

Estonia's Passenger Cars Sales (Apr 2021)

Sales of New Cars rose 191% in April 2021

Sales of new cars in Estonia increased by 1.57 thousand in April compared to last year and reached 2.40 thousand. In the first four months of the year, 8.12 thousand cars have been sold, a growth of 25.5% yoy. In 1Q2021, sale of electric-chargeable vehicles reached 0.127 thousand and accounted for 2.22% of all new cars sold.

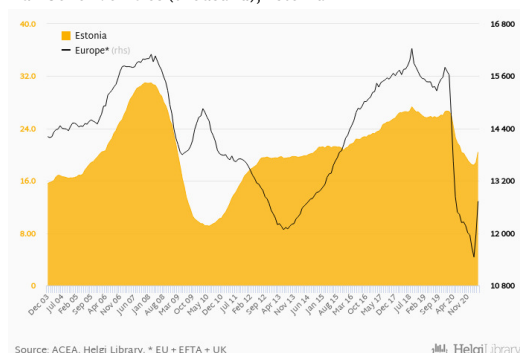
- ✓ Sales of new passenger cars in Estonia reached 2.40 thousand in April 2021, according to ACEA. This is 191%, or 1.57 thousand more than in the previous year. In the first four months of 2021, some 8.12 thousand cars were sold, up 25.5% yoy.
- ✓ In the first quarter of 2021, sales of new electrically-chargeable passenger cars reached 0.127 thousand in Estonia, up 95.4% yoy. Together with hybrid and other alternative fuels, sale of alternative fuel vehicles reached 30.8% of all new cars sold.
- ✓ Sales of traditionally-powered vehicles using petrol and diesel reached 3.96 thousand or 69.2% of total in the first quarter of 2021 in Estonia. The share of petrol reached 44.4% and of diesel-powered vehicles 24.8% of all new passenger cars sold.
- ✓ In Europe, sales of new cars rose 256% to 1,040 thousand in April. Within the first four months of the year, the increase reached 23.1% as 4,121 thousand cars were sold.
- ✓ Volkswagen Group sold the most cars in April 2021 in Europe, some 280 thousand vehicles representing 27.0% of the European market. Sales of PSA Group amounted to 162 thousand vehicles (or 15.5% of the market) while Renault Group and Hyundai Group held 8.10% and 7.50% of the market. Overall, the five largest manufacturers sold 65.5% of all new cars in April.

Sale of New Cars (ths.)

Country	Apr 21	YoY
Germany	230	90.0%
Italy	145	3,289%
UK	142	3,177%
France	140	569%
Spain	78.6	1,788%
Poland	40.1	163%
Belgium	37.2	602%
Netherlands	23.8	55.1%
Austria	22.3	98.7%
Switzerland	22.1	135%
Sweden	21.9	15.6%
Czechia	19.0	77.7%
Denmark	15.5	52.2%
Portugal	14.8	439%
Norway	13.2	77.3%
Hungary	10.5	70.5%
Greece	10.2	319%
Finland	8.84	47.8%
Ireland	7.16	1,983%
Romania	6.86	58.8%

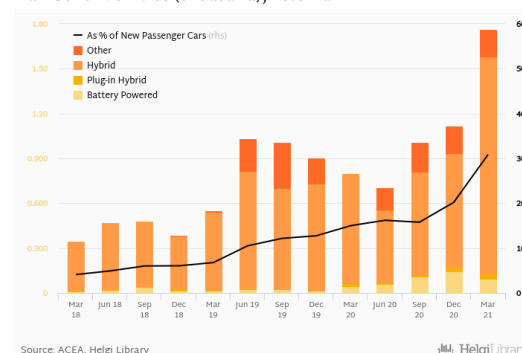
Annual Sales of New Passenger Cars

Number of Vehicles (thousand), Estonia



Sales of Alternately-Powered Vehicles

Number of Vehicles (thousand), Estonia



Data tells a story

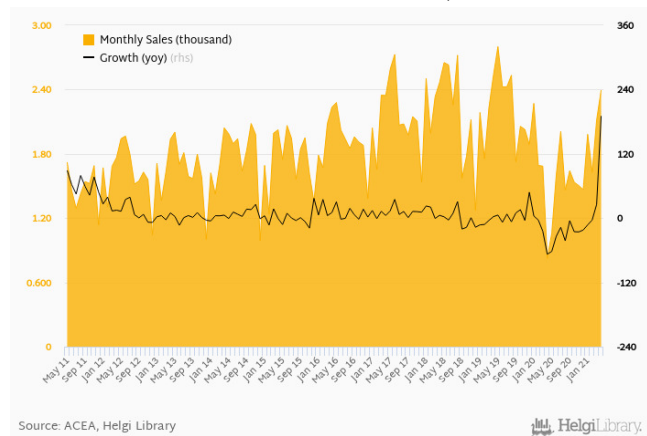
Sales of New Cars in Estonia rose 191% in April 2021

Sales of new passenger cars reached 2.40 thousand in April 2021 in Estonia, according to ACEA. This is 191%, or 1.57 thousand more than in the previous year. In the first four months of 2021, some 8.12 thousand cars were sold, up 25.5% 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.

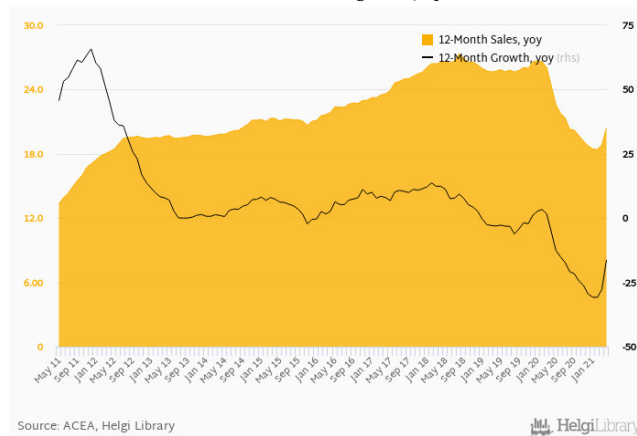
Monthly Sales of New Passenger Cars

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



Annual Sales of New Passenger Cars in Estonia

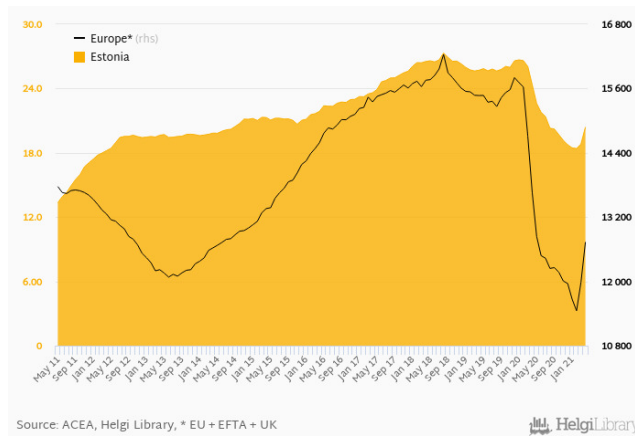
Number of Vehicles (thousand) and Annual growth, April 2021



In Europe, sales of new passenger cars reached 1,040 thousand in April 2021. This is 256%, or 748 thousand more than in the previous year. In the first four months of 2021, some 4,121 thousand cars were sold in Europe, up 23.1% yoy.

Annualized Sales of New Cars (Estonia vs. Europe)

Number of Vehicles (thousand)

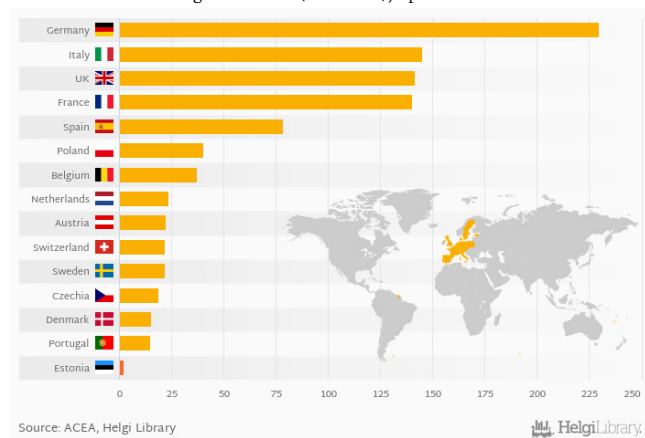


In April, most vehicles (230 thousand) were sold in Germany (up 90.0% yoy), followed by Italy (145 thousand, up 3.00%), the United Kingdom with 142 thousand cars (up 3.00%), 140 thousand new vehicles were registered in France (up 569%) and 78.6 thousand in Spain (up 1.00%).

