocket Guide remains the go-to reference for the latest insights into the automotive industry and market, with updated data and analysis published each year. This edition provides a timely snapshot of a sector navigating a rapidly evolving landscape, where growing concerns about competitiveness are compounded by an increasingly uncertain global geopolitical environment.

Despite these headwinds, Europe's automotive industry remains the continent's largest private investor in research and development, allocating €84 billion to R&D in 2024. This represents an increase of €18 billion compared with 2021 and is nearly twice the investment made by the next-largest industrial sector. These figures underscore our industry's steady commitment to advancing zero-emission road transport while reinforcing Europe's position as a global technology leader.

EU vehicle production remains well below pre-pandemic levels, with around 3 million fewer vehicles produced in 2025 compared with 2019, highlighting the ongoing challenge of preserving Europe's attractiveness as a global automotive manufacturing base. Passenger car production remained broadly stable at 11.5 million units, while commercial vehicle output declined further, falling by nearly 5.5% last year.

Global car sales grew by 3.5% last year, with the EU's market share at around 14%. EU car sales continued their upward trend, with battery-electric models increasing their market share to 17.4%. Commercial vehicle registrations declined by 8%, with electric vans reaching 11%, while trucks also declined by around 6%. Buses remained the standout performer, surpassing 38,000 registrations to achieve a new all-time high.

Manufacturers now offer more than 400 electrically-chargeable models across the EU, but the share of vehicles on Europe's roads with a plug is still less than 5%, 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 recharging infrastructure. Today, the EU averages around seven battery-electric vehicles per public recharging point, with France, Germany and the Netherlands together accounting for 56% of the EU's recharging points.

In 2025, the EU continued to experience a significant decline in both the value and volume of vehicle trade. However, the value of EU vehicle exports continued to exceed imports, resulting in a trade surplus of €85 billion. The UK and the US continued to be the two largest export destinations by value, highlighting the importance of maintaining open and stable trade relations with these key partners. Türkiye is also emerging as an increasingly important trading partner, both as a source of imports and as a growing export market. In contrast, the EU's vehicle trade balance with China has deteriorated significantly over the past three years, reaching a deficit of almost €7 billion in 2025.

The EU also continues to lead the way in global road safety, with road fatalities decreasing by 2.2% in 2024, including reductions recorded in 20 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 reducing our environmental footprint. CO_2 production emissions per vehicle hit new lows. Production water usage per vehicle also sank, falling by almost 56% over the same period.

Although 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 geopolitical tensions, rising manufacturing costs, and an increasingly complex EU regulatory environment. The ACEA Pocket Guide underlines the importance of creating favourable conditions for Europe's critical industries—as automotive is—to remain competitive by enabling investment, innovation and open trade.

> **"The automotive sector remains a cornerstone of Europe's economy, supporting millions of jobs, driving investment in research and development, and making a significant contribution to trade and economic growth. Yet the industry is facing a polycrisis of weak market demand, intensifying global competition, rising costs, regulatory pressures, and geopolitical uncertainty. At the same time, delivering the transition to zero-emission mobility will require continued investment from manufacturers, alongside a policy framework that strengthens Europe's competitiveness and industrial resilience.**

Sigrid de Vries
ACEA Director General

KEY FIGURES

EMPLOYMENT

Motor vehicle manufacturing (EU)	2.4 million jobs = 8% of EU manufacturing employment	2024
Total (EU manufacturing, services, and construction)	13.5 million jobs = 6.9% of EU employment	2024

PRODUCTION

Motor vehicles (global)	96.5 million units	2025
Motor vehicles (EU)	13.8 million units = 14.3% of global vehicle production	2025
Passenger cars (global)	78.7 million units	2025
Passenger cars (EU)	11.5 million units = 14.6% of global car production	2025

REGISTRATIONS

Motor vehicles (global)	95.3 million units	2025
Motor vehicles (EU)	12.6 million units = 13.2% of global vehicle registrations	2025
Passenger cars (global)	77.6 million units	2025
Passenger cars (EU)	10.8 million units = 13.9% of global car registrations	2025
New cars by power source (EU)	battery electric 17.4%, petrol 26.6% market share	2025
New vans by power source (EU)	electric 11.2%, diesel 80.7% market share	2025
New trucks by power source (EU)	electric 4.2%, diesel 93.2% market share	2025
New buses by power source (EU)	electric 23.8%, diesel 62.1% market share	2025

TRADE

Motor vehicle exports (extra-EU)	€169.2 billion	2025
Motor vehicle imports (extra-EU)	€84.5 billion	2025
Trade balance (extra-EU)	€84.7 billion	2025

VEHICLES ON ROADS	Motor vehicles (EU)	294 million units	2024
	Passenger cars (EU)	256 million units	2024
	Motorisation rate (EU)	654 vehicles per 1,000 inhabitants	2024
	Average age of cars (EU)	12.7 years	2024
	Average age of vans (EU)	12.9 years	2024
	Average age of trucks (EU)	14 years	2024
	Average age of buses (EU)	12.2 years	2024
INFRASTRUCTURE	Recharging points (EU)	1.1 million units	2025
ROAD SAFETY	Road fatalities per million inhabitants (EU)	45 people	2024
	Road fatalities (EU)	-17.4% since 2014	2024
ENVIRONMENT	Average CO2 emissions from new cars (EU)	96.7g CO2/km	2025
	CO2 emissions from car production	-63.4% since 2005	2025
INNOVATION	Automobiles and parts sector (EU)	€84.3 billion = 33% of the EU's total R&D spending	2024
TAXATION	Fiscal income from motor vehicles (EU major markets)	€427.1 billion	2025

The data in this publication are presented as interactive maps, charts, and tables on **www.acea.auto/figures**, where they are periodically updated throughout the year.

EMPLOYMENT

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2026

DRIVING MOBILITY FOR EUROPE

The auto industry provides direct and indirect jobs for more than 13.5 million Europeans

EU AUTOMOTIVE SECTOR: DIRECT AND INDIRECT EMPLOYMENT

In thousands, 2024[1]

13.5 m jobs

2.4 m direct jobs

11.1 m indirect jobs

3.1 m manufacturing jobs

10.4 m non-manufacturing jobs

DIRECT MANUFACTURING	2,411
Motor vehicles	1,098
Bodies (coachwork), trailers, and semi-trailers	166
Parts and accessories	1,147

2.4 m jobs

INDIRECT MANUFACTURING	706
Computers and peripheral equipment	64
Electric motors, generators, and transformers	642

0.7 m jobs

AUTOMOBILE USE	4,266
Sale of vehicles	1,504
Maintenance and repair of vehicles	1,459
Sale of vehicle parts and accessories	662
Retail sale of automotive fuel in specialised stores	426
Renting and leasing of vehicles	215

4.3 m jobs

TRANSPORT	5,264
Other passenger land transport	1,800
Freight transport by road	3,464

5.3 m jobs

CONSTRUCTION	897
Roads, bridges, and tunnels[2]	897

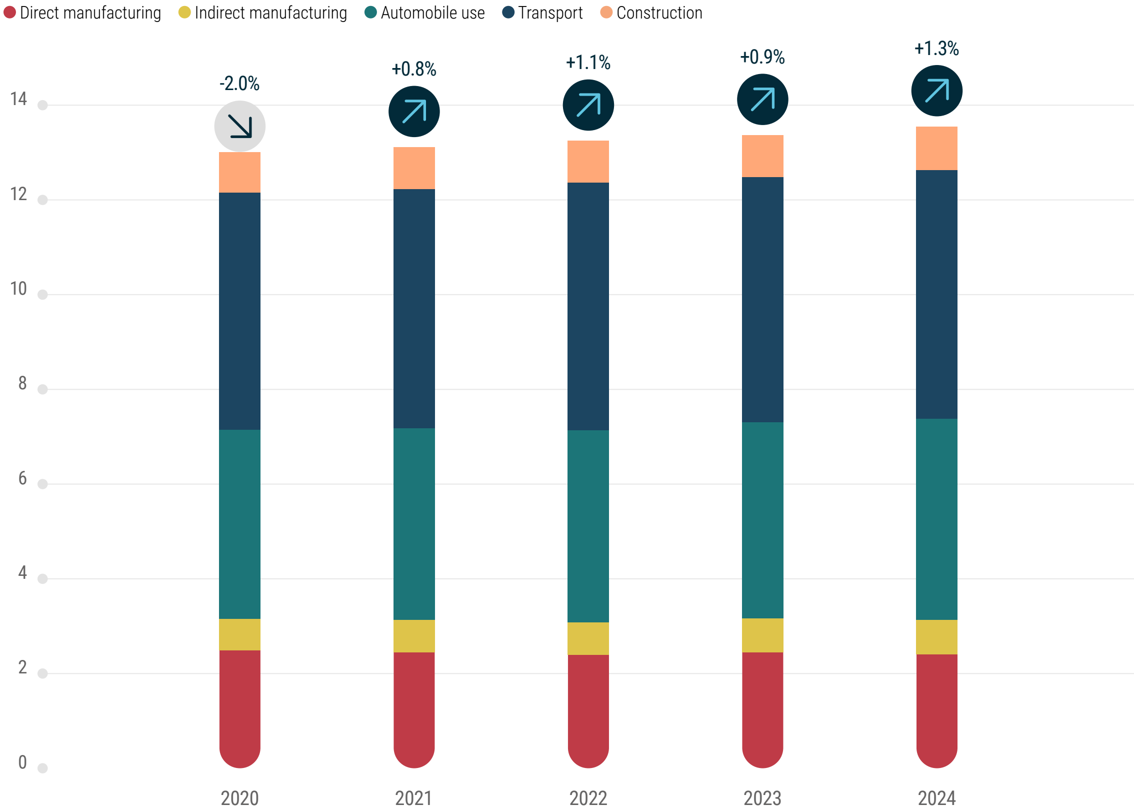
0.9 m jobs

1. Provisional
2. Including railways

SOURCE: **EUROSTAT**

EMPLOYMENT IN THE EU AUTOMOTIVE SECTOR

In million jobs, 2020 – 2024[1]



SOURCE: **EUROSTAT**

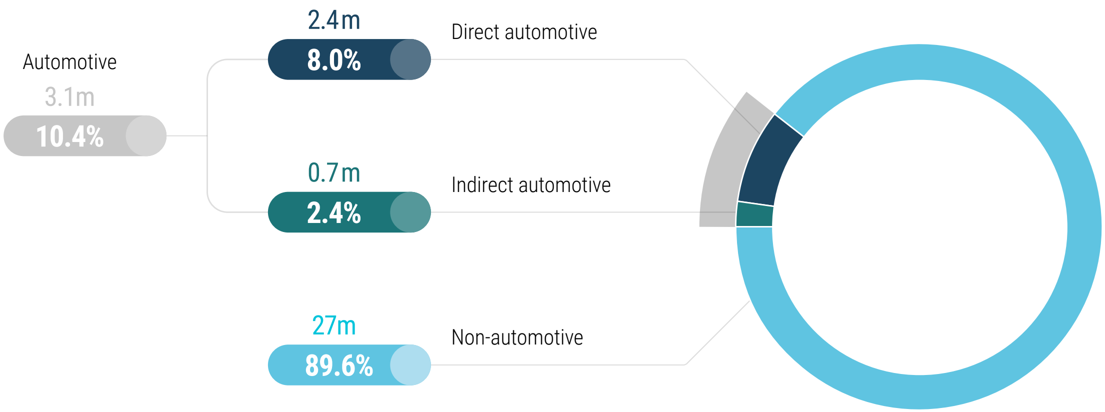
The automotive sector accounts for almost 7% of all EU jobs

1. Provisional data for 2024. Historical data can be subject to revision in case of updates from Eurostat

10.4% of EU manufacturing employment is in the automotive sector

MANUFACTURING JOBS IN THE EU AUTO SECTOR

% share, 2024[1]

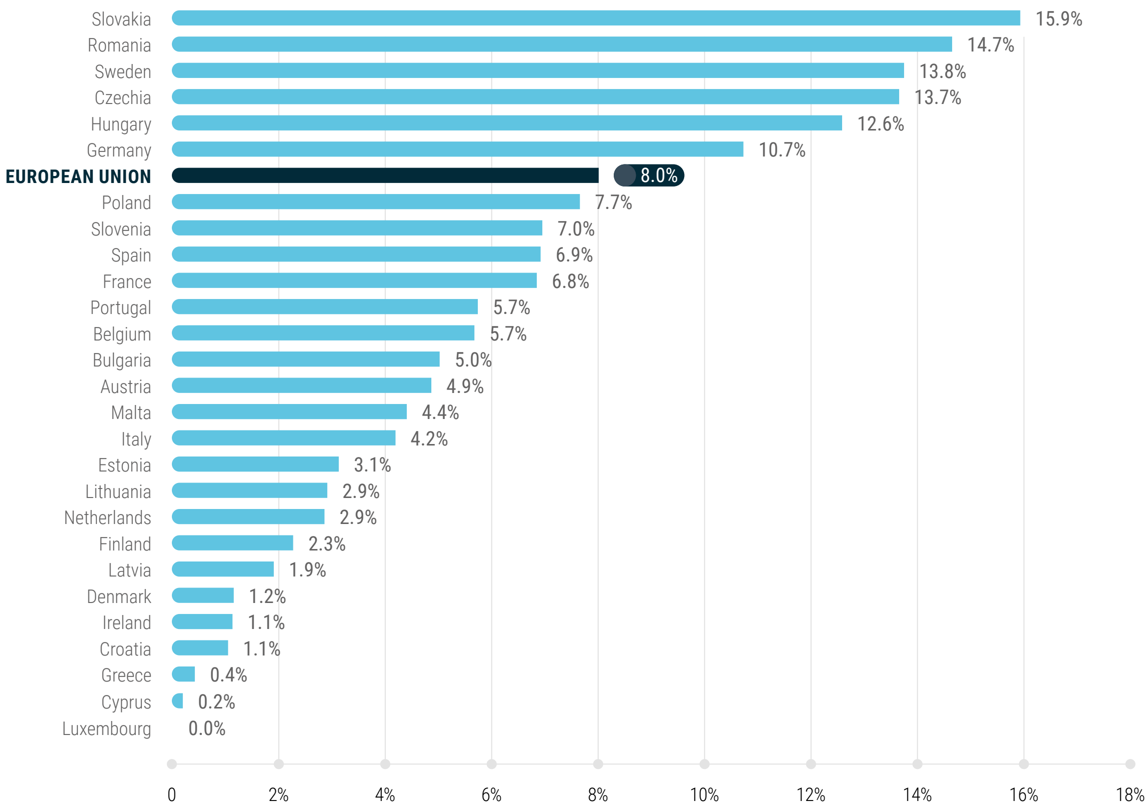


SOURCE: **EUROSTAT**

1. Provisional

EU DIRECT AUTOMOTIVE EMPLOYMENT

Share of total manufacturing by country, 2024[1]



SOURCE: **EUROSTAT**

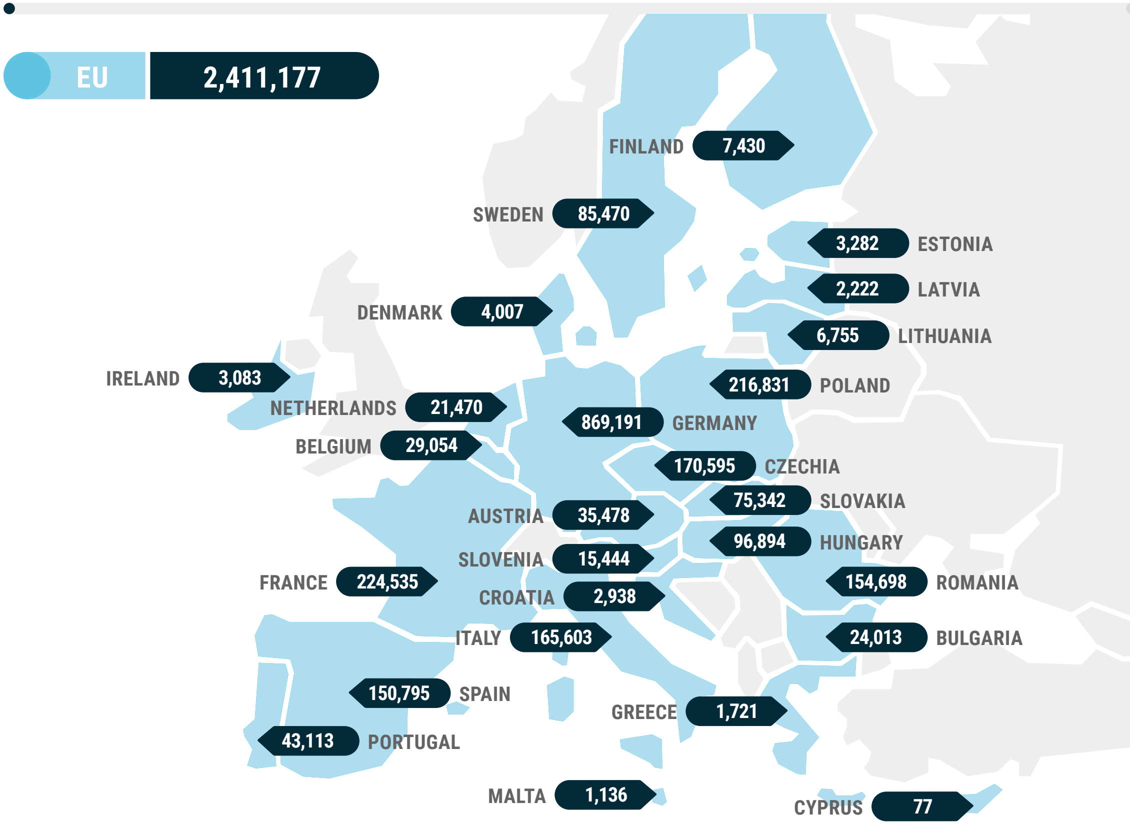
The auto sector directly provides 8% of all EU manufacturing jobs

1. Provisional

More than 2.4 million Europeans are directly employed in automotive manufacturing

EU DIRECT AUTOMOTIVE MANUFACTURING EMPLOYMENT

2024[1]

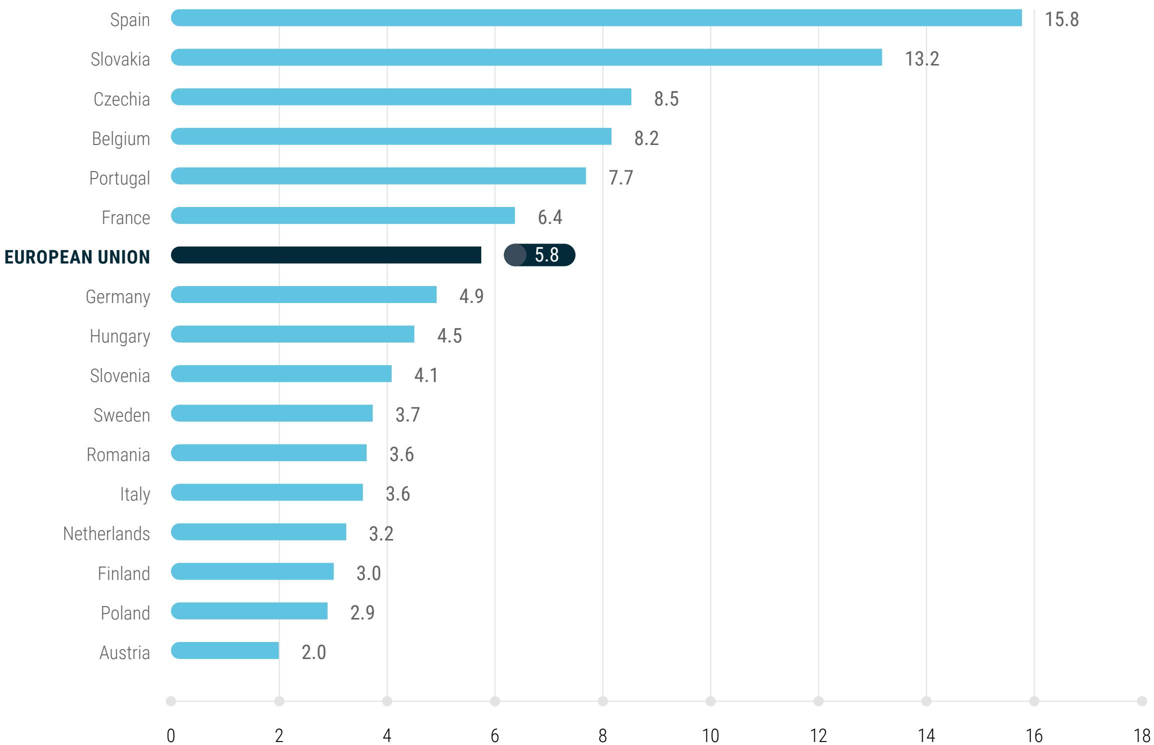


SOURCE: EUROSTAT

1. Provisional

VEHICLE PRODUCTION PER DIRECT AUTOMOTIVE MANUFACTURING EMPLOYEE

By country, 2024[1]



SOURCE: **EUROSTAT, MOBILITY GLOBAL**

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

1. Based on employment most recent data available

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PRODUCTION

THE AUTOMOBILE INDUSTRY
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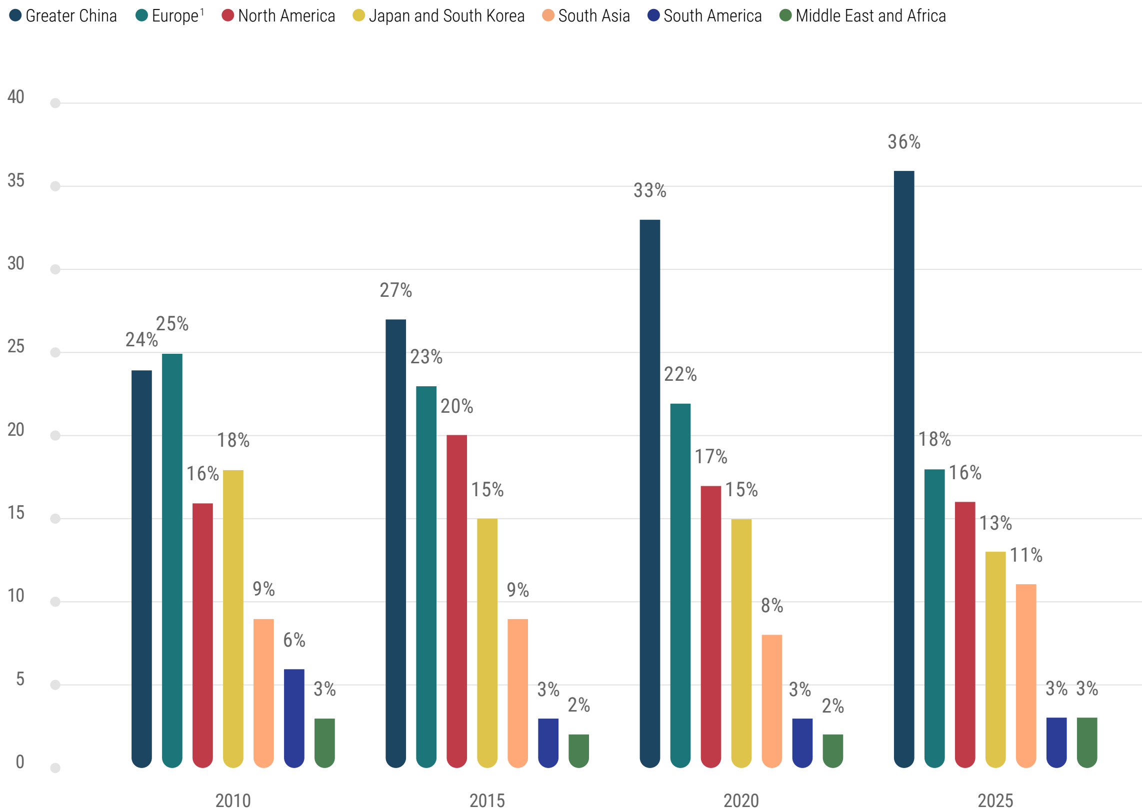
DRIVING MOBILITY FOR EUROPE

