

Estonia's Passenger Cars Sales (Mar 2021)

Sales of New Cars rose 25.6% in March 2021

Sales of new cars in Estonia increased by 0.431 thousand in March compared to last year and reached 2.12 thousand. In the first three months of the year, 5.73 thousand cars have been sold, a growth of 1.43% yoy. In 4Q2020, sale of electric-chargeable vehicles reached 0.172 thousand and accounted for 3.10% of all new cars sold.

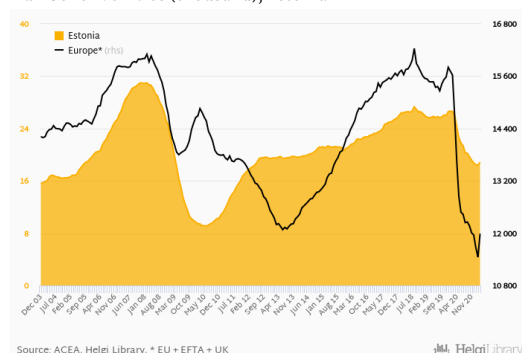
- ✓ Sales of new passenger cars in Estonia reached 2.12 thousand in March 2021, according to ACEA. This is 25.6%, or 0.431 thousand more than in the previous year. In the first three months of 2021, some 5.73 thousand cars were sold, up 1.43% yoy.
- ✓ In the fourth quarter of 2020, sales of new electrically-chargeable passenger cars reached 0.172 thousand in Estonia, up 1,047% yoy. Together with hybrid and other alternative fuels, sale of alternative fuel vehicles reached 20.2% of all new cars sold.
- ✓ Sales of traditionally-powered vehicles using petrol and diesel reached 4.43 thousand or 79.8% of total in the fourth quarter of 2020 in Estonia. The share of petrol reached 41.6% and of diesel-powered vehicles 38.2% of all new passenger cars sold.
- ✓ In Europe, sales of new cars rose 62.7% to 1,388 thousand in March. Within the first three months of the year, the increase reached 0.849% as 3,081 thousand cars were sold.
- ✓ Volkswagen Group sold the most cars in March 2021 in Europe, some 341 thousand vehicles representing 24.6% of the European market. Sales of PSA Group amounted to 212 thousand vehicles (or 15.3% of the market) while Renault Group and BMW Group held 7.80% and 7.50% of the market. Overall, the five largest manufacturers sold 62.3% of all new cars in March.

Sale of New Cars (ths.)

Country	Mar 21	YoY
Germany	292	35.9%
UK	284	11.5%
France	183	192%
Italy	170	499%
Spain	85.8	128%
Poland	47.8	61.3%
Sweden	47.5	71.7%
Belgium	45.0	56.1%
Austria	29.5	177%
Switzerland	25.2	43.7%
Netherlands	24.2	-18.0%
Denmark	23.7	56.3%
Czechia	20.1	46.5%
Norway	15.3	23.1%
Portugal	12.7	19.8%
Hungary	12.4	8.33%
Finland	10.4	13.4%
Ireland	9.23	50.0%
Greece	8.98	140%
Romania	7.86	18.1%

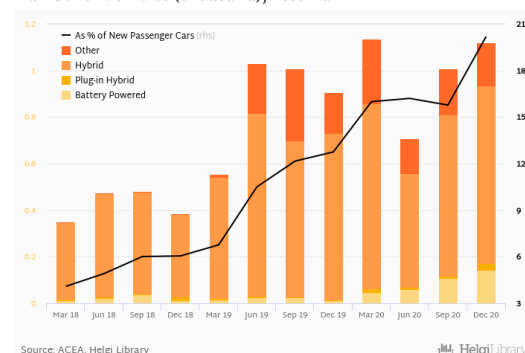
Annual Sales of New Passenger Cars

Number of Vehicles (thousand), Estonia



Sales of Alternately-Powered Vehicles

Number of Vehicles (thousand), Estonia



Data tells a story

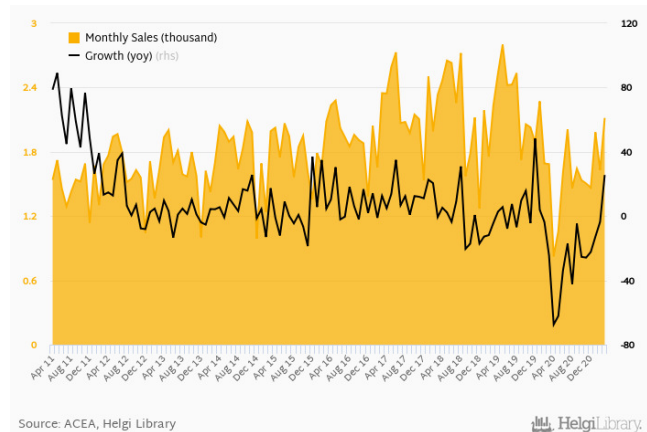
Sales of New Cars in Estonia rose 25.6% in March 2021

Sales of new passenger cars reached 2.12 thousand in March 2021 in Estonia, according to ACEA. This is 25.6%, or 0.431 thousand more than in the previous year. In the first three months of 2021, some 5.73 thousand cars were sold, up 1.43% yoy.

Historically, between 2003 and 2021, sales of passenger cars in Estonia reached a high of 3.23 thousand in May 2007 and a low of 0.562 thousand in February 2010.

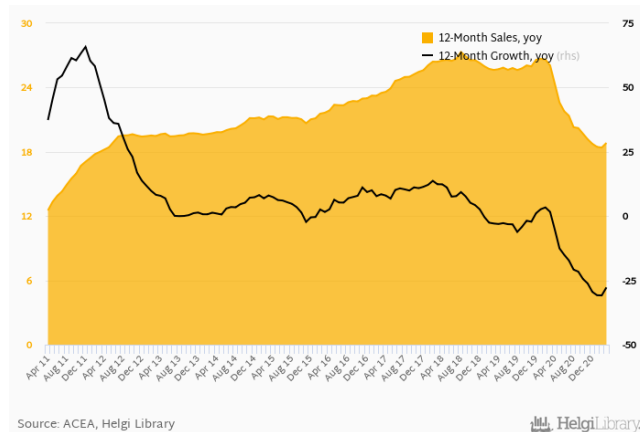
Monthly Sales of New Passenger Cars

Number of Vehicles (thousand) and Annual Growth (%), Estonia



Annual Sales of New Passenger Cars in Estonia

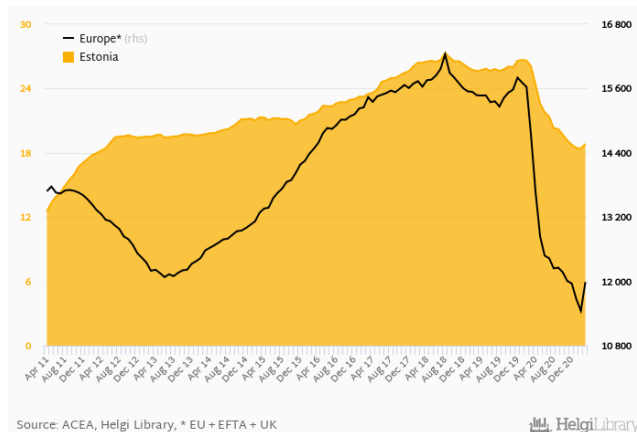
Number of Vehicles (thousand) and Annual growth, March 2021



In Europe, sales of new passenger cars reached 1,388 thousand in March 2021. This is 62.7%, or 535 thousand more than in the previous year. In the first three months of 2021, some 3,081 thousand cars were sold in Europe, up 0.849% yoy.

Annualized Sales of New Cars (Estonia vs. Europe)

Number of Vehicles (thousand)

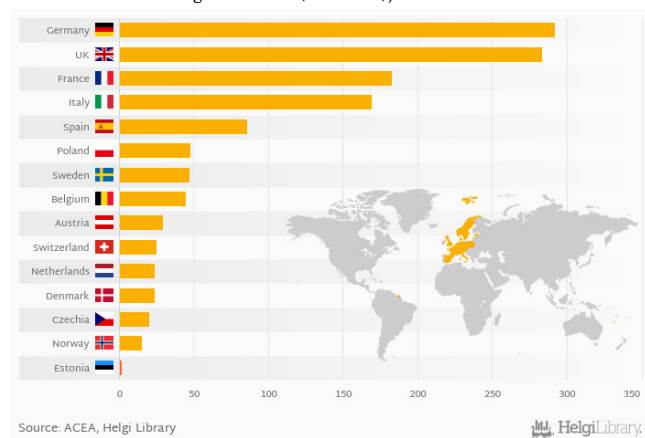


In March, most vehicles (292 thousand) were sold in Germany (up 35.9% yoy), followed by the United Kingdom (284 thousand, up 11.5%), France with 183 thousand cars (up 192%), 170 thousand new vehicles were registered in Italy (up 499%) and 85.8 thousand in Spain (up 128%).

