



Dear Colleague,

This month it was positive to see that demand in the Light Commercial Vehicle (LCV) market was up 9.6% in November, following a turbulent year driven by political and economic issues. Overall, the van market is down by only -0.7% this year and has registered a total of 331,776 commercial vehicles. 334,133 vehicles were put on the road in 2017.

Overall, dealers are seeing strong demand for product which is being driven further by new models entering the market. Coupled with attractive finance offers and better specification vehicles, it appears that the LCV market will continue to thrive as we enter 2019.

A reminder that the NFDA is your trade body and here to help and advise you on regulatory and operational issues that affect your business. However, if there are issues that we have not covered or you have concerns about, please do contact us on the NFDA helpline 01788 538303.

Finally, on behalf of everyone here at the NFDA CV division, I would like to wish you all a very Merry Christmas and a Happy New Year! We look forward to working with you all in 2019!

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- HEAVY GOODS VEHICLE REGISTRATIONS OVER 6.0T
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VAN DEMAND REMAINS STRONG IN NOVEMBER

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Overall, the van market is down by only -0.7% this year and has registered a total of 331,776 commercial vehicles. 334,133 vehicles were put on the road in 2017.

The most significant demand came from the pick-up market. Many of these trucks are built with double-cabs and have accessories fitted to a high standard with leather interiors that very much appeal to tradesman and those who are self-employed. These particular vehicles are purchased for dual purpose for both business and private usage. The pick-up market now represents the third biggest light commercial vehicle sector registering around 15% of all light commercials sold.

This year we have seen a decline in demand for small car type and mid-size vans, with buyers opting for larger commercials over 2.5tonne. November saw 2.5 – 3.5t machines registrations grow 12.9%. This sector is extremely important to corporate and fleet buyers and is used mostly in the online delivery sector. It represents 63% of all light commercials sold.

98% of vehicles sold have been diesel vans, which is an indication that the pollutants debate has not affected the market.

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The 2018 CV Market

- UK Light Commercials up to 3.5 tonne, Jan-Nov 2018 -0.7%
- UK Trucks over 6.0 tonne, Jan-Sept 2018 -7.5%

HEAVY GOODS VEHICLE REGISTRATIONS OVER 6.0T

UK HEAVY GOODS VEHICLE REGISTRATIONS: QUARTER 3 2018 AND % CHANGE ON 2017

	Q3 2018	Q3 2017	% change	Year-to-date 2018	Year-to-date 2017	% change
HGVs	9,853	10,597	-7.0%	30,308	32,774	-7.5%

UK HGV REGISTRATIONS

Quarter	Q3-18	Q3-17	% change
Rigids > 6.0-16t	2,108	2,242	-6.0%
Rigids > 16t	3,498	3,972	-11.9%
All rigids	5,606	6,214	-9.8%
2-axle artics	529	485	9.1%
3+-axle artics	3,717	3,898	-4.6%
All Artics	4,246	4,383	-3.1%

Year-to-date	YTD-18	YTD-17	% change
Rigids > 6.0-16t	6,210	7,255	-14.4%
Rigids > 16t	11,313	12,196	-7.2%
All rigids	17,523	19,451	-9.9%
2-axle artics	1,249	1,206	3.6%
3+-axle artics	11,533	12,117	-4.8%
All Artics	12,782	13,323	-4.1%

Year-to-date by brand

MARQUE	YEAR-TO-DATE		% Change
	2018	2017	
DAF	8298	9941	-16.5%
DENNIS	574	547	4.9%
ISUZU	665	659	0.9%
IVECO	2199	2628	-16.3%
MAN	2709	2447	10.7%
MERCEDES	4949	5154	-4.0%

MITSUBISHI	468	534	-12.4%
RENAULT	1375	1555	-11.6%
SCANIA	4658	4897	-4.9%
VOLVO	4343	4356	-0.3%
OTHER	70	56	25.0%
Total HGVs >6T	30308	32774	-7.5%

NFDA CONTINUES TO LOBBY FOR PRIVATISED HGV TESTING



The DVSA has informed us that booked test cancellations on their part are very low and it is the ATF's who are in fact cancelling more pre booked tests.

The calculations by the DVSA are as follows:

- ATF test cancellation; between 30 days – same day cancellation of booked tester.
- DVSA test cancellation; anytime up to the same morning of booked tester.

We have been unable to ascertain from both DVSA and ATF's the amount of rejected test slots requested by ATF's, but it seems far from the percentage we are often given by the DVSA.

The NFDA has gone directly to Government and request the statistics via a 'Freedom of Information' request and surprisingly the results are very inline with the thoughts of our many ATF members.

	2017	2018 (to Sept 18)
Test hours demand (requests)	629,671	513,906
Test hours supplied	603,794	454,258

What it means is that in 2017, 95.89% of DVSA suppliers requested testing hours. However, in 2018 (up until September) it has dropped to supplying 88.39% of requested testing hours. A non-insignificant drop.

The Government cannot provide earlier data for 2016 and 2015.

THE STRENGTH OF COMMERCIAL REGISTRATIONS IN MAINLAND EUROPE



Total new commercial vehicles

In October 2018, EU commercial vehicle registrations posted growth again after slowing down in September. Demand went up by 6.9% in October, with all vehicle segments performing positively. Except for Italy (-13.2%), all major EU markets recorded growth. Germany saw the strongest increase (+16.9%), followed by the United Kingdom (+10.9%), France (+7.3%) and Spain (+1.7%).

Over the first 10 months of 2018 growth was positive (+3.9%), counting more than two million new commercial vehicles registered across the European Union. Spain posted the highest growth rate (+7.9%), followed by France (+5.4%) and Germany (+5.4%). By contrast, demand fell in Italy (-2.2%) and the United Kingdom (-2.2%) during the same period.

New light commercial vehicles (LCV) up to 3.5t

From January to October 2018, demand for vans increased by 3.7% compared to 2017, totalling 1.7 million units registered. Looking at the biggest EU markets, Spain (+8.8%), Germany (+6.2%) and France (+5.0%) continued to drive growth, while Italy (-4.5%) and the United Kingdom (-1.6%) performed worse than one year ago.

New heavy commercial vehicles (HCV) of 16t and over

Ten months into the year, demand for heavy trucks is still strong, with 263,356 new vehicles registered so far this year – up 5.1% compared to 2017. The United Kingdom (-7.4%) was the only major market to post a decline, while Italy (+11.5%), France (+10.2%), Germany (+3.8%) and Spain (+0.6%) all contributed positively to EU growth.

New medium and heavy commercial vehicles (MHCV) over 3.5t

Over the first 10 months of the year, EU demand for new trucks went up by 5.0% to reach 323,152 units. Italy (+10.2%), France (+9.1%), Germany (+3.5%) and Spain (+2.1%) performed well, but new truck registrations declined in the United Kingdom (-5.1%) so far this year.

THE COMMERCIAL VEHICLE SHOW 30 APRIL - 2 MAY 2019



The **CV Show** is the best attended largest and most comprehensive road transport and commercial vehicle event held in Britain, providing truck and van operators with far greater choice than can be found anywhere else in the UK. The Show attracts close to 21,000 business visitors and its central location at the NEC Birmingham, ensures a truly nationwide attendance. For operators it's the annual meeting place and for sector suppliers the ultimate showcase for products and services.