The five largest countries accounted for 70.7% of total new vehicles registered in April 2021:

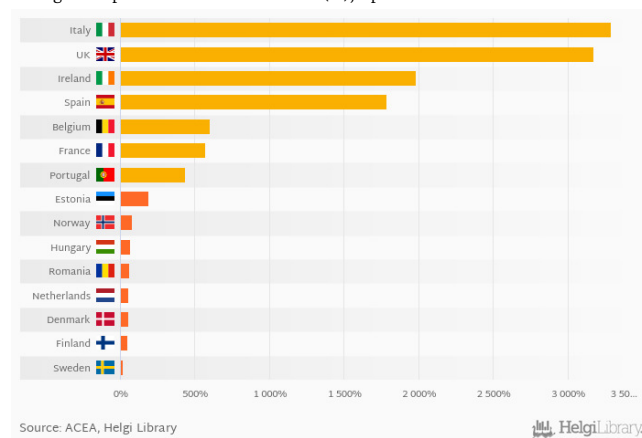
Where Most Cars Were Sold in Europe?

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



Change in Demand for New Cars in Europe

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

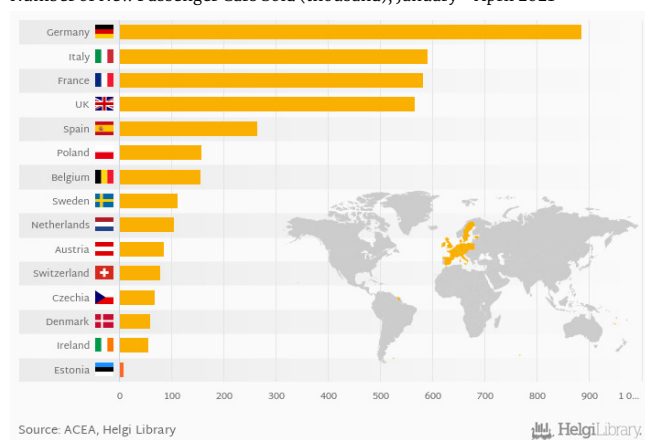


In relative terms, sales in Italy (up 3,289%) and the United Kingdom (up 3,177%) performed the best compared to a year ago, whereas registration in Sweden and Finland performed the worst (up 15.6% and up 47.8% yoy), in April 2021, according to ACEA.

In the first four months of the year, some 4,121 thousand cars were sold in Europe, up 23.1% yoy. Most cars were sold in Germany (886 thousand) followed by Italy (592 thousand) and France (582 thousand).

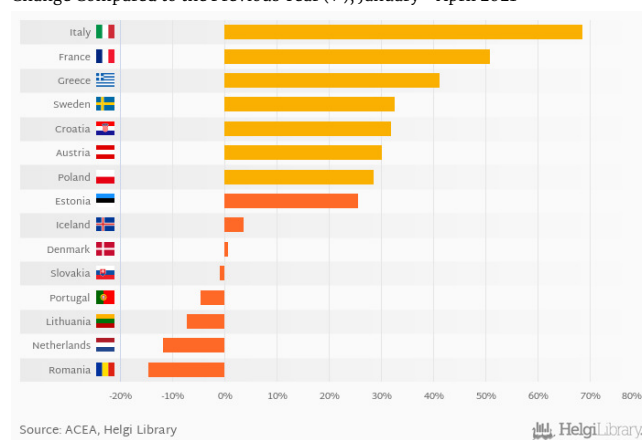
Where Most Cars Were Sold in Europe?

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



Change in Demand for New Cars in Europe

Change Compared to the Previous Year (%), January - April 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	April 2021	April 2020	YOY Change %	1-4/2021	1-4/2020	YOY Change %
Austria	22.3	11.2	98.7	85.8	65.9	30.2
Belgium	37.2	5.30	602	156	133	17.9
Bulgaria	2.40	0.824	191	7.98	6.77	18.0
Croatia	4.15	1.08	285	14.6	11.1	31.9
Cyprus	0.925	0.234	295	3.62	3.18	14.1
Czech Republic	19.0	10.7	77.7	68.5	60.9	12.5
Denmark	15.5	10.2	52.2	59.4	59.1	0.628
Estonia	2.40	0.824	191	8.12	6.47	25.5
Finland	8.84	5.98	47.8	36.8	34.2	7.50
France	140	21.0	569	582	386	51.0
Germany	230	121	90.0	886	822	7.77
Greece	10.2	2.43	319	33.6	23.8	41.2
Hungary	10.5	6.17	70.5	42.7	38.8	9.98
Iceland	0.781	0.372	110	2.96	2.85	3.61
Ireland	7.16	0.344	1,983	55.3	51.6	7.27
Italy	145	4.28	3,289	592	351	68.6
Latvia	1.40	0.683	104	4.84	4.55	6.26
Lithuania	3.61	1.38	162	11.2	12.1	-7.26
Luxembourg	4.33	1.19	263	16.8	13.1	28.1
Netherlands	23.8	15.4	55.1	105	119	-11.7
Norway	13.2	7.43	77.3	49.5	39.8	24.4
Poland	40.1	15.2	163	158	123	28.6
Portugal	14.8	2.75	439	45.8	48.0	-4.54
Romania	6.86	4.32	58.8	27.6	32.3	-14.5
Slovakia	6.79	3.42	98.2	22.2	22.4	-0.898
Slovenia	4.28	1.85	132	20.6	16.2	27.3
Spain	78.6	4.16	1,788	265	223	18.8
Sweden	21.9	18.9	15.6	113	85.1	32.5
Switzerland	22.1	9.38	135	78.6	64.8	21.2
United Kingdom	142	4.32	3,177	567	488	16.2
EU + EFTA	1,040	292	256	4,121	3,347	23.1

Source: ACEA, Helgi Library

Sales by Power

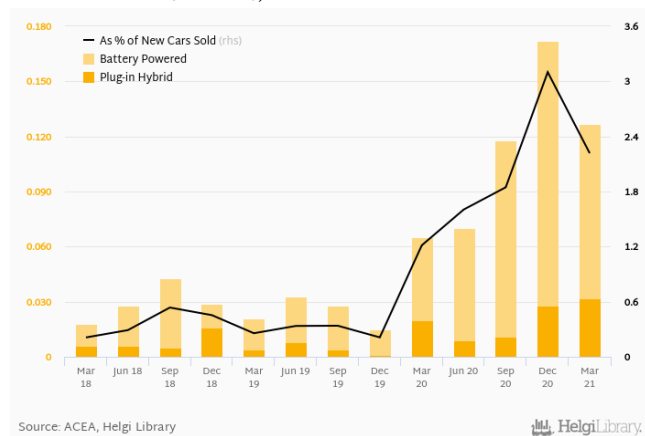
Electric Chargeable Cars

Sales of new electrically-chargeable passenger cars (battery electric and plug-in hybrid electric vehicles) reached 0.127 thousand in the 1Q2021 in Estonia, according to ACEA. This is 95.4%, or 0.062 thousand more than in the previous year.

