DATAFORCE

EU Passenger Car Report 2024
– Recovery expected

April 2024

EUROPEAN PC MARKET

EU Passenger Car Report 2024

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Trends and influencing factors

Current trends - influence on market growth in the next 5 years **– Total Market**

Influence on market growth

| | Negative | Neutral | Positive |

Impact

High
- ✕ Energy prices / cost of living
- Pent-up demand ✕

Medium

Details in the study

Low
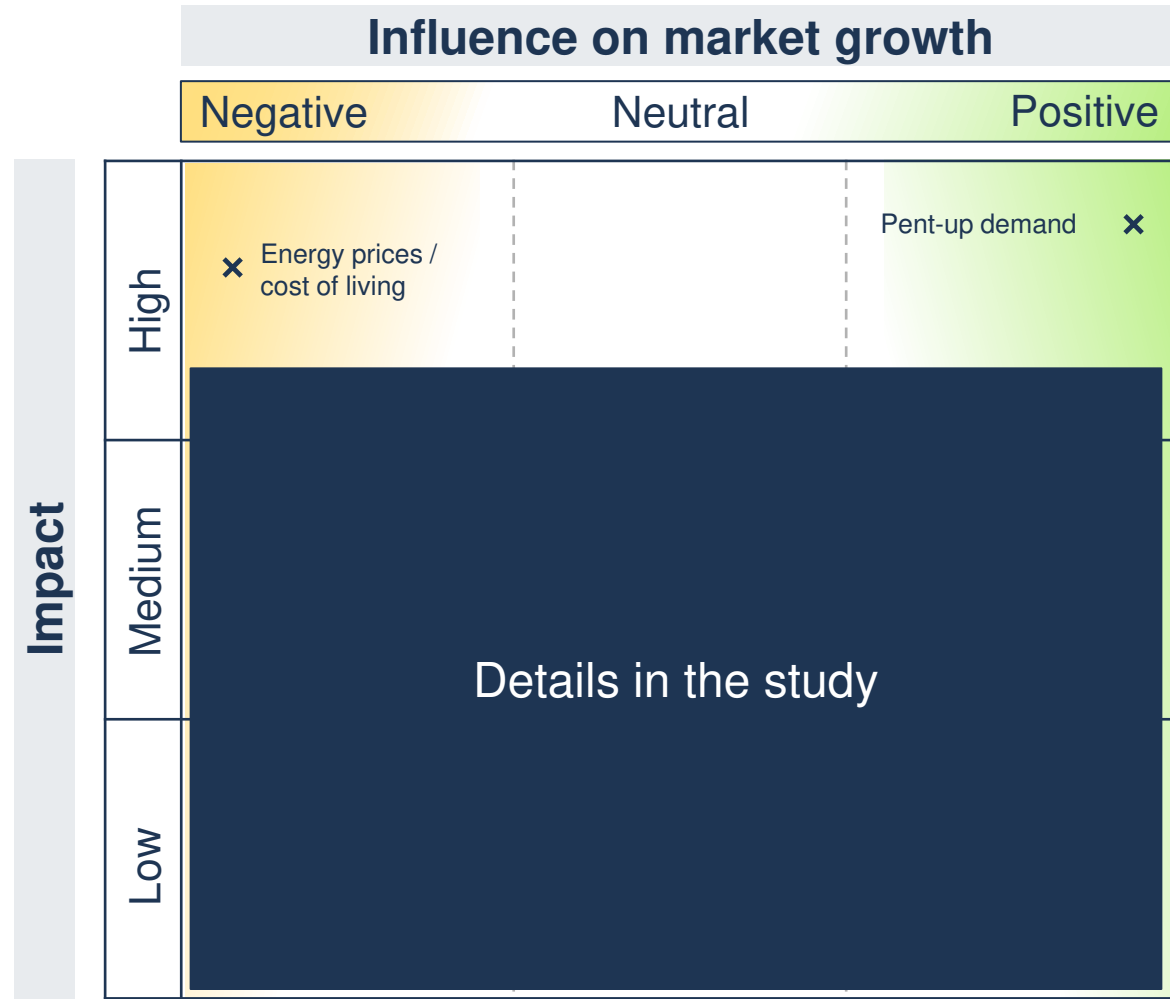
*Depicted trends are mapped according to their influence in the forecast

Glossary

- **Pent-up demand:** Purchases not made in 2020-2023 will be made up.
- **Energy prices / cost of living:** High inflation and stagnating incomes result in less purchasing power.

