

NFDA TRUCK AND VAN UPDATE
July/August 2022



Volvo take second place in market share

Dear Colleague,

UK HGV registrations fell by -2.3% for Quarter 1 2022 as global shortages of key components continue to restrict deliveries. The total of registrations in the first three months of 2022 is 9,837, down 227 from Q1 2021 according to the SMMT.

Similarly, registrations of new light commercial vehicles (LCVs) fell for its sixth consecutive month, recording a -23% decrease in June.

Launched in October 2019, with enforcement commencing on 1 March 2021, Transport for London have published a report on the first year of its pioneering Direct Vision Standard (DVS) and Safety Permit.

NFDA is your trade body: we are here to help and advise you on regulatory and operational issues that affect your business. If you require any assistance, please do contact the helpline on 01788 538303.

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Static Truck registrations at a time huge demand to update fleets

NFDA Truck Registration figures	Jan-21	Jan-22	Feb-21	Feb-22	Mar-21	Mar-22	Apr-21	Apr-22	May-21	May-22	YTD (21)	YTD (22)	YTD COMPARISON VS 21	2022 YTD Market Share
DAF	897	884	908	774	1337	1261	1066	979	1065	1078	5273	4976	-297	30.7
Dennis	51	53	64	28	132	121	95	62	80	78	422	340	-82	2.1
FUSO	26	17	37	18	49	20	47	5	22	10	181	70	-111	0.4
Isuzu	65	76	39	76	88	107	74	88	85	76	351	423	+72	2.6
IVECO	199	232	263	227	330	365	306	288	254	296	1352	1408	+56	8.7
MAN	241	272	158	157	683	446	294	216	272	169	1648	1260	-388	7.8
Mercedes	252	323	189	222	580	396	404	351	385	349	1810	1641	-169	10.1
Renault	78	114	106	143	310	280	205	201	193	184	892	922	+30	5.7
SCANIA	465	565	227	326	890	725	480	448	444	410	2506	2474	-32	15.3
VOLVO	438	570	297	372	665	667	343	509	347	556	2090	2674	+584	16.5
Total	2712	3106	2288	2343	5064	4388	3314	3147	3147	3204	16525	16188	-337	100.0

As you know due to rules and regulations around competitive registration information we are only allowed receive this data six weeks after its compiled so our comments are to some extent a hind-sight view of the market.

Truck registrations for May follow the year to date performance trend of being the same or just a little behind those of 2021. The total HGV registrations for May at 3,204 units was just 57 more trucks going to new customers than the previous May, no doubt down to delivery delays due to component shortages.

Although when you dig deeper into the registration statistics there does seem to be winners and losers between the brands that indicate better supply chains acquiring the components to build the chassis by some manufacturers. Iveco and Renault have grown their registrations by small volumes but the real winner is Volvo that has increased its registrations over last year (YTD) by 28%, meaning that 2,674 units were registered, this year compared with 2090 units in 2021, this in turn has pushed their market share above Scania into second place with a market share of 16.5%.

As usual DAF having products in every weight band lead the market with a 30.7% market share but are slightly behind in unit numbers having registered 4,976 trucks this year compared with 5,273 at the same time last year.

A year is a long time and positions can change and the supply restraints could improve, there is nothing wrong with market demand. It's a question of will the customers put up with ever extending delivery dates without firm forward prices quoted, only the future will tell us. One thing that most Truck dealers know is the business is positive and the market demand shows now waning, but these are challenging times coping with the issues to keep the good-will of customers and retain good staff through these difficult times.

LCV market records sixth month of decline in June

"It is disappointing to see June registration figures for light commercials held back by supply issues and the Russian invasion of Ukraine", said Sue Robinson, Chief Executive of the National Franchised Dealers Association (NFDA), commenting on the latest SMMT's light commercial vehicles registration figures.

All weight sectors were negative, with a huge decline of -43.7% in the popular mid-range 2.0 – 2.5 tonne vehicles. Likewise, the large van sector 2.5 -3.5t registered nearly 4000 fewer units than this time last year, showing a decline of -16.3%.

New light commercial vehicle (LCV) registrations fell by -23% to 26,443 units in June, compared to the 34,363 new LCV registrations recorded in June 2021.

The market is down 26.5% on pre-pandemic average as component shortages continue to limit production.

Battery electric vehicles (BEVs) totalled 2,015 units, up 52.4% on 2021, and represented 7.6% of all new vans registered during the month.

Sue Robinson added: “There is no shortage of demand but due to continual component shortages, particularly with semiconductors many customers are being given delayed delivery dates of up to 12 months. Overall, this year at the halfway mark, the LCV market is down 24.6%”.