Share of electric chargeable vehicles increased to 2.22% of all new passenger cars sold in 1Q2021, up from 1.21% seen in the first quarter of 2020. In Europe, the share was 15.9%, up from 8.10% a year ago:

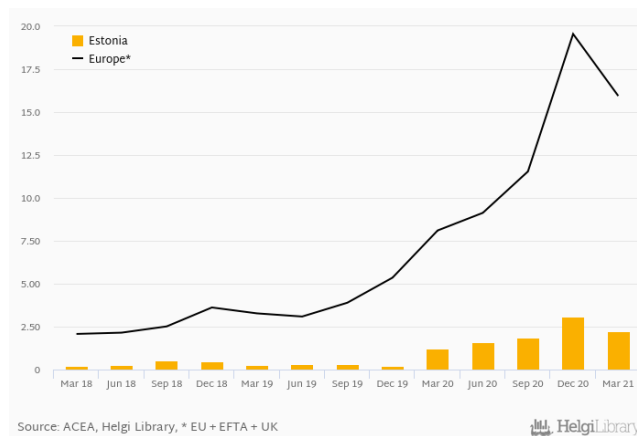
Sales of Electric Chargeable Vehicles

Number of Vehicles (thousand), Estonia



Share of Electric Vehicles vs. Europe

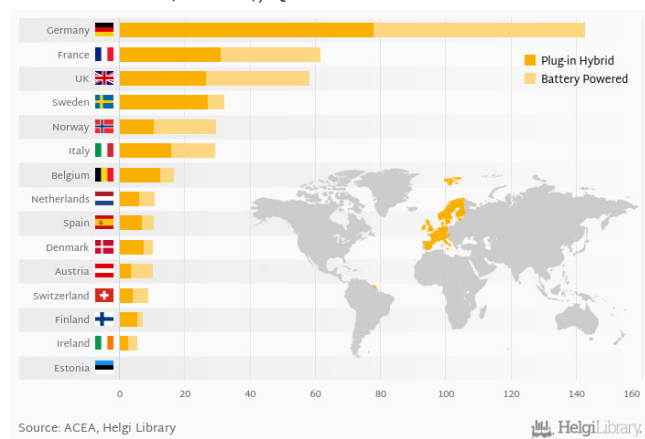
As % of New Cars Sold



In Europe, most electric vehicles (143 thousand) were sold in Germany (up 172% yoy) in the first quarter of 2021, followed by France (61.7 thousand, up 74.4%), the United Kingdom with 58.4 thousand thousand cars (up 82.9%), 32.4 thousand new vehicles were registered in Sweden (up 75.3%) and 29.8 thousand in Norway (up 32.0%). Consumers in Norway preferred the electric cars the most (82.0% of new cars sold) followed by Iceland (51.6%) and Sweden (35.6%):

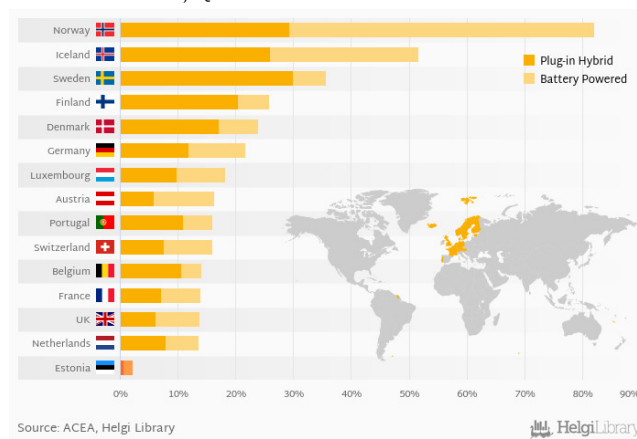
Sales of Electric Chargeable Vehicles in Europe

Number of Vehicles (thousand), 1Q2021



Share of Electric Chargeable Vehicles in Europe

As % of New Cars Sold, 1Q2021



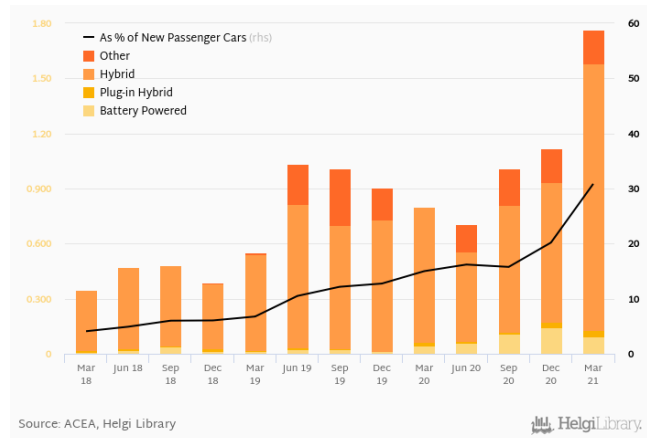
Hybrid Electric and Other Alternately-Powered Cars

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 1.77 thousand vehicles in the first quarter of 2021. This is 120%, or 0.964 thousand more than in the previous year.

Share of such alternately-powered vehicles increased to 30.8% of all new passenger cars sold in 1Q2021, up from 15.0% seen in the first quarter of 2020. In Europe, the share was 36.8%, up from 19.2% a year ago:

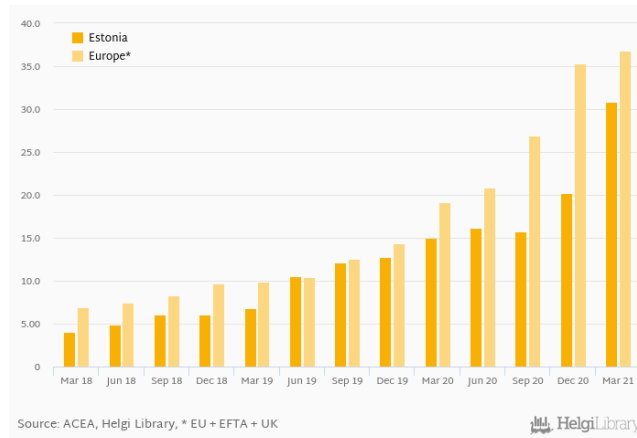
Sales of Alternately-Powered Vehicles

Number of Vehicles (thousand), Estonia



Sales of Alternately-Powered Vehicles vs. Europe

As % Of New Cars Sold



Petrol and Diesel-Powered Cars

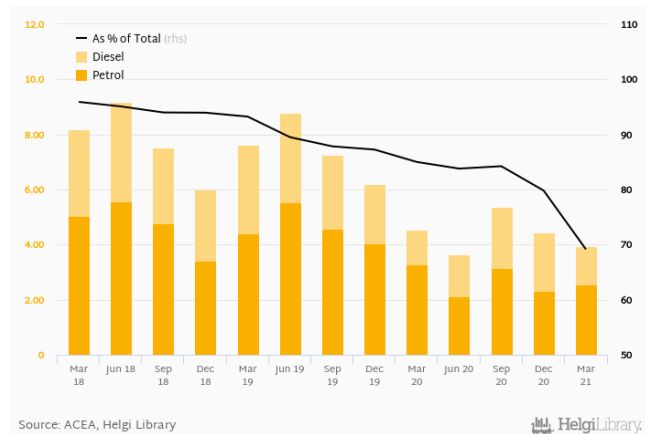
Sales of traditionally-powered vehicles using petrol and diesel reached 3.96 thousand in the first quarter of 2021 in Estonia, according to ACEA. This is 13.0%, or 0.590 thousand vehicles fewer than in the previous year.

Some 2.54 thousand petrol-powered vehicles were sold, down 22.3% when compared to a year ago. The share decreased to 44.4% of all new passenger cars sold in 1Q2021, down from 61.1% seen in the first quarter of 2020. Share of diesel-powered cars rose to 24.8% (from 23.9% in 1Q2021) with 1.42 thousand cars sold in the first quarter of 2021.

