VDA German Association of the Automotive Industry

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Facts and Figures

International Passenger Car Markets May 2023

New Passenger Car Registrations/ Sales

	May 2023	+/- in %	Jan.-May 2023	+/- in %
Europe (EU, EFTA & UK) 1)	1.121.600	18,2	5.323.600	17,4
European Union 1)	939.000	18,5	4.394.000	18,0
W. Europe (EU14, EFTA & UK) 1)	1.008.400	18,9	4.785.500	17,6
New EU Countries (EU13) 1)	113.300	12,4	538.100	15,3
USA* 2)	1.362.000	22,9	6.284.500	11,4
China 3)	2.029.600	26,6	8.896.400	11,1
Japan 4)	272.000	28,4	1.715.700	18,7
India 5)	288.400	14,9	1.591.100	11,8
Brazil* 6)	166.400	-5,0	754.800	9,8

Source: 1) ACEA 2) Wards Intelligence 3) CAAM 4) JAMA 5) SIAM 6) ANFAVEA
* Light Vehicles

Upward trend on international passenger car markets continues in May:
Major passenger car markets mostly up - Strong growth in Asia - Europe: BEV dynamic, PHEV also slightly up in May

The upward trend on **the international automotive markets** continued for the most part in May. In Asian markets, sales developed very dynamically due to weak prior-year figures. Here, the lockdown in the Shanghai metropolitan region in the spring of last year still had a significant impact in the form of logistics problems and limited material availability. In Europe (EU, EFTA & UK), the US and India, too, the market showed clear double-digit growth. Only on the Brazilian market fewer light vehicles were sold than a year earlier.

A good 1.1 million new vehicles were registered in the **European passenger car market** in May. This is 18 percent more than a year earlier. In the previous year, the European market had been particularly hard hit by the effects of the war in Ukraine. The five largest individual markets have recently continued to develop positively, with Italy (+23 percent) and Germany (+19 percent) recording the most dynamic growth in May. The United Kingdom (+17 percent) and France (+15 percent) also achieved double-digit increases. As in the previous month, the Spanish market grew at a slightly more subdued rate of 8 percent. After five months, the overall European market grew significantly by 17 percent over the course of the year, reaching a volume of 5.3 million passenger cars. Compared to pre-crisis 2019, however, it is still 23 percent behind. In terms of e-mobility, sales of BEVs have recently been particularly dynamic. Although sales of PHEVs increased slightly in the past month, they have declined overall over the course of the year. This is primarily due to weak sales on the German market as a result of the expiry of the environmental bonus (subsidy) for PHEVs last year.

In the **United States**, light vehicle sales (passenger cars and light duty) increased significantly by 23 percent in May. In total, a good 1.4 million vehicles were sold last month. For the year to date, this represents growth of 11 percent to a volume of 6.3 million units. The light-duty segment (+12 percent) and the passenger car segment (+10 percent) developed with similar momentum. However, the popular light-duty segment now accounts for a good 79 percent of the overall market.

Vehicle sales in the **Chinese passenger car market** again increased significantly. A sales volume of just over 2.0 million passenger cars represented an increase of 27 percent compared with the same month last year. On the one hand, the lockdown in the Shanghai region last year caused various aftereffects; on the other hand, the current year saw the strongest May sales ever in history. Over the course of the year, new registrations rose to 8.9 million vehicles (+11 percent). The weak start to the year has thus finally been shaken off.

In **Japan**, sales of brand-new passenger cars continue to develop dynamically. In May, 272,000 passenger cars were sold - a good 28 percent more than in the same month of the previous year. The extremely weak prior-year level combined with an improved supply situation is stimulating the market and production in Japan. Over the course of the year, the Japanese passenger car market has grown, reaching a volume of just over 1.7 million units sold (+19 percent).

