











## **4.1 REGISTRATIONS IN SPAIN**



2018 was a positive year for registrations of passenger cars and 4-wheel drives, which were up 7% on the previous year. The private sales channel continued to grow, by 3.7%, while company sales were up 13.6% and sales to rental companies rose 5.7% in the year.

Despite the total for the year and the growth in all of the channels at year end, sales fell in the last four months of 2018, something that had not been seen in Spain for six years. The private sales channel was the most affected sector in the final part of the year, with registrations down 11.2% in December. Consumer uncertainty, the weakness of the market and news of slower economic growth put a brake on purchasing intentions at the end of the year.

Spain had the fifth highest growth in the registration of passenger cars in the European market, behind Germany, the UK, France and Italy.

#### Registrations by autonomous community

Madrid had the most vehicle registrations of any autonomous community in 2018. In terms of vehicle types, registrations of passenger cars and 4-wheel drives stood out, at 456,130 units, up 13.2% on 2017. This was followed by Catalonia in second place, with 185,105 units registered, with sales down 2.8% on the previous year - this was the only autonomous community where passenger-car registrations fell in the year.

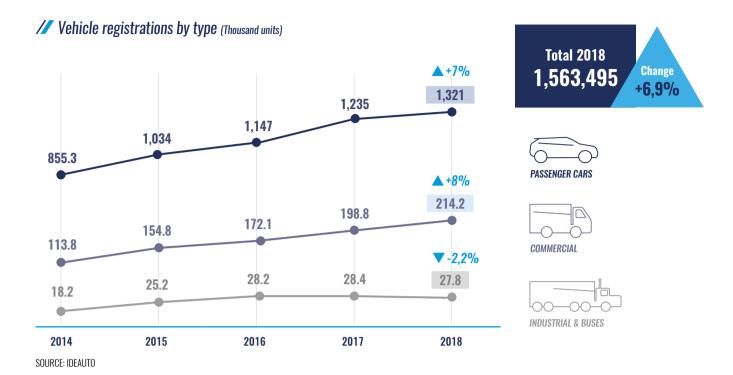












	2014	2015	2016	2017	2018	Change 17/18
Passenger cars and 4-wheel drives	855,308	1,034,232	1,147,009	1,234,932	1,321,437	7.00%
Light commercial	113,782	154,765	172,106	198,821	214,208	7.90%
Derivatives, vans and pick ups	75,733	101,068	110,066	122,242	131,221	7.35%
Light commercial vehicles <= 3.5 MT	38,049	53,697	62,040	76,579	82,987	8.37%
Industrial vehicles, micro buses and buses	18,191	25,215	28,232	28,482	27,850	-2.20%
Industrial vehicles > 3.5 MT	16,214	22,431	24,699	24,663	24,177	-1.97%
Microbuses and buses	1,977	2,784	3,533	3,819	3,673	-3.82%
Total	987,281	1,214,212	1,347,347	1,462,235	1,563,495	6.93%

SOURCE: IDEAUTO

## Registrations of passenger cars and 4-wheel drives by channel

	2014	2015	2016	2017	2018
Rental	155,308	176,561	206,170	225,058	237,777
Company	216,232	283,096	328,377	370,423	420,650
Private	483,768	574,575	612,462	639,451	663,010
Total	855,308	1,034,232	1,147,009	1,234,932	1,321,437











#### **//** Vehicle registrations by autonomous community

Passenger cars and 4-wheel drives	2017	2018	Change 17/18
Andalusia	139,541	149,044	6.81%
Aragon	24,396	26,223	7.49%
Asturias	18,364	19,661	7.06%
Balearic Islands	34,100	34,632	1.56%
Canary Islands	60,216	63,470	5.40%
Cantabria	10,764	11,781	9.45%
Castilla-La Mancha	35,627	38,237	7.33%
Castilla y León	37,838	38,882	2.76%
Catalonia	190,480	185,105	-2.82%
Ceuta and Melilla	2,167	2,404	10.94%
Valencia region	137,068	146,194	6.66%
Extremadura	14,553	15,714	7.98%
Galicia	43,128	46,098	6.89%
La Rioja	5,418	5,644	4.17%
Madrid	402,826	456,130	13.23%
Murcia	26,510	27,274	2.88%
Navarra	12,314	13,243	7.54%
Basque country	39,622	41,701	5.25%
Passenger cars and 4-wheel drives, total	1,234,932	1,321,437	7.00%