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

GLOBAL VEHICLE PRODUCTION

In million units, % share, 2010 – 2025

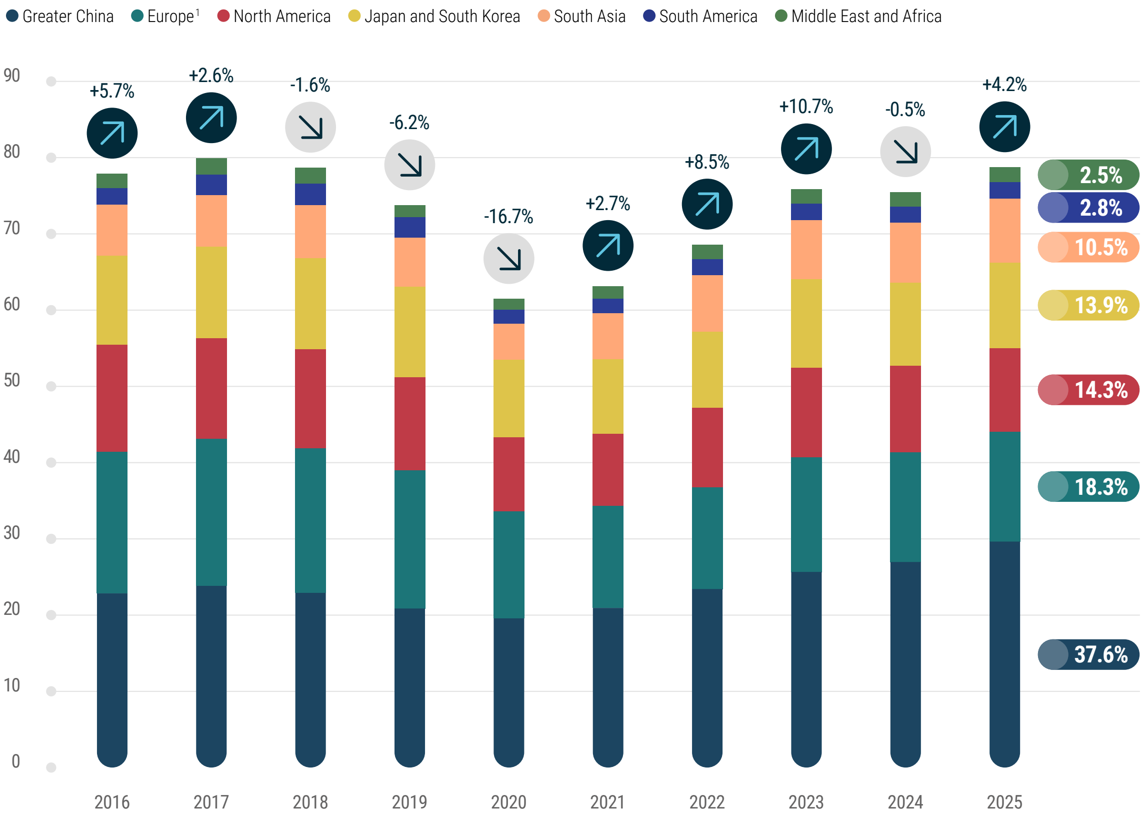


SOURCE: **MOBILITY GLOBAL**

1. Europe includes all countries extending eastward to and including Russia

GLOBAL CAR PRODUCTION

In million units, % change, % share, 2016 – 2025



SOURCE: **MOBILITY GLOBAL**

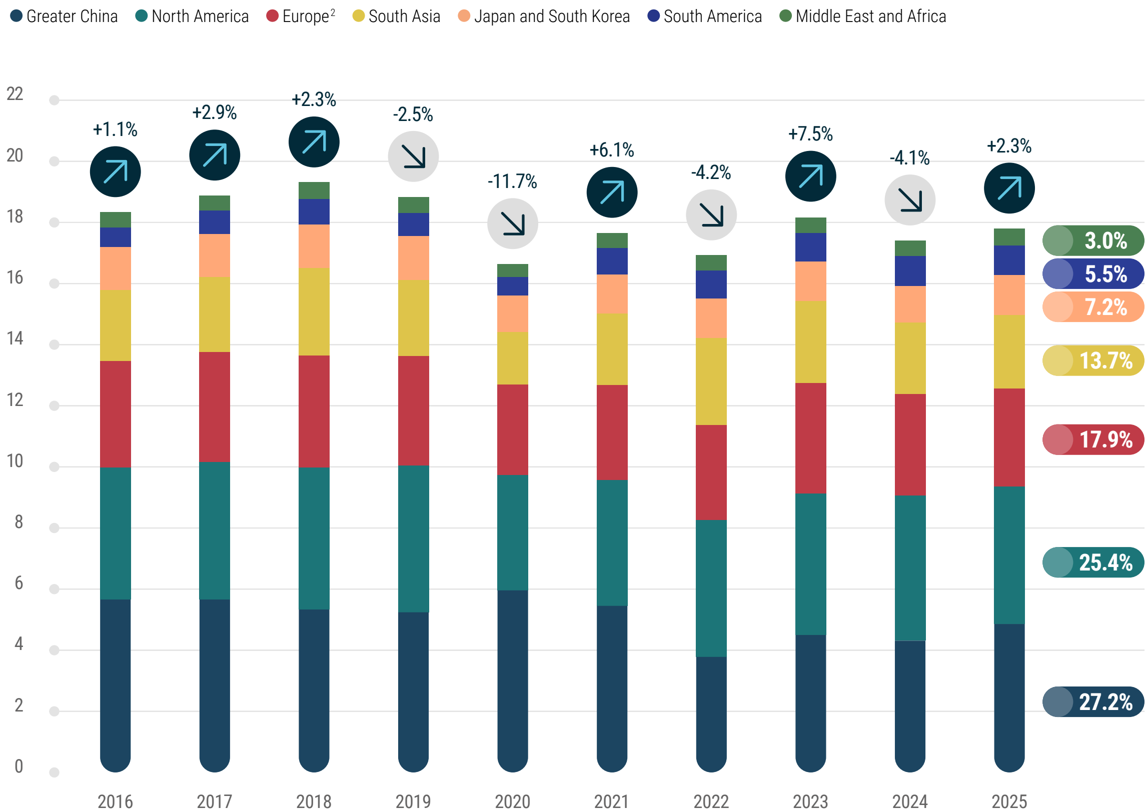
Global car production regained momentum in 2025 compared to the previous year

1. Europe includes all countries extending eastward to and including Russia

Global commercial vehicle production increased by around 2% in 2025

GLOBAL COMMERCIAL VEHICLE[1] PRODUCTION

In million units, % change, % share, 2016 – 2025

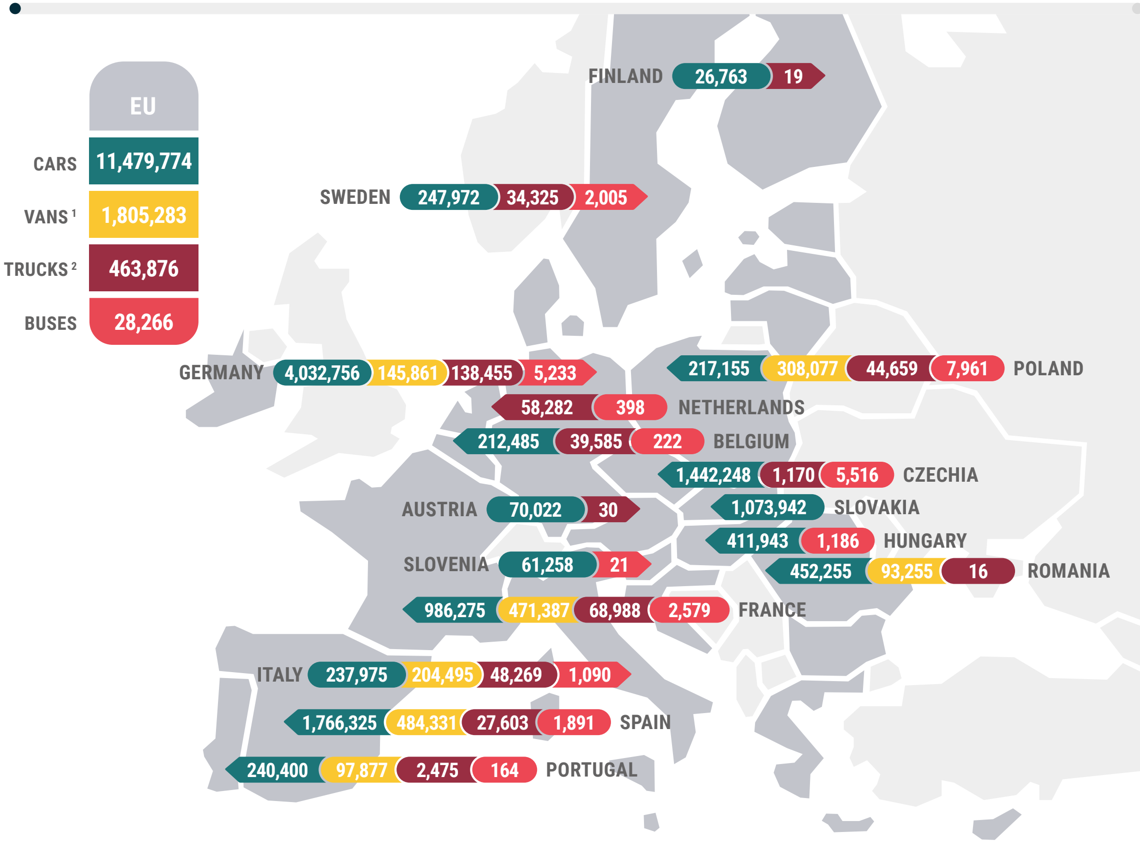


SOURCE: **MOBILITY GLOBAL**

1. Includes buses
2. Europe includes all countries extending eastward to and including Russia

EU VEHICLE PRODUCTION

2025



SOURCE: **MOBILITY GLOBAL**

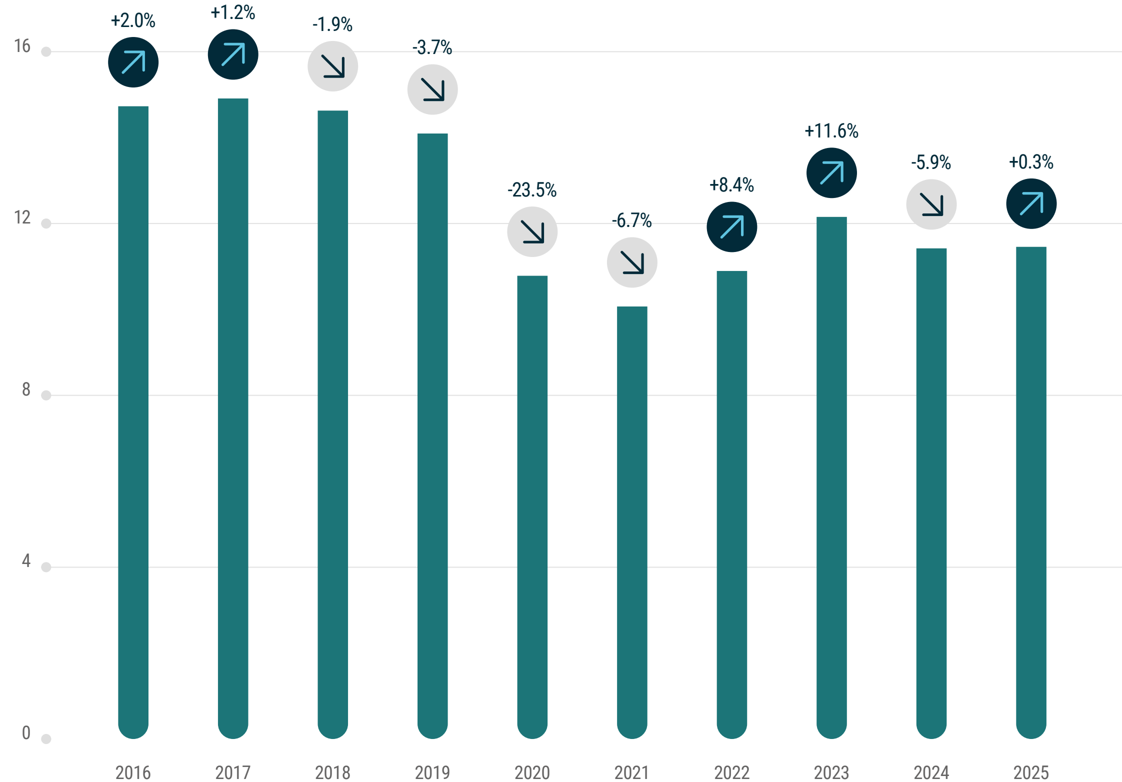
About 13.8 million vehicles are made in the EU annually

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

EU car production remained stable in 2025 compared to the previous year

EU CAR PRODUCTION

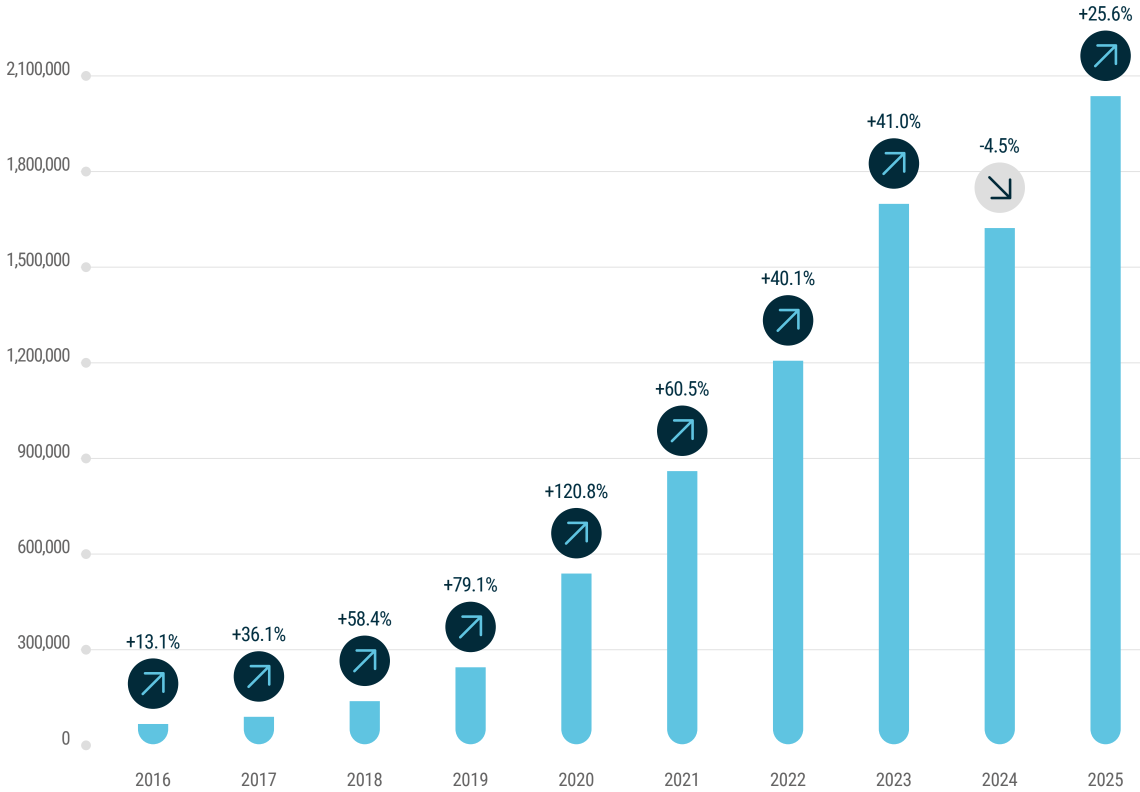
In million units, % change, 2016 – 2025



SOURCE: **MOBILITY GLOBAL**

EU BATTERY-ELECTRIC CAR PRODUCTION

In units, % change, 2016-2025



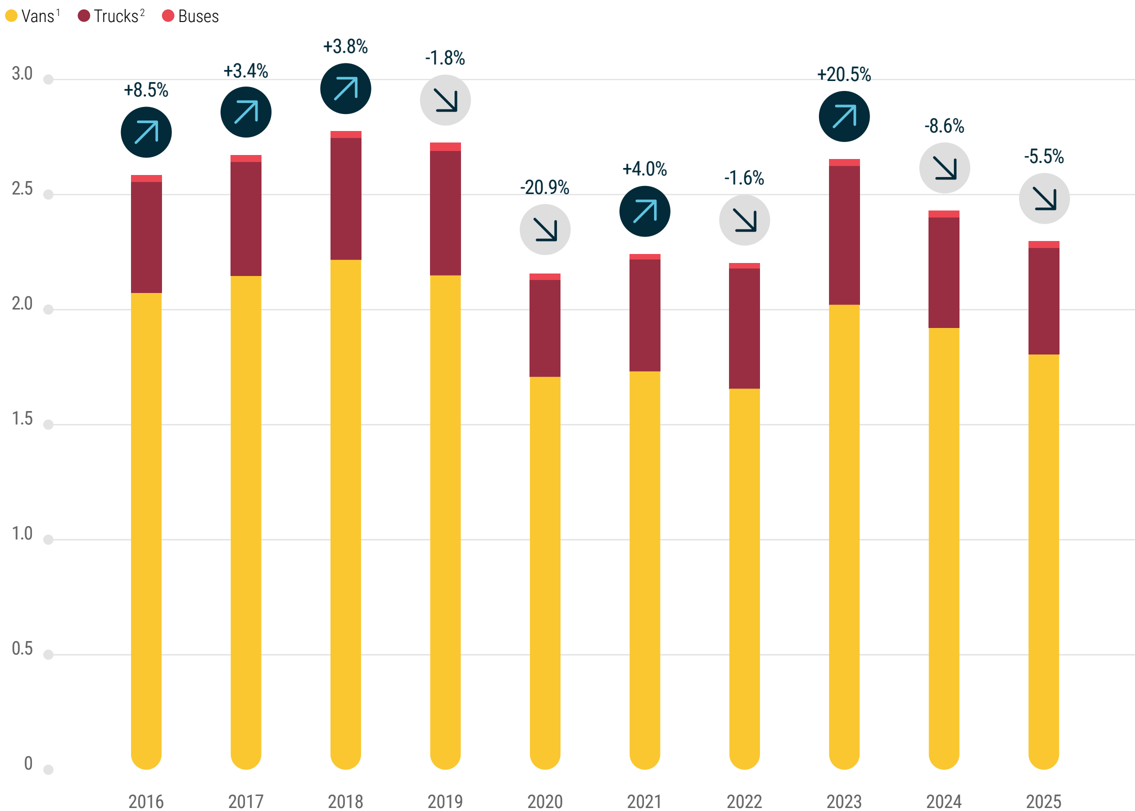
SOURCE: **MOBILITY GLOBAL**

The EU battery-electric car production grew rapidly these past ten years

EU commercial vehicle production continued to decline in 2025

EU COMMERCIAL VEHICLE PRODUCTION

In million units, % change, 2016 – 2025



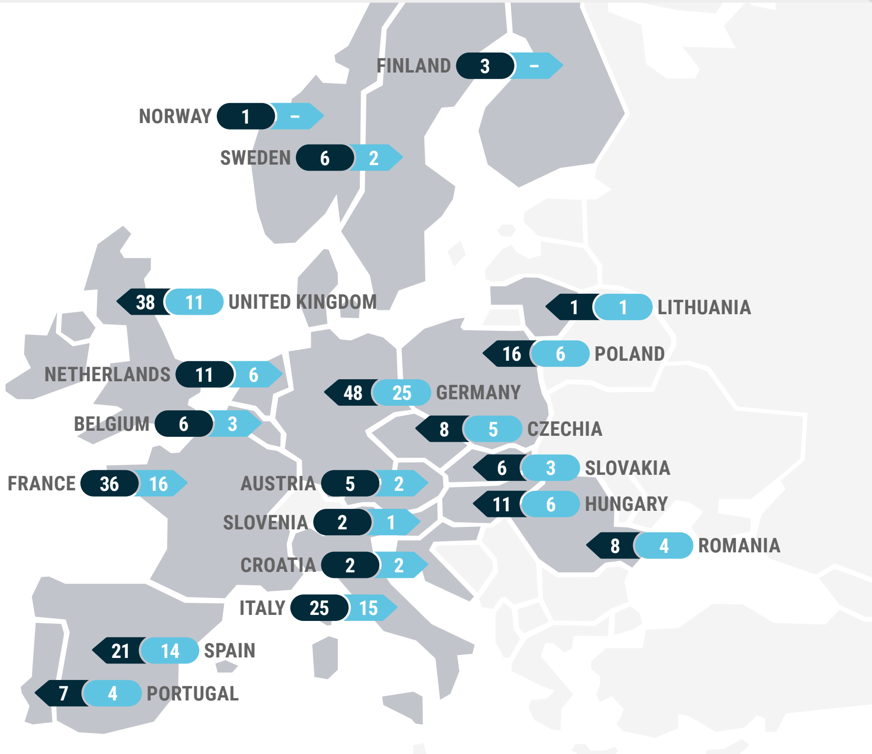
SOURCE: **MOBILITY GLOBAL**

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

AUTOMOBILE ASSEMBLY, BATTERY, AND ENGINE PLANTS

2026

● All plants ● BEV[1] production



	CARS	VANS	TRUCKS	BUSES	POWERTRAINS	BATTERIES	TOTAL
EU+NO+UK	100	29	32	42	61	75	260

SOURCE: **ACEA**

There are 260 automobile assembly, engine/ electric motors, and battery production plants in Europe[2]

1. Battery-electric vehicle
2. Europe includes 27 EU member states, Norway and the UK

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REGISTRATIONS

THE AUTOMOBILE INDUSTRY
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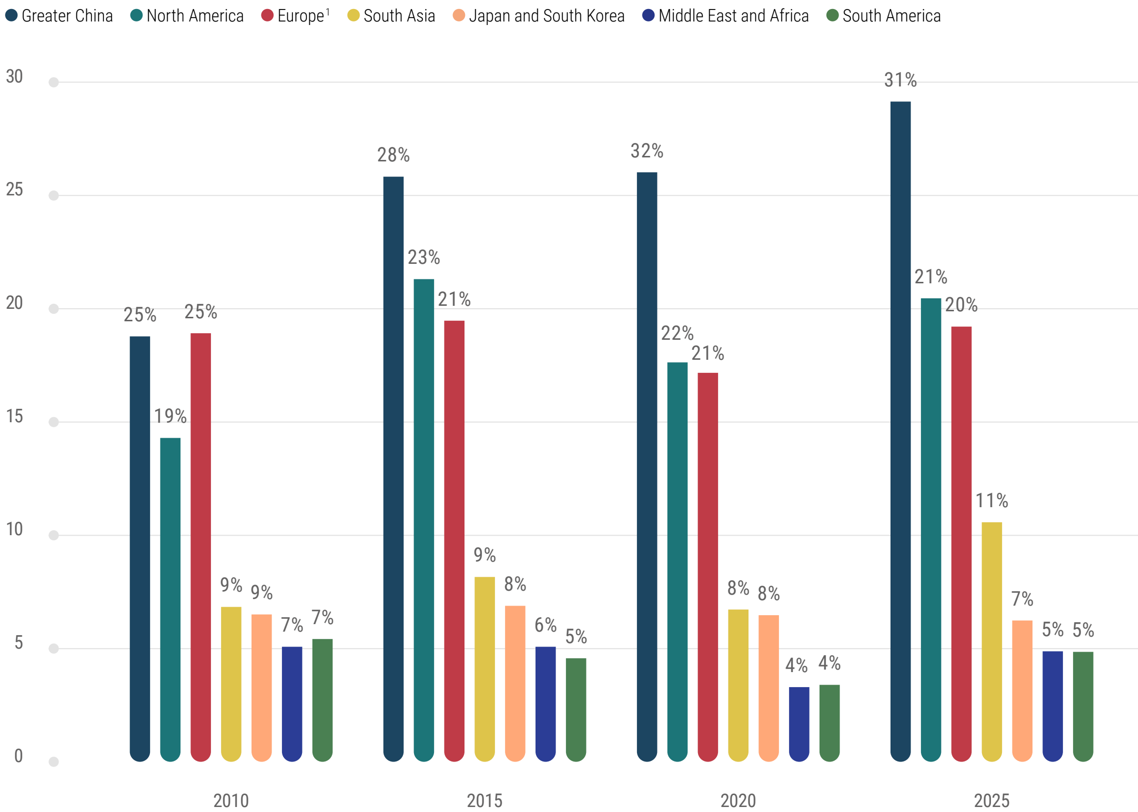
DRIVING MOBILITY FOR EUROPE