As a result, share of traditionally-powered cars amounted to 69.2% of all new passenger cars sold in 1Q2021, down from 85.0% seen in the first quarter of 2020. In Europe, the share was 63.2%, down from 80.8% a year ago:

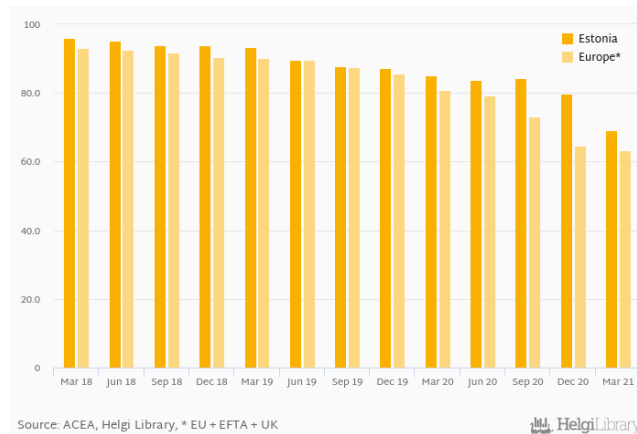
Sales of Traditionally-Powered Vehicles

Number of Vehicles (thousand), Estonia



Sales of Traditionally-Powered Vehicles vs. Europe

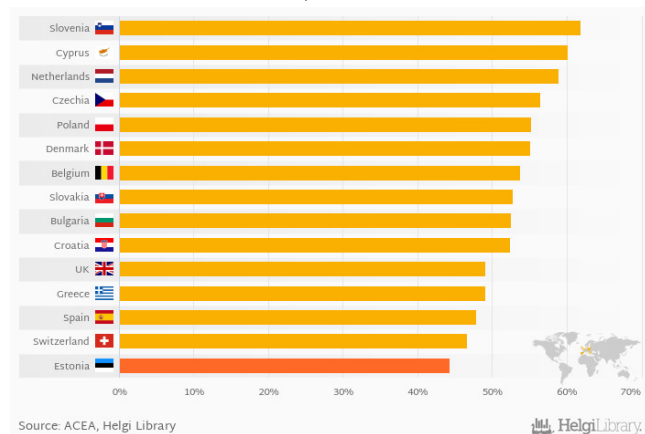
As % of New Cars Sold



In the first quarter of 2021, Slovenia ranked the highest in the number of petrol-fuelled as a proportion of new cars sold with 61.9% followed by Cyprus and Netherlands. In terms of diesel-fuelled vehicles, Ireland ranked the highest with 36.6% followed by Bulgaria and Slovenia:

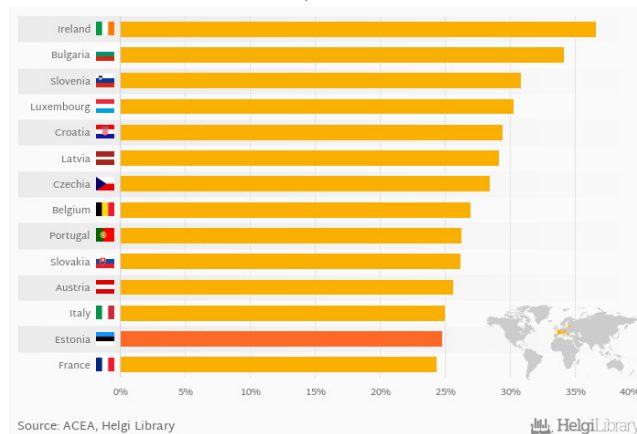
Who likes the Petrol-Fuelled Cars the Most?

Petrol Cars as % Of New Cars Sold (%), 1Q2021



Who Likes Diesel-fuelled Cars the Most?