Image source SMMT

REGISTRATIONS OF VANS plus HCVs 3.5T-6T by MONTH				
	Jun-22	Jun-21	% change	
Pickups	2,408	3,858	-37.6%	
4x4s	286	508	-43.7%	
Vans <= 2.0t	888	1,282	-30.7%	
Vans > 2.0 - 2.5t	2,412	4,281	-43.7%	
Vans > 2.5 - 3.5t	20,449	24,434	-16.3%	
All Vans to 3.5t	26,443	34,363	-23.0%	
Rigids > 3.5 - 6.0t	520	627	-17.1%	

REGISTRATIONS OF VANS plus HCVs 3.5T-6T by YEAR-TO-DATE				
	YTD-22	YTD-21	% change	
Pickups	14,995	24,461	-38.7%	
4x4s	1,283	2,269	-43.5%	
Vans <= 2.0t	4,326	9,629	-55.1%	
Vans > 2.0 - 2.5t	19,804	26,659	-25.7%	
Vans > 2.5 - 3.5t	103,976	128,495	-19.1%	
All Vans to 3.5t	144,384	191,513	-24.6%	

June					
	2022	2021	% change	Mkt share -22	Mkt share -21
BEV	2,015	1,322	52.4%	7.6%	3.8%
Diesel	23,817	32,455	-26.6%	90.1%	94.4%
Others	611	586	4.3%	2.3%	1.7%
TOTAL	26,443	34,363	-23.0%		

Year to date					
	YTD 2022	YTD 2021	% change	Mkt share -22	Mkt share -21
BEV	8,100	5,061	60.0%	5.6%	2.6%
Diesel	133,066	183,689	-27.6%	92.2%	95.9%
Others	3,218	2,763	16.5%	2.2%	1.4%
TOTAL	144,384	191,513	-24.6%		

NFDA CV Policy: Transport for London has published a report on the first year of its pioneering Direct Vision Standard (DVS) and Safety Permit

It is part of the Mayor's Vision Zero programme to eliminate all deaths and serious injuries on London's roads by 2041. Launched in October 2019, with enforcement commencing on 1 March 2021, DVS seeks to improve drivers' direct vision through the cab windows of HGVs and prevent collisions caused by limited visibility.

Key points from the executive summary include:

- An excellent level of freight industry compliance with the new rules, with 191,769 permits issued in the first year
- Well over 100,000 vehicles being fitted with safe systems to improve road safety
- The number of fatal collisions involving HGV where vision was cited as a contributing factor has fallen compared to previous years.
- The overall number of serious injuries involving HGVs has also fallen from 48 in 2017 to 17 in 2021

You can see the full report at <https://content.tfl.gov.uk/dvs-one-year-on-report-june-2022.pdf>

Department for Transport Highway Code changes

From 1 July new rules on the use of self-driving vehicles in Great Britain have come into force. The changes are included in a new section in The Highway Code.

At the moment, only vehicles with advanced driver assistance systems are available in the UK. No vehicles in Great Britain have been classed as self-driving yet but they could start to be as soon as next year.

The plans also include a change to current regulation, allowing drivers to view content which is not related to driving on built-in display screens, while the self-driving vehicle is in control.

Please note, it will however, still be illegal to use mobile phones in self-driving mode, given the greater risk they pose in distracting drivers as shown in research.

The government is working with the manufacturer, retailer and leasing industries to ensure that anyone accessing a self-driving vehicle will receive advice on how to use it.

The updates can be found here: [Updates - The Highway Code - Guidance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/updates-to-the-highway-code-guidance)

New UK laws will require chargepoints to respond to periods of high demand by slowing or delaying charging sessions

The Electric Vehicles (Smart Charge Points) Regulations 2021 were made (signed into law) on 15 December 2021, and have been brought into effect as of 30 June 2022.

These set out the minimum standards for all home and workplace chargepoints.

- All new chargepoints must have a data connection.
- New charge points will be configured to avoid charging during peak hours. However, users can choose to ignore the factory presets and override these charging features.
- New security and privacy requirements

The Department for Transport will review progress after launch, informing a second phase of regulations due by the end of 2025.

For more information, please visit: [Electric vehicle smart charging - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/electric-vehicle-smart-charging)

MILS Legal Update: Healthcare Professionals to be able to provide fit notes



This July sees other Healthcare Professionals such as Pharmacists, Nurses, Occupational Therapists and Physiotherapists, also being able to provide fit notes. It means that GPs alone will not have to bear the burden. The reason behind the change in the law is to assist GPs, who are very over-burdened, with what is often a paper exercise for them.

This is to be welcomed, but if there is a concern it is probably that widening the category of professionals who can give fit notes, to those who perhaps have less of an overview of the employee's health, might only heighten the trend that the health care professional will always sign off the employee, if they request it, without a real examination of whether employees are, really, too ill to work.

Motor Industry Legal Services

Motor Industry Legal Services (MILS Legal Ltd) provides fully comprehensive legal advice and representation to UK motor retailers for one annual fee. It is the only law firm in the UK which specialises in motor law and motor trade law. MILS currently advises over 1,000 individual businesses within the sector as well as the Retail Motor Industry Federation (RMI) and its members.