The five largest countries accounted for 73.1% of total new vehicles registered in March 2021:

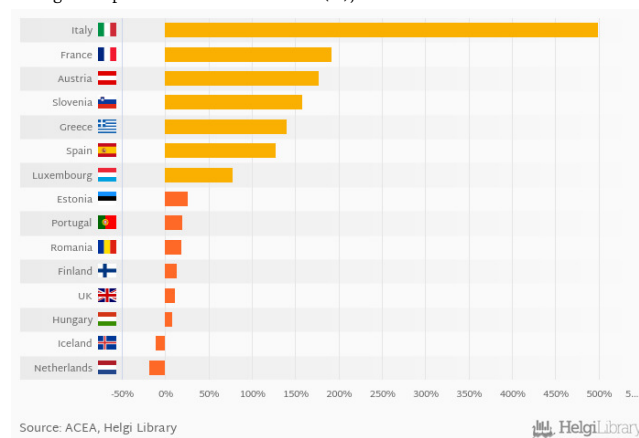
Where Most Cars Were Sold in Europe?

Number of New Passenger Cars Sold (thousand), March 2021



Change in Demand for New Cars in Europe

Change Compared to the Previous Year (%), March 2021

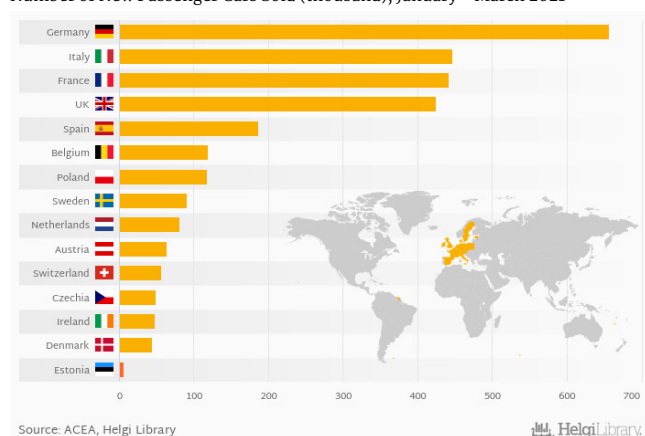


In relative terms, sales in Italy (up 499%) and France (up 192%) performed the best compared to a year ago, whereas registration in Netherlands and Iceland performed the worst (down 18.0% and down 11.2% yoy), in March 2021, according to ACEA.

In the first three months of the year, some 3,081 thousand cars were sold in Europe, up 0.849% yoy. Most cars were sold in Germany (656 thousand) followed by Italy (447 thousand) and France (442 thousand).

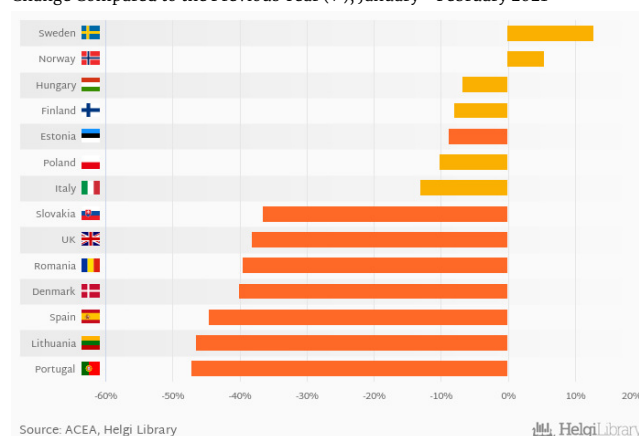
Where Most Cars Were Sold in Europe?

Number of New Passenger Cars Sold (thousand), January - March 2021



Change in Demand for New Cars in Europe

Change Compared to the Previous Year (%), January - February 2021





The table below shows details of the sales for each of the European countries in the last month and since the beginning of the year.

Sales of New Passenger Cars in Europe (thousands of vehicles)

COUNTRY	March 2021	March 2020	YOY Change %	1-3/2021	1-3/2020	YOY Change %
Austria	29.5	10.7	177	63.5	54.7	16.2
Belgium	45.0	28.8	56.1	119	127	-6.42
Bulgaria	2.16	1.61	33.9	5.58	5.94	-6.06
Croatia	4.15	2.72	52.8	10.5	10.0	4.67
Cyprus	0.964	0.742	29.9	2.70	2.94	-8.23
Czech Republic	20.1	13.7	46.5	49.5	50.2	-1.31
Denmark	23.7	15.2	56.3	43.9	48.9	-10.1
Estonia	2.12	1.69	25.6	5.73	5.65	1.43
Finland	10.4	9.19	13.4	28.0	28.3	-1.03
France	183	62.7	192	442	365	21.1
Germany	292	215	35.9	656	701	-6.40
Greece	8.98	3.74	140	23.4	21.4	9.58
Hungary	12.4	11.5	8.33	32.2	32.7	-1.46
Iceland	0.957	1.08	-11.2	2.18	2.48	-12.3
Ireland	9.23	6.15	50.0	48.2	51.2	-5.99
Italy	170	28.3	499	447	347	28.9
Latvia	1.38	1.07	28.9	3.44	3.87	-11.1
Lithuania	3.07	2.24	37.4	7.61	10.7	-29.0
Luxembourg	4.97	2.80	77.5	12.5	11.9	4.57
Netherlands	24.2	29.5	-18.0	81.2	104	-21.6
Norway	15.3	12.5	23.1	36.3	32.4	12.2
Poland	47.8	29.7	61.3	118	108	9.50
Portugal	12.7	10.6	19.8	31.0	45.3	-31.5
Romania	7.86	6.65	18.1	20.8	28.0	-25.8
Slovakia	6.54	5.01	30.5	15.4	19.0	-18.8
Slovenia	7.07	2.74	158	16.3	14.3	13.8
Spain	85.8	37.6	128	186	219	-14.9
Sweden	47.5	27.6	71.7	90.9	66.1	37.4
Switzerland	25.2	17.6	43.7	56.5	55.5	1.88
United Kingdom	284	255	11.5	426	484	-12.0
EU + EFTA	1,388	853	62.7	3,081	3,055	0.849

Source: ACEA, Helgi Library

Sales by Power

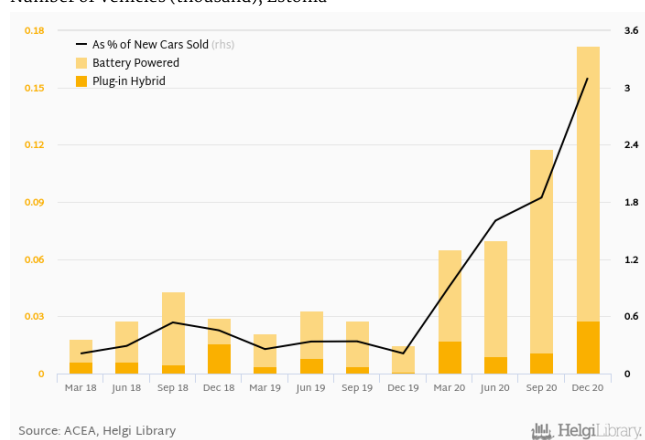
Electric Chargeable Cars

Sales of new electrically-chargeable passenger cars (battery electric and plug-in hybrid electric vehicles) reached 0.172 thousand in the 4Q2020 in Estonia, according to ACEA. This is 1.00%, or 0.157 thousand more than in the previous year.