Diesel Cars as % Of New Cars Sold (%), 1Q2021

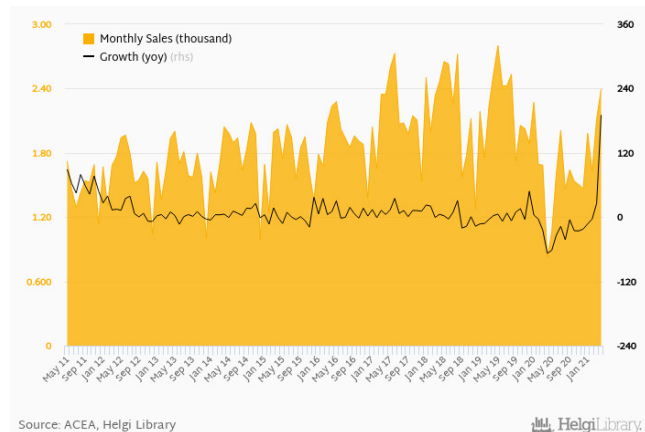




Sales of New Cars in Estonia

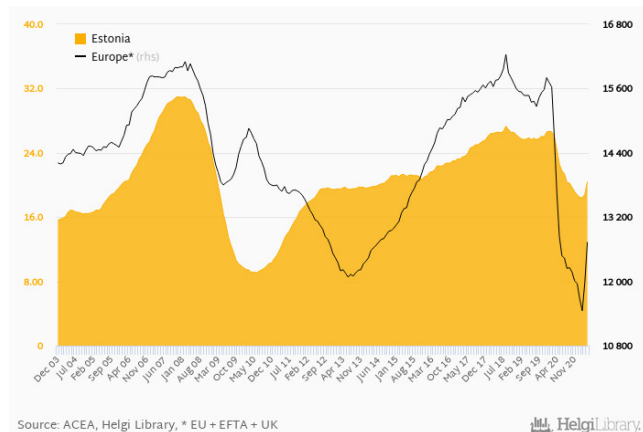
Monthly Sales of New Passenger Cars

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



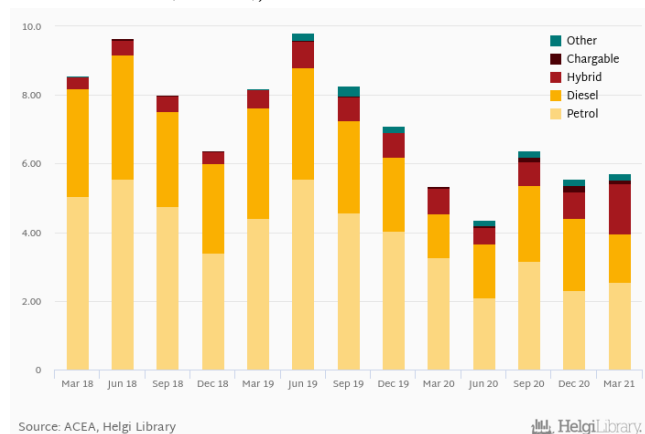
Annual Sales of New Passenger Cars

Number of Vehicles (thousand), Estonia



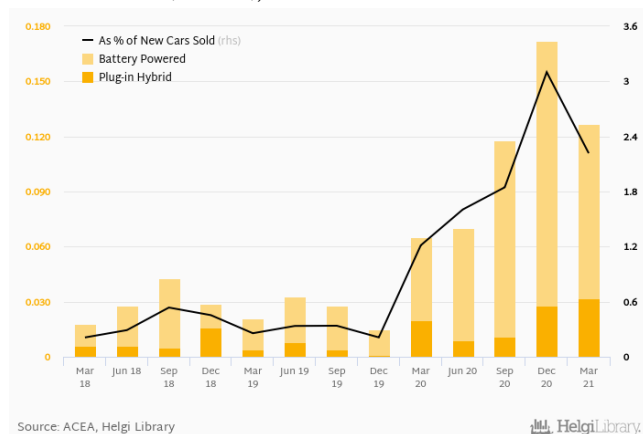
Sales of Vehicles by Power

Number of Vehicles (thousand), Estonia



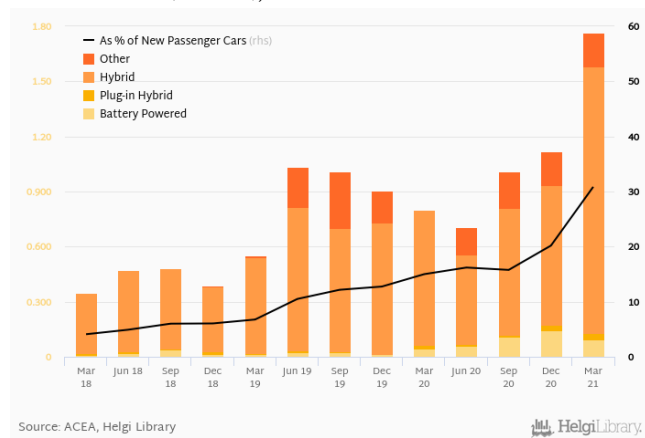
Sales of Electric Chargeable Vehicles

Number of Vehicles (thousand), Estonia



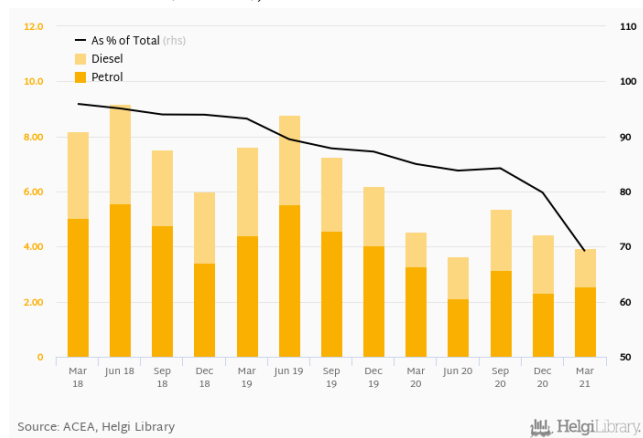
Sales of Alternately-Powered Vehicles

Number of Vehicles (thousand), Estonia



Sales of Traditionally-Powered Vehicles

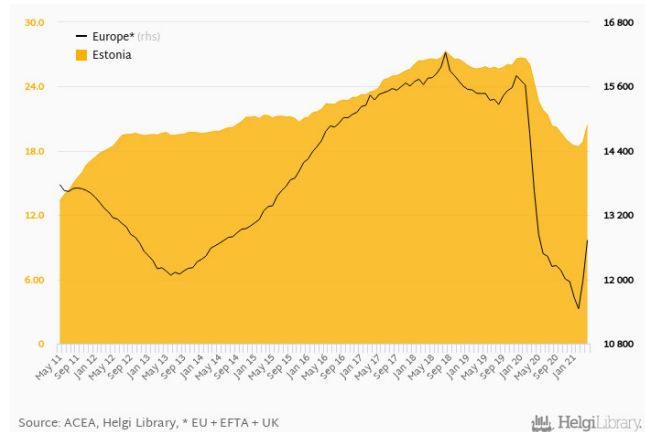
Number of Vehicles (thousand), Estonia



Quarterly Sales of New Cars in Estonia vs. Europe

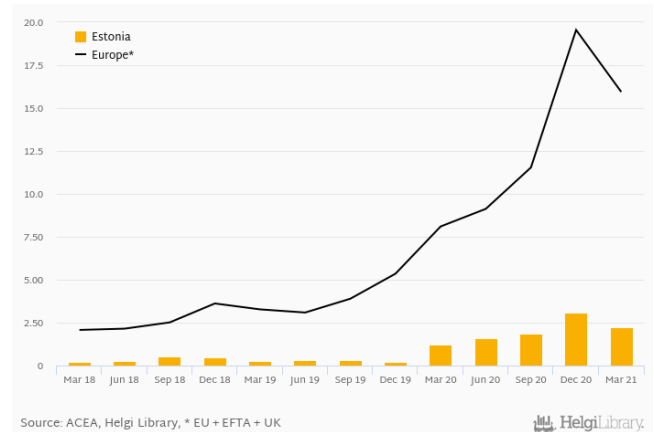
Annualized Sales of New Cars (Estonia vs. Europe)

Number of Vehicles (thousand)



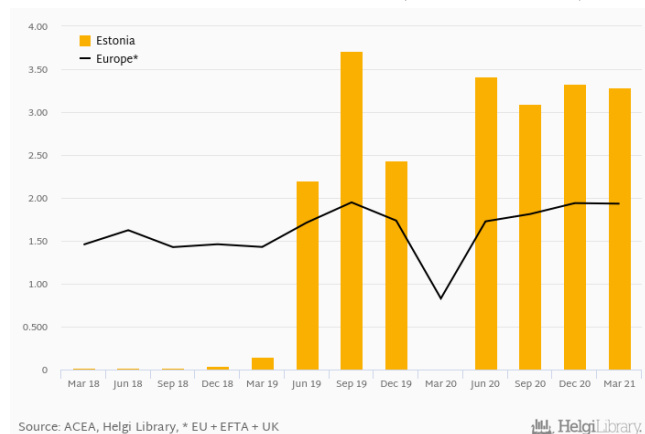
Sales of Chargeable Electric Vehicles

As % of New Cars Sold



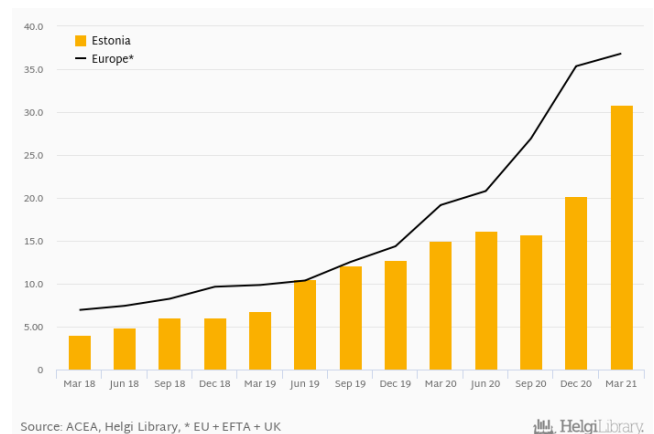
Sales of Alternately-Powered Vehicles

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



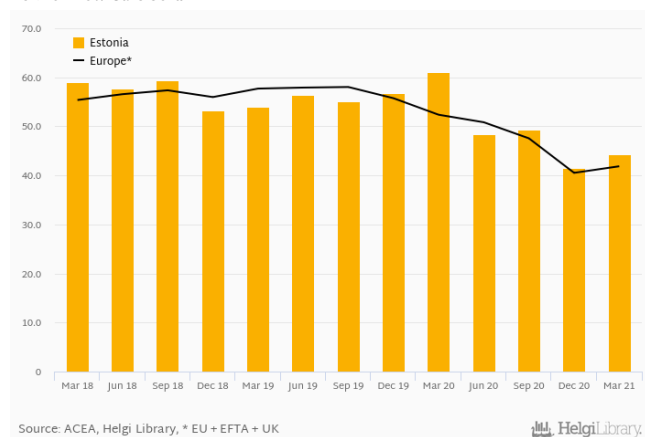
Sales of All Alternately Powered Vehicles