Elektro International April 2023

New Electric Car Registrations in the Most Important Markets Jan.- Apr. 2023

	Electric registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change Apr. 2022 vs. Apr. 2023	Cumulative new registrations / sales since January 2010	Electric proportion of 2023 YTD	Electric proportion of 2022 YTD	Electric market share of German Brand 2023 YTD	Electric market share of German Brand 2022 YTD	German Brand market share in the overall car market 2023 YTD
Germany	173.896	-11%	-5%	2.392.159	20,0%	24,2%	59%	58%	69%
France	135.590	42%	29%	1.182.800	24,5%	20,2%	23%	23%	26%
UK	145.211	27%	54%	1.277.865	23,2%	21,4%	36%	39%	46%
Italy	48.387	31%	20%	402.751	8,8%	8,5%	33%	37%	34%
Netherlands	51.376	69%	55%	556.642	40,3%	30,3%	33%	42%	40%
Norway	33.959	-9%	0%	774.009	90,2%	88,7%	31%	38%	33%
Sweden	47.390	-1%	10%	556.273	56,5%	52,0%	35%	35%	40%
EU+UK+EFTA	885.133	23%	28%	8.960.900	21,1%	20,1%	41%	43%	46%
USA (LV)	411.606	55%	72%	3.671.194	8,4%	5,9%	12%	9%	9%
Canada (LV)	39.074	29%	87%	446.359	7,8%	6,4%	14%	9%	10%
China	2.120.484	43%	117%	16.634.646	30,9%	23,2%	7%	5%	19%
South Korea	35.568	2%	2%	388.986	7,2%	7,8%	18%	22%	12%
Japan	32.026	40%	84%	474.636	2,2%	1,9%	13%	17%	4%

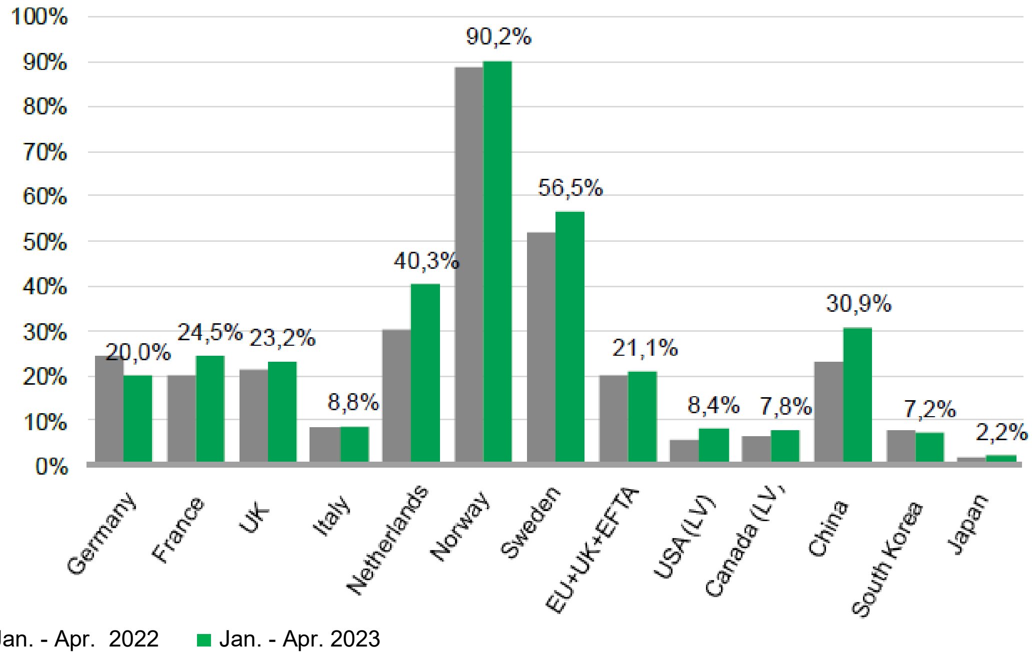
Source: KBA, Ward's, Fourin, S&P Global Mobility

In April, most markets in Europe showed growth (+28 percent). The strongest increases were recorded in the Netherlands (+55 percent) and UK ((+54 percent), which were ahead of France (+29 percent) and Italy (+20 percent). Decline was from the major markets Germany only (-5 percent). The non-European markets were all in growth, where China had the largest increase with 117 percent.

With 2.12 million newly registered e-cars (+43 percent), China was by far the most important e-market worldwide. For comparison: Europe (EU+EFTA+UK) came with a total of 0.89 million units (+23 percent) to less than half. The USA ranked behind with 0.41 million sales (+55 percent).

The market share of the German brand on the e-market didn't match the share of the overall market in any important European market. In Europe as a whole the e-share was 41 percent while the total market share was 46 percent. In China, the discrepancy was even greater with 19 percent overall and 7 percent e-market share. In the remaining overseas markets considered here, which are rather insignificant apart from the USA (12 percent e-market share with 9 percent total market share), German OEMs are more successful with e-cars than with combustion cars.