Fuel types of new trucks in the European Union – 2021 overview

In 2021, diesel continued to dominate sales of new medium and heavy commercial vehicles in the European Union, accounting for 95.8% of the market (96.5% in 2020). Electrically-chargeable vehicles made up 0.5% of new truck sales across the region (up from 0.4%), while alternative-fuel vehicles held a market share of 3.6% (compared to 3.0% in 2020).

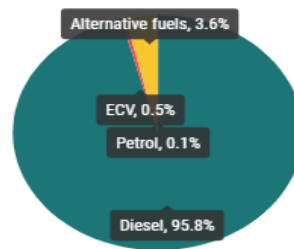
Image source: ACEA

New trucks by fuel type in the EU

% SHARE / 2021



■ Petrol ■ Diesel ■ Electrically-chargeable (ECV) ■ Hybrid electric (HEV)
■ Alternative fuels



Last year, registrations of new diesel trucks in the EU increased by 13.6% to reach 255,099 units. With the exception of Cyprus, all EU markets posted growth.

Overall in 2021, registrations of new electrically-chargeable vehicles (ECV) grew by 26.6%, going from 982 units in 2020 to 1,243 electric trucks in 2021.

Registrations of new hybrid electric (HEV) trucks in the EU saw a significant decrease, with sales falling by 55.9% to 67 units. The market share of hybrid trucks shrank from 0.1% in 2020 to 0.03% of total EU truck sales in 2021.

Alternative fuels, which include natural gas, LPG, biofuels and ethanol, accounted for the vast majority of alternatively-powered trucks sold across the EU in 2021, with a total market share of 3.6% (up from 3.0% in 2020). Demand increased by 40.7% across the region, totalling 9,688 units sold last year.

For more information please visit: [link](#)

General news

Major fleets join drive to decarbonise HGVs

Industry leaders in shipping and haulage are launching a cross-industry action group focused on the decarbonisation of heavy goods vehicles (HGVs).

The new HGVzero taskforce will bring together some of Europe's largest fleets, including Coca-Cola European Partners, Tesco, XPO Logistics, Eddie Stobart and DPDgroup, to accelerate the decarbonisation of their collective fleets.

Within the first six months of the programme, HGVzero members will co-develop solutions in support from key industry collaborators to tackle the complex pinch points that have so far hindered successful low-carbon HGV rollouts.

New initiatives include:

- Shared infrastructure mapping
- Innovation discovery
- Joint action plan: To prioritise and breakdown shared infrastructure barriers and co-create a deployment roadmap for viable HGV projects

Source: [here](#)

Hydrogen filling stations to open on A1 and M6

Element 2 is partnering with Exelby Services to open the UK's first public hydrogen refuelling stations on the A1(M) and the M6.

The sites will be located at Conegarth, Yorkshire, and Golden Fleece, Cumbria, and will provide hydrogen refuelling services for hydrogen-powered Heavy Goods Vehicles (HGVs).

Exelby and Element 2 said they are responding to demand from commercial customers seeking to rapidly transition to low-carbon, sustainable transport, with hydrogen forming a central pillar of their strategies.

Source: [Hydrogen filling stations to open on A1 and M6 | Latest News \(commercialfleet.org\)](#)

Trio announce plans for charging infrastructure joint venture

Traton Group, Daimler Truck and Volvo Group will combine forces on the project, called Commercial Vehicle Charging Europe.

The joint venture sees 1,700 charge points installed and operated by the trio.

Typically, these charging stations will be positioned on, or close to, highways and at logistics hubs throughout the region.

In total, €500 million will be invested, making it the largest charging infrastructure investment in the European heavy-duty truck industry to date.

Source: <https://truckingmag.co.uk/news/trio-announce-plans-for-charging-infrastructure-joint-venture/>

DPD confirms net-zero commitment

DPD UK has welcomed plans by its parent GeoPost/DPDgroup for net-zero targets and confirmed that the UK operation is on track to achieve these targets and, where possible exceed them.

The business has submitted both a near-term decarbonisation and a long-term net-zero target for approval by the Science Based Target initiative (SBTi).

The group aims to achieve net-zero emissions by 2040 and has committed to reduce its scope 1, 2 and 3 greenhouse gas (GHG) emissions by 43% by 2030 and 90% by 2040 from a 2020 baseline - 10 years ahead of the Paris Agreement.

In the UK DPD is focusing on the rapid decarbonisation of its delivery fleet with 3,000 Electric Vehicles on the road this year and plans for 5,000 by the end of 2023. By the end of next year, DPD will be delivering to 30 major towns and cities in the UK, only on electric

vehicles.

Source: <https://www.commercialfleet.org/news/latest-news/2022/07/15/dpd-confirms-net-zero-commitment>