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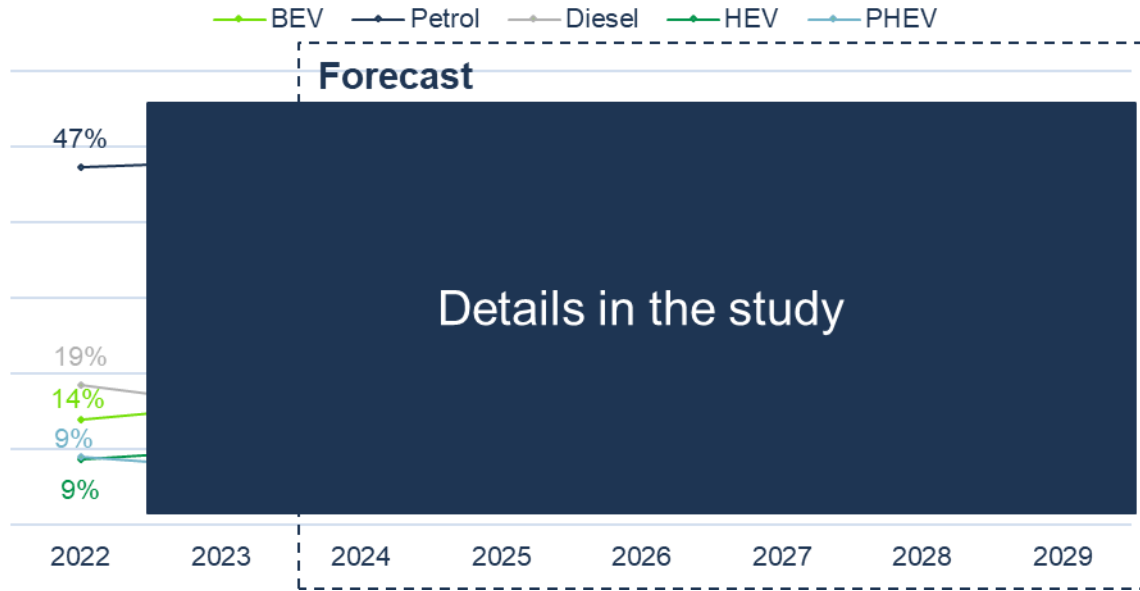
Forecast

BEV — Petrol — Diesel — HEV — PHEV

47%

19%
14%
9%

9%

2022 2023 2024 2025 2026 2027 2028 2029

Details in the study

## Summary

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Infrastructure

The mass-market adoption of e-mobility requires a diverse and convenient infrastructure that caters to scenarios from daily commuting to long-distance travel. At the moment, the lack of accessible home/work charging limits the market potential.

According to EAFO data (Q1 2024):

778.000

Charging points in EU 30

Subsidies

While purchase grants are gradually reduced or completely phased out, many countries have introduced disincentives for ICEs, such as CO_2-related taxes.

Subsidy for BEV compared to ICE models (k) €

5,2   4,7

2022 2023
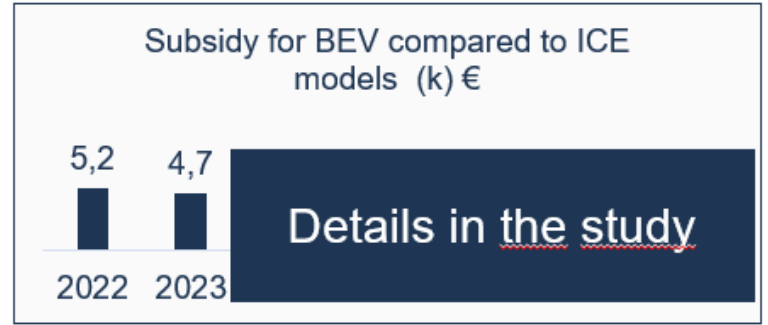
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EU-CAFE CO2 targets