Share of electric chargeable vehicles increased to 3.10% of all new passenger cars sold in 4Q2020, up from 0.211% seen in the fourth quarter of 2019. In Europe, the share was 19.6%, up from 5.37% a year ago:

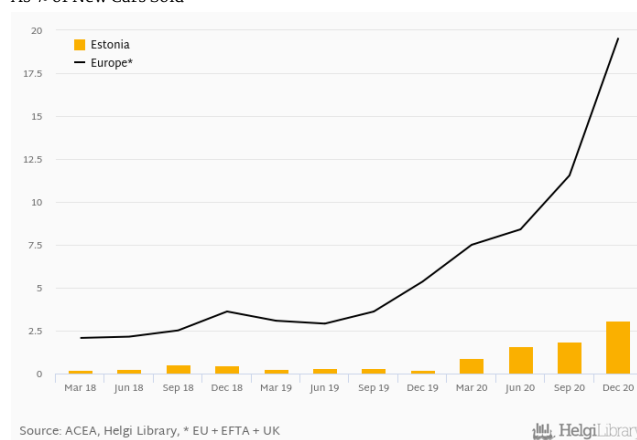
Sales of Electric Chargeable Vehicles

Number of Vehicles (thousand), Estonia



Share of Electric Vehicles vs. Europe

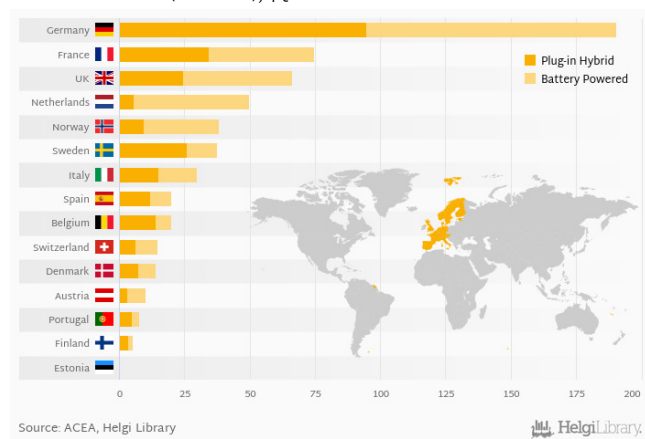
As % of New Cars Sold



In Europe, most electric vehicles (190 thousand) were sold in Germany (up 455% yoy) in the fourth quarter of 2020, followed by France (74.8 thousand, up 291%), the United Kingdom with 66.2 thousand thousand cars (up 168%), 49.9 thousand new vehicles were registered in Netherlands (up 50.2%) and 38.2 thousand in Norway (up 111%). Consumers in Norway preferred the electric cars the most (82.9% of new cars sold) followed by Iceland (58.5%) and Netherlands (46.3%):

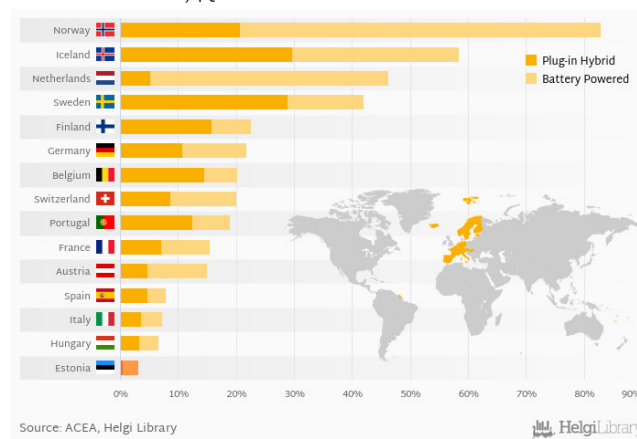
Sales of Electric Chargeable Vehicles in Europe

Number of Vehicles (thousand), 4Q2020



Share of Electric Chargeable Vehicles in Europe

As % of New Cars Sold, 4Q2020



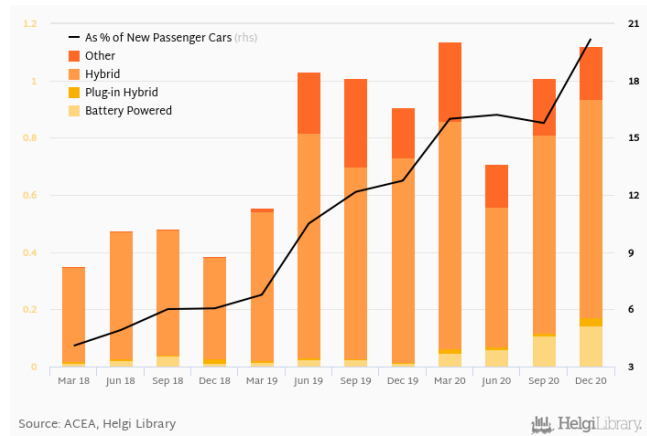
Hybrid Electric and Other Alternately-Powered Cars

When hybrid electric vehicles (cars that combine a conventional internal combustion engine system with an electric propulsion system) and other alternately-powered cars (such as natural gas vehicles (NGV), LPG-fueled vehicles and ethanol (E85) vehicles) are included, total sales of alternately-powered cars in Estonia (other than using diesel or petrol) amounted to 1.12 thousand vehicles in the fourth quarter of 2020. This is 23.8%, or 0.215 thousand more than in the previous year.

Share of such alternately-powered vehicles increased to 20.2% of all new passenger cars sold in 4Q2020, up from 12.7% seen in the fourth quarter of 2019. In Europe, the share was 35.3%, up from 14.4% a year ago:

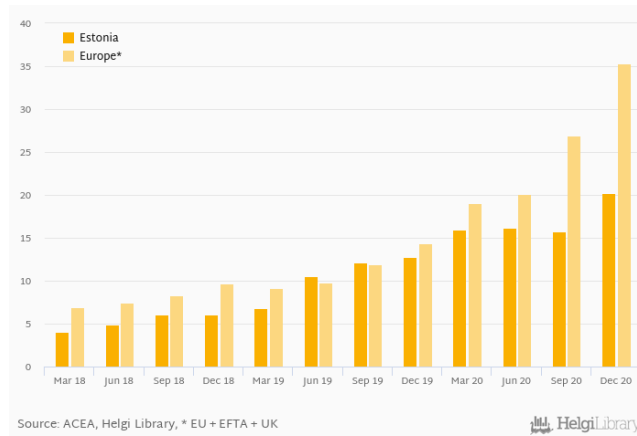
Sales of Alternately-Powered Vehicles

Number of Vehicles (thousand), Estonia



Sales of Alternately-Powered Vehicles vs. Europe

As % Of New Cars Sold



Petrol and Diesel-Powered Cars

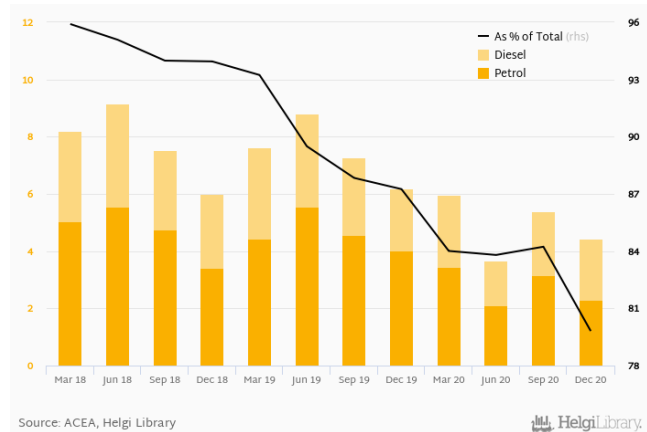
Sales of traditionally-powered vehicles using petrol and diesel reached 4.43 thousand in the fourth quarter of 2020 in Estonia, according to ACEA. This is 28.5%, or 1.77 thousand vehicles fewer than in the previous year.

Some 2.31 thousand petrol-powered vehicles were sold, down 42.8% when compared to a year ago. The share decreased to 41.6% of all new passenger cars sold in 4Q2020, down from 56.8% seen in the fourth quarter of 2020. Share of diesel-powered cars rose to 38.2% (from 30.5% in 4Q2020) with 2.12 thousand cars sold in the fourth quarter of 2020.

