German Association of the Automotive Industry

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Facts and Figures

International Passenger Car Markets November 2022

New Passenger Car Registrations/ Sales

	November	+/- in %	Jan. - Nov. 2022	+/- in %
Europe (EU27, EFTA & UK)* 1)	1,014,600	17.4	10,196,100	-5.8
European Union (EU27)* 1)	829,500	16.3	8,359,300	-6.1
W. Europe (EU14, EFTA & UK) 1)	921,200	18.7	9,162,200	-5.9
New EU Countries (EU13)* 1)	93,400	5.9	1,033,900	-4.7
USA** 2)	1,120,100	10.4	12,457,800	-9.4
China 3)	2,050,000	-4.8	21,004,200	12.1
Japan 4)	308,100	5.6	3,164,000	-6.8
India 5)	276,200	-12.4	3,424,700	19.6
Brazil** 6)	192,100	19.0	1,758,300	-1.4

Source: 1) ACEA 2) Wards Intelligence 3) CAAM 4) JAMA 5) SIAM 6) ANFAVEA
* without Malta
** Light Vehicles

Europe and USA clearly up - Japan still on the rise - China with setbacks

The international automobile markets developed very differently from region to region in November. Due to the continuing base effect and a gradually improving supply situation, double-digit growth rates were achieved in Europe and the United States. The markets in China and India, which are already back at a high level compared to pre-crisis levels, have to cope with a decline in new registrations at the end of the year. Due to the supply bottlenecks that have still not been fully overcome, especially in the semiconductor segment, all lead markets, except for China and India, remain in negative territory compared to the previous year's level.

New registrations in the European passenger car market (EU27, EFTA & UK) again increased significantly in November compared to the same month last year. 1.0 million newly registered vehicles meant an increase of a good 16 percent. The current year's performance of the European market is at a level of 10.2 million vehicles and thus still clearly in the red (-6 percent). The five large individual European markets were again able to achieve growth rates in step with each other. Especially in Germany (+31 percent) and the United Kingdom (+23 percent) passenger car sales increased significantly in November. But double-digit growth was also achieved in Italy (+15 percent), Spain and France (both +10 percent). The year, which continues to be marked by the war in Ukraine (including the energy crisis and high inflation), remains in the red in all major individual markets. In Germany, the United Kingdom and Spain, however, the comparative value is approached again at the end of the year, while in France and Italy it will remain significantly below.

In the USA, the light vehicle market (passenger cars and light trucks), sales rose to a level of 1.1 million units in November, a good 10 percent increase compared to the same month last year. So far this year, 12.5 million light vehicles have been sold, 9 percent less than in the same period last year. The share of the light truck segment was recently 79 percent. Accordingly, the car segment only accounted for a good 21 percent of the total market.

In the Chinese passenger car market, 2.1 million passenger cars were registered in November, 5 percent less than in November of the previous year. This represents the first decline in new registrations in six months. Due to the very dynamic previous months, the current year is still on its path with growth of a good 12 percent at around 21.0 million units compared to the same period last year.

In Japan, 308,100 new passenger car registrations were booked in the past month, a growth rate of almost 6 percent. November was the third consecutive month of growth, boosted by the base effect. After eleven months, just under 3.2 million new registrations were recorded in the current year, 7 percent less than at the same time last year.