Europe accounts for a fifth of global vehicle sales

GLOBAL NEW VEHICLE REGISTRATIONS

In million units, % share, 2010 – 2025

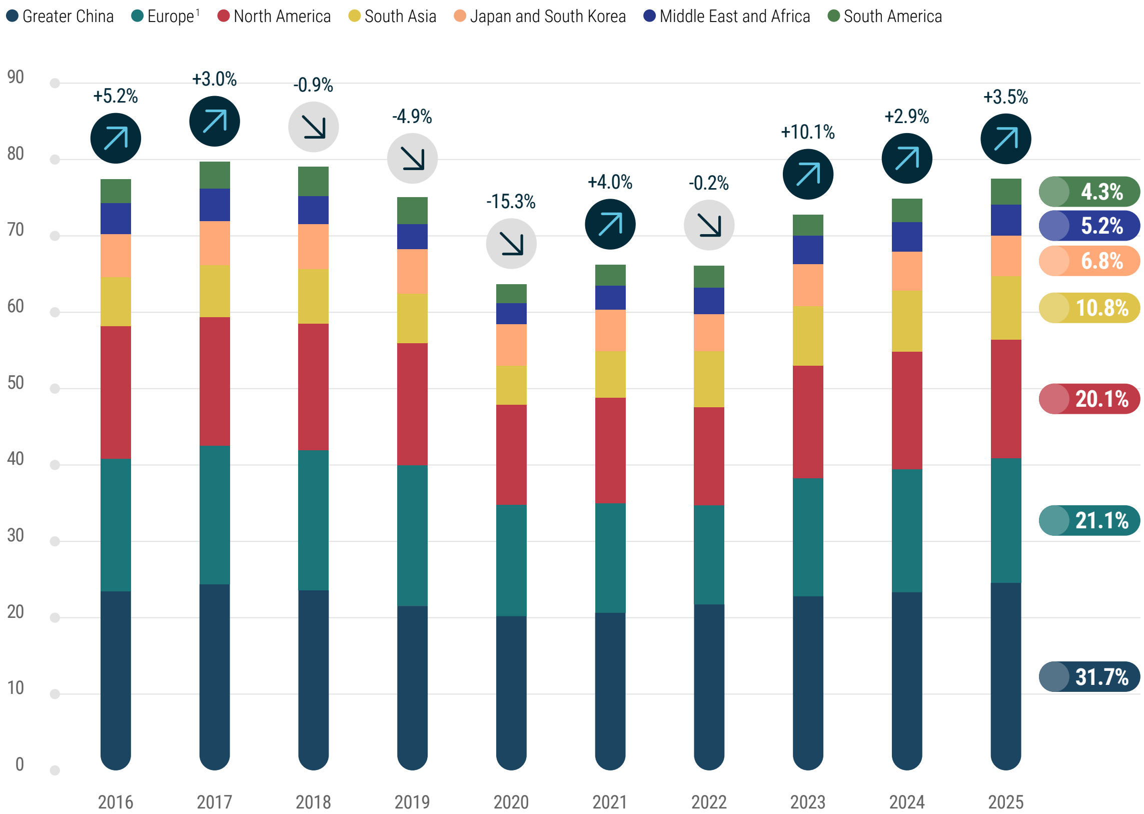


SOURCE: **MOBILITY GLOBAL**

1. Europe includes all countries extending eastward to and including Russia

GLOBAL NEW CAR REGISTRATIONS

In million units, % change, % share, 2016 – 2025



SOURCE: **MOBILITY GLOBAL**

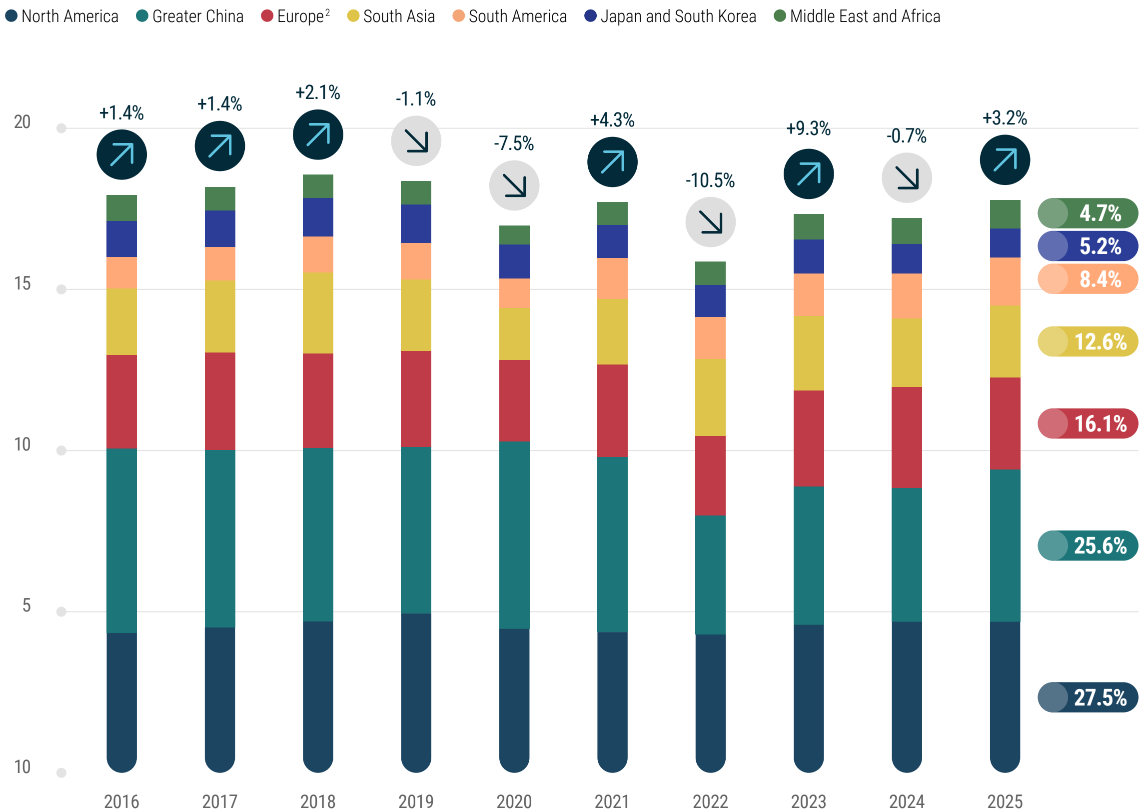
Europe accounts for about 21% of global car sales

1. Europe includes all countries extending eastward to and including Russia

Europe accounts for more than 16% of global commercial vehicle sales

GLOBAL NEW COMMERCIAL VEHICLE[1] REGISTRATIONS

In million units, % change, % share, 2016 – 2025

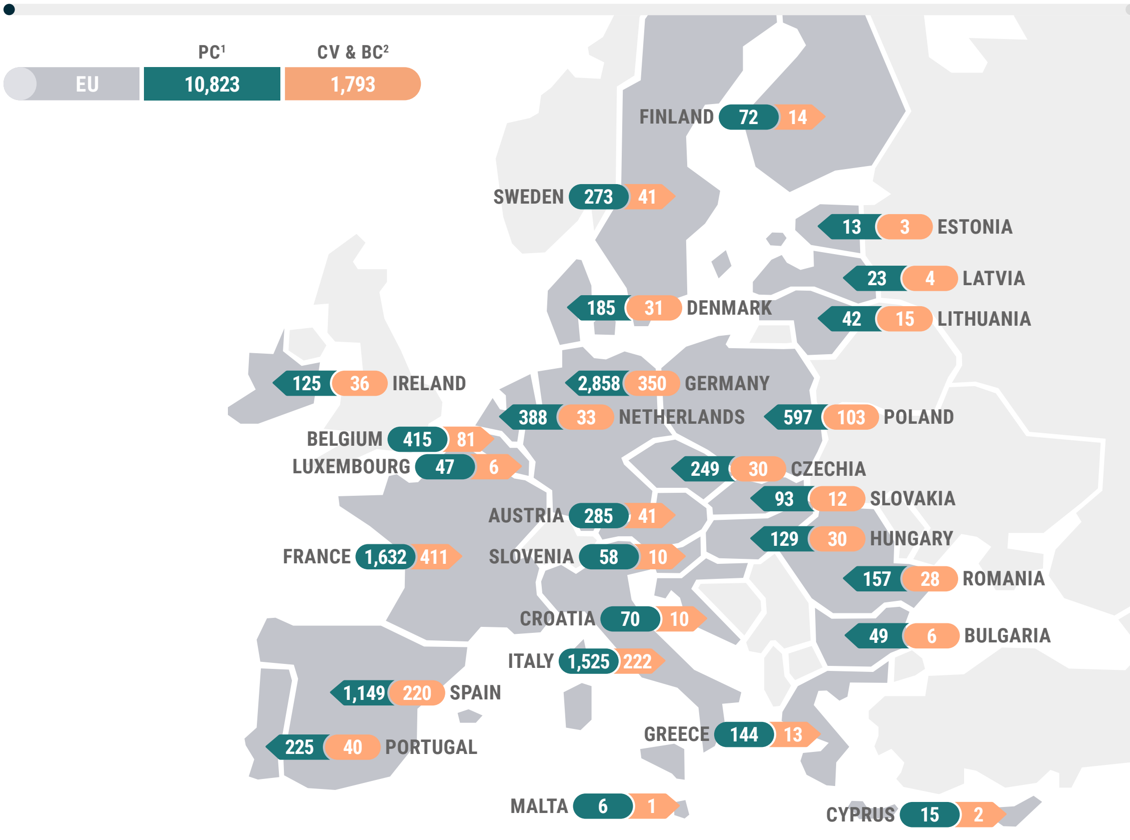


SOURCE: **MOBILITY GLOBAL**

1. Includes buses
2. Europe includes all countries extending eastward to and including Russia

NEW EU VEHICLE REGISTRATIONS

By country, in thousand units, 2025



SOURCE: **ACEA**

Auto makers sold more than 12.6 million new vehicles in the EU in 2025

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

Vehicle sales largely mirror economic trends

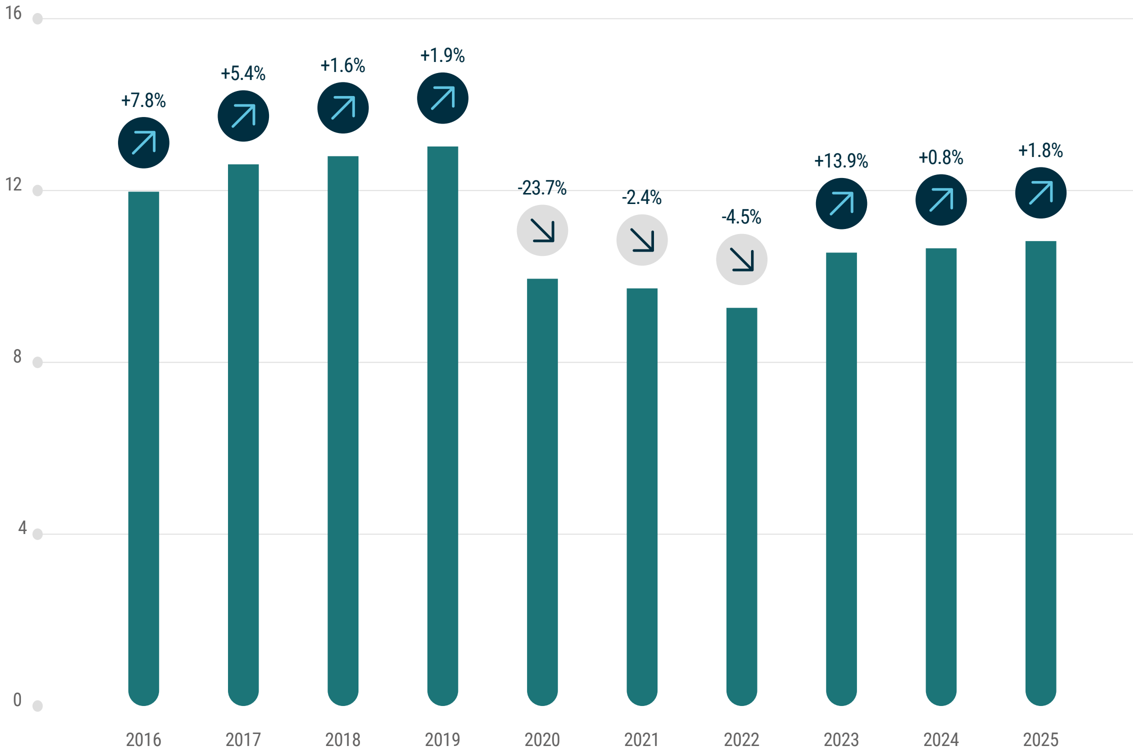
NEW EU VEHICLE SALES AND GDP

2018 – 2027

SOURCE: **EUROPEAN COMMISSION, MOBILITY GLOBAL**

NEW EU CAR REGISTRATIONS

In million units, % change, 2016 – 2025



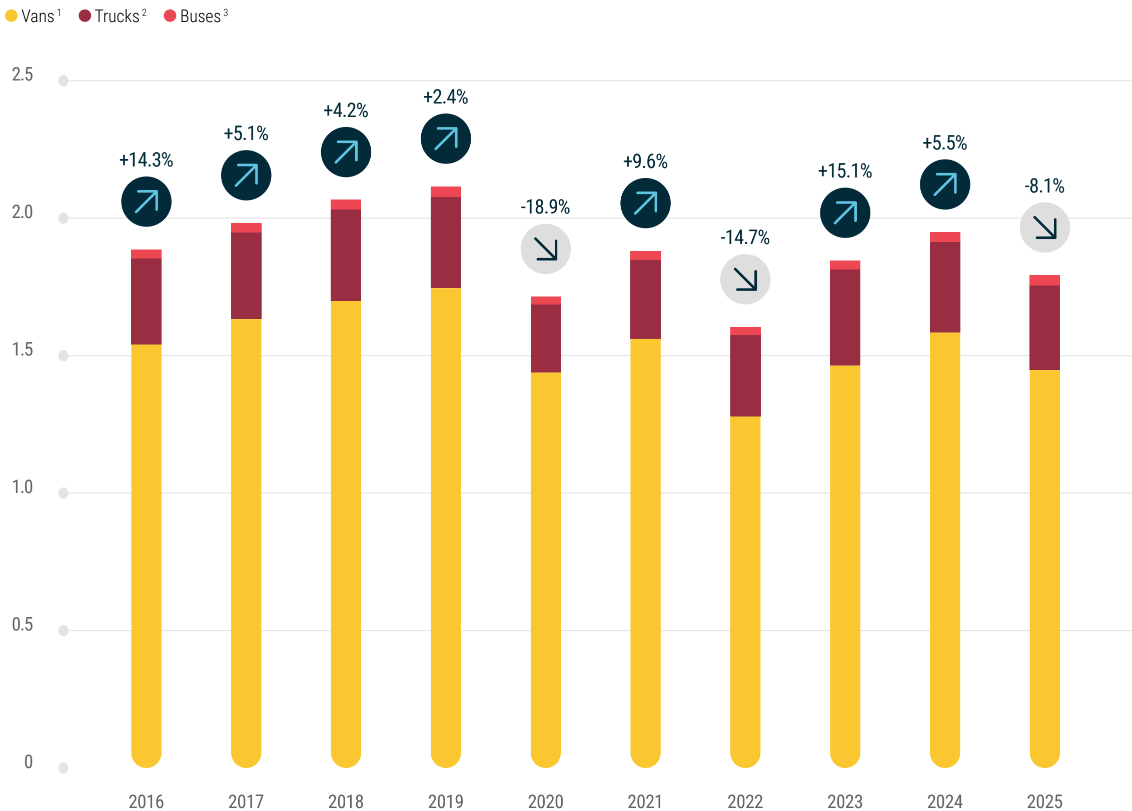
SOURCE: **ACEA**

EU car sales increased by almost 2% in 2025 compared to the previous year

EU commercial vehicle sales contracted by 8% in 2025

NEW EU COMMERCIAL VEHICLE REGISTRATIONS

In million units, % change, 2016 – 2025

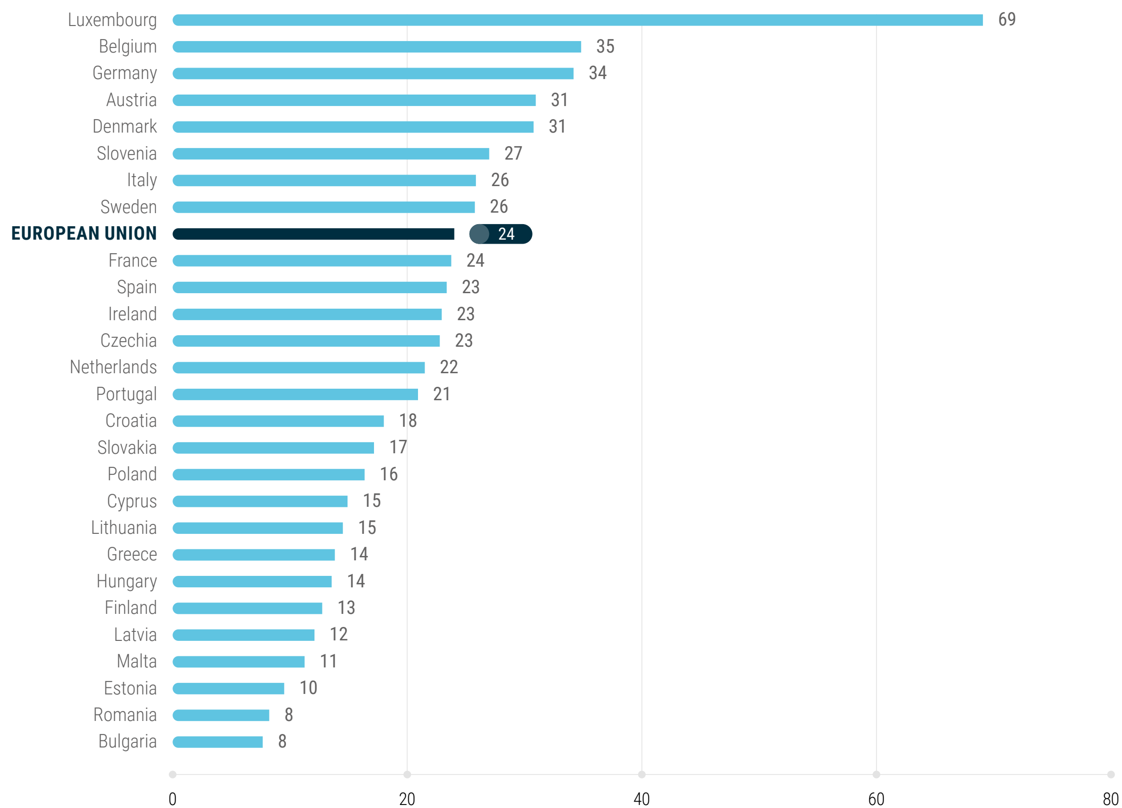


SOURCE: **ACEA**

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, 2025



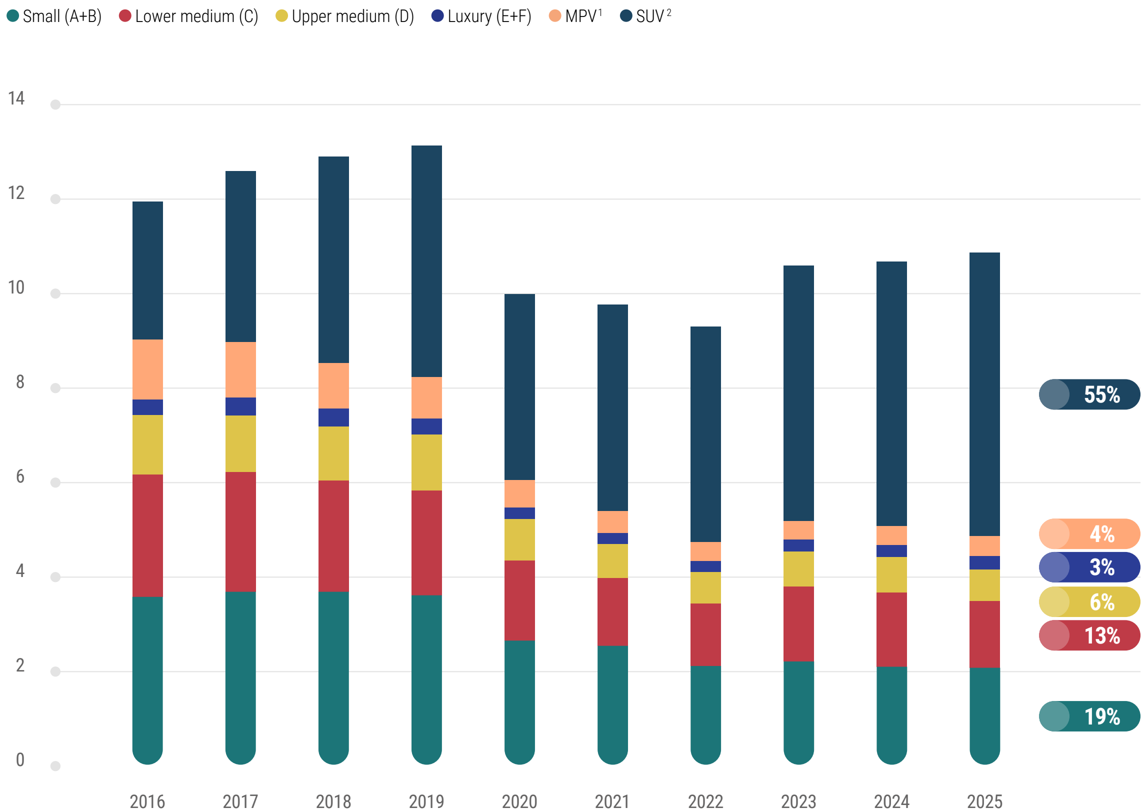
SOURCE: **ACEA, EUROSTAT**

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

SUVs represented more than half of new EU car sales in 2025

NEW EU CAR SALES BY SEGMENT

In million units, % share, 2016 – 2025

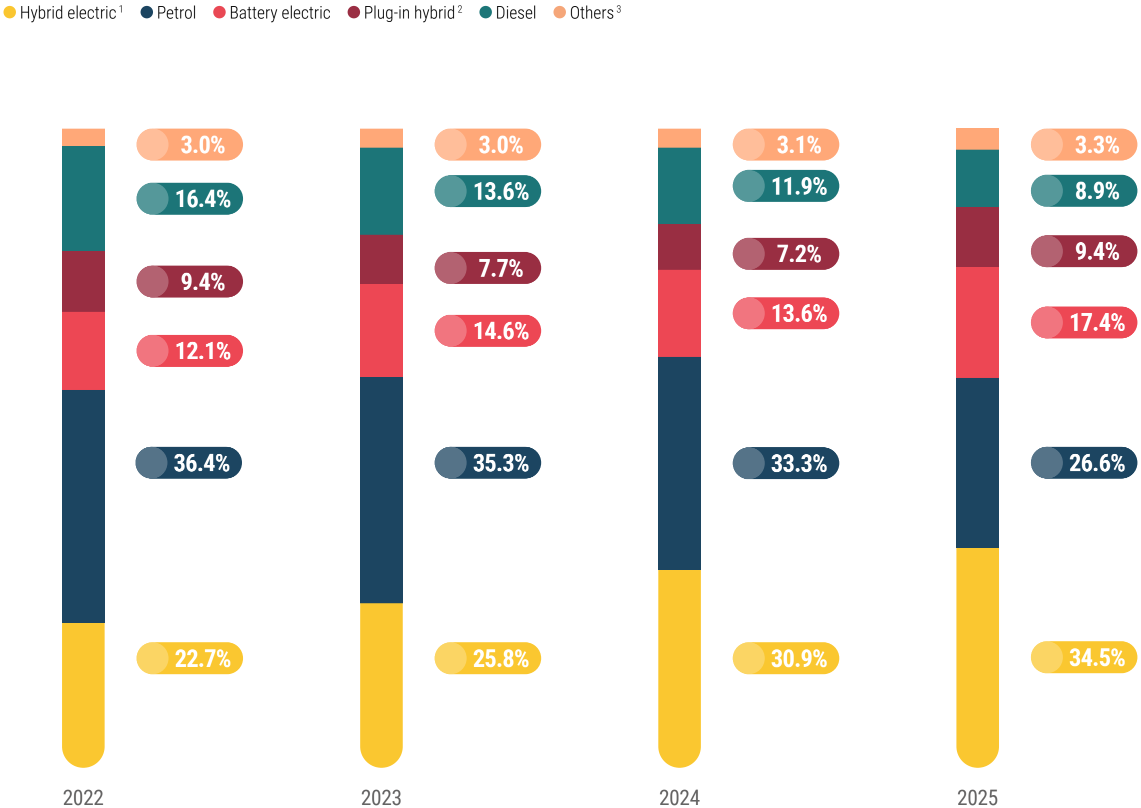


SOURCE: **MOBILITY GLOBAL**

1. Multi-purpose vehicles
2. Sport utility vehicles

NEW EU CAR SALES BY POWER SOURCE

Market share, 2022 – 2025



SOURCE: **ACEA**

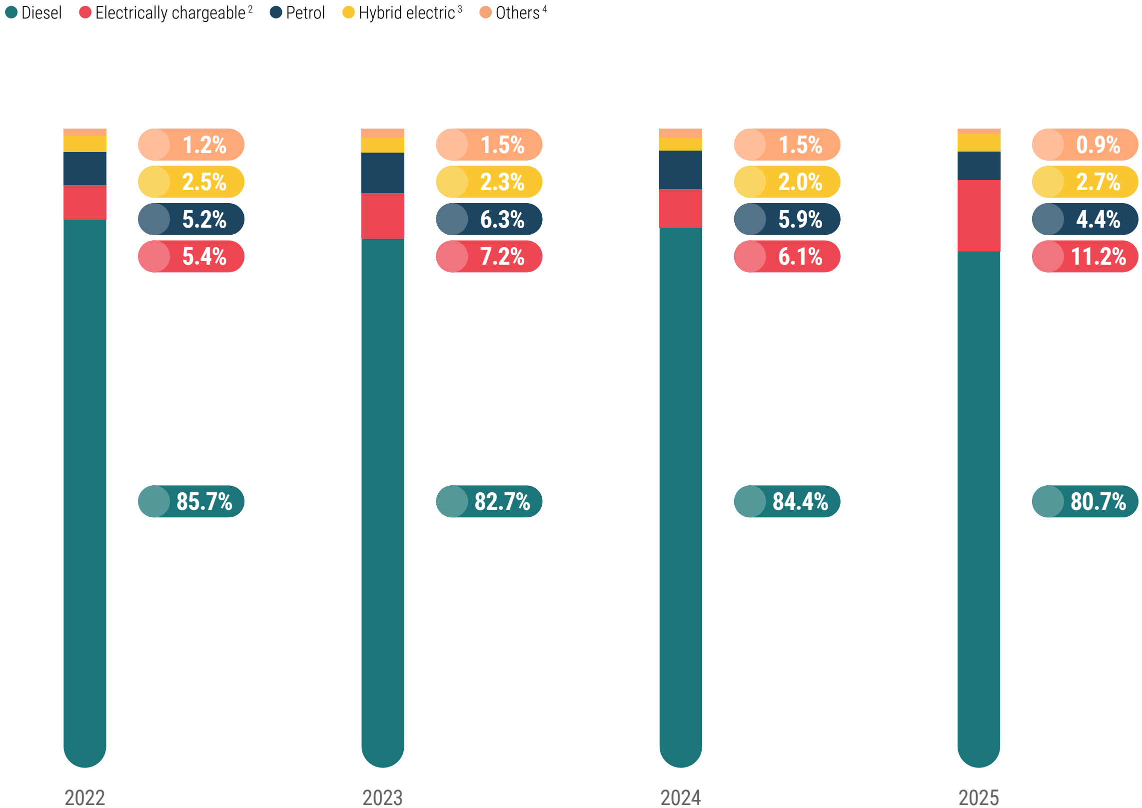
Hybrid-electric cars are now the top choice among consumers in new car sales