As a result, share of traditionally-powered cars amounted to of all new passenger cars sold in 1Q2021, up from 84.0% seen in the first quarter of 2020. In Europe, the share was , up from 81.0% a year ago:

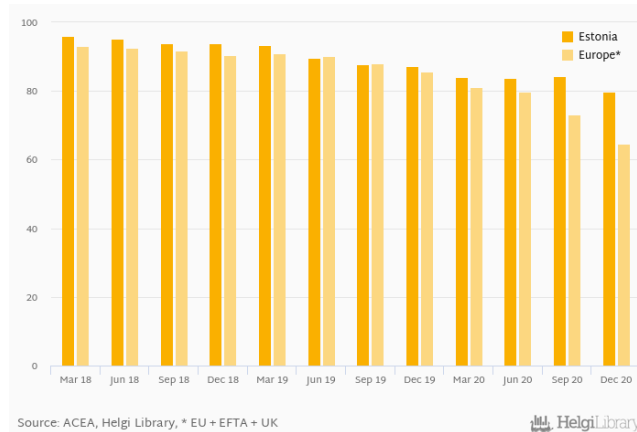
Sales of Traditionally-Powered Vehicles

Number of Vehicles (thousand), Estonia



Sales of Traditionally-Powered Vehicles vs. Europe

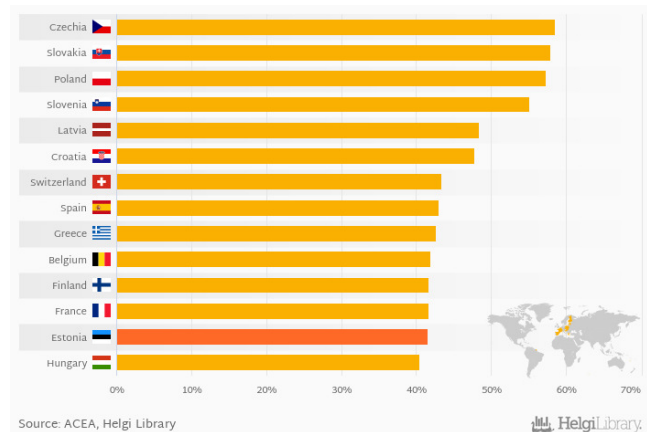
As % of New Cars Sold



In the first quarter of 2021, ranked the highest in the number of petrol-fuelled as a proportion of new cars sold with followed by and . In terms of diesel-fuelled vehicles, ranked the highest with followed by and :

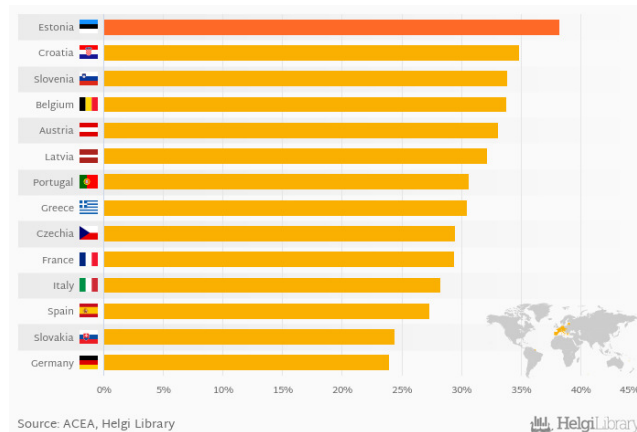
Who likes the Petrol-Fuelled Cars the Most?

Petrol Cars as % Of New Cars Sold (%), 4Q2020



Who Likes Diesel-fuelled Cars the Most?