Light commercial	2017	2018	Change 17/18
Derivatives, vans and pick ups			
Andalusia	12,364	12,691	2.64%
Aragon	2,275	2,517	10.64%
Asturias	1,313	1,515	15.38%
Balearic Islands	4,595	4,680	1.85%
Canary Islands	10,640	11,534	8.40%
Cantabria	995	928	-6.73%
Castilla-La Mancha	3,411	4,279	25.45%
Castilla y León	2,678	3,061	14.30%
Catalonia	18,579	17,359	-6.57%
Ceuta and Melilla	113	114	0.88%
Valencia region	11,518	11,364	-1.34%
Extremadura	1,514	1,756	15.98%
Galicia	3,015	3,255	7.96%
La Rioja	627	657	4.78%
Madrid	40,000	46,160	15.40%
Murcia	2,851	2,564	-10.07%
Navarra	1,584	1,929	21.78%
Basque country	4,170	4,858	16.50%
Derivatives, vans and pick ups, total	122,242	131,221	7.35%
Light commercial <= 3.5 MT			-
Andalusia	8,689	8,973	3.27%
Aragon	1,631	1,724	5.70%
Asturias	1,189	1,130	-4.96%
Balearic Islands	1,969	1,896	-3.71%
Canary Islands	4,092	3,955	-3.35%
Cantabria	781	811	3.84%
Castilla-La Mancha	2,301	2,430	5.61%
Castilla y León	2,586	2,754	6.50%
Catalonia	13,858	13,468	-2.81%
Ceuta and Melilla	48	49	2.08%
Valencia region	7,059	7,575	7.31%
Extremadura	866	923	6.58%
Galicia	2,734	2,883	5.45%
La Rioja	453	491	8.39%
Madrid	21,513	26,902	25.05%
Murcia	1,846	1,777	-3.74%
Navarra	1,178	1,325	12.48%
Basque country	3,786	3,921	3.57%
Light commercial <= 3.5 MT, total	76,579	82,987	8.37%

SOURCE: IDEAUTO

Light commercial, total











214,208

Industrial vehicles, micro buses and buses	2017	2018	Change 17/18
Industrial >3.5 MT			
Andalusia	3,887	3,530	-9.18%
Aragon	1,027	1,076	4.77%
Asturias	412	393	-4.61%
Balearic Islands	269	293	8.92%
Canary Islands	467	515	10.28%
Cantabria	403	357	-11.41%
Castilla-La Mancha	1,368	1,340	-2.05%
Castilla y León	1,460	1,389	-4.86%
Catalonia	3,401	3,410	0.26%
Ceuta and Melilla	1	4	300.00%
Valencia region	2,129	2,404	12.92%
Extremadura	458	479	4.59%
Galicia	1,224	1,252	2.29%
La Rioja	189	197	4.23%
Madrid	4,924	4,634	-5.89%
Murcia	1,678	1,253	-25.33%
Navarra	577	701	21.49%
Basque country	789	950	20.41%
Industrial >3.5 MT, total	24,663	24,177	-1.97%
Microbuses and buses			
Andalusia	470	382	-18.72%
Aragon	76	107	40.79%
Asturias	87	85	-2.30%
Balearic Islands	200	168	-16.00%
Canary Islands	308	327	6.179
Cantabria	31	15	-51.61%
Castilla-La Mancha	109	110	0.92%
Castilla y León	263	135	-48.67%
Catalonia	518	597	15.25%
Ceuta and Melilla	1	2	100.00%
Valencia region	205	198	-3.41%
Extremadura	39	56	43.59%
Galicia	244	268	9.84%
La Rioja	33	30	-9.09%
Madrid	798	884	10.78%
Murcia	62	46	-25.81%
Navarra	65	64	-1.54%
Basque country	310	199	-35.81%
Microbuses and buses, total	3,819	3,673	-3.82%