Electric Share in the Overall Passenger Car Market (Jan.- Apr. 2022 vs Jan.- Apr. 2023)



When it comes to the electric share in the overall market, the e-share consolidated over the course of the year in Norway at 90 percent. The second place was Sweden with 56 percent, which followed by the Netherlands (40 percent), China (31 percent), France (25 percent) and UK (23 percent) ahead of Germany (20 percent) where the environmental bonus has been reduced for BEVs and has expired for PHEVs is still having an effect.

BEV and PHEV new registrations of cars in the most important markets Jan.- Apr. 2023

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change Apr. 2023 vs. Apr. 2022	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change Apr. 2023 vs. Apr. 2022
Germany	124.476	18%	34%	72%	49.332	-45%	-46%
France	81.971	46%	35%	60%	53.593	35%	22%
UK	96.727	26%	59%	67%	48.459	29%	44%
Italy	20.361	42%	32%	42%	28.024	25%	14%
Netherlands	33.418	95%	75%	65%	17.951	36%	24%
Norway	31.702	-7%	4%	93%	2.257	-32%	-28%
Sweden	29.832	19%	28%	63%	17.556	-22%	-10%
EU+UK+EFTA	560.959	37%	49%	63%	323.941	5%	3%
USA (LV)	329.192	61%	84%	80%	81.462	36%	38%
Canada (LV)	29.537	29%	114%	76%	9.521	29%	43%
China	1.523.884	30%	109%	72%	596.600	90%	144%
South Korea	30.469	14%	15%	86%	2.887	-45%	-19%
Japan	15.467	58%	106%	48%	16.423	30%	74%

* BEV = Battery Electric Vehicle, PHEV = Plug-in Hybrid EV

Source: KBA, Ward's, Fourin, S&P Global Mobility

In April, all major BEV markets were clearly in the positive growth. Canada was at the forefront with +114 percent while the saturated Norwegian market realized the lowest growth with +4 percent. With +49 percent, Europe performed not as well as China with +109 percent. In China, the national e-subsidy ended at the end of 2022, while many local governments still introduced subsidies for e-cars.

In the first four months, all important BEV markets except Norway (-7 percent, because sales tax from Jan 2023 on e-cars) recorded significant double-digit percentage growth. The highest growth was in the Netherlands (+95 percent), where there is a "first come, first serve" subsidy available for this year fixed. In addition, there are no purchase and vehicle taxes. The USA followed with +61 percent ahead of Japan (+58 percent) and France (+46 percent). In Italy, the increase was 42 percent. In Sweden (+19 percent) the market was already picking up pace again although after November 8th ordering e-cars would no longer receive a climate bonus. Both South Korea and Germany (environmental bonus reduced) recorded lower growth at +14 and +18 percent respectively.

The development of the PHEV was also heterogeneous in April. Due to the subsidies ended last year, Germany recorded the highest decline at -46 percent. In Norway, the decrease was -28 percent. Since the beginning of the year, VAT has been applied to e-cars over approx. EUR 50,000 in Norway and there has also been a new important tax for all passenger cars since Jan 2023. New registrations of PHEVs in South Korea (-19 percent) and Sweden (-10 percent) also declined, where e-car subsidies have generally expired. However, there were high increases in China (+144 percent), Japan (+74 percent), UK (+44 percent), Canada (+43 percent) and the USA (+38 percent). In rural China, PHEVs are currently very popular due to their long range.

By far the most important plug-in hybrid market was China with 597 thousand units (+90 percent). Europe came to 324 thousand (+5 percent). The USA followed at a great distance with 81 thousand (+36 percent). In Europe, the largest PHEV market is France (54k, +35%) ahead of Germany (49k, -45%) and the UK (48k, +29%).