Diesel Cars as % Of New Cars Sold (%), 4Q2020

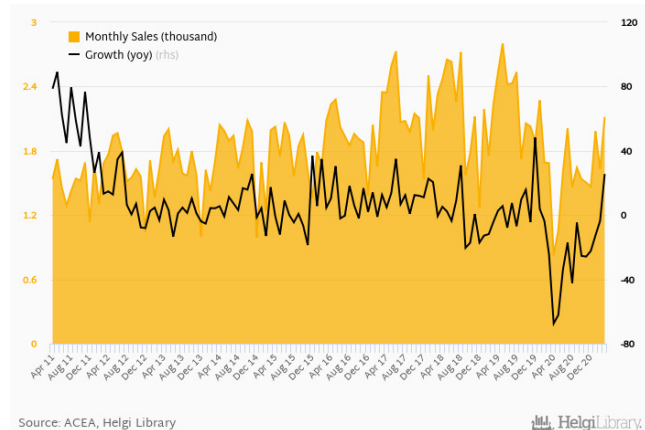




Sales of New Cars in Estonia

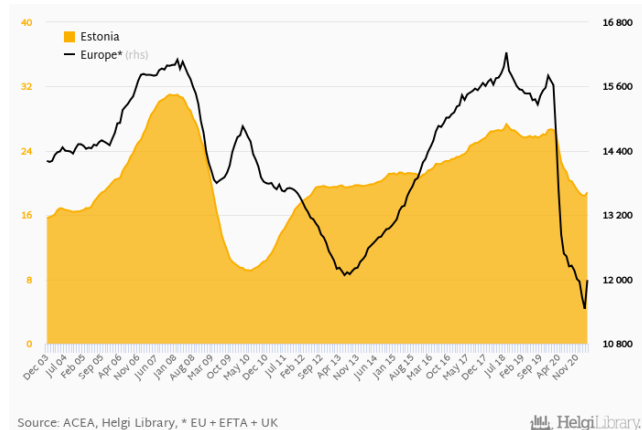
Monthly Sales of New Passenger Cars

Number of Vehicles (thousand) and Annual Growth (%), Estonia



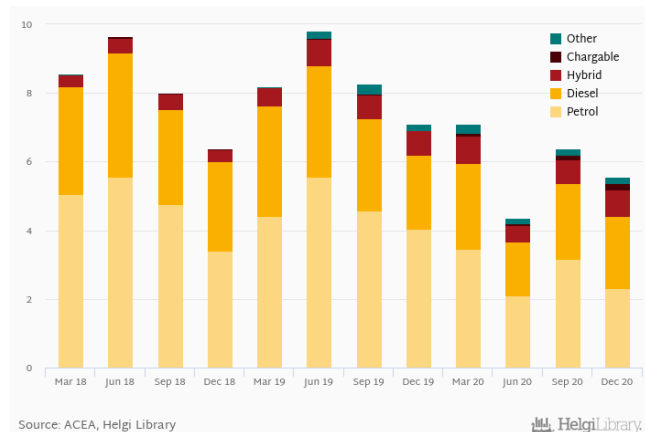
Annual Sales of New Passenger Cars

Number of Vehicles (thousand), Estonia



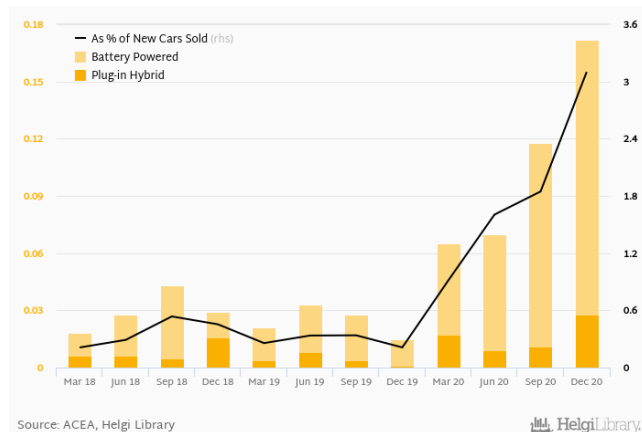
Sales of Vehicles by Power

Number of Vehicles (thousand), Estonia



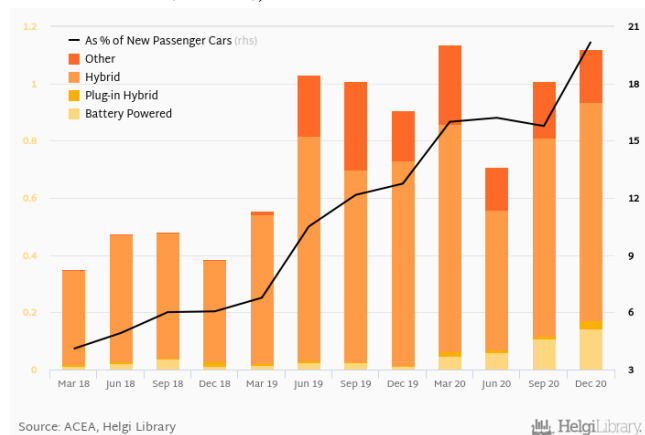
Sales of Electric Chargeable Vehicles

Number of Vehicles (thousand), Estonia



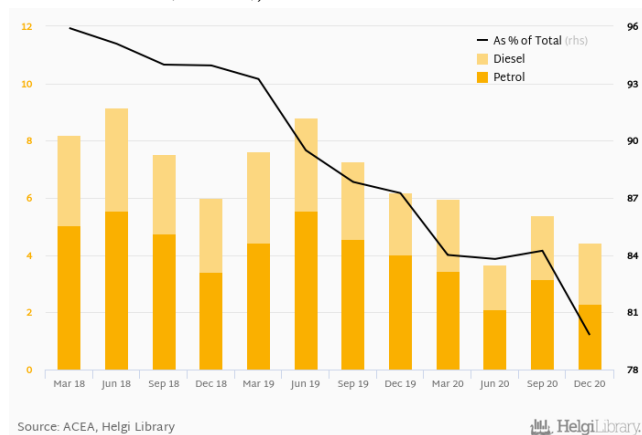
Sales of Alternately-Powered Vehicles

Number of Vehicles (thousand), Estonia



Sales of Traditionally-Powered Vehicles

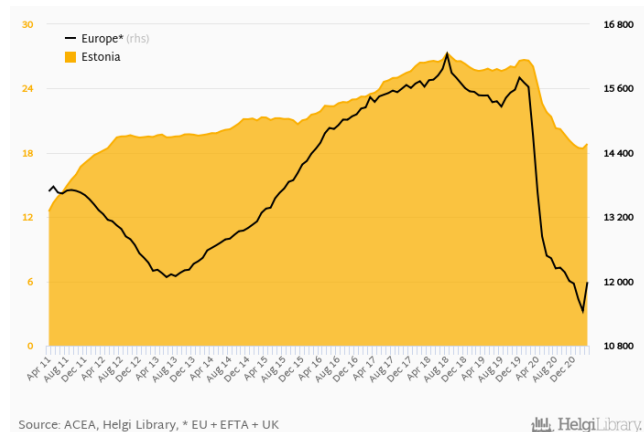
Number of Vehicles (thousand), Estonia



Quarterly Sales of New Cars in Estonia vs. Europe

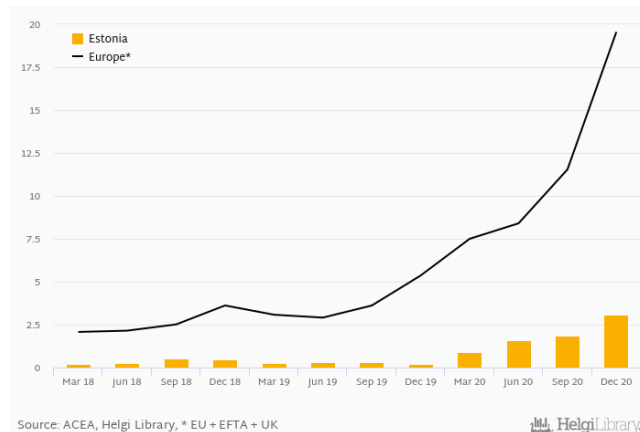
Annualized Sales of New Cars (Estonia vs. Europe)

Number of Vehicles (thousand)



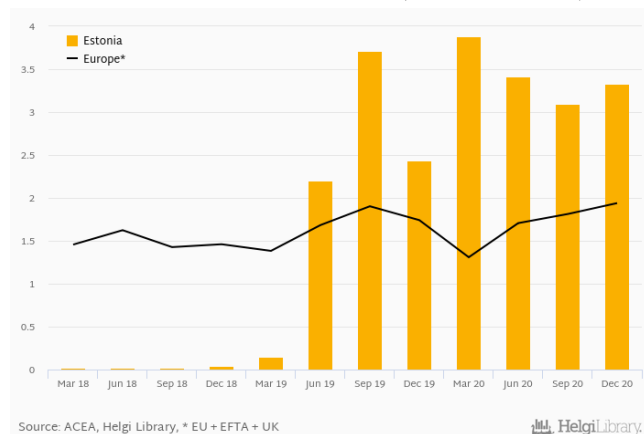
Sales of Chargeable Electric Vehicles

As % of New Cars Sold



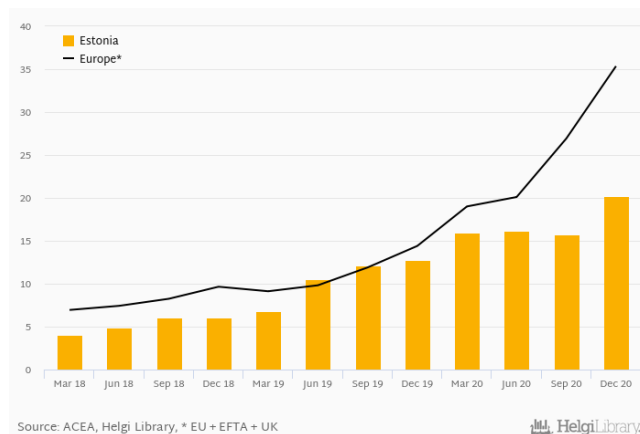
Sales of Alternately-Powered Vehicles

Alternative Powered Vehicles Other than Electric (as % of New Cars Sold)



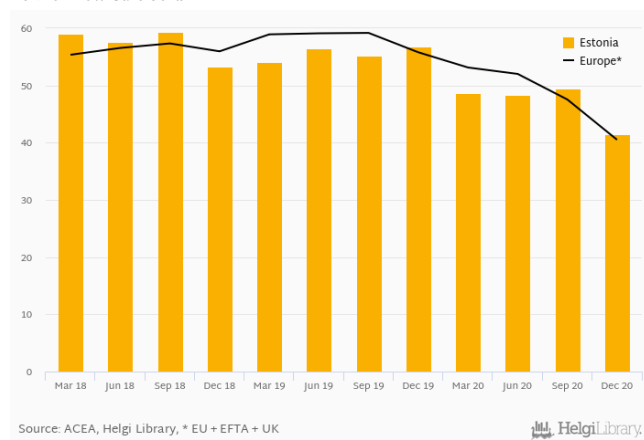
Sales of All Alternately Powered Vehicles

As % of New Cars Sold



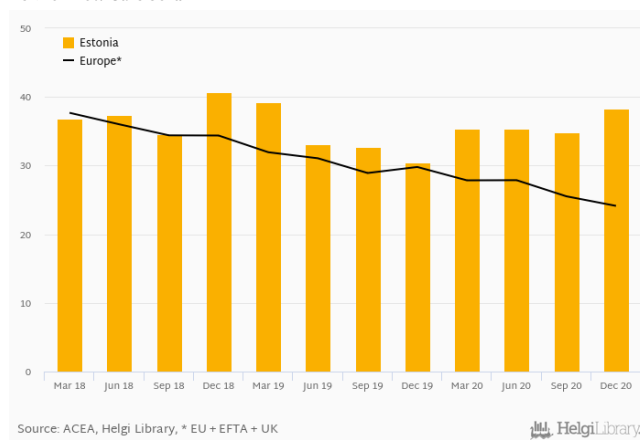
Sales of Petrol-Powered Vehicles

As % of New Cars Sold



Sales of Diesel-Powered Vehicles

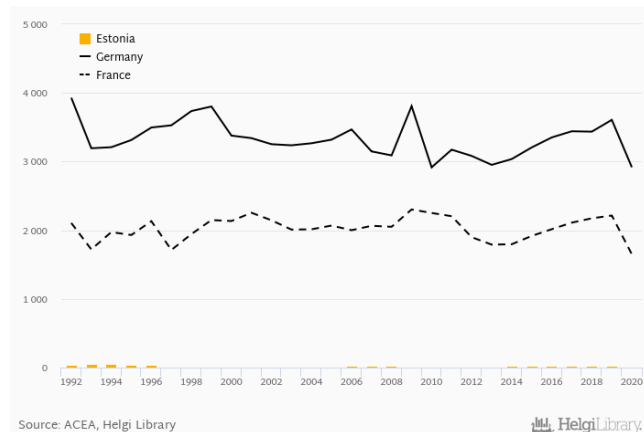
As % of New Cars Sold



Annual Sales of New Cars in Estonia vs. Europe

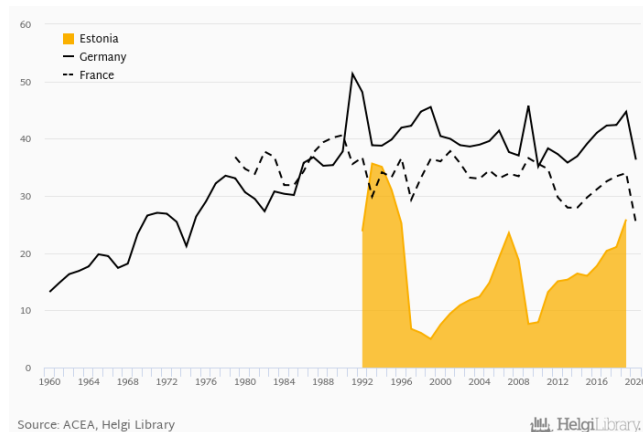
Sales of New Cars

Number of Vehicles (thousand)



