

SLIGHT MARGIN OF GROWTH

Registrations of buses and coaches on the EU's borders increased by 1.4% in year 2014. Spain, Ireland and Greece are recovering balance

THE situation on the European coach market remains positive, but not that much that subsequently reduces the growth margins. According to the data provided by ACEA (European Automobile Manufacturers' Association), buses of more than 3.5 tones registered in year 2014 on the EU's borders amounted to 33,561 compared to 33,083 in year 2013. In fact, we have got a slight increase of 1.4%. Practically, the value of the previous year has been halved.

In 2014, the UK was the European country with the highest number of buses registered (6,669 vehicles), followed by France (5,896 vehicles) and Germany (5,651 vehicles). These markets collectively represent more than 50 percent of registered transport vehicles across the Europe. But this area of the old continent is not the best for registration performance. Indeed, bad news are coming from the above-mentioned markets. In fact, France comes to lose 15.3%, UK - 4.1%, while Germany is limited to 3%.

Other market segments are showing signs of recovery. Let us start with the southern European countries affected by the crisis of recent years, such as Spain, Portugal and Greece. In the Iberian Peninsula, the buses registered in 2014 rose to 1,896 that means 15% more compared to 1,648 vehicles in year 2013.

In Portugal they increased from 174 to 239 (+37.4%) while in Greece from 100 to 175 (+75%). Italy is the only exception among the Mediterranean countries. After the trend reversal in 2013, the beautiful country of Italy tends toward going into negative figures with 1,975 coach registrations against 2,372 ones the year before. The decline is rather drastic (-16.7%). Quite the opposite is observed in the Northern Europe, where the business seems to be going rather well. In 2014, Belgium increased the registration of buses by 49.3% (from 765 to 1,142), (the neighboring Netherlands by 14.1% (from 583 to 665) and further north, in Finland, the registration even increased by 78.1% (from 388 to 691 vehicles).

The Eastern Europe shows good performances as well: +20.9% in Slovenia, +19.1% in the Czech Republic, +62.5 in Slovakia.

It goes well in Romania where the registered buses reach the number of 1,148, with an increase of +32.7%.

You cannot say the same about the EFTA's members (European Free Trade Association). Norway lost 19.4% (1,015 vehicles compared to 1,259 in 2013) and Iceland lost 10.8%. On the contrary, Switzerland in 2014 is catching up and increasing the number of vehicles by 11.9%.

NEW BUS REGISTRATIONS IN EUROPE (ACEA source)						
MARKET	2010	2011	2012	2013	2014	2014-2013 Δ%
AUSTRIA	760	602	722	713	900	26.2%
BELGIUM	1,019	716	701	765	1,142	49.3%
BULGARIA	n.a.	n.a.	n.a.	n.a.	n.a.	n.d.
CROATIA	n.a.	n.a.	n.a.	109	96	-11.9%
CYPRUS	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CZECH REPUBLIC	751	837	731	891	1,061	19.1%
DENMARK	659	475	508	401	468	16.7%
ESTONIA	125	55	116	126	138	9.5%
FINLAND	513	398	535	388	691	78.1%
FRANCE	5,906	6,803	6,062	6,963	5,896	-15.3%
GERMANY	5,219	5,042	5,139	5,824	5,651	-3%
GREECE	403	83	118	100	175	75%
HUNGARY	272	152	51	432	467	8.1%
IRELAND	47	78	236	162	207	27.8%
ITALY*	4,432	3,063	2,131	2,372	1,975	-16.7%
LATVIA	137	189	93	242	208	-14%
LITHUANIA	90	104	145	176	288	63.6%
LUXEMBURG	174	197	159	171	159	-7%
NETHERLANDS	684	640	784	583	665	14.1%
POLAND	1,362	1,538	1,271	1,383	1,472	6.4%
PORTUGAL	491	331	224	174	239	37.4%
ROMANIA	344	139	1,463	865	1,148	32.7%
SLOVAKIA	505	302	307	275	447	62.5%
SLOVENIA	142	123	92	139	168	20.9%
SPAIN	2,428	2,679	1,641	1,648	1,896	15%
SWEDEN	1,672	1,617	1,629	1,230	1,335	8.5%
UNITED KINGDOM	6,563	5,485	7,233	6,951	6,669	-4.1%
EUROPEAN UNION	34,698	31,648	32,091	33,083	33,561	1.4%
ICELAND	25	31	69	74	66	-10.8%
NORWAY	1,482	1,345	1,231	1,259	1,015	-19.4%
SWITZERLAND	531	669	509	580	649	11.9%
EFTA	2,038	2,045	1,809	1,913	1,730	-9.6%
TOTAL EU+EFTA	36,736	33,693	33,900	34,996	35,291	0.8%

*) ANFIA estimate, based on data of the Italian Ministry of Transport.