1. Includes full and mild hybrids
2. Includes extended-range electric vehicles
3. Includes natural gas, LPG, ethanol, and fuel-cell electric vehicles

The EU market share of electrically-chargeable vans increased to 11% in 2025

NEW EU VAN[1] SALES BY POWER SOURCE

Market share, 2022 – 2025

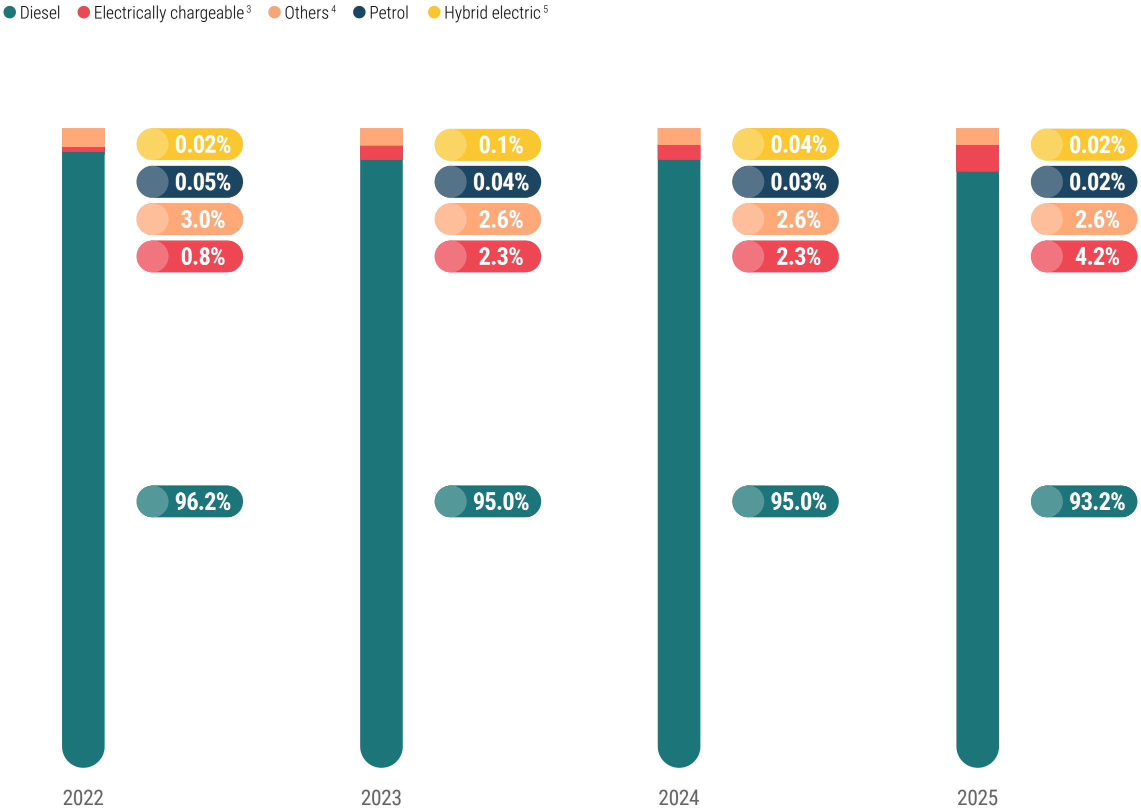


SOURCE: **ACEA**

1. Light commercial vehicles up to 3.5 tonnes
2. Includes battery and plug-in-hybrid electric 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, 2022 – 2025



SOURCE: **ACEA**

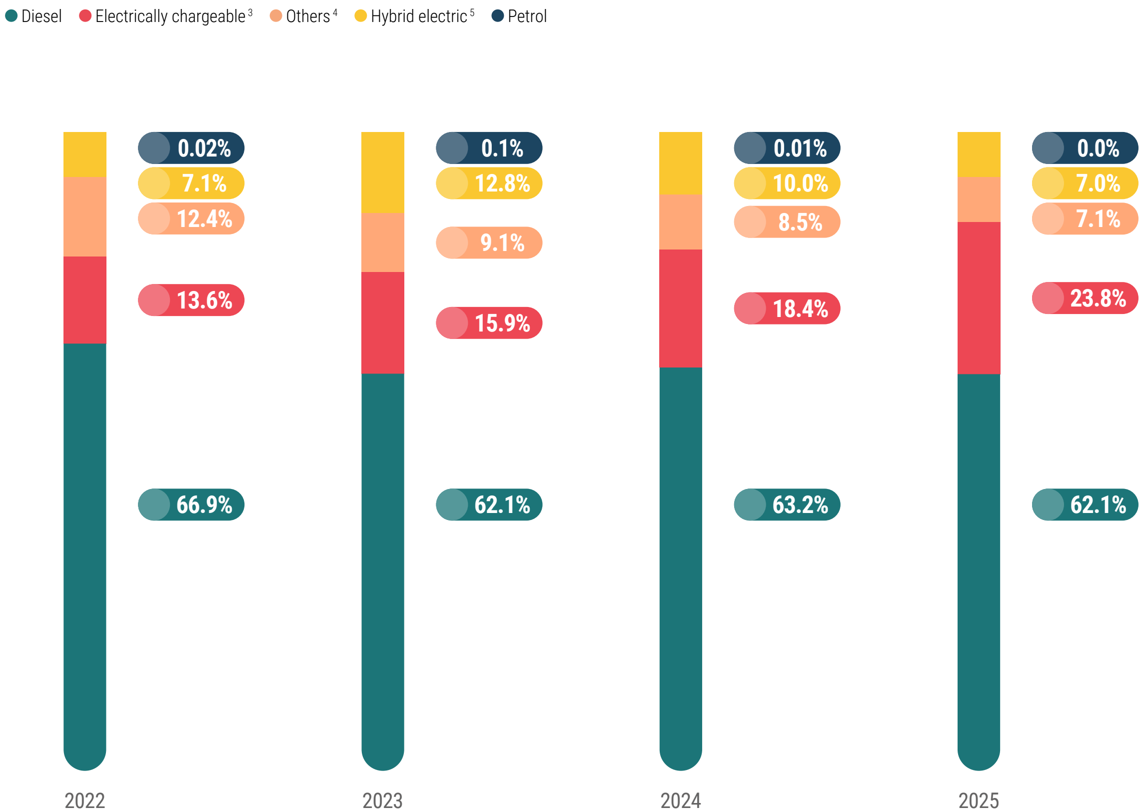
Electrically-chargeable trucks are gradually gaining ground from a low basis

1. Data for Bulgaria and Malta not available
2. Commercial vehicles over 3.5 tonnes
3. Includes battery and plug-in-hybrid electric vehicles
4. Includes natural gas, LPG, ethanol, and fuel-cell electric vehicles
5. Includes full and mild hybrids

The market share of electrically-chargeable buses is 75% higher in 2025 than in 2022

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

Market share, 2022 – 2025



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 natural gas, LPG, ethanol, and fuel-cell electric vehicles
5. Includes full and mild hybrids

TRADE

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2026

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DRIVING MOBILITY FOR EUROPE

The trade surplus generated by the EU auto industry fell by 11% in 2025

EU NEW VEHICLE TRADE

By type, in million €, 2025

Trade in value	Cars	Vans [1]	Trucks [2]	Buses	TOTAL
2025					
Imports	71,876	6,208	2,546	3,829	84,460
Exports	147,736	7,283	13,232	918	169,169
Trade balance	75,861	1,075	10,685	-2,912	84,710
2024					
Imports	74,231	6,313	2,107	2,727	85,378
Exports	157,731	8,585	13,913	742	180,971
Trade balance	83,500	2,272	11,805	-1,985	95,592
% change 25/24					
Imports	-3.2%	-1.7%	+20.8%	+40.4%	-1.1%
Exports	-6.3%	-15.2%	-4.9%	+23.6%	-6.5%
Trade balance	-9.1%	-52.7%	-9.5%	+46.7%	-11.4%

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

SOURCE: **EUROSTAT**

EU NEW VEHICLE TRADE

By type, in units, 2025

Trade in volume	Cars	Vans [1]	Trucks [2]	Buses	TOTAL
2025					
Imports	3,578,252	265,731	154,466	22,234	4,020,683
Exports	4,473,945	352,331	159,982	23,078	5,009,336
2024					
Imports	3,463,467	304,880	136,632	17,073	3,922,052
Exports	4,687,261	405,004	174,119	5,557	5,271,941
% change 25/24					
Imports	+3.3%	-12.8%	+13.1%	+30.2%	+2.5%
Exports	-4.6%	-13.0%	-8.1%	+315.3%	-5.0%

SOURCE: **EUROSTAT**

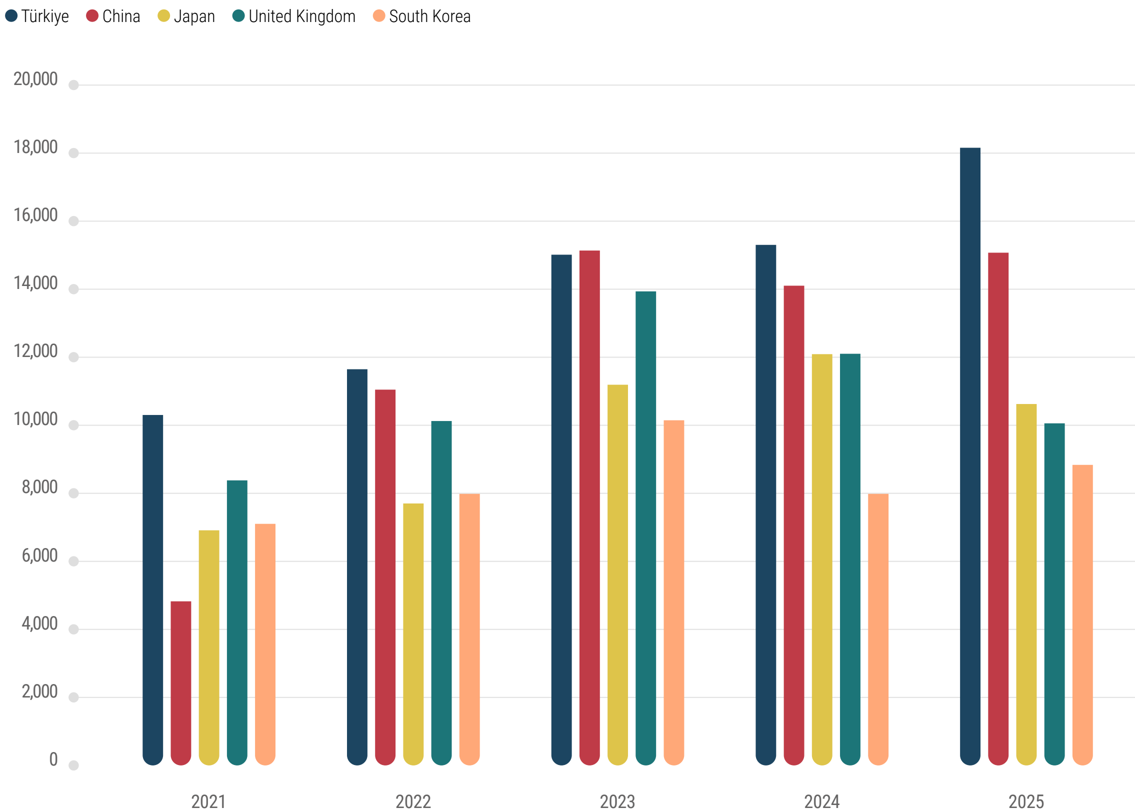
EU vehicle imports increased while exports declined in 2025

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

The value of EU vehicle imports from China has increased substantially

MAIN COUNTRIES OF ORIGIN OF EU NEW VEHICLE IMPORTS

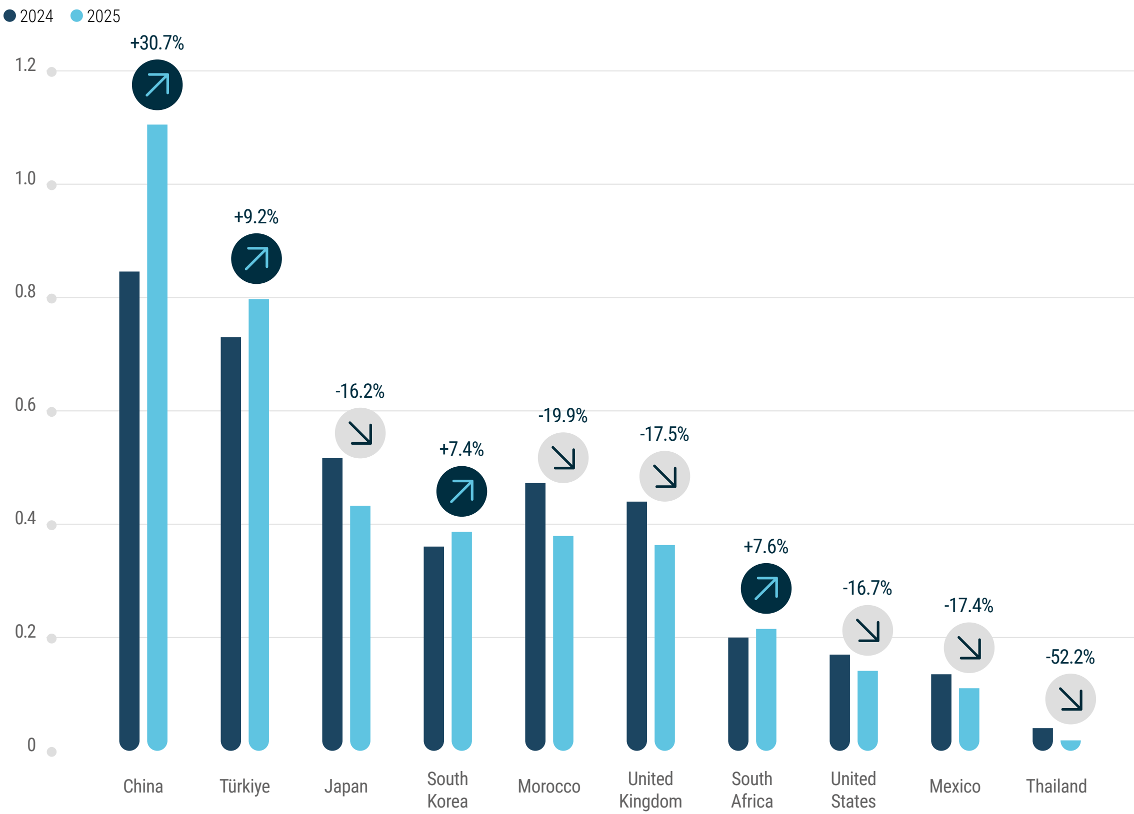
In million €, 2021 – 2025



SOURCE: **EUROSTAT**

MAIN COUNTRIES OF ORIGIN OF EU NEW VEHICLE IMPORTS

In million units, 2025



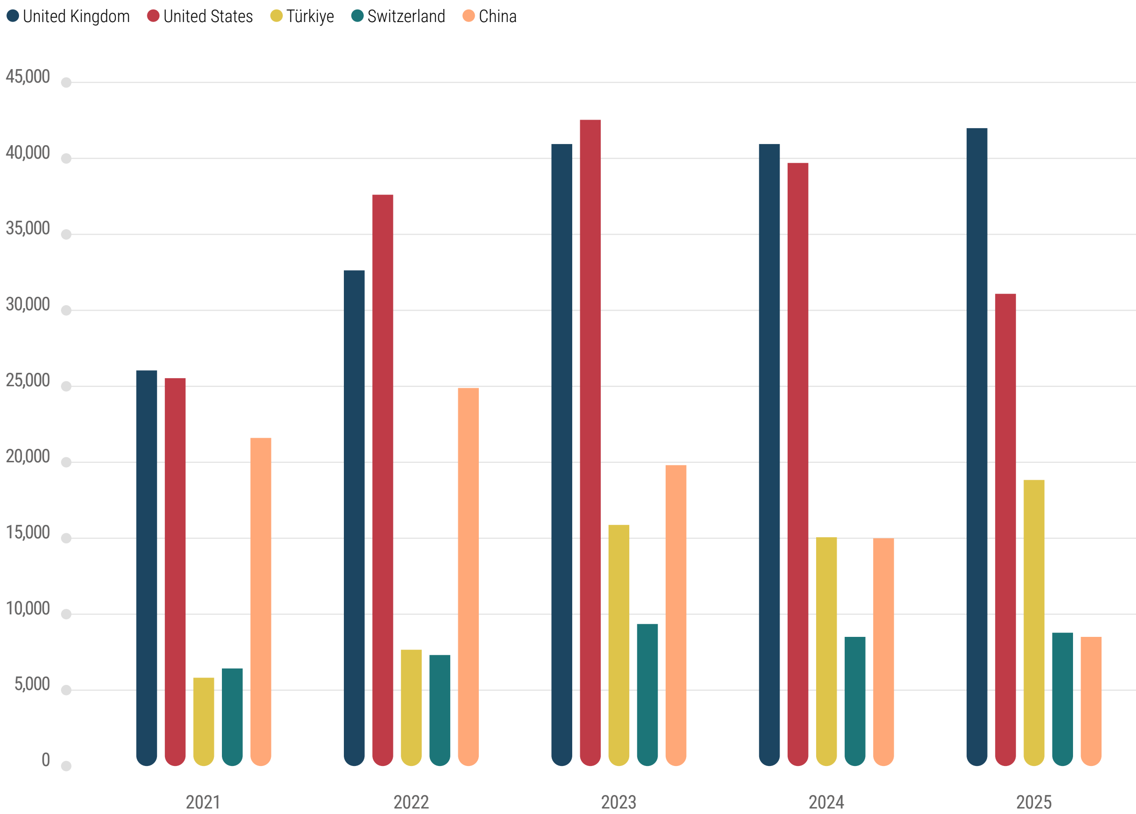
SOURCE: **EUROSTAT**

China, Türkiye, and Japan are the top three countries of origin for EU vehicle imports (in units)