Mnfac 2018 ANNUAL REPORT

SOURCE: IDEAUTO

Industrial vehicles, micro buses and buses, total







28,482



27,850

### Registrations of passenger cars and 4-wheel drives by segment

	2017	Share 2017	2018	Share 2018	Change 17/18
Urban	52,517	4.25%	55,133	4.17%	4.98%
Utility	289,512	23.44%	289,413	21.90%	-0.03%
Compact	273,820	22.17%	272,865	20.65%	-0.35%
Medium	74,489	6.03%	61,163	4.63%	-17.89%
Large	9,672	0.78%	8,661	0.66%	-10.45%
Premium	2,068	0.17%	2,487	0.19%	20.26%
Sports, high	737	0.06%	740	0.06%	0.41%
Sports, low	2,201	0.18%	1,986	0.15%	-9.77%
Van, small	76,065	6.16%	67,943	5.14%	-10.68%
Van, Large	10,128	0.82%	7,753	0.59%	-23.45%
SUV small	145,334	11.77%	196,641	14.88%	35.30%
SUV medium	239,562	19.40%	288,869	21.86%	20.58%
Large SUV	45,758	3.71%	54,873	4.15%	19.92%
Premium SUV	8,335	0.67%	7,928	0.60%	-4.88%
4-wheel drives	4,734	0.38%	4,982	0.38%	5.24%
Total	1,234,932	100.00%	1,321,437	100.00%	7.00%













### Registrations of passenger cars and 4-wheel drives by make

		2017	2018	Change 17/18
<b>(1)</b>	Alfa Romeo	4,036	4,723	17.02%
Alpro	Alpine	0	27	
	Aston Martin	19	15	-21.05%
0000	Audi	54,939	55,216	0.50%
8	Bentley	52	52	0.00%
	BMW	48,754	49,417	1.36%
	Buick	1	0	-100.00%
	Citroën	64,743	68,917	6.45%
DACIA	Dacia	46,398	51,928	11.92%
0	Dfsk	0	2	
ď	Dr	0	6	
K	Ds	3,675	4,325	17.69%
NOTE:	Ferrari	52	63	21.15%
(FIAT)	Fiat	54,343	58,607	7.85%
Ford	Ford	62,398	63,301	1.45%
	Honda	8,407	8,017	-4.64%
B	Hyundai	55,219	64,573	16.94%
<b>(</b>	Infiniti	1,849	1,759	-4.87%
2	Jaguar	3,545	4,394	23.95%
Jeep	Jeep	8,493	17,240	102.99%
KIA	Kia	58,949	67,786	14.99%
0	Lada	1	2	100.00%
	Lamborghini	14	15	7.14%
(AVCR)	Lancia	37	0	-100.00%
LAND - ROVER	Land rover	10,192	7,808	-23.39%
	Lexus	6,130	7,247	18.22%
	Lotus	3	8	166.67%

		2017	2018	Change 17/18
D	Mahindra	133	156	17.29%
	Maserati	367	320	-12.81%
$\Theta$	Mazda	18,558	21,362	15.11%
7	McLaren	4	9	125.00%
	Mercedes	52,058	52,334	0.53%
<b>ANNE</b>	Mini	12,136	12,713	4.75%
*	Mitsubishi	9,770	12,114	23.99%
- infini	Morgan	6	5	-16.67%
7	Мрт	0	3	
NISSAN	Nissan	62,403	62,327	-0.12%
9	Opel	86,921	79,755	-8.24%
N	Peugeot	87,732	98,914	12.75%
Ø.	Porsche	2,302	2,253	-2.13%
<b></b>	Renault	101,503	96,198	-5.23%
R	Rolls Royce	3	1	-66.67%
S	Seat	94,461	107,328	13.62%
	Skoda	24,860	29,460	18.50%
O	Smart	5,990	6,288	4.97%
<b>(</b> )	SsangYong	3,857	3,412	-11.54%
	Subaru	2,210	3,099	40.23%
12	Suzuki	7,675	7,528	-1.92%
T	Tesla	387	323	-16.54%
(1)	Toyota	66,300	71,267	7.49%
	Volkswagen	89,602	102,954	14.90%
	Volvo	13,445	15,866	18.01%
Total		1,234,932	1,321,437	7.00%