As % of New Cars Sold



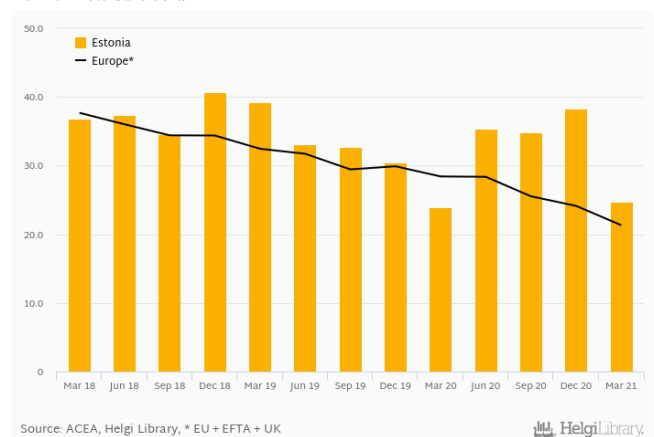
Sales of Petrol-Powered Vehicles

As % of New Cars Sold



Sales of Diesel-Powered Vehicles

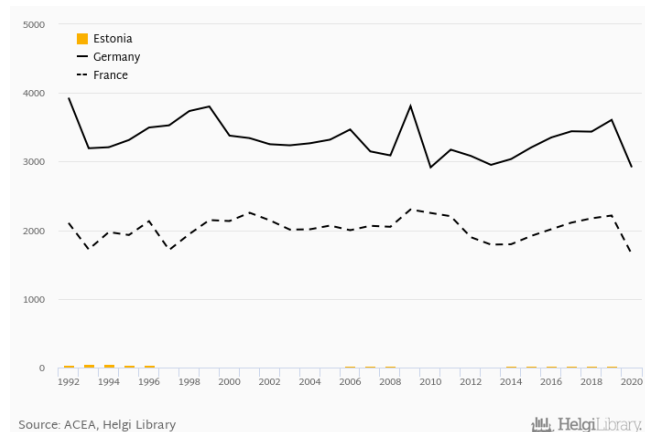
As % of New Cars Sold



Annual Sales of New Cars in Estonia vs. Europe

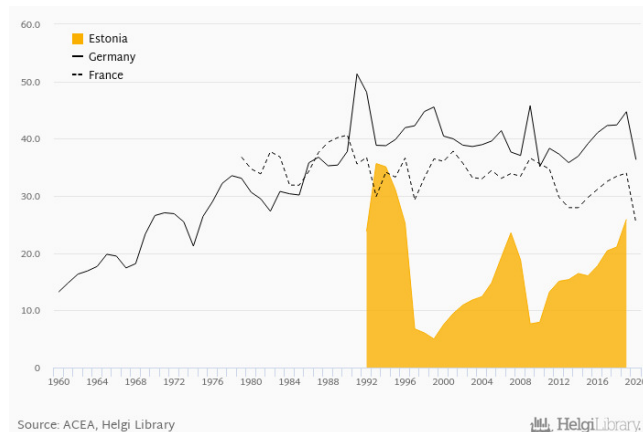
Sales of New Cars

Number of Vehicles (thousand)



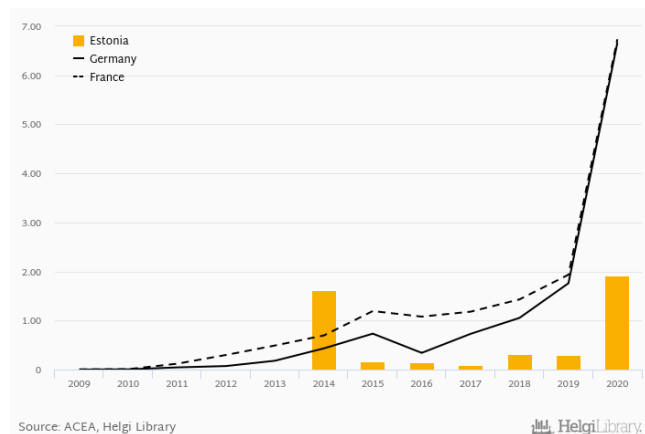
Sales of Cars per 1,000 People

Number of Vehicles



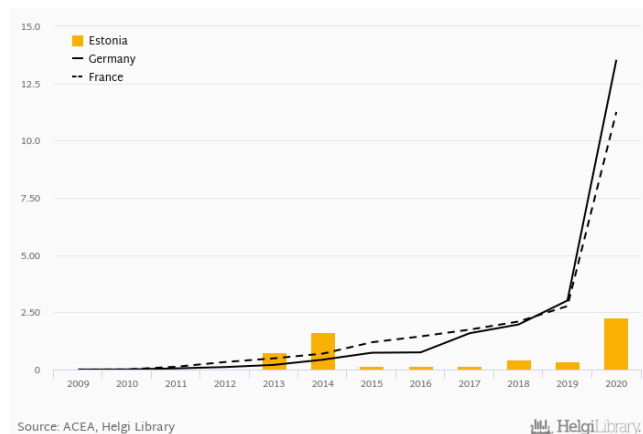
Battery Electric Vehicles

As % of New Cars Sold



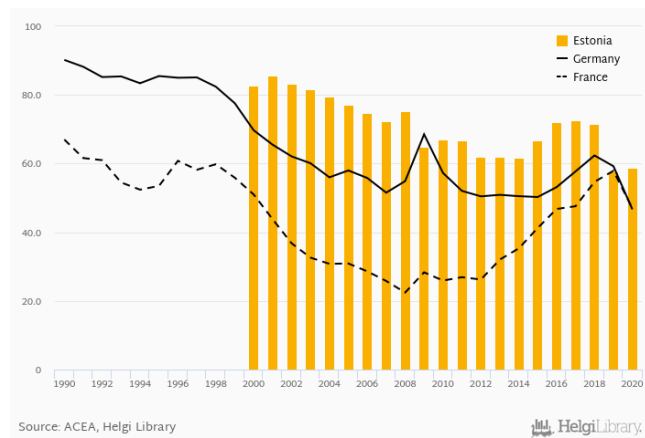
Total Chargeable Electric Vehicles

As % of New Cars Sold



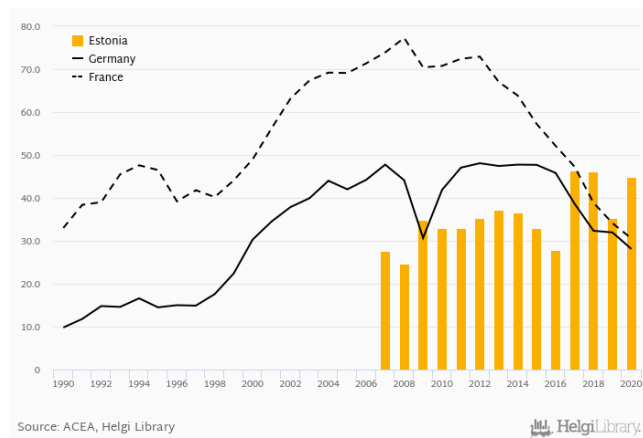
Petrol-Fuelled Cars

As % of New Cars Sold



Diesel-Fuelled Cars

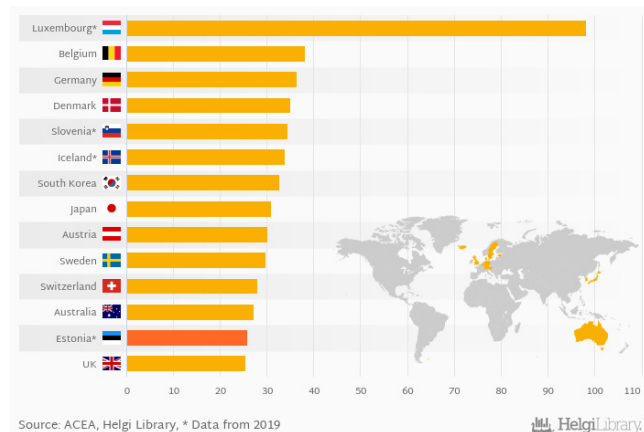
As % of New Cars Sold



Estonia in the International Comparison

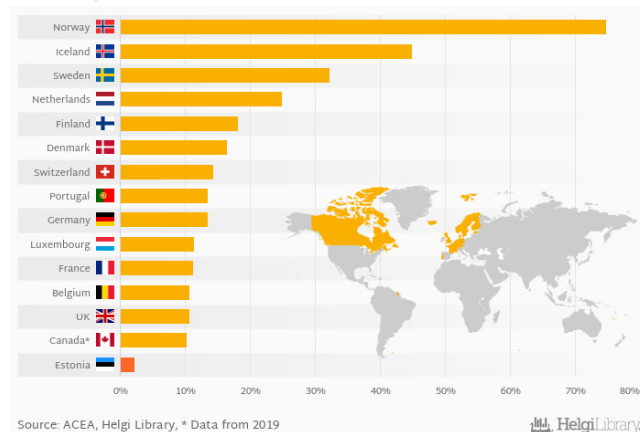
Who Buys Cars Most Often?

Sales Of Cars Per 1,000 People, 2020



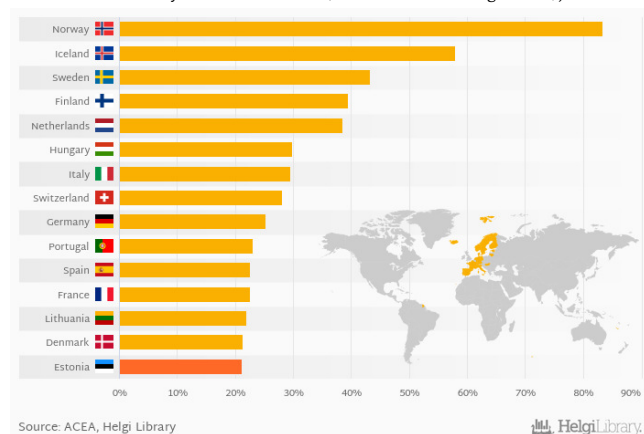
Who Buys Electric Cars Most Often?