Elektro Germany May 2023

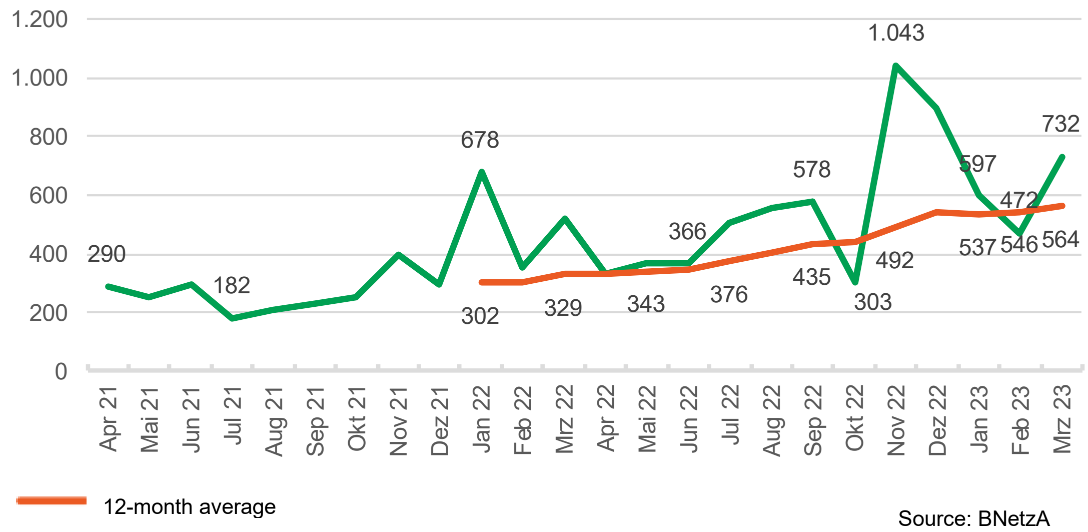
Overview of New Electric Car Registrations Germany

	Mai 2023	Mai 2022	23/22 in %	Jan.-Mai 2023	Jan.-Mai 2022	23/22 in %	Anteil Mai 2023	Anteil Mai 2022	Anteil Jan.-Mai 2023	Anteil Jan.-Mai 2022
Elektro gesamt	**56.617**	**52.427**	**8%**	**230.513**	**247.891**	**-7%**	**22,9%**	**25,3%**	**20,6%**	**24,5%**
darunter										
BEV	42.780	29.182	47%	167.256	135.029	24%	17,3%	14,1%	15,0%	13,3%
Brennstoffzelle	34	36	-6%	122	185	-34%	0,0%	0,0%	0,0%	0,0%
Plug-In Hybrid (PHEV)	13.803	23.209	-41%	63.135	112.677	-44%	5,6%	11,2%	5,7%	11,1%
Zum Vergleich:										
Hybrid (ohne Plug-In)	*57.842*	*37.450*	*54%*	*261.759*	*194.080*	*35%*	*23,4%*	*18,1%*	*23,4%*	*19,2%*
dar. Mild-Hybrid*	*51.142*	*31.480*	*62%*	*224.763*	*163.292*	*38%*	*20,7%*	*15,2%*	*20,1%*	*16,1%*
Erdgas	*130*	*124*	*5%*	*633*	*853*	*-26%*	*0,1%*	*0,1%*	*0,1%*	*0,1%*
LPG	*1.166*	*619*	*88%*	*5.137*	*6.522*	*-21%*	*0,5%*	*0,3%*	*0,5%*	*0,6%*
Alternative Antriebe ges	115.755	90.620	28%	498.042	449.346	11%	46,9%	43,7%	44,6%	44,3%
Neuwagen gesamt	246.966	207.199	19%	1.116.731	1.013.417	10%	100,0%	100,0%	100,0%	100,0%

* Aktueller Monat geschätzt. Quelle: KBA, VDA

New registrations of electric vehicles developed positively in May. The German market for electric cars increased by 8% compared to the same month last year. 56,600 electric cars were newly registered in May of this year. There was another significant slump in plug-in hybrids (PHEV): 13,800 newly registered units meant a decrease of 41% compared to May of the previous year. New registrations of new, purely battery-electric passenger cars (BEV) rose by around 47% compared with May 2022 to a level of 42,800 units. Thus, they developed much more dynamically than the car market as a whole. A total of 230,500 e-cars were sold in the first five months of the current year. That is 7% less than in the same period last year. This decline is due to the development of PHEVs: while BEVs have increased by 24% to 167,300 units in the year to date, PHEV registrations have fallen by 44% to 63,100.

New publicly accessible charging points per week (including late-reported registrations)



Source: BNetzA

Till April 1st, 2023, 88,316 charging points (of which 15,875 were rapid charging points with an output of 22 kW and more) were registered with the Federal Network Agency (BNetzA) in Germany. For detailed info, please refer to Link.

With an estimate total of 1.95 million e-cars untill April 1st, there were 45 charging points for 1,000 e-cars (or 22 e-cars per charging point). In March, the BNetzA reported an additional 3,243 charging points (including late registrations). The moving twelve-month average rose slightly to 564 charging points per week.

To reach 1 million LP in 2030 would require building around 2,250 charging points per week. To achieve this, the expansion rate of the last 12 months would have to be quadrupled.

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