### // Registrations by vehicle type and source

		2017	2018	Change 17/18
	Domestic	111,738	87,361	-21.82
	Imported from EU	933,317	1,014,273	8.67
Passenger cars and 4-wheel drives	Imported NON-EU	189,877	219,803	15.76
	Total	1,234,932	1,321,437	7.00
	Domestic	34,605	46,793	35.22
	Imported from EU	51,495	45,617	-11.41
Derivatives, vans and pick ups	Imported NON-EU	36,142	38,811	7.38
	Total	122,242	131,221	7.35
	Domestic	11,419	12,389	8.49
	Imported from EU	9,479	8,739	-7.81
Light commercial vehicles <= 3.5 MT	Imported NON-EU	55,681	61,859	11.10
	Total	76,579	82,987	8.37
	Domestic	7,407	7,157	-3.38
	Imported from EU	16,368	15,831	-3.28
Industrial vehicles > 3.5 MT	Imported NON-EU	888	1,189	33.90
	Total	24,663	24,177	-1.97
	Domestic	541	444	-17.93
	Imported from EU	368	380	3.26
Microbuses	Imported NON-EU	71	71	0.00
	Total	980	895	-8.67
	Domestic	1,419	999	-29.60
	Imported from EU	1,280	1,606	25.47
Buses	Imported NON-EU	140	173	23.57
	Total	2,839	2,778	-2.15
Total		1,462,235	1,563,495	6.93

SOURCE: DGT (Spanish Traffic Authority)













LETTER FROM THE CHAIRMAN **BASIC FIGURES VEHICLE PRODUCTION VEHICLE VEHICLE** TURNOVER MILESTONES TRANSPARENCY PORTAL AND VICE CHAIRMAN REGISTRATIONS AND TAXATION OF THE SECTOR AND EXPORTS STOCK OF THE YEAR

# **4.2 REGISTRATIONS BY POWER SOURCE**



Deliveries of alternative vehicles increased by 62% in 2018 compared to 2017, with 115,147 units registered. Hybrid was the most popular alternative technology in terms of registrations in 2018. There were 76,118 registrations of non-plug-in hybrid vehicles, while plug-in vehicles increased by 70% in 2018, with 5,683 deliveries.

Registrations of electric vehicles also increased, up by 59% with 7,833 deliveries; however, there were only 148 registrations of extended range electric vehicles (E-REV) in the year, 20% fewer than in 2017.

Registrations of gas-powered vehicles stood at 25,364 units in 2018, four-times the sales of 2017. LPG was the fastest growing technology, with a total of 19,663 vehicles delivered, while 5,403 CGN vehicles were registered, 128% more than in the previous year.