The US and the UK remain the two most valuable markets for EU vehicle exports

MAIN DESTINATIONS FOR EU NEW VEHICLE EXPORTS

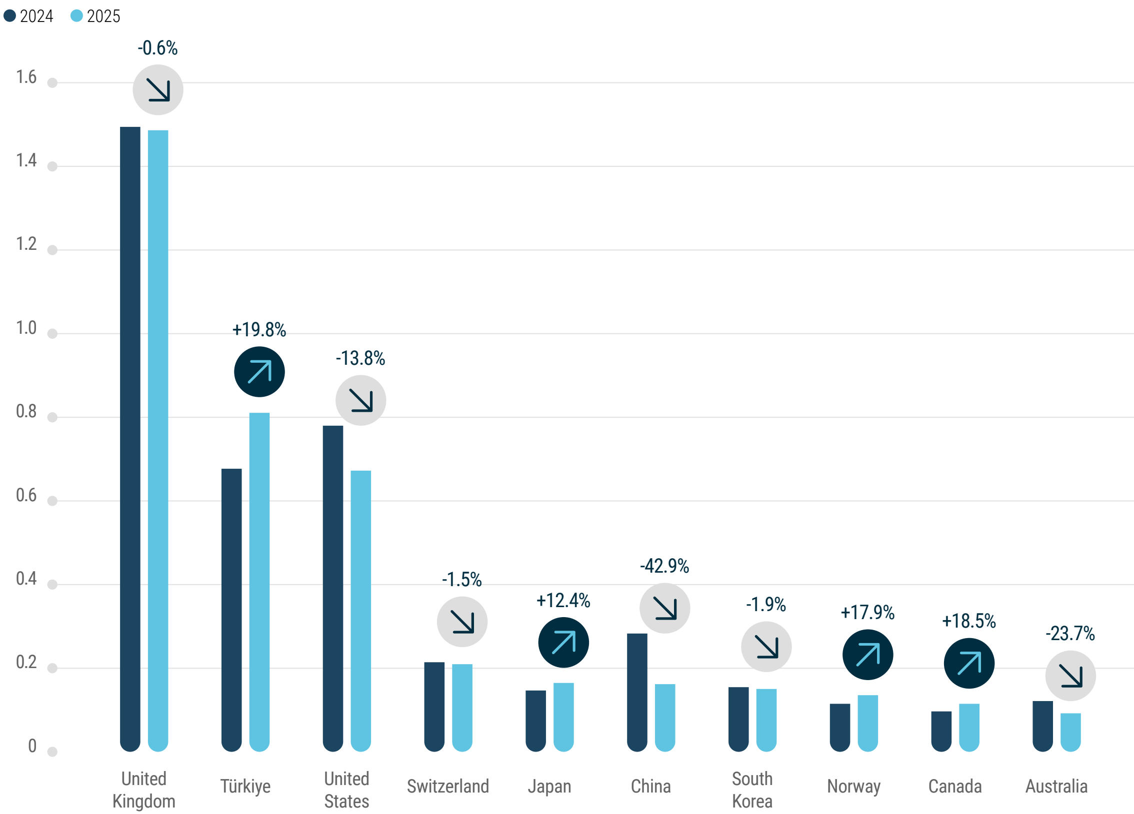
In million €, 2021 – 2025



SOURCE: **EUROSTAT**

MAIN DESTINATIONS FOR EU NEW VEHICLE EXPORTS

In million units, 2025



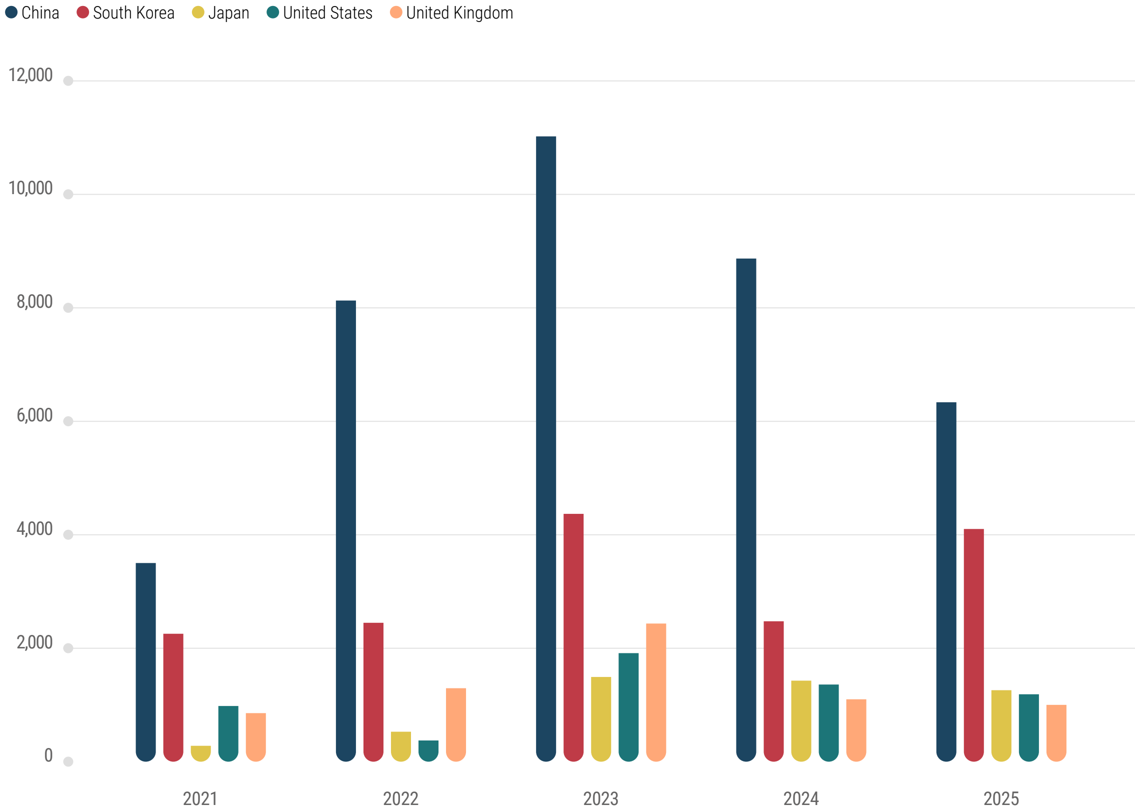
SOURCE: **EUROSTAT**

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

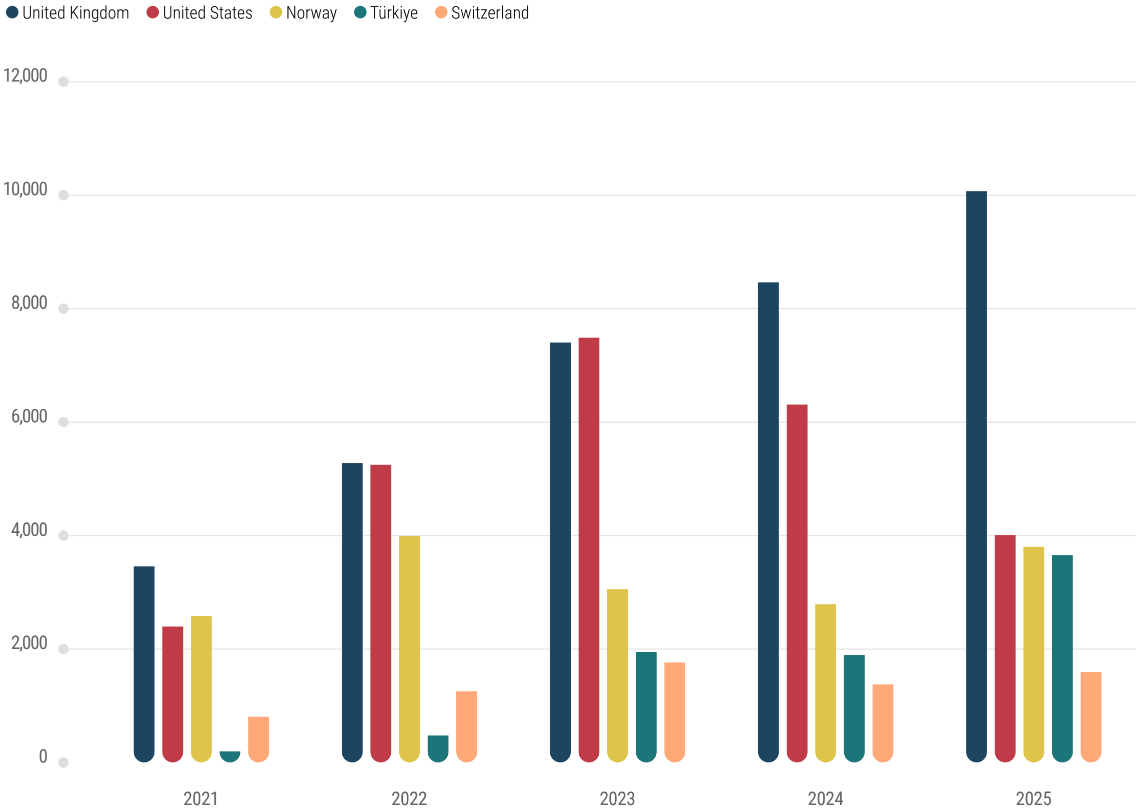
In million €, 2021 – 2025



SOURCE: **EUROSTAT**

MAIN COUNTRIES OF DESTINATION OF EU BATTERY-ELECTRIC CAR EXPORTS

In million €, 2021 – 2025



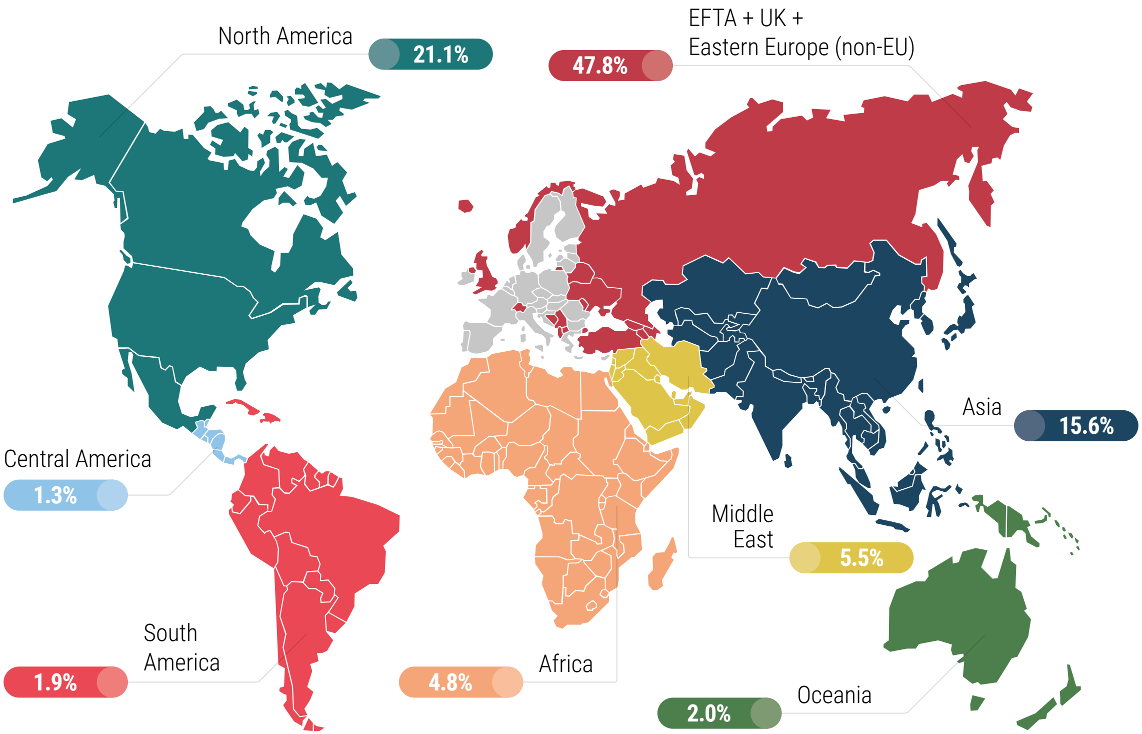
SOURCE: **EUROSTAT**

The UK is by far the most valuable market for EU battery-electric car exports

Almost half of EU vehicle exports go to other European (non-EU) countries

DESTINATIONS FOR EU NEW VEHICLE EXPORTS

Value market share, 2025



SOURCE: **EUROSTAT**

VEHICLES ON ROADS

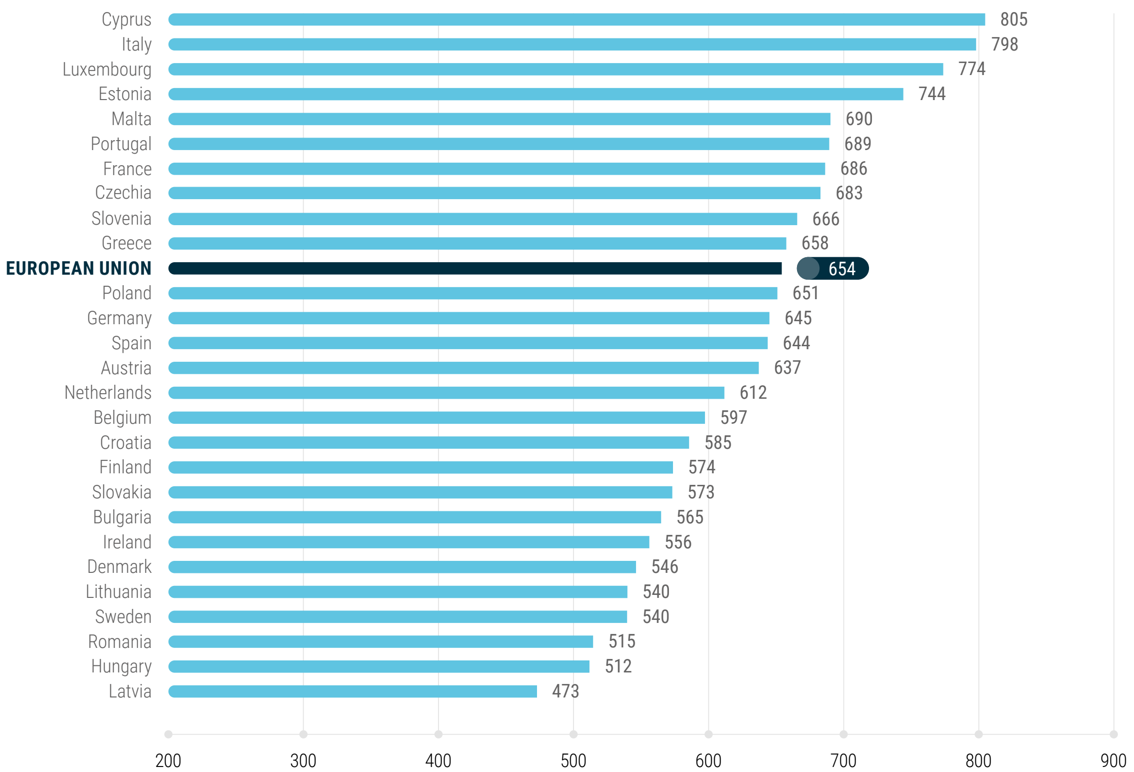
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2026

DRIVING MOBILITY FOR EUROPE

There are 654 vehicles per 1,000 inhabitants in the EU

VEHICLES PER 1,000 EU INHABITANTS

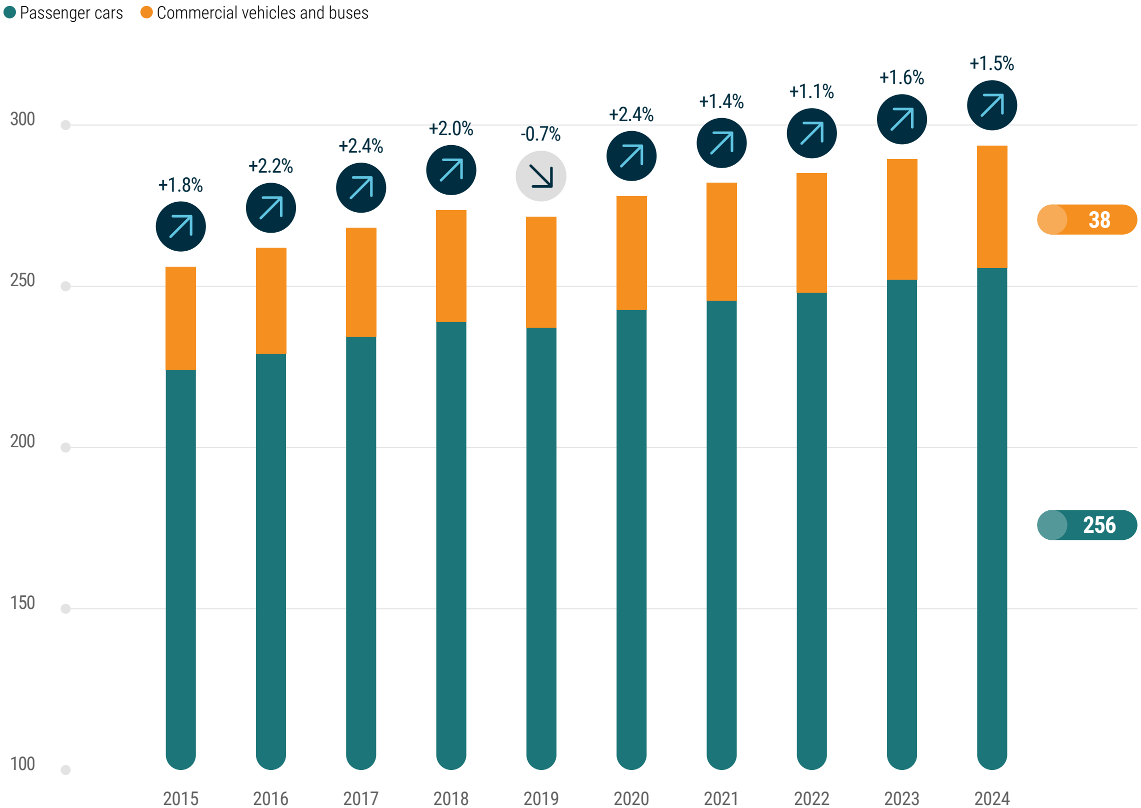
2024



SOURCE: ACEA

EU VEHICLE FLEET: SIZE AND SEGMENT DISTRIBUTION[1]

In million units, 2015 – 2024



SOURCE: **ACEA**

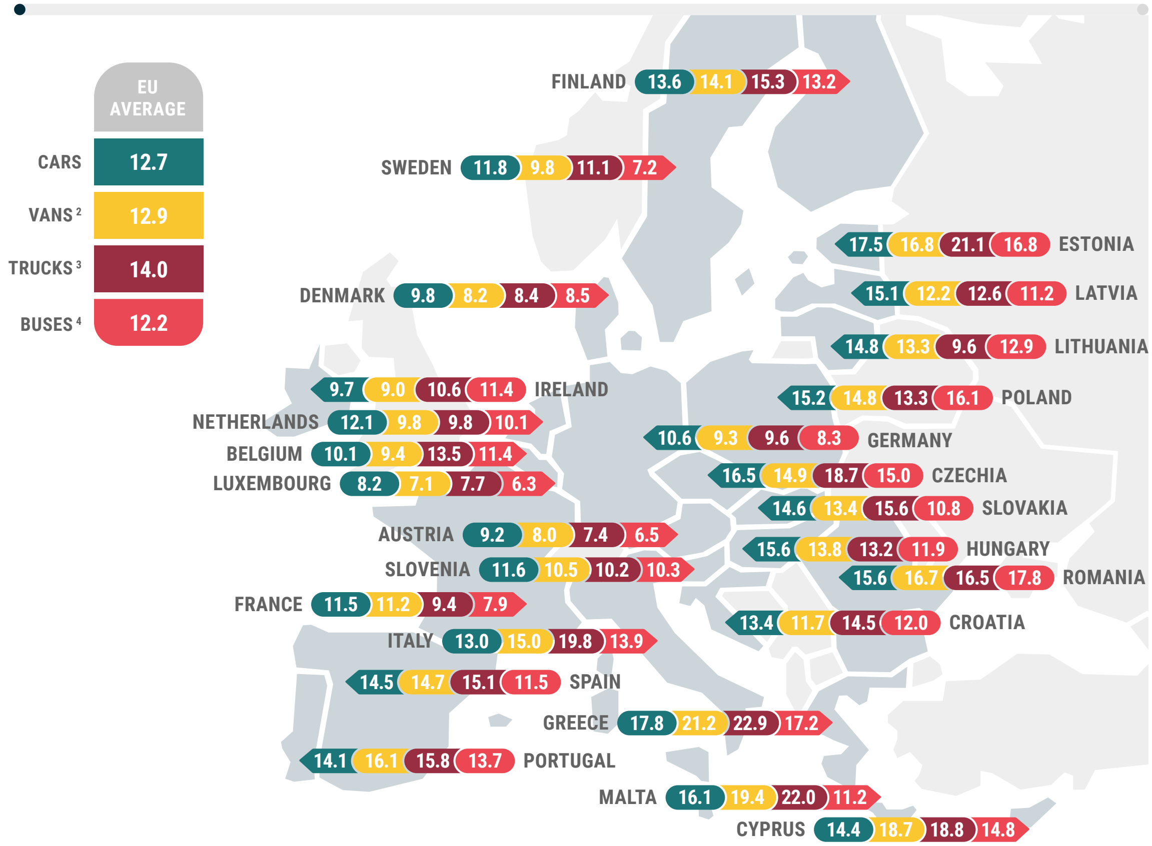
There are nearly 300 million vehicles on EU roads

1. Includes Bulgaria and Malta as from 2020

Trucks have the highest average age of all vehicle types

AVERAGE AGE OF EU VEHICLE FLEET[1]

By country, in years, 2024

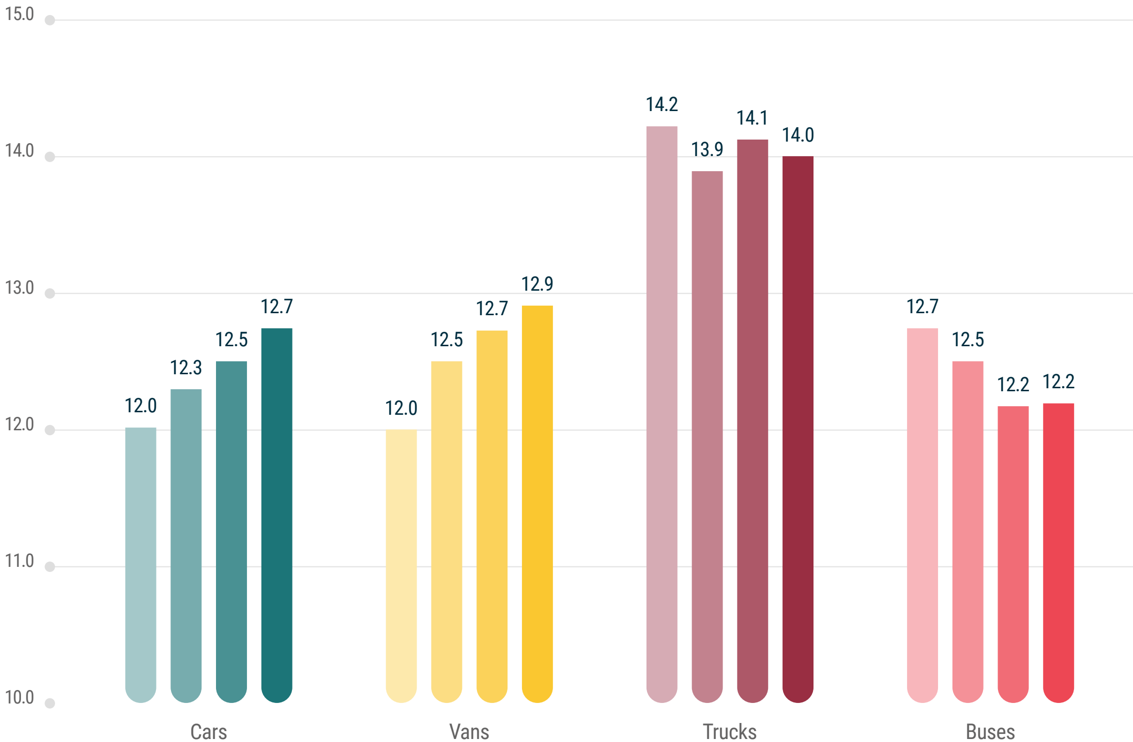


SOURCE: **ACEA**

1. Data for Bulgaria not available
2. Light commercial vehicles up to 3.5 tonnes
3. Medium and heavy commercial vehicles over 3.5 tonnes
4. Buses and coaches over 3.5 tonnes

EVOLUTION OF AVERAGE AGE OF EU FLEET

By vehicle type, in years, 2021 – 2024



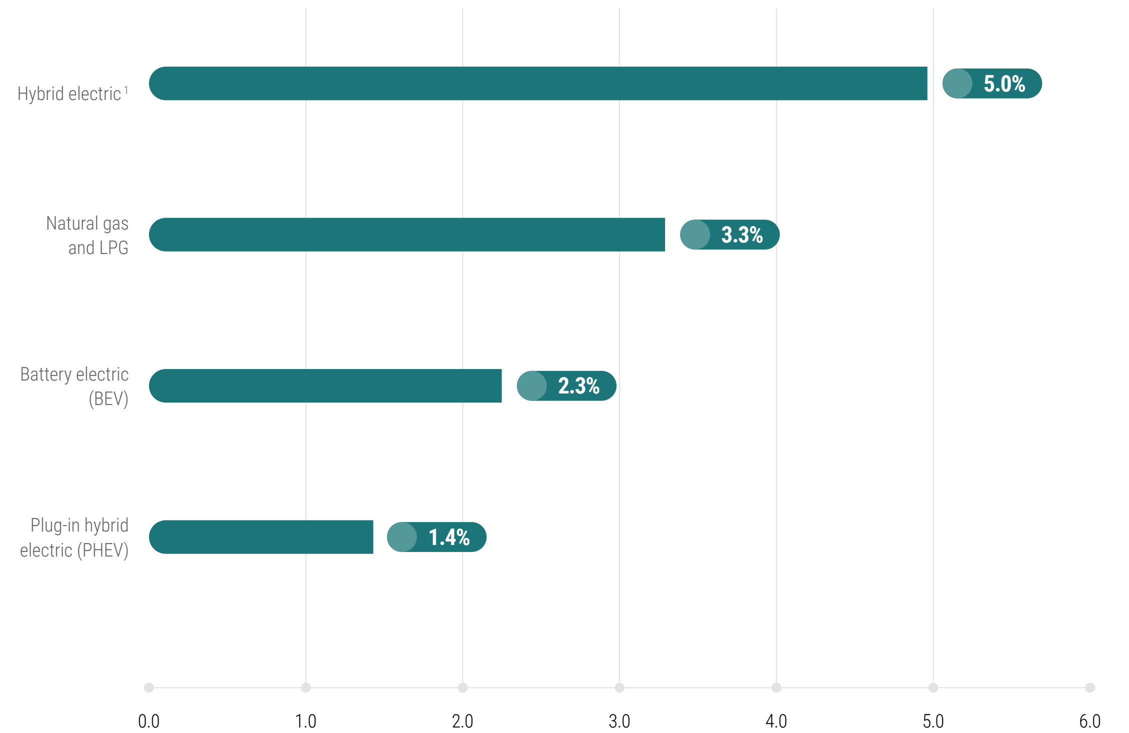
SOURCE: **ACEA**

The average age of cars and vans continues rising

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

EU CAR FLEET: SHARE OF ALTERNATIVELY-POWERED VEHICLES

% share, 2024

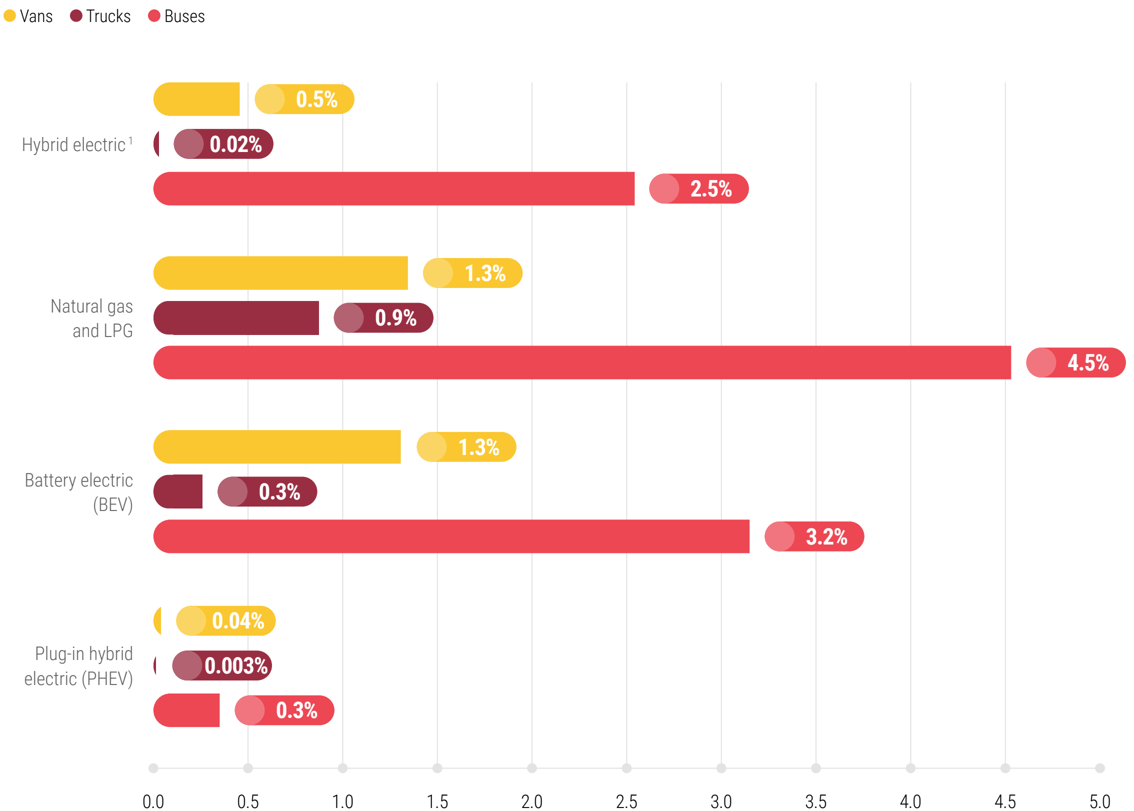


SOURCE: ACEA

1. Includes full and mild hybrids

EU COMMERCIAL VEHICLE FLEET: SHARE OF ALTERNATIVELY-POWERED VEHICLES

By segment, % share, 2024



SOURCE: **ACEA**

Alternatively-powered commercial vehicles remain a marginal share of the EU fleet