Elektro International October 2022

New Electric Car Registrations in the Most Important Markets Jan.- Oct. 2022

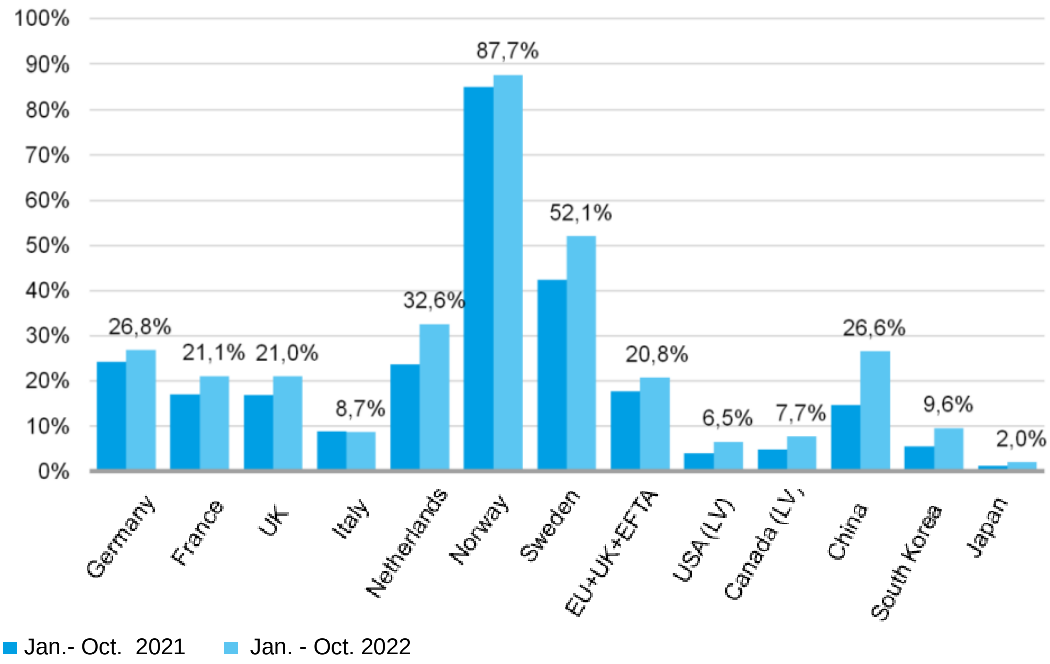
	Electric registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change Oct. 2022 vs. Oct 2021	Cumulative new registrations / sales since January 2010	Electric proportion of 2022 YTD	Electric proportion of 2021 YTD	Electric market share of German Brand 2022 YTD	Electric market share of German Brand 2021 YTD	German Brand market share in the overall car market 2022 YTD
Germany	556.631	5%	25%	1.941.481	26,8%	24,2%	58%	68%	68%
France	260.749	11%	8%	977.340	21,1%	17,1%	24%	29%	26%
UK	282.054	17%	16%	1.038.751	21,0%	16.9%	39%	43%	46%
Italy	94.929	-15%	-19%	331.954	8,7%	8,8%	38%	40%	34%
Netherlands	82.745	34%	20%	479.884	32,6%	23,7%	42%	45%	41%
Norway	101.122	-15%	5%	686.652	87,7%	85,1%	42%	38%	44%
Sweden	118.202	10%	31%	465.839	52,1%	42,4%	38%	40%	41%
EU+UK+EFTA	1.912.236	8%	14%	7.380.899	20,8%	17,7%	45%	50%	46%
USA (LV)	740.767	45%	43%	3.054.274	6,5%	4,0%	10%	12%	9%
Canada (LV)	100.270	46%	50%	384.930	7,7%	4,8%	8%	8%	10%
China	5.043.327	107%	82%	12.976.380	26,6%	14,7%	5%	6%	20%
South Korea	111.977	66%	59%	331.858	9,6%	5,5%	19%	27%	15%
Japan	57.369	57%	34%	429.776	2,0%	1,2%	13%	25%	5%

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

Most markets in Europe (+14 percent) showed growth in October. Double-digit increases were recorded in Sweden (+31 percent), Germany (+25 percent), the Netherlands (+20 percent) and UK (+16 percent). The saturated Norwegian market (+5 percent) and Italy (-19 percent) developed the weakest. The non-European markets showed a rising trend, although China (+82 percent) with the growth rate crumbling slightly.

With 5.04 million newly registered e-cars (+107 percent) in the first 10 months, China remains by far the most important e-market worldwide. For comparison: Europe (EU+EFTA+UK) came at overall 1.91 million units (+8 percent). The USA ranked behind with 0.74 million sales (+45 percent).

Electric Share in the Overall Passenger Car Market (Jan.- Oct. 2021 vs Jan.- Oct. 2022)



When it comes to the electric share in the overall market, the proportion of e-cars in Norway now consolidates at 88 percent in the 10 months of this year. The second place is Sweden with 52 percent, which followed by the Netherlands (33 percent), China and Germany each (27 percent), UK (21 percent), and France (21 percent).