Registrations of alternative vehicles increased by 62% compared to 2017











### ✓ Vehicle registrations by type and power source

	2014	2015	2016	2017	2018	Change 17/18
Passenger cars and 4-wheel drives	855,308	1,034,232	1,147,009	1,234,932	1,321,437	7.00%
Petrol	275,045	360,967	459,171	570,008	739,531	29.74%
Diesel	565,477	650,093	651,617	597,006	473,477	-20.69%
Hybrid diesel	258	136	80	132	1,218	822.73%
Hybrid petrol	11,825	18,270	30,817	55,420	74,555	34.53%
Electric	974	1,342	2,005	3,920	5,982	52.60%
Electric e-REV	102	119	138	186	148	-20.43%
Plug-in hybrid diesel (PHEV)	31	16	32	63	48	-23.81%
Plug-in hybrid petrol (PHEV)	298	771	1,479	3,279	5,635	71.85%
Hydrogen	0	0	0	0	1	
LPG	1,130	2,256	1,321	3,688	17,088	363.34%
CNG	140	262	349	1,230	3,754	205.20%
LNG	28	0	0	0	0	
Light commercial	113,782	154,765	172,106	198,821	214,208	7.74%
Derivatives, vans and pick ups	75,733	101,068	110,066	122,242	131,221	7.35%
Petrol	954	4,217	6,921	10,709	15,620	45.86%
Diesel	74,143	95,855	102,026	109,515	110,459	0.86%
Electric	433	615	826	977	1,822	86.49%
LPG	153	314	207	778	2,569	230.21%
CNG	50	67	86	263	750	185.17%
LNG	0	0	0	0	1	
Commercial <= 3.5	38,049	53,697	62,040	76,579	82,987	8.37%
Petrol	16	37	24	28	41	46.43%
Diesel	37,999	53,596	61,903	76,411	82,779	8.33%
Electric	0	0	23	0	3	
LPG	0	0	0	0	1	
CNG	32	64	90	137	159	16.06%
LNG	2	0	0	3	4	33.33%
Industrial vehicles	18,190	25,209	28,220	28,482	27,842	-2.25%
Industrial > 3.5	16,214	22,431	24,699	24,663	24,177	-1.97%
Petrol	6	0	6	4	0	-100.00%
Diesel	16,169	22,373	24,354	24,154	23,457	-2.89%
Hybrid diesel	0	0	7	47	85	80.85%
Electric	0	0	2	3	4	33.33%
LPG	0	1	0	0	5	
CNG	33	53	288	426	333	-21.83%
LNG	6	4	42	29	293	910.34%
Microbuses and buses	1,976	2,778	3,521	3,819	3,665	-4.03%
Petrol	4	2	1	0	0	
Diesel	1,887	2,647	3,108	3,313	2,976	-10.17%
Hybrid diesel	31	62	142	172	260	51.16%
Electric	3	1	10	18	22	22.22%
Electric e-REV	5	1	0	0	0	
CNG	42	65	260	316	407	28.80%
LNG	4	0	0	0	0	
Total	987,280	1,214,206	1,347,335	1,462,235	1,563,487	6.92%























LETTER FROM THE CHAIRMAN BASIC FIGURES VEHICLE PRODUCTION VEHICLE **VEHICLE** TURNOVER MILESTONES TRANSPARENCY AND EXPORTS REGISTRATIONS STOCK AND TAXATION PORTAL AND VICE CHAIRMAN OF THE SECTOR OF THE YEAR

# **4.3 REGISTRATIONS IN EUROPE** (by country and type)



SOURCE: National Automobile Manufacturers' Associations

15.136.590

Total EU

15.158.874

0.1%

1.996.158





2.058.755





714.134

3.1%



737.919

1.03









		INDUSTRIAL	INDUSTRIAL ≥16 MT			BUSES & COACHES >3.5 MT			
	2017	2018	Change 17/18	2017	2018	Change 17/18	2017	2018	Change 17/18
Austria	8,186	8,204	0.2%	7,652	7,722	0.9%	1,244	1,125	-9.6%
<b>Belgium</b>	9,818	10,816	10.2%	8,337	9,095	9.1%	869	1,060	22.0%
Bulgaria	-	-		-	-		-	-	
Croatia	1,344	1,397	3.9%	1,051	1,052	0.1%	204	224	9.8%
<b>Cyprus</b>	104	121	16.3%	65	50	-23.1%	-	-	
Czech Rep.	10,008	9,894	-1.1%	8,286	7,988	-3.6%	804	1,203	49.6%
<b>Denmark</b>	5,029	4,998	-0.6%	4,545	4,574	0.6%	856	578	-32.5%
<b>Estonia</b>	1,037	1,078	4.0%	991	1,005	1.4%	212	137	-35.4%
Finland	3,473	3,897	12.2%	2,868	2,904	1.3%	514	475	-7.6%
France	51,308	55,463	8.1%	44,452	48,519	9.1%	6,329	6,230	-1.6%
Germany	91,755	94,404	2.9%	64,747	66,770	3.1%	6,697	6,687	-0.1%
<b>Greece</b>	445	351	-21.1%	218	171	-21.6%	190	263	38.4%
Hungary	5,854	6,258	6.9%	5,178	5,590	8.0%	642	659	2.6%
<b>Ireland</b>	2,264	2,144	-5.3%	1,883	1,810	-3.9%	339	446	31.6%
<b>Italy</b>	24,347	25,582	5.1%	19,614	20,594	5.0%	3,353	4,584	36.7%
Latvia	1,561	1,645	5.4%	1,505	1,582	5.1%	245	126	-48.6%
Lithuania	6,996	8,290	18.5%	6,862	8,178	19.2%	392	696	77.6%
Luxembourg	1,138	1,032	-9.3%	977	885	-9.4%	239	217	-9.2%
Netherlands	14,635	15,971	9.1%	13,267	14,322	8.0%	887	562	-36.6%
Poland	27,659	29,870	8.0%	25,317	27,445	8.4%	2,288	2,687	17.4%
Portugal	5,372	5,133	-4.4%	4,503	4,156	-7.7%	361	510	41.3%
Rumania	6,108	6,903	13.0%	5,821	6,656	14.3%	1,031	1,324	28.4%
Slovakia	4,190	4,308	2.8%	3,749	3,846	2.6%	403	351	-12.9%
Slovenia	2,367	2,761	16.6%	2,215	2,578	16.4%	183	187	2.2%
Spain	24,675	24,178	-2.0%	20,659	19,792	-4.2%	3,527	3,327	-5.7%
Sweden	6,752	6,802	0.7%	6,198	6,205	0.1%	1,301	931	-28.4%
<b>≥K</b> UK	54,648	52,468	-4.0%	40,649	38,470	-5.4%	8,342	7,403	-11.3%
EU15	303,845	311,443	2.5%	240,569	245,989	2.3%	35,048	34,398	-1.9%
EU12	67,228	72,525	7.9%	61,040	65,970	8.1%	6,404	7,594	18.6%
EFTA	11,221	11,879	5.9%	8,415	8,616	2.4%	2,058	1,816	-11.8%
EU + EFTA	382,294	395,847	3.5%	310,024	320,575	3.4%	43,510	43,808	0.7%
EU15 + EFTA	315,066	323,322	2.6%	248,984	254,605	2.3%	37,106	36,214	-2.4%
lceland	391	422	7.9%	222	255	14.9%	156	109	-30.1%
<b>H</b> Norway	6,244	7,068	13.2%	4,470	4,919	10.0%	1,190	1,026	-13.8%
Switzerland	4,586	4,389	-4.3%	3,723	3,442	-7.5%	712	681	-4.4%
Total EU	371,073	383,968	3.5%	301,609	311,959	3.4%	41,452	41,992	1.3%