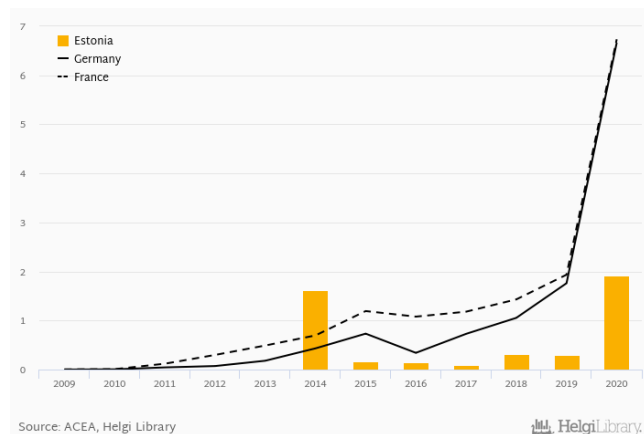
Sales of Cars per 1,000 People

Number of Vehicles



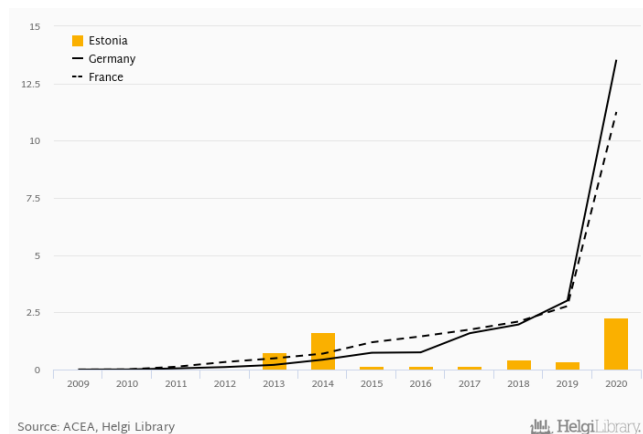
Battery Electric Vehicles

As % of New Cars Sold



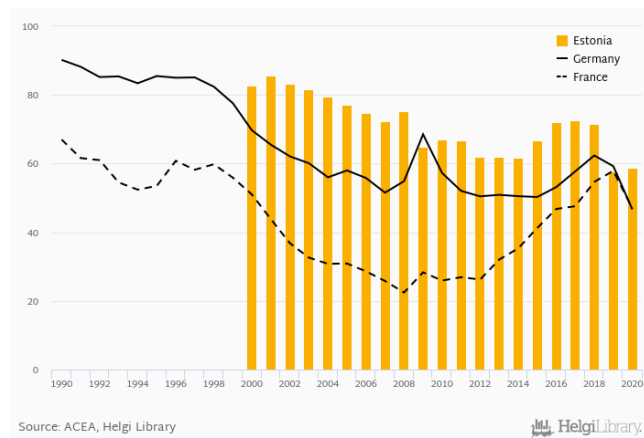
Total Chargeable Electric Vehicles

As % of New Cars Sold



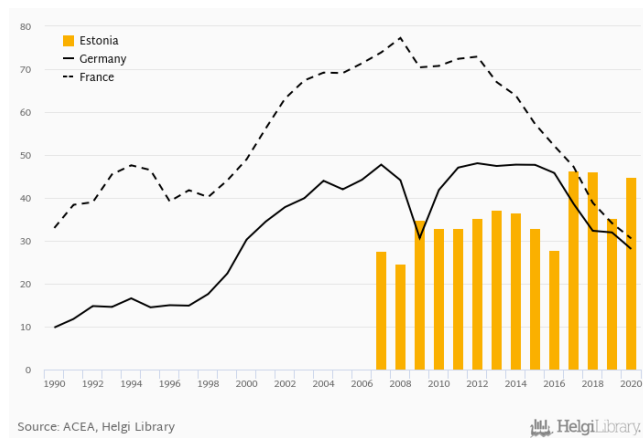
Petrol-Fuelled Cars

As % of New Cars Sold



Diesel-Fuelled Cars

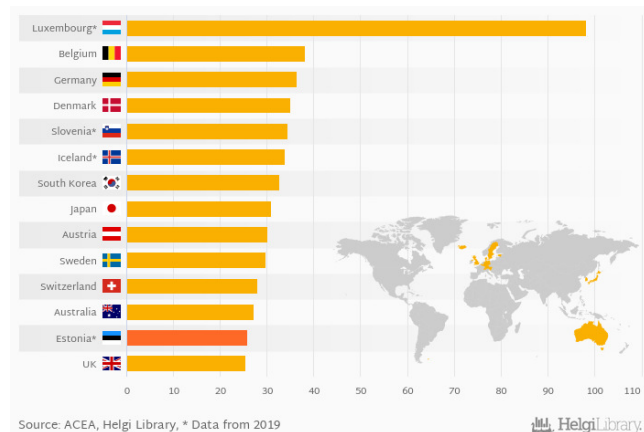
As % of New Cars Sold



Estonia in the International Comparison

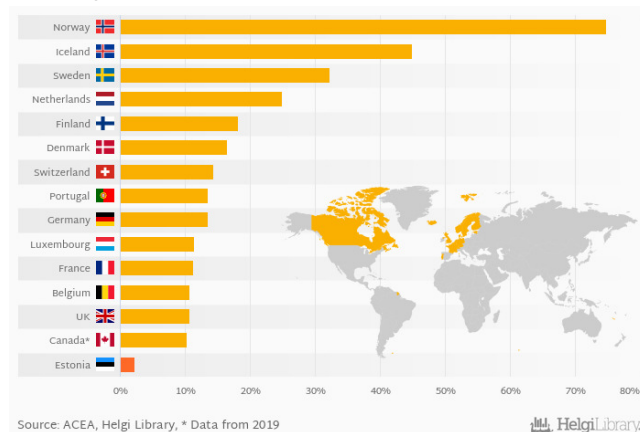
Who Buys Cars Most Often?

Sales Of Cars Per 1,000 People, 2020



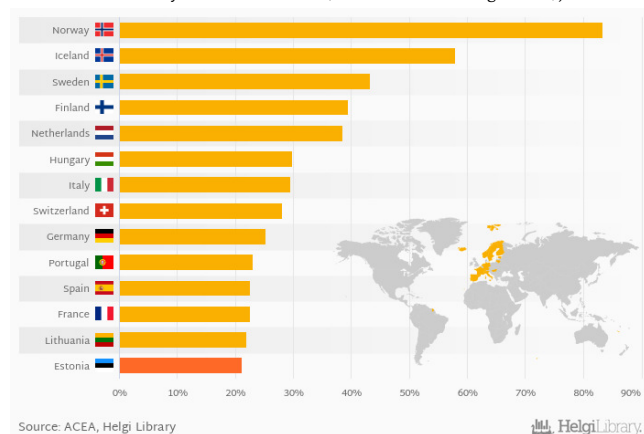
Who Buys Electric Cars Most Often?

Total Chargeable Electric Vehicles (As % of New Cars Sold), 2020



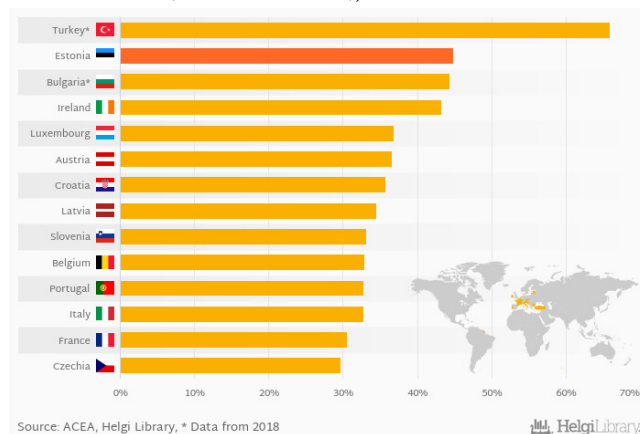
Who Buys Alternative Cars Most Often?

Sales of Alternately Powered Vehicles (As % of New Passenger Cars), 2020



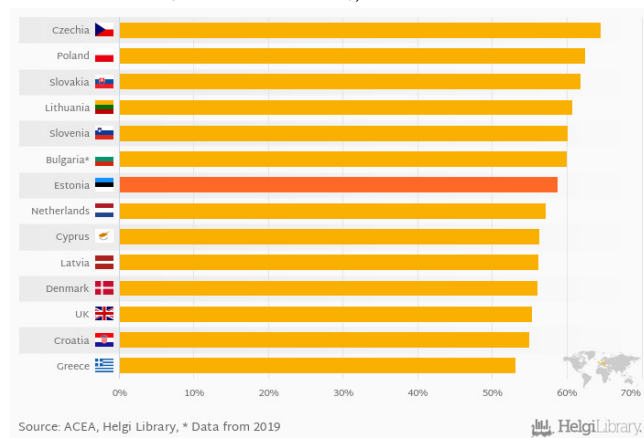
Who likes the Diesel-Fuelled Cars the Most?