- 2020: < 116 g/km (WLTP), 95 g/km (NEDC)
- 2025: < 93,6 g/km (WLTP)
- 2030: < 49,5 g/km (WLTP)
- 2035: = 0 g/km

CO_2-Emissions, EU-27 + NO/IS

152

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2019 2020 2021 2022 2023

Most popular PC Segments in the European Market

PC Registrations in vehicle segments in 2023 **– Total Market**

	Legend
🚗	PC Mini / Small
🚙	PC Compact / Medium
🚙	PC Large
🚙	SUV Small / Compact
🚙	SUV Medium / Large
🚗	Other

Pie chart values: 5,7% · 13,7% · 39,9% · X,x% · X,x% · X,x%
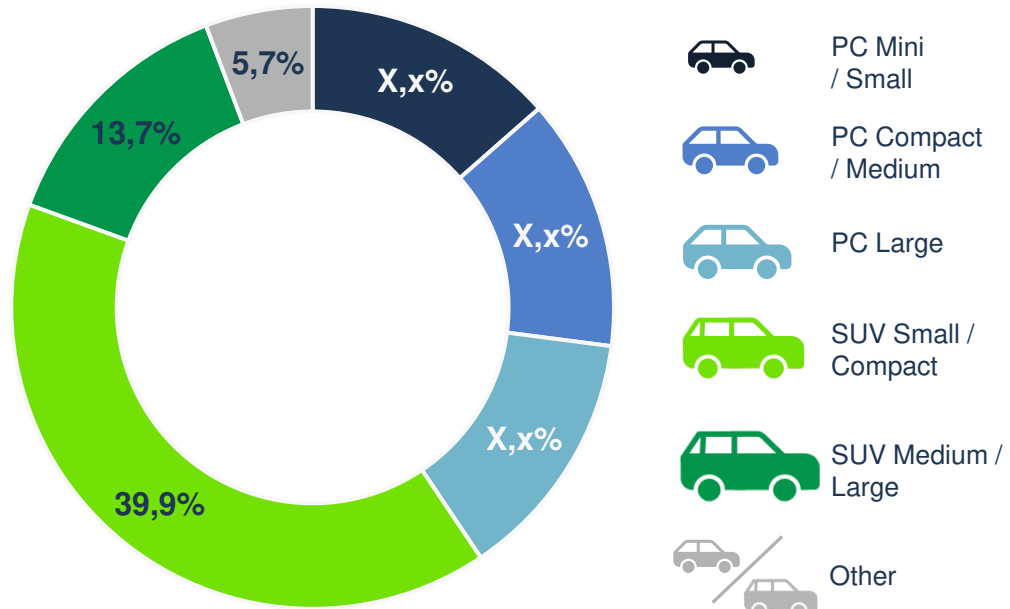
Regional popularity of body types

Details in the study

Details in the study

Most popular Models in True Fleet PC Market

Top 10 Models by PC registrations in 2023 **– True Fleet**

Top 10 Models

Details in the study

Kia Sportage �ён 64.300
Nissan Qashqai ▭ 60.600

– XXXX

– XXX
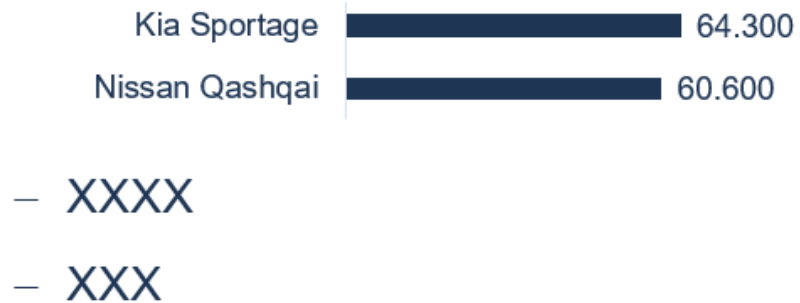
Top 3 countries for respective model

| 10% | 20% | 30% | 40% | 50% | 60% | 70% | 80% | 90% | 100% |

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Peugeot 208   🇫🇷   🇬🇧 🇳🇱 Other Countries