1. Includes full and mild hybrids

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INFRASTRUCTURE

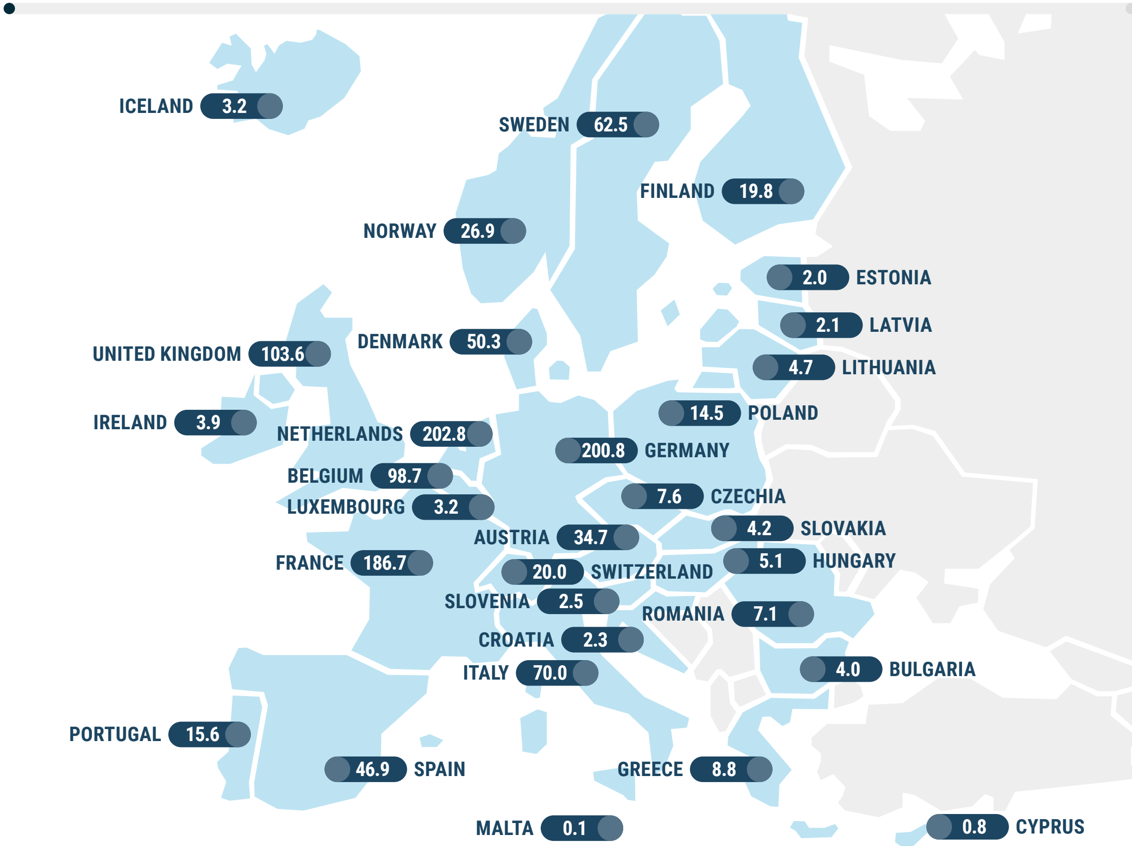
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2026

DRIVING MOBILITY FOR EUROPE

Three EU countries (France, Germany, and the Netherlands) account for 56% of all EU public recharging points

ELECTRIC RECHARGING POINTS

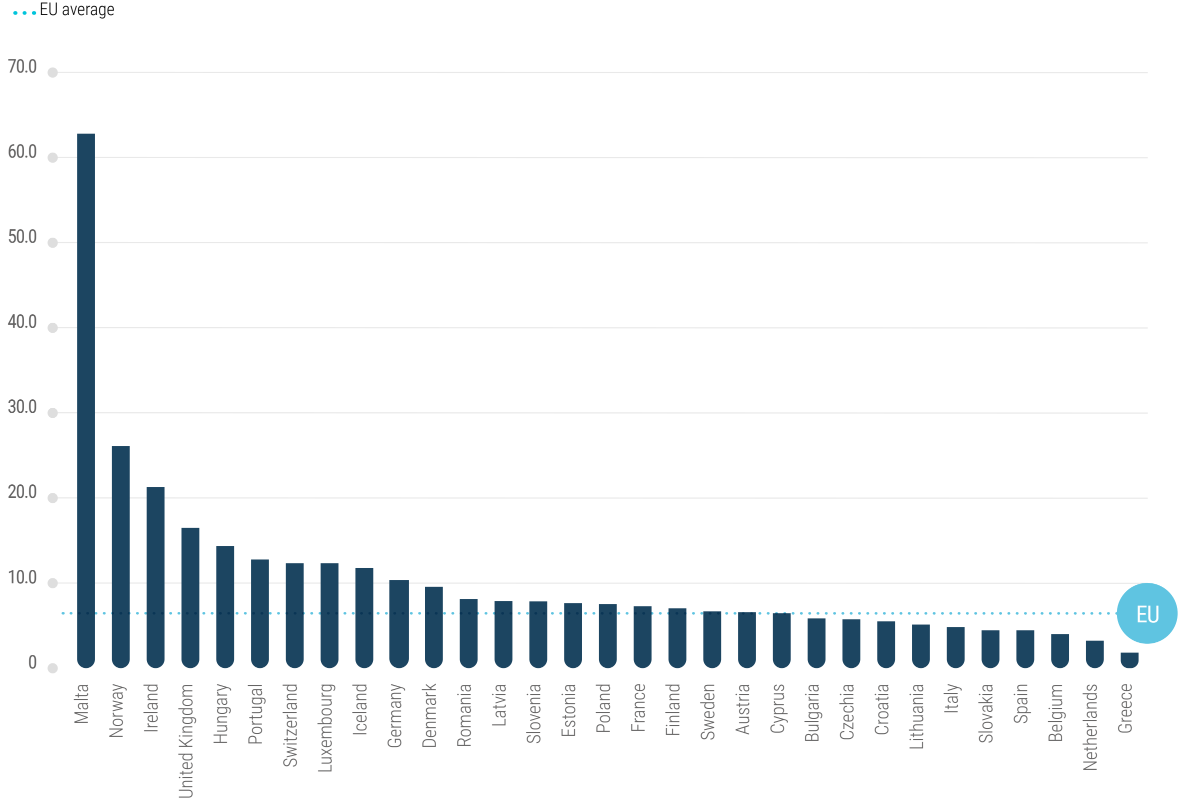
In thousand units, 2025



SOURCE: EUROPEAN ALTERNATIVE FUELS OBSERVATORY (EAFO)

BATTERY-ELECTRIC CARS ON ROADS PER RECHARGING POINT

2024



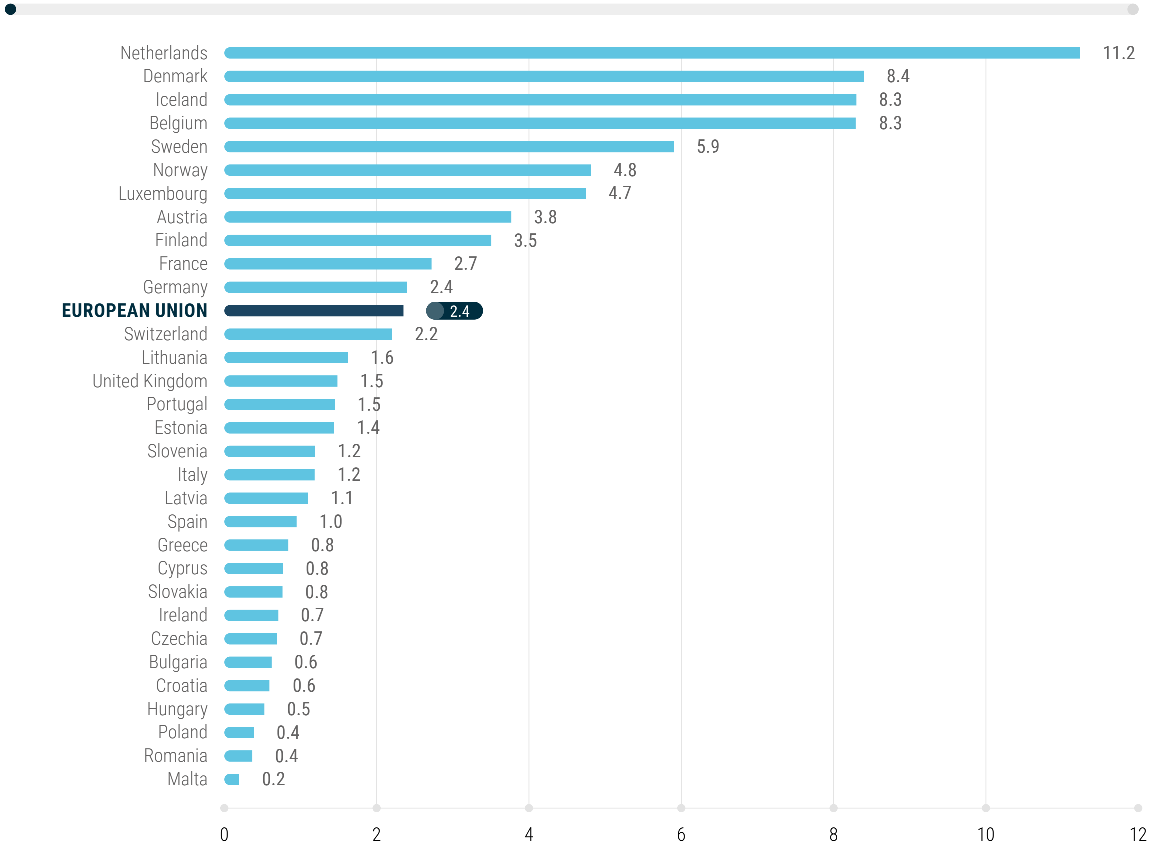
SOURCE: **ACEA, EUROPEAN ALTERNATIVE FUELS OBSERVATORY (EAFO)**

On average, there is one public recharging point per every seven battery-electric cars in the EU

Over a third of EU member states have fewer than one public recharging point per 1,000 inhabitants

RECHARGING POINTS PER 1,000 INHABITANTS

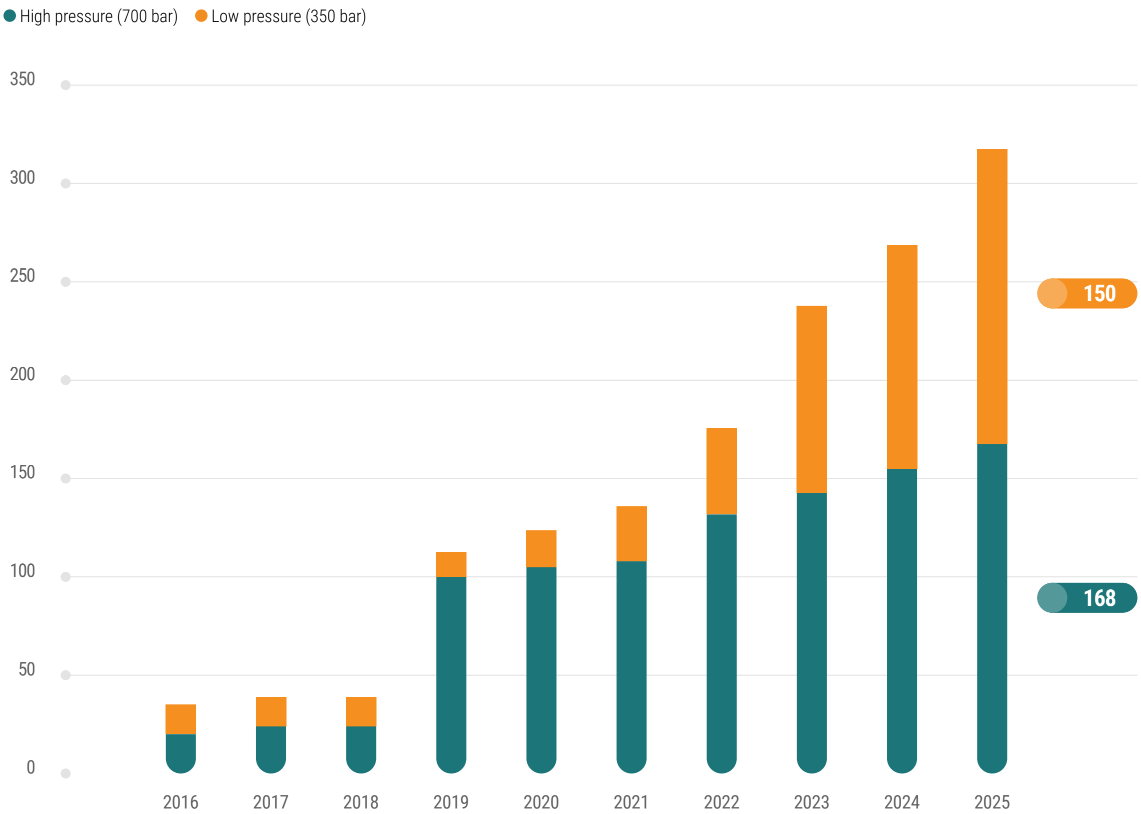
2025



SOURCE: **EUROPEAN ALTERNATIVE FUELS OBSERVATORY (EAFO), EUROSTAT**

HYDROGEN (H2) REFILLING POINTS IN THE EU

2016-2025



SOURCE: **EUROPEAN ALTERNATIVE FUELS OBSERVATORY (EAFO)**

There are just over 300 hydrogen refilling points in the EU

The data in this publication are presented as interactive maps, charts, and tables on **www.acea.auto/figures**, where they are periodically updated throughout the year.

ROAD SAFETY

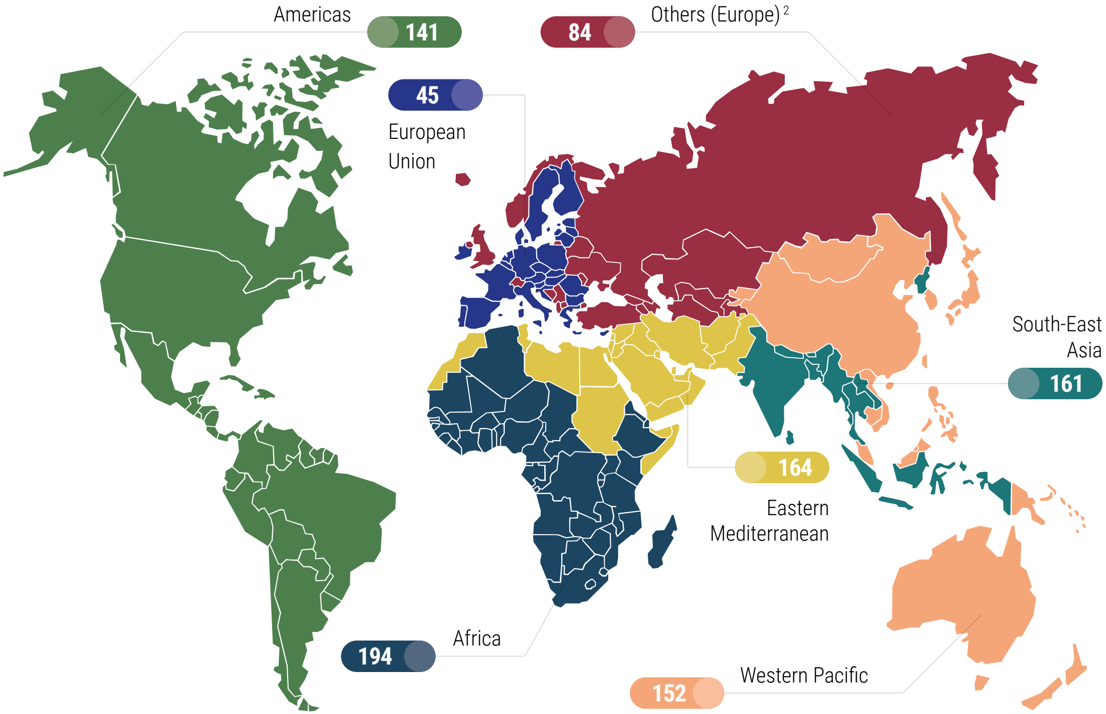
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2026

DRIVING MOBILITY FOR EUROPE

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

ROAD FATALITIES PER MILLION INHABITANTS

By region[1], 2021, 2024



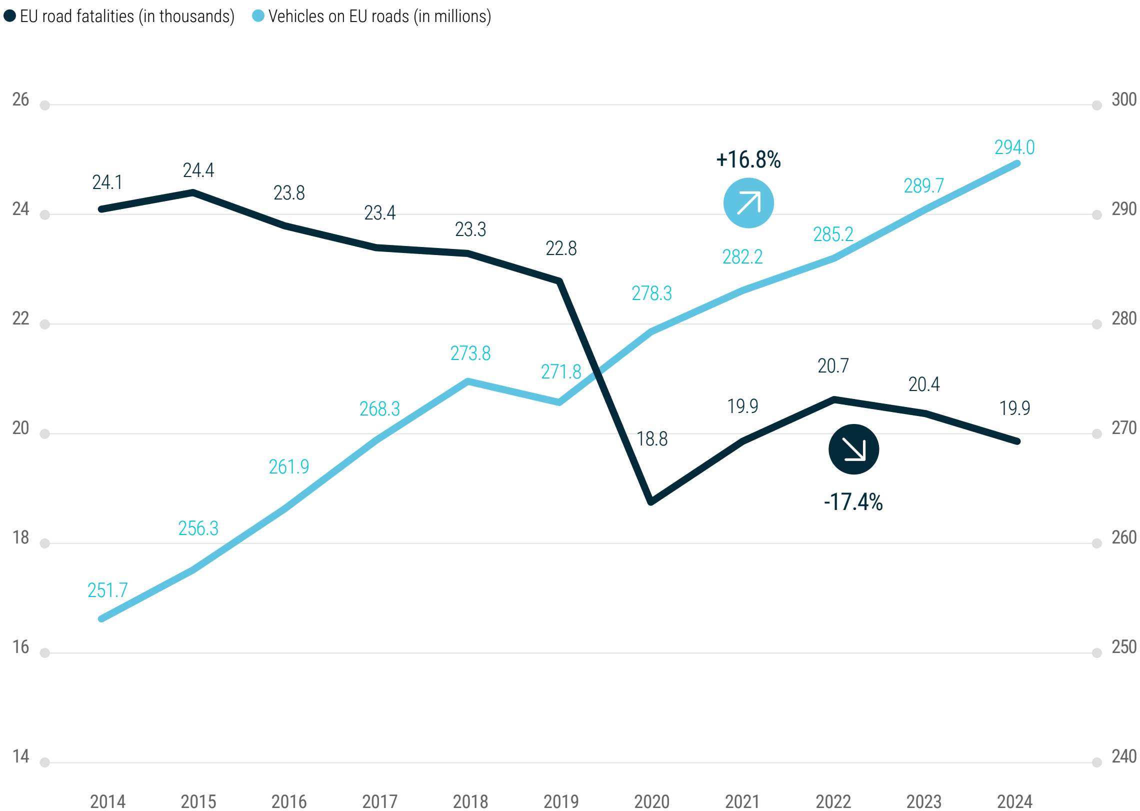
WORLD | 147 road fatalities per million inhabitants

SOURCE: EUROPEAN ROAD SAFETY OBSERVATORY, WHO GLOBAL HEALTH OBSERVATORY

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

NUMBER OF EU VEHICLES AND ROAD FATALITIES

2014 – 2024



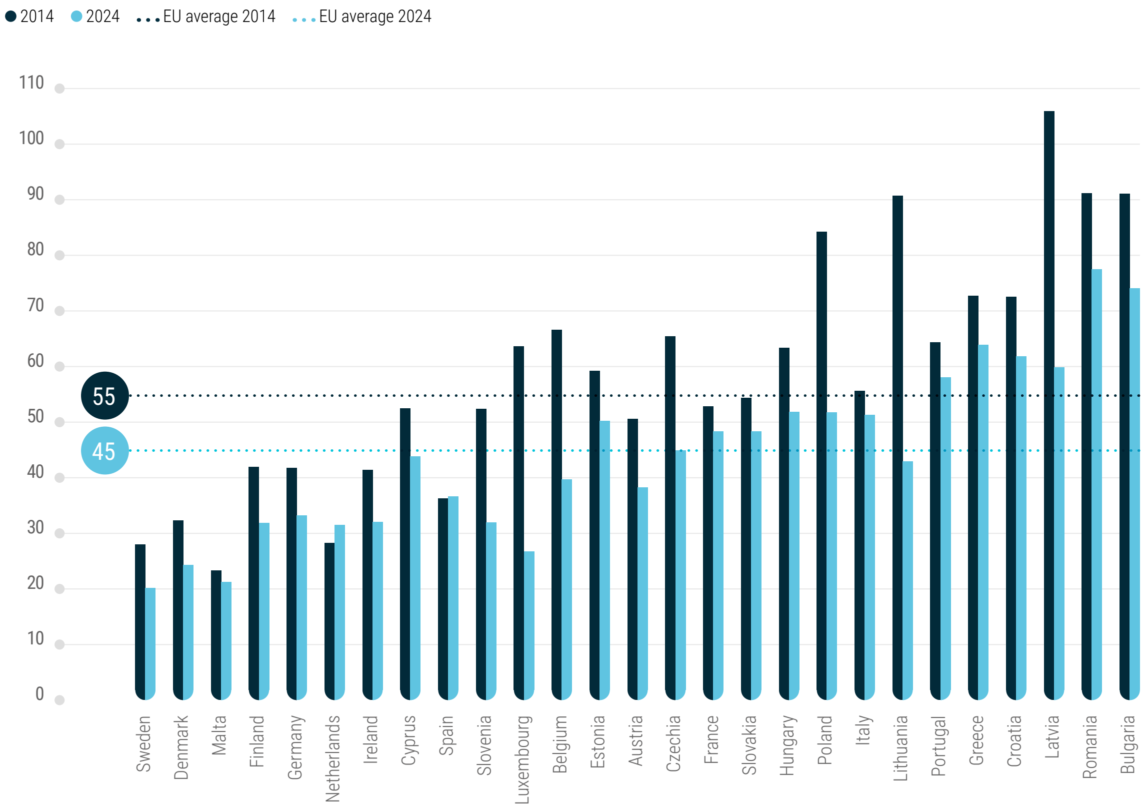
SOURCE: **ACEA, EUROPEAN ROAD SAFETY OBSERVATORY**

Road fatalities have fallen significantly since 2014 despite an increase in the number of cars on EU roads

Most EU countries have achieved notable cuts in road fatalities since 2014

ROAD FATALITIES PER MILLION INHABITANTS

By country, 2014, 2024

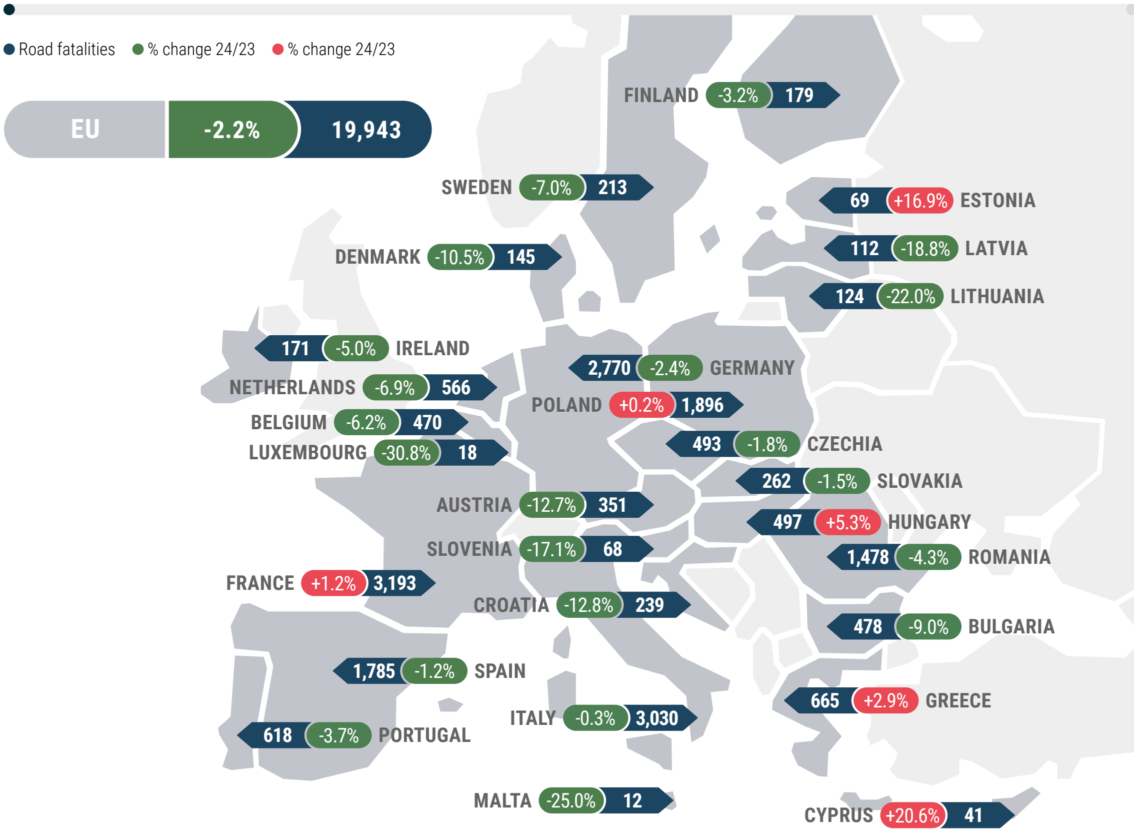


SOURCE: **EUROPEAN ROAD SAFETY OBSERVATORY**

EU road fatalities declined by 2.2% in 2024

ROAD FATALITIES IN THE EU

By country, 2024



SOURCE: **EUROPEAN ROAD SAFETY OBSERVATORY**

The data in this publication are presented as interactive maps, charts, and tables on **www.acea.auto/figures**, where they are periodically updated throughout the year.