SOURCE: National Automobile Manufacturers' Associations













#### **TOTALS AND CHANGE**

	TOTALS AND CHANGE							
		2017	2018	Change 17/18				
	Austria	410,576	401,760	0.98%				
	Belgium	641,979	648,539	1.01%				
	Bulgaria	-	-					
	Croatia	61,419	71,430	1.16%				
***	Cyprus	-	-					
	Czech Rep.	310,091	300,747	0.97%				
+	Denmark	268,163	262,574	0.98%				
	Estonia	31,489	32,619	1.04%				
-	Finland	140,967	143,290	1.02%				
	France	2,650,252	2,741,266	1.03%				
	Germany	3,875,155	3,888,830	1.00%				
HE I	Greece	95,563	111,121	1.16%				
	Hungary	147,881	171,829	1.16%				
	Ireland	160,036	155,518	0.97%				
	Italy	2,211,837	2,142,375	0.97%				
	Latvia	22,245	22,625	1.02%				
	Lithuania	43,319	53,188	1.23%				
	Luxembourg	59,883	59,798	1.00%				
	Netherlands	516,566	553,838	1.07%				
	Poland	602,605	660,710	1.10%				
0	Portugal	270,888	277,371	1.02%				
	Rumania	135,368	163,387	1.21%				
•	Slovakia	112,008	115,711	1.03%				
-	Slovenia	87,764	91,070	1.04%				
	Spain	1,482,894	1,583,288	1.07%				
+	Sweden	449,034	424,295	0.94%				
	UK	3,006,405	2,822,813	0.94%				
EU15		16,240,198	16,216,676	1.00%				
EU12		1,606,684	1,738,872	1.08%				
EFTA		585,351	559,431	0.96%				
EU + E	FTA	18,432,233	18,514,979	1.00%				
EU15 -	+ EFTA	16,825,549	16,776,107	1.00%				
#	lceland	24,081	20,671	0.86%				
#	Norway	206,392	198,146	0.96%				
+	Switzerland	354,878	340,614	0.96%				
	Total EU	17,846,882	17,955,548	1.01%				
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SOURCE: National Automobile Manufacturers' Associations