Nissan Qashqai   🇬🇧   🇮🇹 🇪🇸 Other Countries

Development of Annual Registrations (in thousand) & Top Brands/Models **– Total Market**

2.148

1.772

2019 2020 2021 2022 2023

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Compared to previous year: **-18%**

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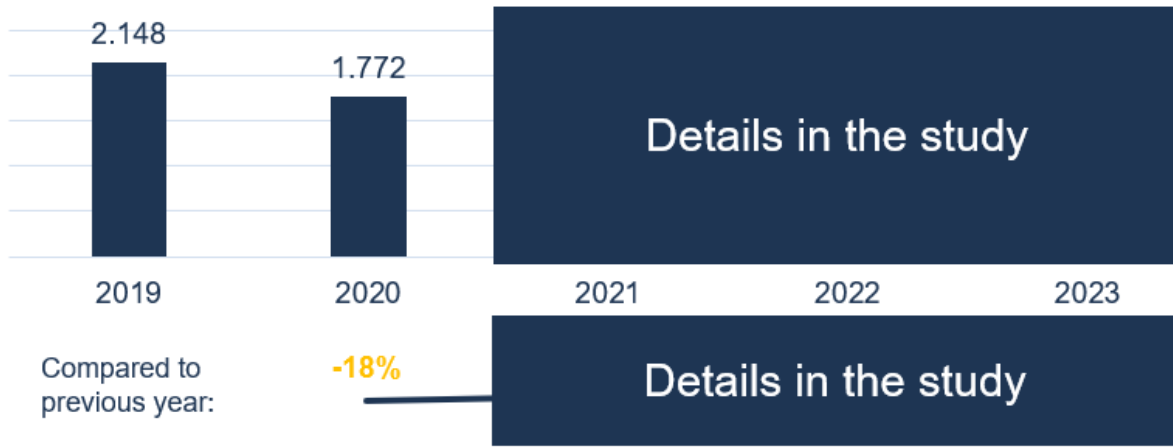
Summary

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Registering PC models as LCVs

In many European countries, customers can benefit from lower registration costs or tax breaks by registering their cars as LCVs. Countries with the highest proportion of PC models registered as LCVS are:

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Top 10 Brands
(in new car registrations)

16,7%	10,7%	9,6%
15,6%	8,7%	7,1%	5,8%
	7,9%	5,3%	3,7%
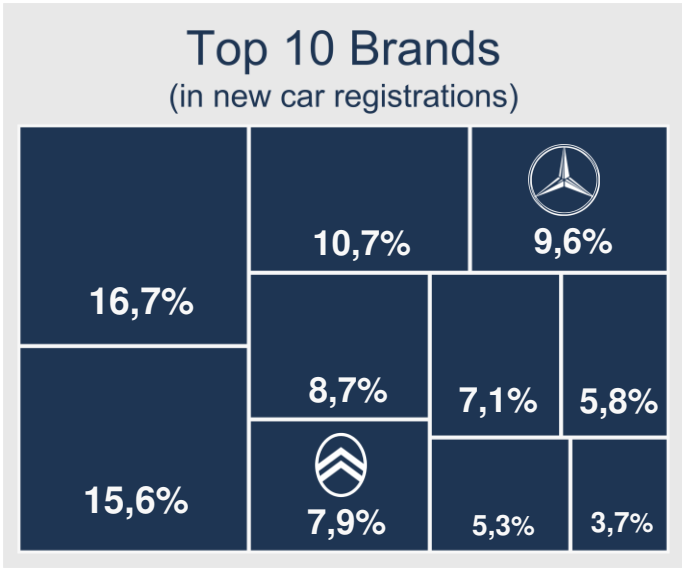
Top 10 Models
(in new car registrations)

1. XXX	6. XXX
2. XXX	7. Peugeot Partner
3. Ford Transit	8. XXX
4. XXX	9. XXX
5. XXX	10. XXX

EU Passenger Car Report 2024 : Pricing and order form

Direct online [order here](#)

☐ EU Passenger Car Report 2024 (€1,950 net)

Company: _____

Name: _____

E-Mail: _____

Phone: _____

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