Diesel-Fuelled Cars (As % of New Cars Sold), 2020



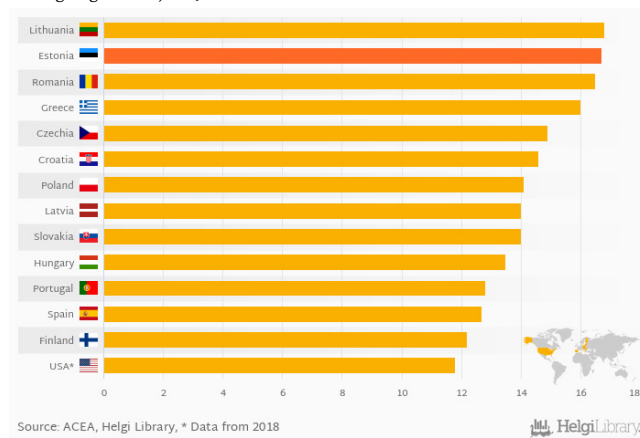
Who Buys Petrol Cars Most Often?

Petrol-Fuelled Cars (As % of New Cars Sold), 2020



Who Drives the Oldest Cars?

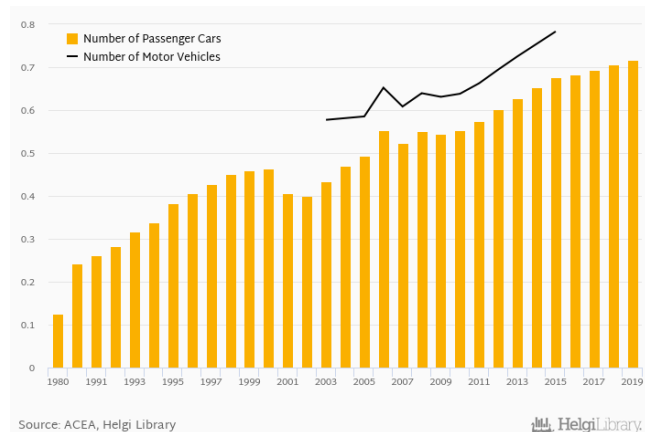
Average Age of Car, 2019



Vehicles, Infrastructure & Accidents in Estonia

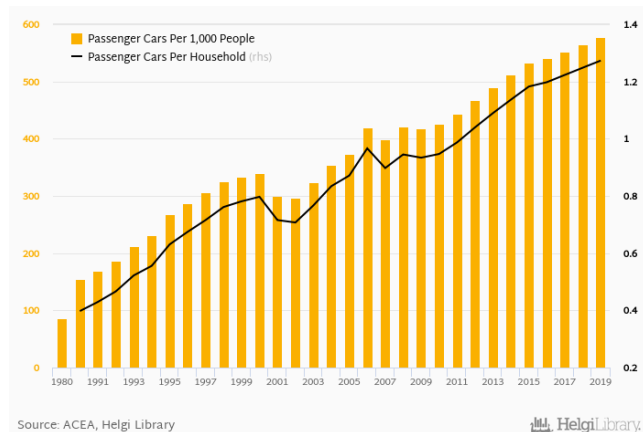
Stock of Motor Vehicles & Cars

Number of Vehicles (mil)



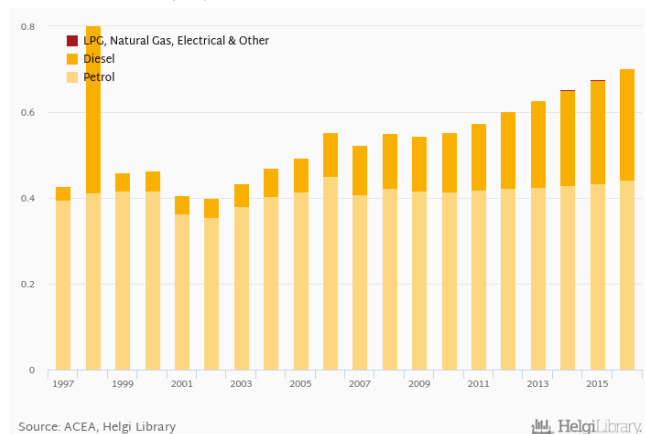
Stock of Passenger Cars

Number of Vehicles



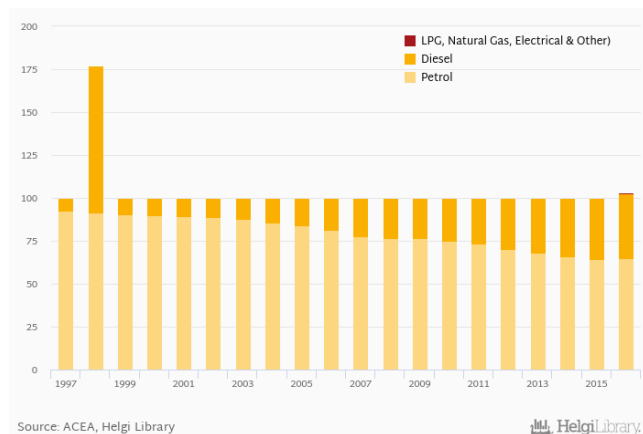
Absolute Stock of Passenger Cars

Number of Vehicles (mil)



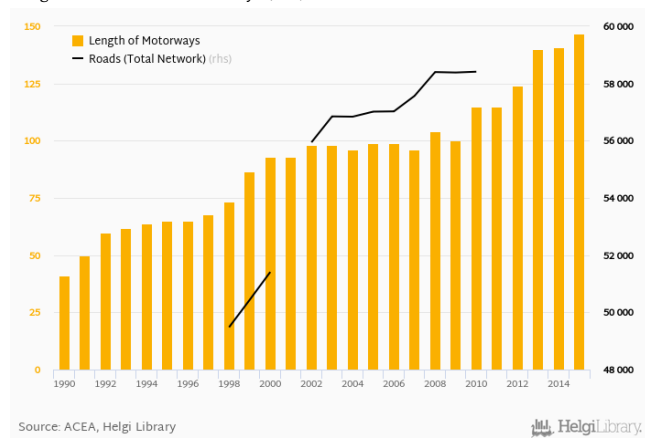
Relative Stock of Passenger Cars

As % of Total Cars



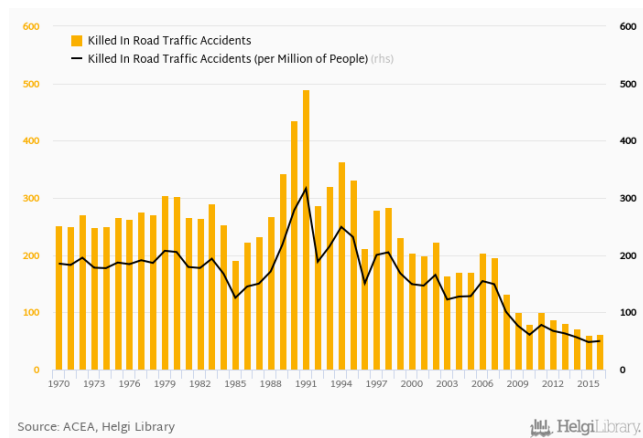
Road Infrastructure

Length of Roads and Motorways (km)