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



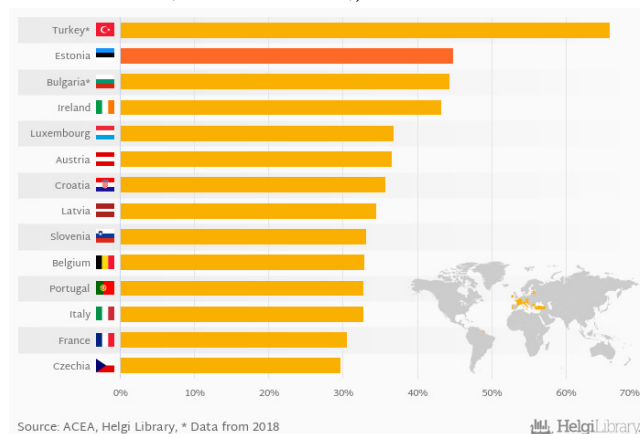
Who Buys Alternative Cars Most Often?

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



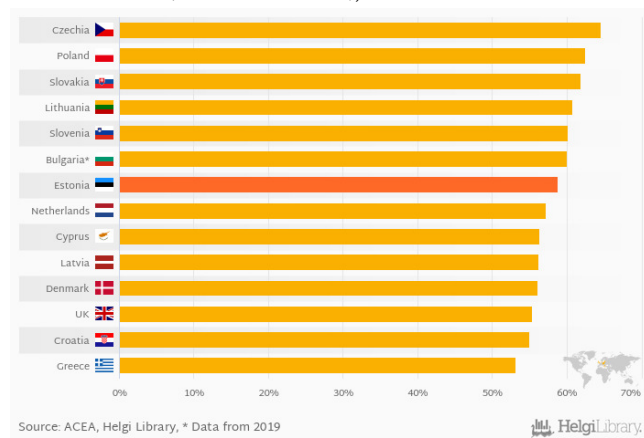
Who likes the Diesel-Fuelled Cars the Most?

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



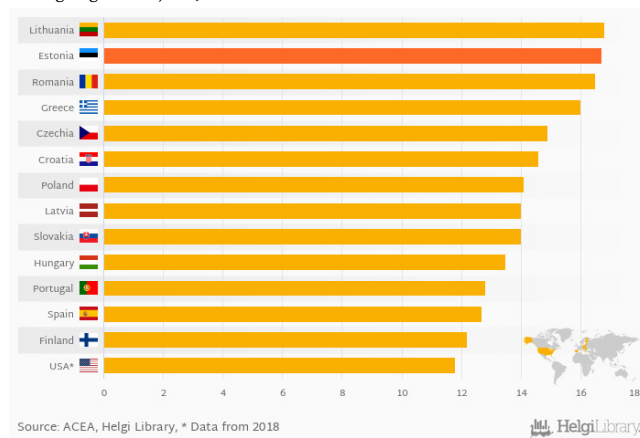
Who Buys Petrol Cars Most Often?

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



Who Drives the Oldest Cars?

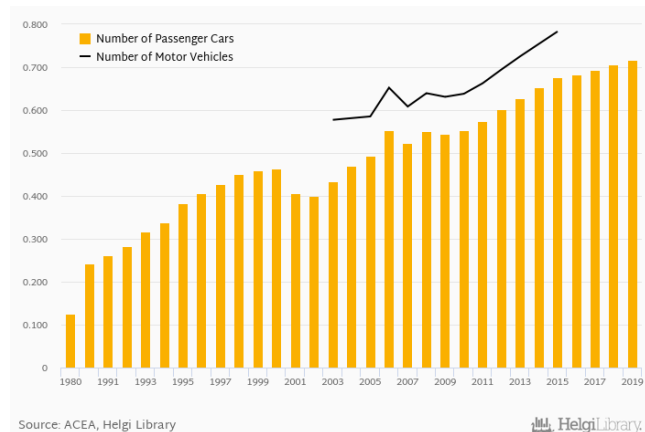
Average Age of Car, 2019



Vehicles, Infrastructure & Accidents in Estonia

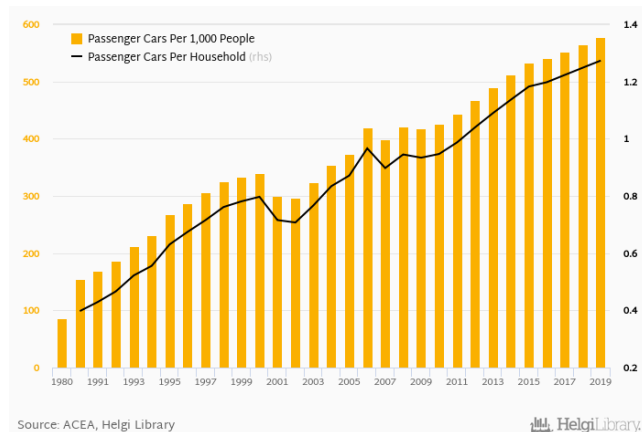
Stock of Motor Vehicles & Cars

Number of Vehicles (mil)



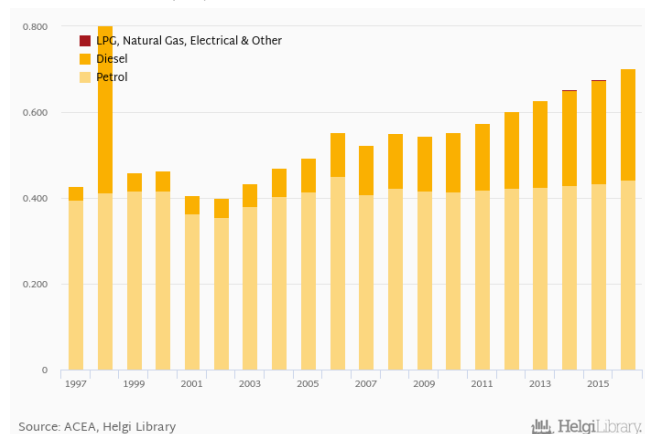
Stock of Passenger Cars

Number of Vehicles



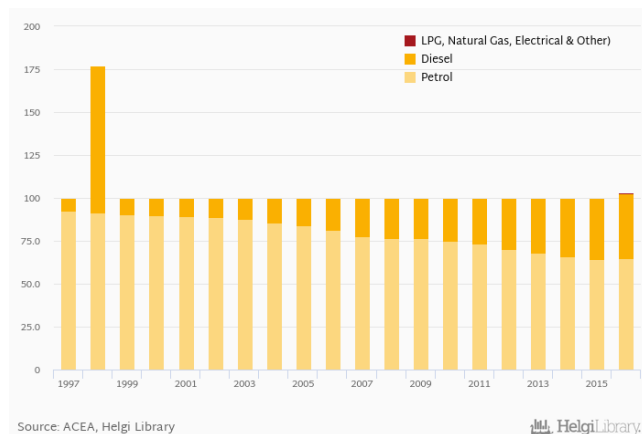
Absolute Stock of Passenger Cars

Number of Vehicles (mil)