ENVIRONMENT

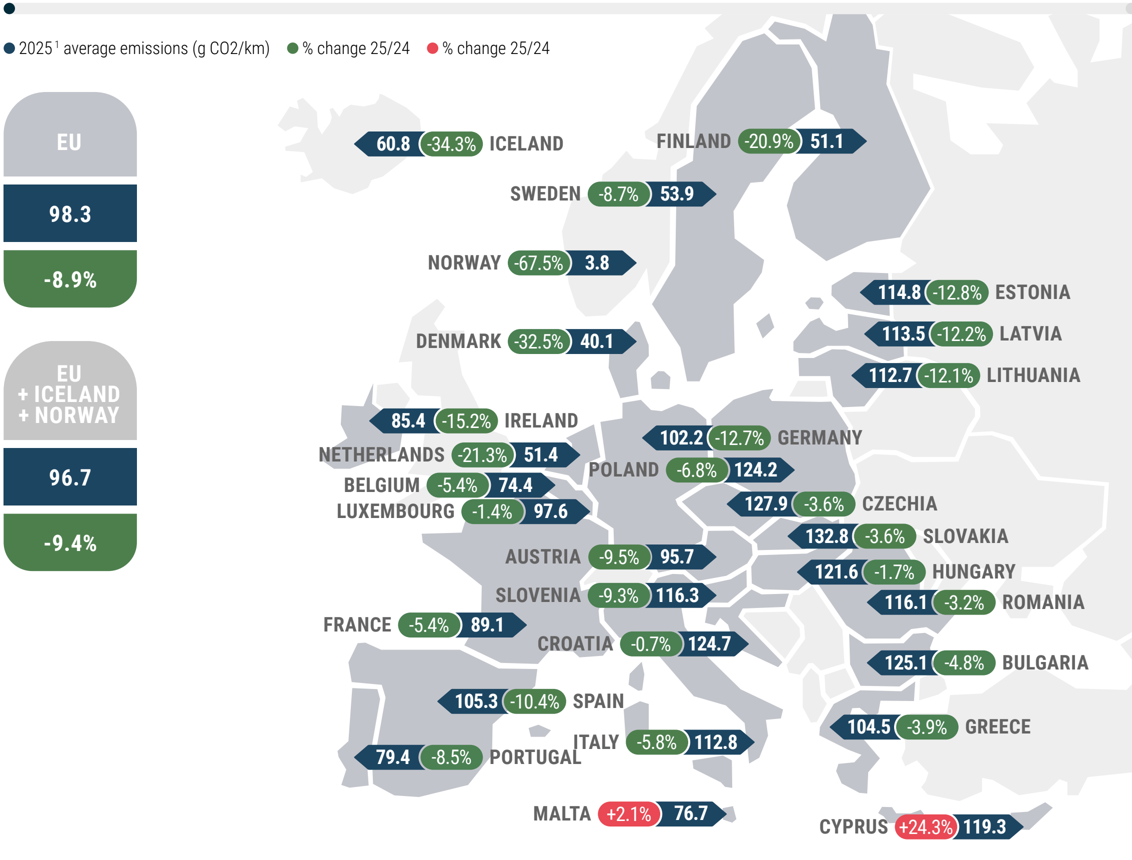
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2026

DRIVING MOBILITY FOR EUROPE

In almost all European countries, cars have emitted less CO2 on average than in 2024

CO2 EMISSIONS FROM NEW CARS BY COUNTRY

In g CO2/km, 2025[1]

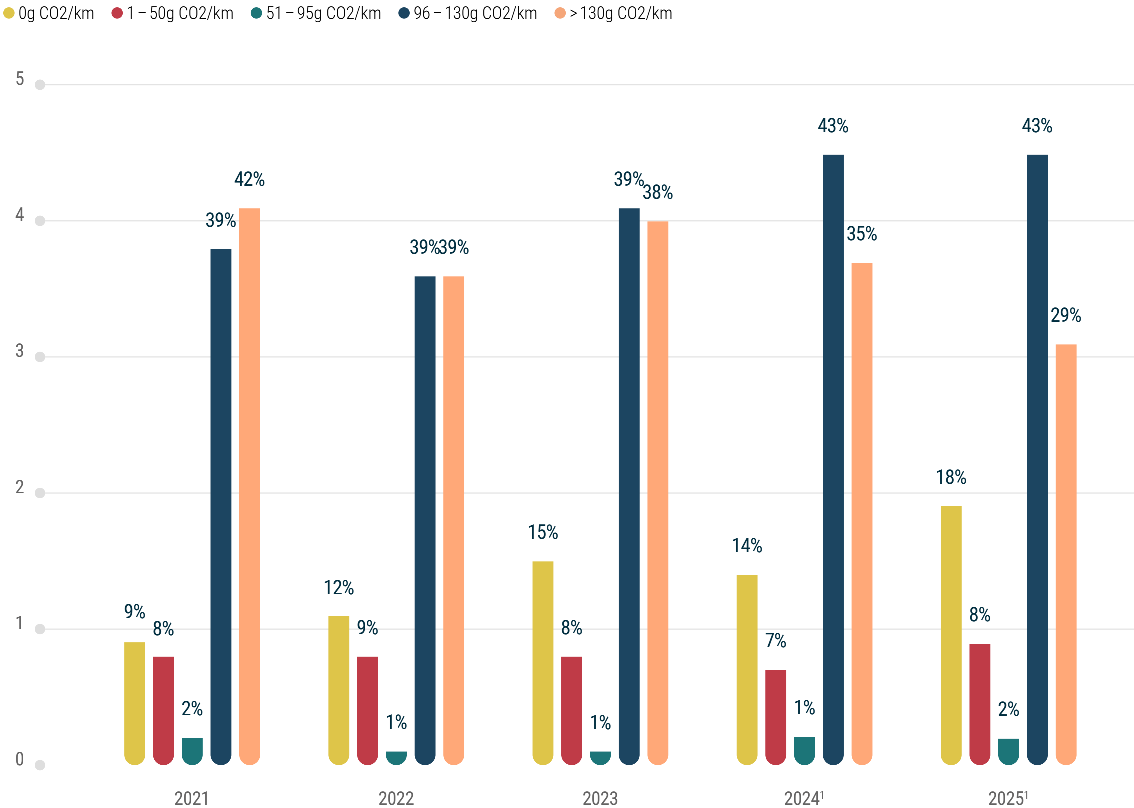


SOURCE: EUROPEAN ENVIRONMENT AGENCY (EEA)

1. Provisional; Worldwide Harmonised Light Vehicles Test Procedure (WLTP)

NEW CARS BY EMISSION CLASSES IN THE EU

In million units, % share, 2021 – 2025[1]



SOURCE: **EUROPEAN ENVIRONMENT AGENCY (EEA)**

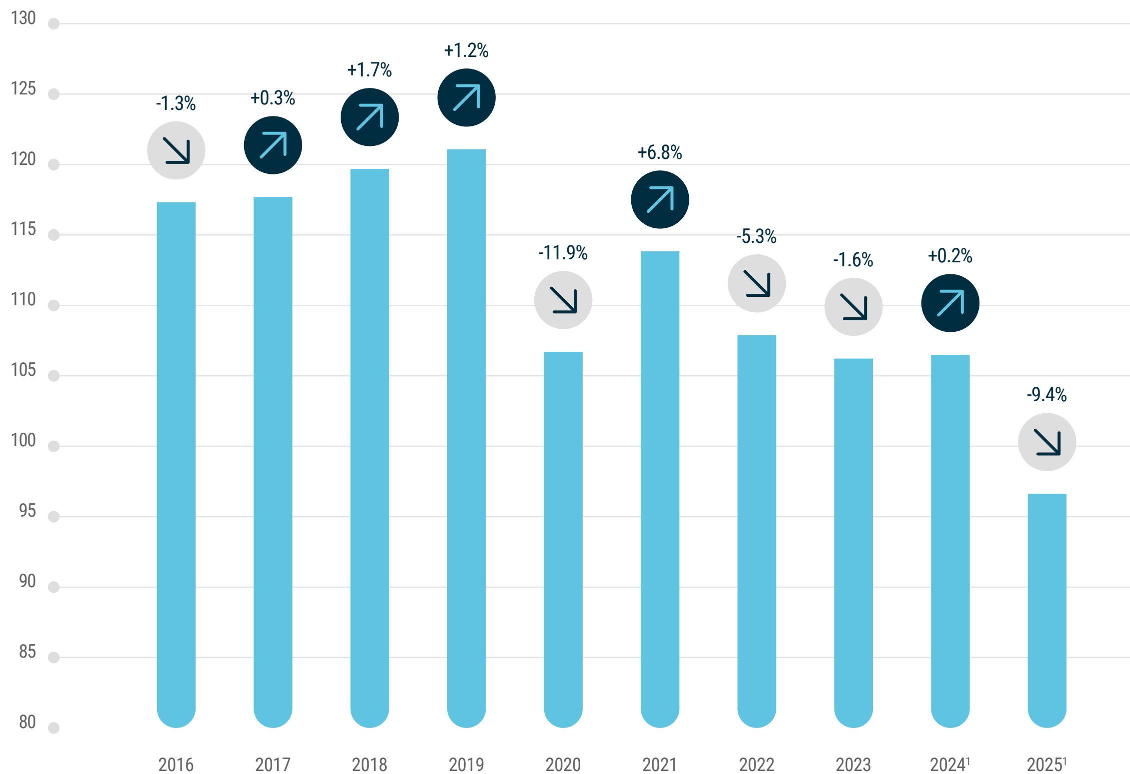
Almost 30% of new cars emit 95g CO2/km or less

1. Provisional; Worldwide Harmonised Light Vehicles Test Procedure (WLTP)

CO2 emissions from new cars are down by 9.4% in 2025

CO2 EMISSIONS FROM NEW CARS IN THE EU, ICELAND AND NORWAY

In g CO2/km, % change, 2016 – 2025[1]

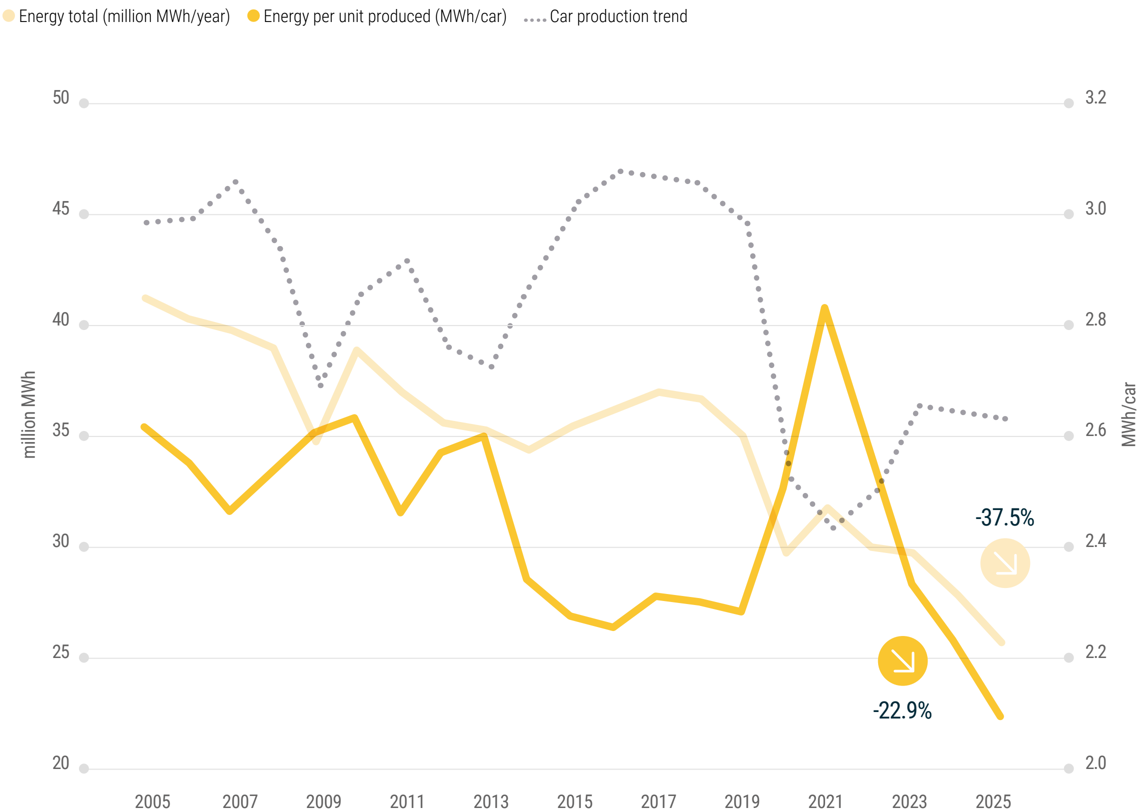


SOURCE: **EUROPEAN ENVIRONMENT AGENCY (EEA)**

1. Provisional; NECD (2012-2020), WLTP (2021-2025)

CAR PRODUCTION: ENERGY CONSUMPTION

2005 – 2025



SOURCE: **ACEA**

Car makers have slashed production energy use per unit by almost 23% since 2005

Car makers have cut production CO2 emissions per unit by more than 60% since 2005

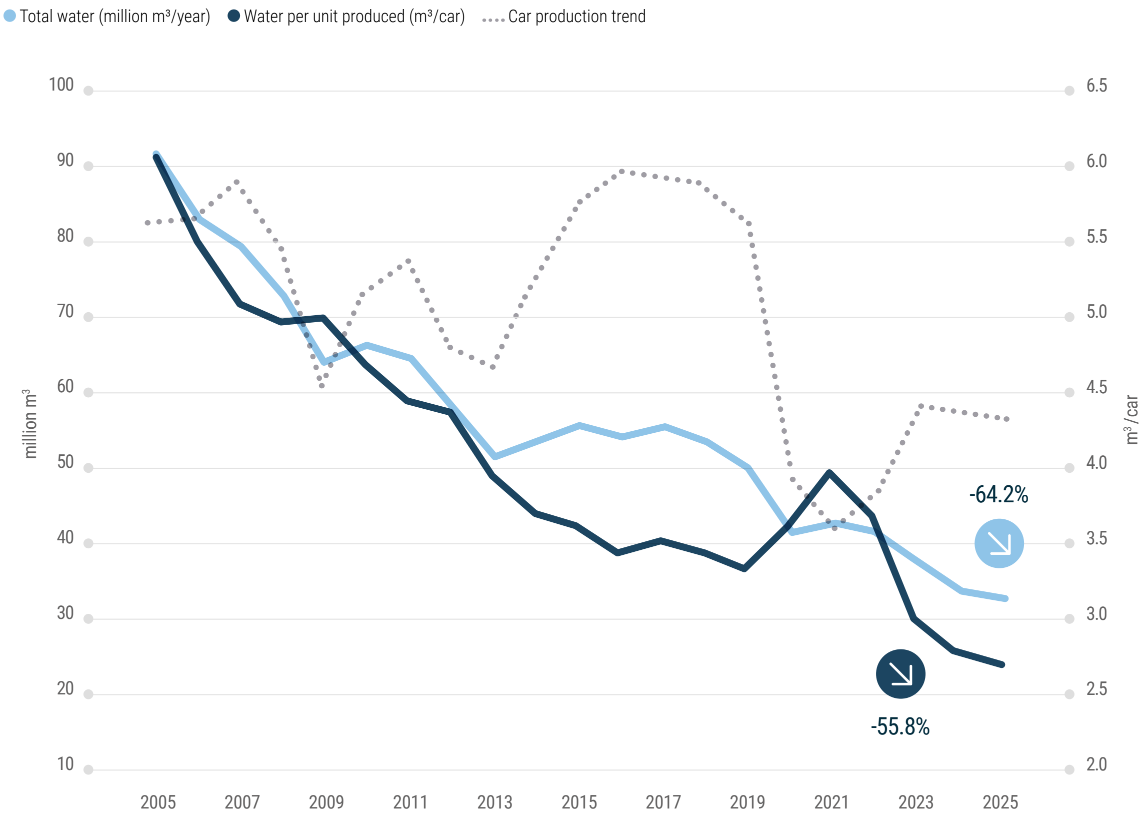
CAR PRODUCTION: CO2 EMISSIONS

2005 – 2025

SOURCE: ACEA

CAR PRODUCTION: WATER CONSUMPTION

2005 – 2025



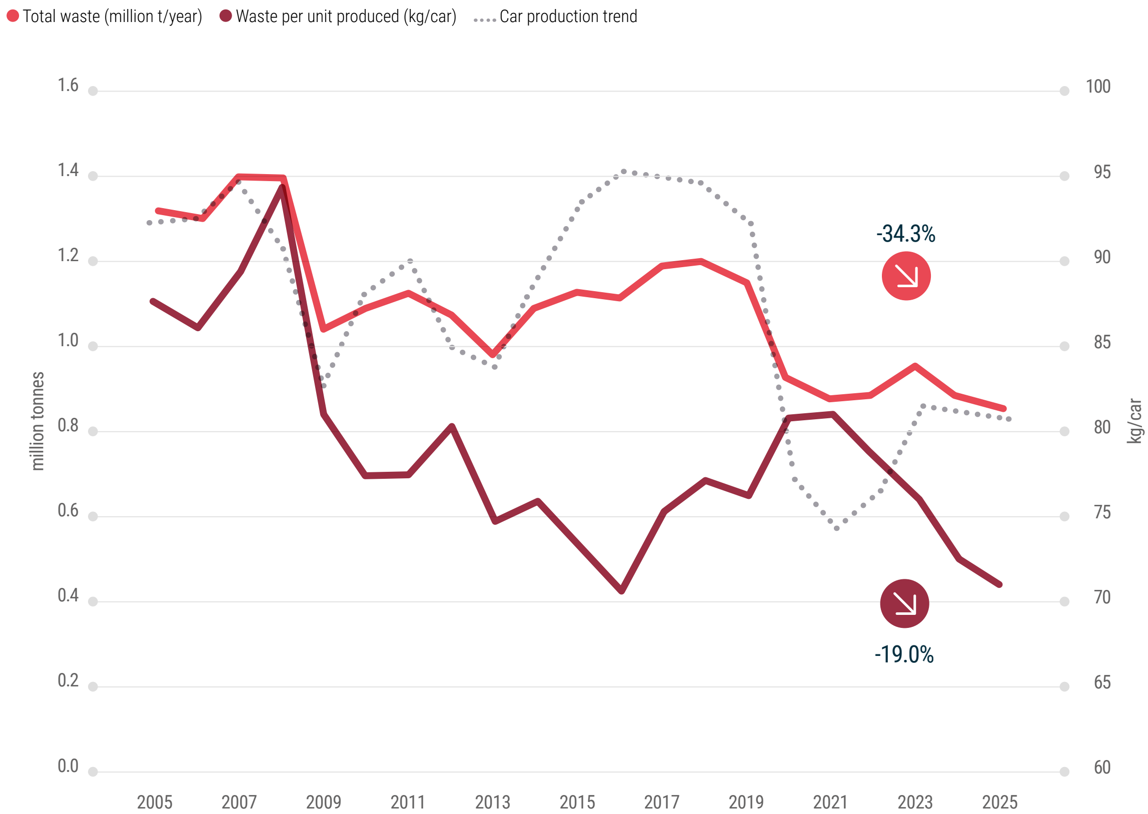
SOURCE: **ACEA**

Car makers have reduced production water use per unit by over 55% since 2005

Levels of car manufacturing total waste largely follow production trends

CAR PRODUCTION: WASTE[1]