Road Safety

Number of Deaths





Sale of Vehicles – Annually

SALE OF VEHICLES		2012	2013	2014	2015	2016	2017	2018	2019
Sales Of New Passenger Cars	thousand	19.4	19.7	21.1	21.0	23.0	25.6	26.3	26.6
Sales Of Cars Per 1,000 People	vehicles	15.1	15.4	16.4	16.0	17.8	20.4	21.1	25.9
Sales Of New Cars (As of World's Sales)	%	0.032	0.031	0.032	0.031	0.032	0.036	0.038	0.050
Sales of Battery Electric Vehicles	thousand	...	0.001	0.340	0.034	0.035	0.026	0.085	0.080
Sales of Plug-in Hybrid Electric Vehicles	thousand	...	...	...	...	0	0.017	0.033	0.017
Sales of Total Chargeable Electric Vehicles	thousand	...	0.149	0.340	0.034	0.035	0.043	0.118	0.097
Sales of Alt. Fuel Vehicles Other than Electric	thousand	...	...	...	...	0.025	0.040	0.009	0.708
Sales of Petrol-Fuelled Cars	thousand	12.1	12.2	13.0	13.6	16.2	18.6	18.8	18.6
Sales of Diesel-Fuelled Cars	thousand	6.86	7.35	7.67	6.71	6.23	11.9	12.1	11.3
Battery Electric Vehicles (As of New Cars Sold)	%	...	0.005	1.62	0.167	0.156	0.101	0.323	0.301
Plug-in Hybrid Electric (As of New Cars Sold)	%	...	...	...	...	0	0.066	...	...
Chargeable Electric (As of New Cars Sold)	%	...	0.757	1.62	0.167	0.156	0.168	0.449	0.365
Petrol-Fuelled Cars (As of New Cars Sold)	%	62.0	62.0	61.8	66.8	72.1	72.6	71.4	57.8
Diesel-Fuelled Cars (As of New Cars Sold)	%	35.3	37.3	36.6	33.0	27.8	46.3	46.1	35.3

Source: Company Data, Helgi Analytics

Sale of Vehicles – Quarterly

SALE OF VEHICLES		Jun 19	Sep 19	Dec 19	Mar 20	Jun 20	Sep 20	Dec 20	Mar 21
Sales Of New Passenger Cars	thousand	9.83	8.28	7.10	7.10	4.36	6.39	5.55	...
Sales of Battery Electric Vehicles	thousand	0.025	0.024	0.014	0.048	0.061	0.107	0.144	...
Sales of Plug-in Hybrid Electric Vehicles	thousand	0.008	0.004	0.001	0.017	0.009	0.011	0.028	...
Sales of Total Chargeable Electric Vehicles	thousand	0.033	0.028	0.015	0.065	0.070	0.118	0.172	...
Sales of Alt. Fuel Vehicles Other than Electric	thousand	0.216	0.307	0.173	0.276	0.149	0.198	0.185	...
Sales of Petrol-Fuelled Cars	thousand	5.55	4.57	4.03	3.46	2.11	3.16	2.31	...
Sales of Diesel-Fuelled Cars	thousand	3.25	2.70	2.16	2.51	1.55	2.23	2.12	...
Battery Electric Vehicles (As of New Cars Sold)	%	0.254	0.290	0.197	0.676	1.40	1.67	2.60	...
Plug-in Hybrid Electric (As of New Cars Sold)	%	0.081	0.048	0.014	0.239	0.206	0.172	0.505	...
Chargeable Electric (As of New Cars Sold)	%	0.336	0.338	0.211	0.915	1.60	1.85	3.10	...
Alt. Fuel Other than Electric (As of Cars Sold)	%	2.20	3.71	2.44	3.89	3.41	3.10	3.33	...
Petrol-Fuelled Cars (As of New Cars Sold)	%	56.4	55.2	56.8	48.7	48.4	49.4	41.6	...
Diesel-Fuelled Cars (As of New Cars Sold)	%	33.1	32.7	30.5	35.3	35.4	34.8	38.2	...

Source: Company Data, Helgi Analytics



Stock of Vehicles

STOCK OF VEHICLES		2012	2013	2014	2015	2016	2017	2018	2019
Number of Motor Vehicles	mil	0.694	0.725	0.754	0.783	...	...	...	...
Number of Passenger Cars	mil	0.602	0.629	0.653	0.677	0.682	0.694	0.705	0.717
Number of Passenger Cars (Petrol Engine)	mil	0.424	0.426	0.429	0.434	0.443	...	...	...
Number of Passenger Cars (Diesel Engine)	mil	0.177	0.201	0.223	0.241	0.258	...	...	...
Passenger Cars Fuelled by Alternative Energy	mil	< 0.001	< 0.001	0.001	0.002	0.002	...	...	...
Petrol Passenger Cars (As % of Total Cars)	%	70.5	67.8	65.7	64.2	64.9	...	...	...
Diesel Passenger Cars (As % of Total Cars)	%	29.4	32.0	34.1	35.6	37.9	...	...	...
Alt. Fuel Passenger Cars (As % of Total Cars)	%	0.100	0.132	0.199	0.222	0.239	...	...	...
Age of Car (Average)	years	...	...	...	15.1	15.3	16.0	16.7	16.7
Total Commercial Vehicles	mil	0.092	0.097	0.101	0.107	...	...	...	...
Number of Coaches, Buses & Trolleybuses	vehicles	4,410	4,587	4,706	4,845	...	...	...	...
Number of Motorcycles	'000	22.8	24.8	27.0	...	...	...	...	...
Number of Mopeds	'000	12.4	13.9	15.3	16.5	...	...	...	...

Source: Company Data, Helgi Analytics

Vehicles per Population

VEHICLES PER POPULATION		2012	2013	2014	2015	2016	2017	2018	2019
Motor Vehicles Per 1,000 People	vehicles	539	566	591	617	...	...	...	...
Passenger Cars Per 1,000 People	vehicles	468	490	512	533	540	553	565	577
Passenger Cars Per Household	vehicles	1.04	1.09	1.14	1.18	1.20	1.22	1.25	1.27
Coaches & Buses per mil People	vehicles	3,425	3,579	3,689	3,817	...	...	...	...
Motorcycles Per 1,000 People	vehicles	17.7	19.4	21.1	...	...	...	...	...
Mopeds Per 1,000 People	vehicles	9.65	10.8	12.0	13.0	...	...	...	...

Source: Company Data, Helgi Analytics

Production of Vehicles

Source: Company Data, Helgi Analytics



Safety on the Road

SAFETY ON THE ROAD		2012	2013	2014	2015	2016	2017	2018	2019
Killed and Injured in Road Traffic Accidents	persons	1,383	1,385	1,437	1,392	1,458	...	...	...
Killed In Road Traffic Accidents	persons	87.0	81.0	72.0	61.0	63.0	...	...	...
Injured in Road Traffic Accidents	persons	1,296	1,304	1,365	1,331	1,395	...	...	...
Killed and Injured per mil People	persons	1,006	1,017	1,070	1,049	1,105	...	...	...
Killed In Road Traffic Accidents per mil People	persons	67.6	63.2	56.4	48.1	49.9	...	...	...
Injured in Road Accidents per mil People	persons	1,006	1,017	1,070	1,049	1,105	...	...	...
Number Injured per 100,000 Cars	persons	...	...	...	...	...	...	...	...
Number Killed per 1,000 Road Accidents	persons	...	...	...	...	...	...	...	...
Number of Fatalities per 100,000 Cars	persons	...	...	...	...	...	...	...	...
Road Injury Accidents		1,383	1,385	1,437	1,392	1,458	...	...	...
Road Injury Accidents per mil People		...	...	...	...	...	...	...	...

Source: Company Data, Helgi Analytics

Road Infrastructure

ROAD INFRASTRUCTURE		2012	2013	2014	2015	2016	2017	2018	2019
Roads (Total Network)	km	...	...	...	...	...	...	...	...
Roads, Paved (As % of Total Roads)	%	...	...	...	...	...	...	...	...
Length of Motorways	km	124	140	141	147	...	...	...	...
Length of Other Roads	km	58,644	58,827	58,984	58,828	...	...	...	...
Motorway Density (km per 1,000 km2 of Land)	km	2,925	3,303	3,326	...	...	...	...	...
Road Density (km per 100 km2 of Land Area)	km	...	...	...	...	...	...	...	...
Road Infrastructure Investments (As of GDP)	%	0.710	0.664	0.549	0.774	...	...	...	...
Road Energy Consumption (As of Total)	%	...	...	...	...	...	...	...	...
Road Energy Consumption (kt of Oil)	kt	...	...	...	...	...	...	...	...
Road Energy Consumption Per Capita	kg	...	...	...	...	...	...	...	...
Vehicles (Per km of Road)	vehicles	...	...	...	...	...	...	...	...

Source: Company Data, Helgi Analytics



ABOUT HELGI ANALYTICS

Helgi Analytics is a consulting company based in the Czech Republic. The company mainly provides consultancy in the area of financial services and real estate and focuses primarily on the region of Central and Eastern Europe.

Helgi Analytics also runs a web application called Helgi Library, which is a database/library offering data and analyses on more than 99% of the world's economy and population. The Library aims to bring interesting statistical data and analyses to a wide audience under affordable conditions. If you wish to get more details, please visit www.helgilibrary.com or contact us at info@helgilibrary.com.

Helgi Analytics
Eliášova 38, Prague 6
160 00, Czech Republic
www.helgianalytics.com

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