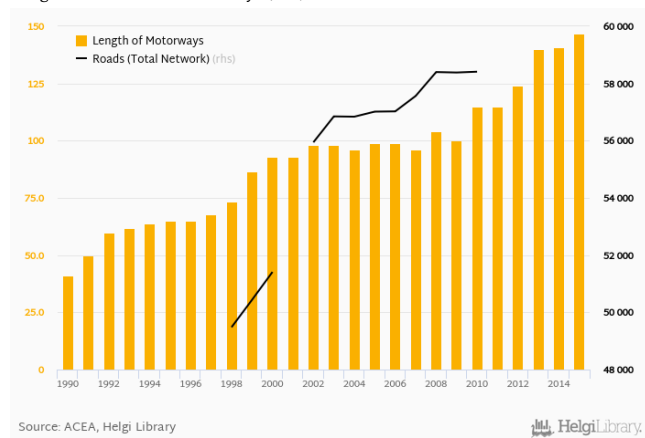
Relative Stock of Passenger Cars

As % of Total Cars



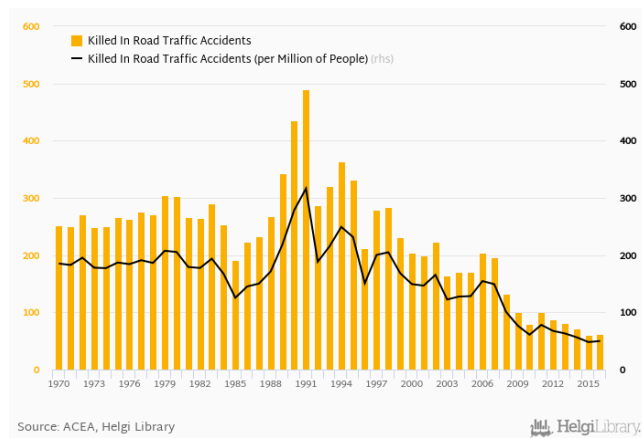
Road Infrastructure

Length of Roads and Motorways (km)



Road Safety

Number of Deaths





Sale of Vehicles – Annually

SALE OF VEHICLES		2013	2014	2015	2016	2017	2018	2019	2020
Sales Of New Passenger Cars	thousand	19.7	21.1	21.0	23.0	25.6	26.3	26.6	18.8
Sales Of Cars Per 1,000 People	vehicles	15.4	16.4	16.0	17.8	20.4	21.1	25.9	...
Sales Of New Cars (As of World's Sales)	%	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	0.360
Sales of Plug-in Hybrid Electric Vehicles	thousand	...	...	...	0	0.017	0.033	0.017	0.065
Sales of Total Chargeable Electric Vehicles	thousand	0.149	0.340	0.034	0.035	0.043	0.118	0.097	0.425
Sales of Alt. Fuel Vehicles Other than Electric	thousand	...	...	...	0.025	0.040	0.009	0.708	0.808
Sales of Petrol-Fuelled Cars	thousand	12.2	13.0	13.6	16.2	18.6	18.8	18.6	11.0
Sales of Diesel-Fuelled Cars	thousand	7.35	7.67	6.71	6.23	11.9	12.1	11.3	8.40
Battery Electric Vehicles (As of New Cars Sold)	%	0.005	1.62	0.167	0.156	0.101	0.323	0.301	1.92
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	2.27
Petrol-Fuelled Cars (As of New Cars Sold)	%	62.0	61.8	66.8	72.1	72.6	71.4	57.8	58.8
Diesel-Fuelled Cars (As of New Cars Sold)	%	37.3	36.6	33.0	27.8	46.3	46.1	35.3	44.8

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	5.35	4.36	6.39	5.55	5.73
Sales of Battery Electric Vehicles	thousand	0.025	0.024	0.014	0.045	0.061	0.107	0.144	0.095
Sales of Plug-in Hybrid Electric Vehicles	thousand	0.008	0.004	0.001	0.020	0.009	0.011	0.028	0.032
Sales of Total Chargeable Electric Vehicles	thousand	0.033	0.028	0.015	0.065	0.070	0.118	0.172	0.127
Sales of Alt. Fuel Vehicles Other than Electric	thousand	0.216	0.307	0.173	0	0.149	0.198	0.185	0.188
Sales of Petrol-Fuelled Cars	thousand	5.55	4.57	4.03	3.27	2.11	3.16	2.31	2.54
Sales of Diesel-Fuelled Cars	thousand	3.25	2.70	2.16	1.28	1.55	2.23	2.12	1.42
Battery Electric Vehicles (As of New Cars Sold)	%	0.254	0.290	0.197	0.840	1.40	1.67	2.60	1.66
Plug-in Hybrid Electric (As of New Cars Sold)	%	0.081	0.048	0.014	0.374	0.206	0.172	0.505	0.559
Chargeable Electric (As of New Cars Sold)	%	0.336	0.338	0.211	1.21	1.60	1.85	3.10	2.22
Alt. Fuel Other than Electric (As of Cars Sold)	%	2.20	3.71	2.44	0	3.41	3.10	3.33	3.28
Petrol-Fuelled Cars (As of New Cars Sold)	%	56.4	55.2	56.8	61.1	48.4	49.4	41.6	44.4
Diesel-Fuelled Cars (As of New Cars Sold)	%	33.1	32.7	30.5	23.9	35.4	34.8	38.2	24.8

Source: Company Data, Helgi Analytics



Stock of Vehicles

STOCK OF VEHICLES		2013	2014	2015	2016	2017	2018	2019	2020
Number of Motor Vehicles	mil	0.725	0.754	0.783	...	...	...	...	...
Number of Passenger Cars	mil	0.629	0.653	0.677	0.682	0.694	0.705	0.717	...
Number of Passenger Cars (Petrol Engine)	mil	0.426	0.429	0.434	0.443	...	...	...	...
Number of Passenger Cars (Diesel Engine)	mil	0.201	0.223	0.241	0.258	...	...	...	...
Passenger Cars Fuelled by Alternative Energy	mil	< 0.001	0.001	0.002	0.002	...	...	...	...
Petrol Passenger Cars (As % of Total Cars)	%	67.8	65.7	64.2	64.9	...	...	...	...
Diesel Passenger Cars (As % of Total Cars)	%	32.0	34.1	35.6	37.9	...	...	...	...
Alt. Fuel Passenger Cars (As % of Total Cars)	%	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	0.097	0.101	0.107	...	...	...	...	...
Number of Coaches, Buses & Trolleybuses	vehicles	4,587	4,706	4,845	...	...	...	...	...
Number of Motorcycles	'000	24.8	27.0	...	...	...	...	...	...
Number of Mopeds	'000	13.9	15.3	16.5	...	...	...	...	...

Source: Company Data, Helgi Analytics

Vehicles per Population

VEHICLES PER POPULATION		2013	2014	2015	2016	2017	2018	2019	2020
Motor Vehicles Per 1,000 People	vehicles	566	591	617	...	...	...	...	...
Passenger Cars Per 1,000 People	vehicles	490	512	533	540	553	565	577	...
Passenger Cars Per Household	vehicles	1.09	1.14	1.18	1.20	1.22	1.25	1.27	...
Coaches & Buses per mil People	vehicles	3,579	3,689	3,817	...	...	...	...	...
Motorcycles Per 1,000 People	vehicles	19.4	21.1	...	...	...	...	...	...
Mopeds Per 1,000 People	vehicles	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		2013	2014	2015	2016	2017	2018	2019	2020
Killed and Injured in Road Traffic Accidents	persons	1,385	1,437	1,392	1,458	...	...	...	...
Killed In Road Traffic Accidents	persons	81.0	72.0	61.0	63.0	...	...	...	...
Injured in Road Traffic Accidents	persons	1,304	1,365	1,331	1,395	...	...	...	...
Killed and Injured per mil People	persons	1,017	1,070	1,049	1,105	...	...	...	...
Killed In Road Traffic Accidents per mil People	persons	63.2	56.4	48.1	49.9	...	...	...	...
Injured in Road Accidents per mil People	persons	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		1,385	1,437	1,392	1,458	...	...	...	...
Road Injury Accidents per mil People		...	...	...	...	...	...	...	...

Source: Company Data, Helgi Analytics

Road Infrastructure

ROAD INFRASTRUCTURE		2013	2014	2015	2016	2017	2018	2019	2020
Roads (Total Network)	km	...	...	...	...	...	...	...	...
Roads, Paved (As % of Total Roads)	%	...	...	...	...	...	...	...	...
Length of Motorways	km	140	141	147	...	...	...	...	...
Length of Other Roads	km	58,827	58,984	58,828	...	...	...	...	...
Motorway Density (km per 1,000 km2 of Land)	km	3,303	3,326	...	...	...	...	...	...
Road Density (km per 100 km2 of Land Area)	km	...	...	...	...	...	...	...	...
Road Infrastructure Investments (As of GDP)	%	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.

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