2005 – 2025

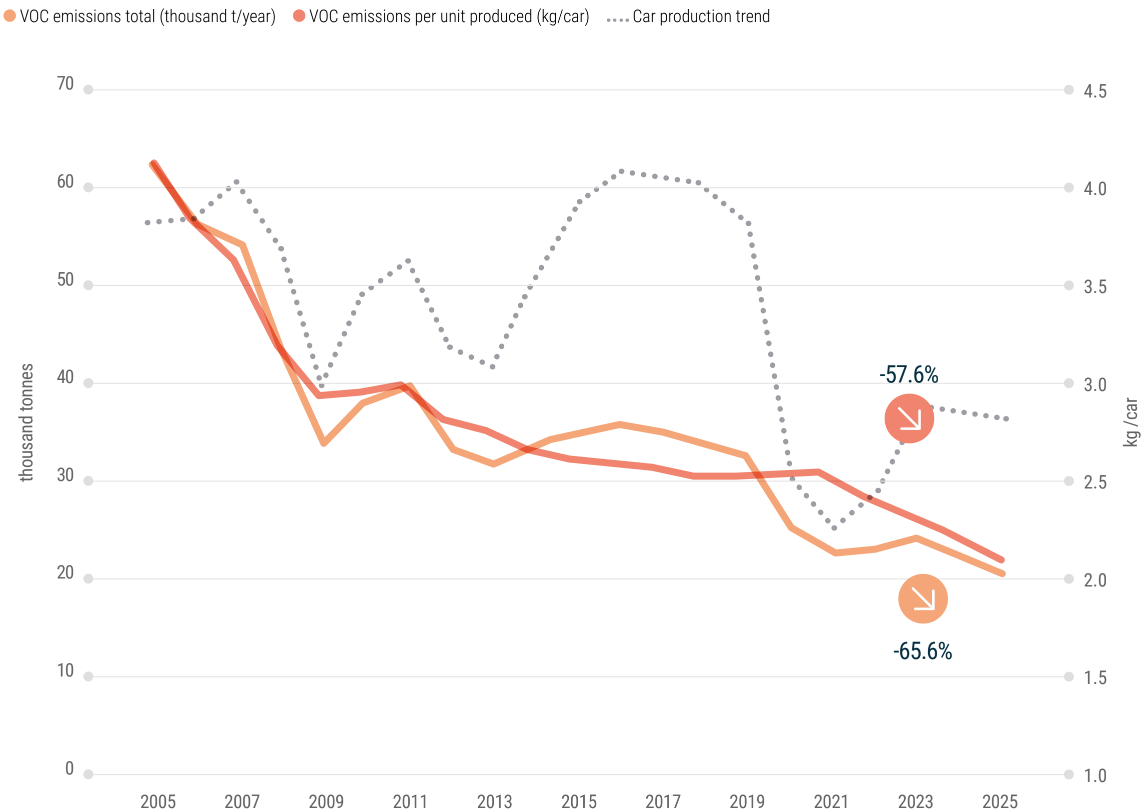


SOURCE: ACEA

1. Excluding scrap metal and demolition waste

CAR PRODUCTION: VOC[1] EMISSIONS

2005 – 2025



SOURCE: **ACEA**

Car makers have reduced production VOC emissions per unit by over 57% since 2005

1. Volatile organic compounds

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INNOVATION

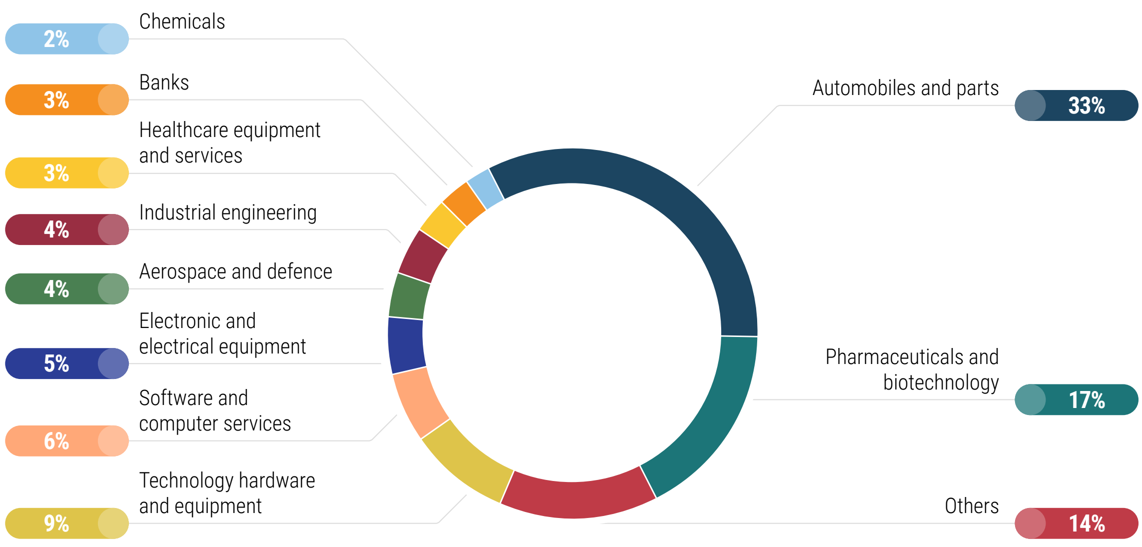
THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2026

DRIVING MOBILITY FOR EUROPE

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

EU COMPANIES' R&D INVESTMENT BY SECTOR

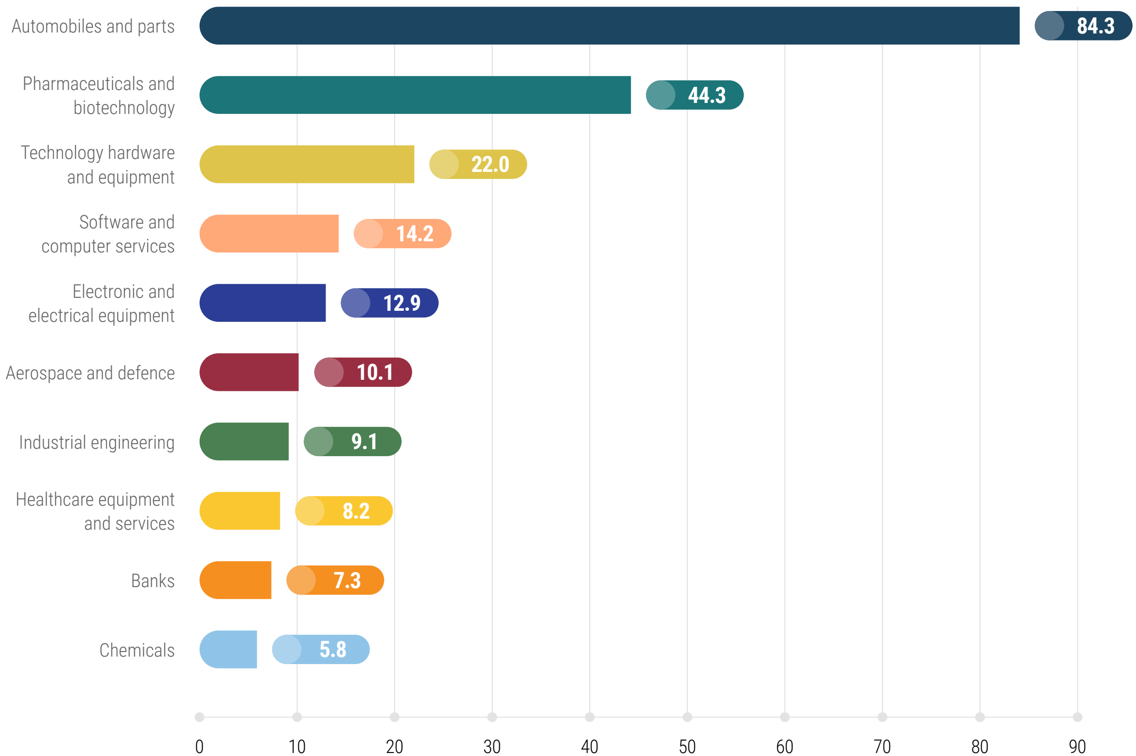
% share, 2024



SOURCE: **THE 2025 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD**

EU R&D INVESTMENT IN THE TOP 10 INDUSTRIAL SECTORS

In billion €, 2024



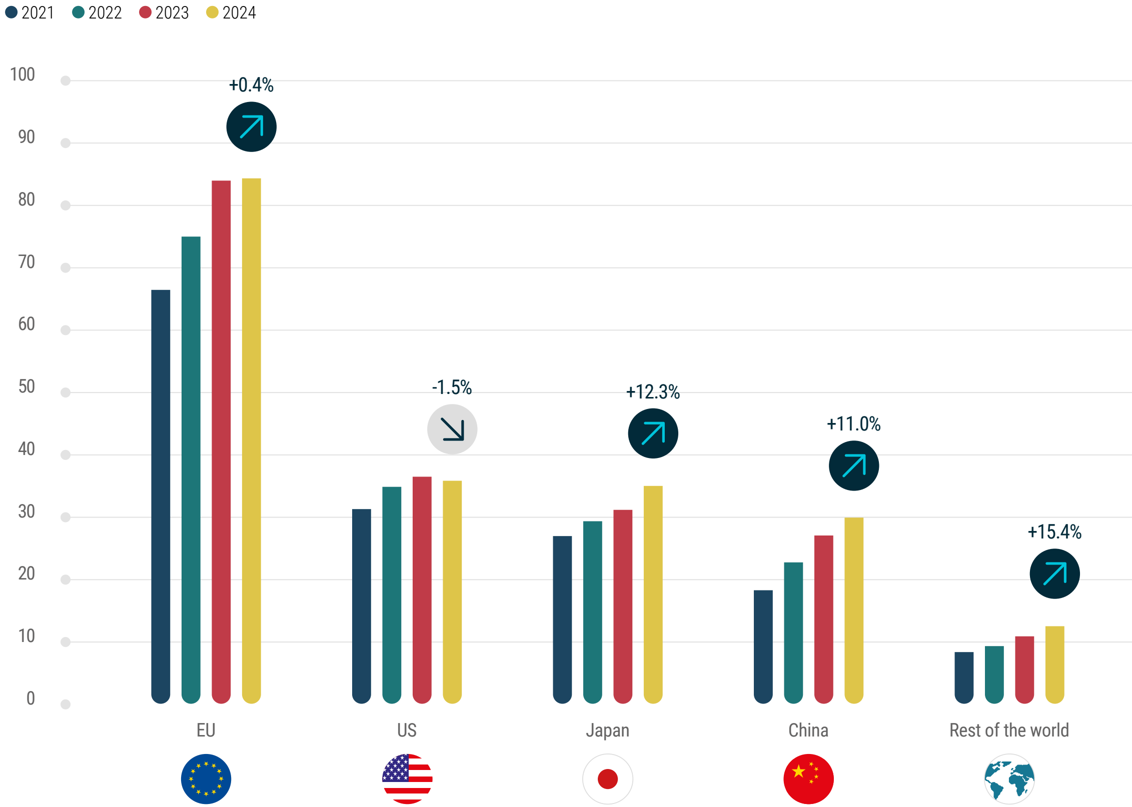
SOURCE: **THE 2025 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD**

EU auto makers invest around €84 billion in R&D annually, almost twice as much as the pharmaceutical and biotechnology sector

EU-based auto makers invested €84 billion in R&D in 2024

AUTOMOTIVE R&D INVESTMENT BY REGION

In billion €, % change



SOURCE: **THE 2025 EU INDUSTRIAL R&D INVESTMENT SCOREBOARD**

TAXATION

THE AUTOMOBILE INDUSTRY
POCKET GUIDE 2026

DRIVING MOBILITY FOR EUROPE

TAX BENEFITS AND PURCHASE INCENTIVES: ELECTRIC CARS

2026

	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

2026

	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 recharging infrastructure

TAX BENEFITS AND PURCHASE INCENTIVES: ZERO-EMISSION COMMERCIAL VEHICLES

2026

	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

2026

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

SOURCE: **ACEA**

Barely 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 2023	€ bn 2024	DKK bn 2025[3]	€ bn 2025	€ bn 2024	€ bn 2024	€ bn 2025[3]
1. VAT on vehicle sales servicing, repair & parts	3.4	8.9	–	1.7	23.4	32.1	1.5
2. Sales & registration taxes	0.5	0.5	5.3	0.3	3.1	–	0.6
3. Annual ownership taxes	2.8	2.1	9.7	1.0	1.0	9.7	1.2
4. Fuels & lubricants	5.4	8.6	10.5	3.9	43.2	37.8	5.4
5. Others:							
Driving license fees	–	–	–	–	0.01	0.3	0.1
Insurance taxes	0.5	1.2	1.5	0.5	6.4	6.4	0.7
Tolls	2.5	1.0	2.2	–	15.4	13.0	–
Customs duties	–	–	–	–	–	0.4	–
Other taxes	0.4	1.2	–	–	2.0	–	0.2
TOTAL (national currencies)	**15.5**	**23.5**	**29.2**	**7.4**	**94.5**	**99.6**	**9.7**
TOTAL (€)[2]	15.5	23.5	3.9	7.4	94.5	99.6	9.7

1. Latest available data; only country for which sourced data is available are listed
2. Euro foreign exchange reference rates on 4 June 2026; source: ECB
3. Estimates

SOURCE: **ACEA**

FISCAL INCOME FROM VEHICLES IN MAJOR EU MARKETS [1]

	Ireland	Italy	Netherlands	Portugal	Spain	Sweden
Purchase or transfer	€ bn 2024	€ bn 2024	€ bn 2025	€ bn 2024	€ bn 2024	SEK bn 2024[3]
1. VAT on vehicle sales servicing, repair & parts	1.0	21.9	3.7	4.6	11.3	30.0
2. Sales & registration taxes	1.0	1.9	1.3	0.5	0.7	–
3. Annual ownership taxes	0.9	7.5	5.4	0.9	3.0	14.6
4. Fuels & lubricants	3.3	40.7	7.8	2.9	22.7	60.0
5. Others:						
Driving license fees	0.03	–	0.6	–	0.1	0.03
Insurance taxes	0.1	4.1	2.8	–	1.3	2.8
Tolls	0.2	2.3	–	0.3	–	2.8
Customs duties	0.06	–	–	–	–	–
Other taxes	–	4.6	0.8	1.8	0.8	1.5
TOTAL (national currencies)	**6.6**	**83.0**	**22.4**	**10.9**	**39.8**	**111.7**
TOTAL (€)[2]	6.6	83.0	22.4	10.9	39.8	10.3

SOURCE: **ACEA**

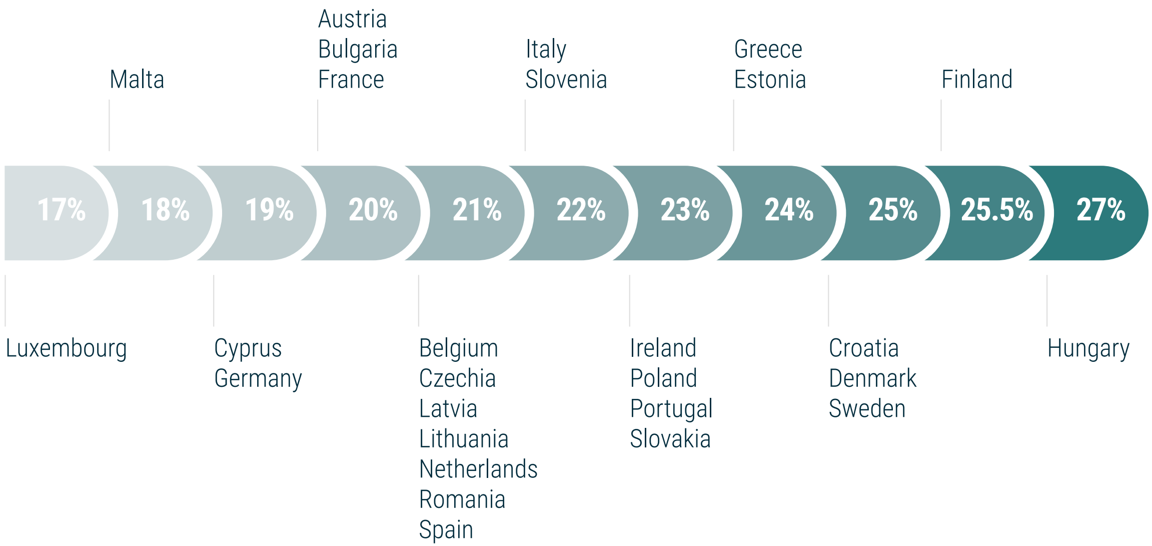
Vehicle-related taxes and charges contribute about €430 billion to public budgets in major EU markets

1. Latest available data; only country for which sourced data is available are listed
2. Euro foreign exchange reference rates on 4 June 2026; source: ECB
3. Estimates

Car VAT rates in the EU range from 17% to 27%

VAT SHARE IN NET CAR PRICES

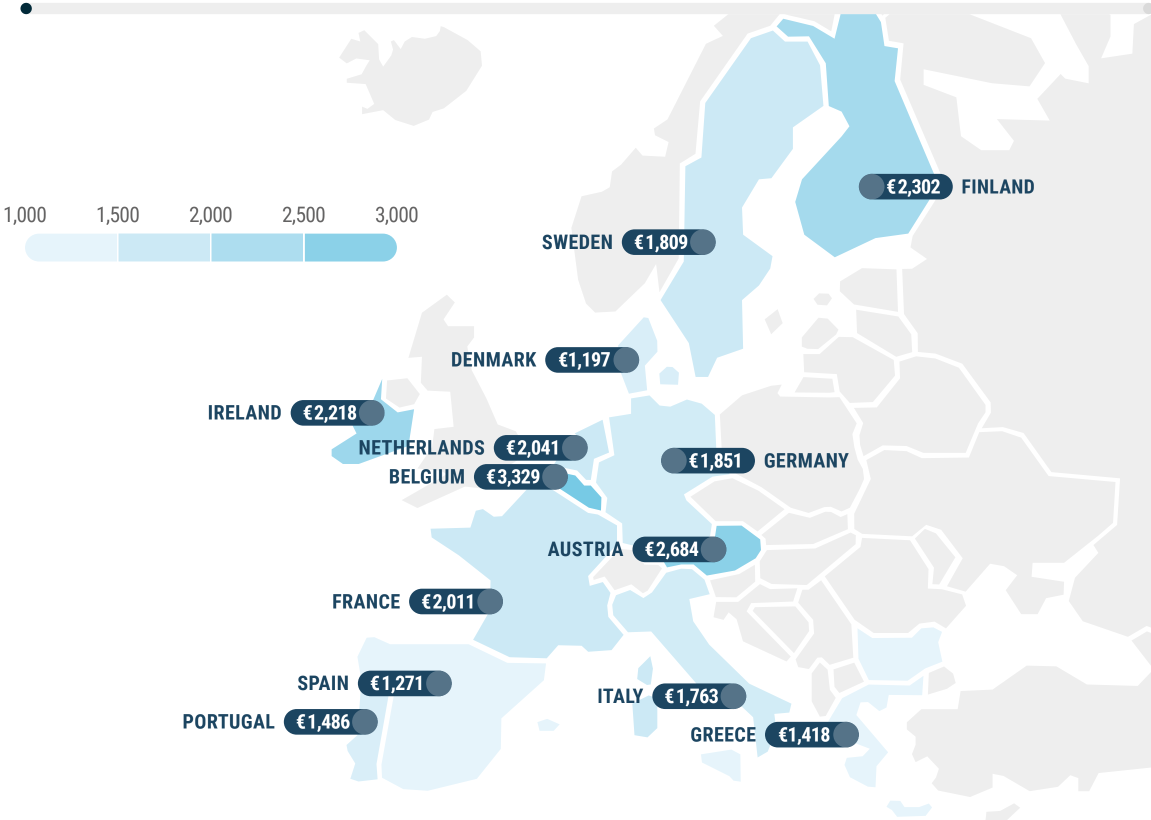
% share, 2026



SOURCE: **ACEA**

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

In € per vehicle, 2026



SOURCE: **ACEA**

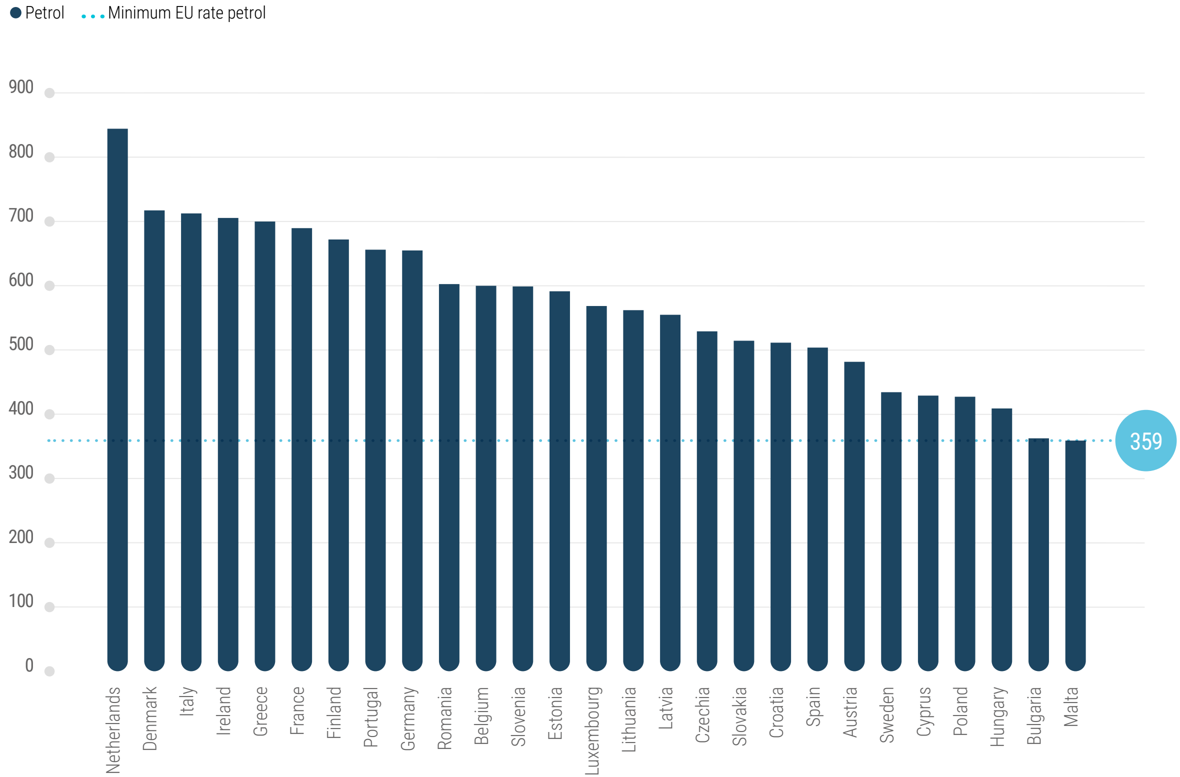
Annual tax income averages at €2,000 per vehicle in major EU markets

1. Per country estimates based on total number of vehicles on roads

The Netherlands, Denmark, and Italy rank top for the highest petrol excise duties

EXCISE DUTIES ON UNLEADED PETROL

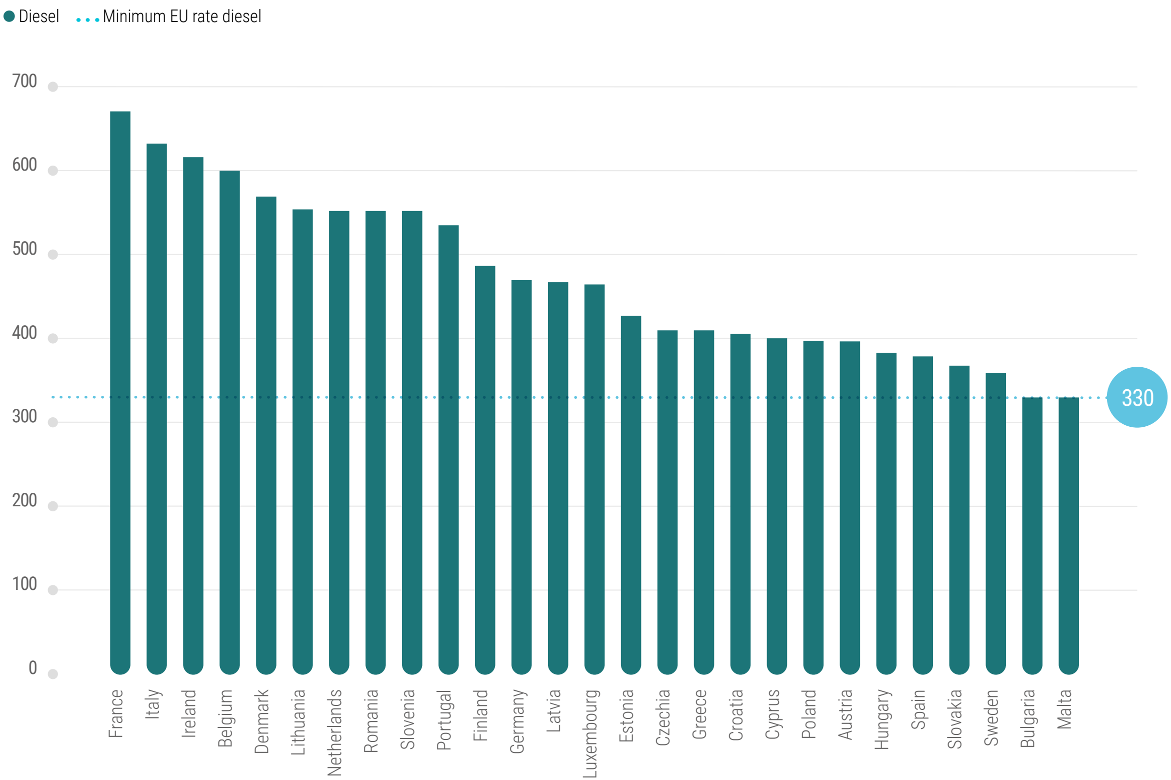
In €/1,000 litres, 2026



SOURCE: **ACEA**

EXCISE DUTIES ON DIESEL

In €/1,000 litres, 2026



SOURCE: **ACEA**

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

BMW GROUP BMW 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 17 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 facts and figures 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.

ECOSYSTEM

ACEA:intelligence is the new intelligence structure of ACEA closely aligned with its spirit. Its mission is providing advanced automotive datasets, market analysis and strategic insights across European mobility markets. Learn more at **ACEA:intelligence**.

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