BEV and PHEV new registrations of cars in the most important markets Jan.- Oct 2022

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change Oct 2022 vs. Oct 2021	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change Oct 2022 vs. Oct 2021
Germany	308.254	15%	17%	55%	247.711	-6%	35%
France	157.702	29%	8%	60%	102.927	-9%	7%
UK	195.539	38%	23%	69%	86.507	-13%	2%
Italy	39.592	-27%	-48%	42%	55.330	-4%	22%
Netherlands	52.771	49%	15%	64%	29.889	15%	29%
Norway	89.633	1%	20%	89%	11.464	-63%	-49%
Sweden	65.968	57%	74%	56%	52.232	-20%	-4%
EU+UK+EFTA	1.124.503	25%	15%	59%	786.664	-8%	12%
USA (LV)	581.921	60%	60%	79%	156.677	8%	7%
Canada (LV)	80.874	62%	105%	81%	19.359	4%	-38%
China	3.886.795	94%	66%	77%	1.156.400	166%	154%
South Korea	92.646	120%	88%	83%	10.709	-40%	-49%
Japan	24.187	46%	22%	42%	32.420	83%	48%

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

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

In October, all major BEV markets outside of Europe were recorded double-digit percent growth. Canada (+105 percent) and South Korea (+88 percent) were recorded the highest increases, growth in China was weakened (+66 percent), while in the USA there was a growth of 60 percent. In Europe (total +15 percent), all major markets except Italy (-48 percent) increased. The strongest momentum was recorded in Sweden (+74 percent), then followed by UK (+23 percent), Norway (+20 percent), Germany (+17 percent) and the Netherlands (+15 percent), where funding will be cut at the end of the year.

Over the course of the year, the Chinese BEV market clearly dominated with 3.89 million (+94 percent). Europe achieved 1.12 million new BEV registrations (+25 percent). The USA was in third place with 0.58 million electric light vehicles (+60 percent). South Korea (+120 percent), where production was expanding in 2022, as well as Canada (+62 percent) and Sweden (+57 percent), the Netherlands (+49 percent) and Japan (+46 percent) recorded very high growth rates. There were declining figures in Italy (-27 percent), which was to be seen against the background of the halving of the incentives for zero-emission vehicles at the end of May.

In October, the PHEV in Europe (+ 12 percent) showed a mixed picture. Germany recorded the greatest growth (+35 percent), where purchases were brought forward due to the end of subsidies. The markets in the Netherlands (+29 percent) and Italy (+22 percent) also showed double-digit growth. In Norway (-49 percent) and Sweden (-4 percent), new PHEV registrations have fallen. Outside of Europe, PHEVs were only declining in Canada (-38 percent) and South Korea (-49 percent). However, this was compensated by the largest market, China, where the PHEV increased (+154 percent) clearly exceeds the BEV growth.

New registrations of PHEV in China increased by 166 percent over the course of the year to 1.156 million and China remains the world's largest PHEV market, ahead of Europe (787 thousand, -8 percent). The most important European market was still Germany, which currently recorded a decline of 6 percent to 248 thousand. The USA followed with 157 thousand (+8 percent).

Elektro Germany November 2022

Overview of New Electric Car Registrations Germany

	Nov. 2022	Nov. 2021	22/21 in %	Jan.-Nov. 2022	Jan.-Nov. 2021	22/21 in %	Anteil Nov. 2022	Anteil Nov. 2021	Anteil Jan.-Nov. 2022	Anteil Jan.-Nov. 2021
Elektro gesamt	**102.656**	**68.198**	**51%**	**659.287**	**600.646**	**10%**	**39,4%**	**34,4%**	**28,2%**	**25,1%**
darunter										
BEV	57.980	40.270	44%	366.234	307.525	19%	22,3%	20,3%	15,7%	12,8%
Plug-In Hybrid (PHEV)	44.581	27.899	60%	292.292	292.697	0%	17,1%	14,1%	12,5%	12,2%
Brennstoffzelle	95	29	228%	761	424	79%	0,0%	0,0%	0,0%	0,0%
Zum Vergleich:										
Hybrid (ohne Plug-In)	*43.697*	*31.352*	*39%*	*424.868*	*392.953*	*8%*	*16,8%*	*15,8%*	*18,2%*	*16,4%*
dar. Mild-Hybrid*	*37.197*	*26.481*	*40%*	*358.943*	*337.894*	*6%*	*14,3%*	*13,4%*	*15,4%*	*14,1%*
Erdgas	*119*	*183*	*-35%*	*1.728*	*3.610*	*-52%*	*0,0%*	*0,1%*	*0,1%*	*0,2%*
LPG	*1.490*	*1.249*	*19%*	*13.822*	*8.469*	*63%*	*0,6%*	*0,6%*	*0,6%*	*0,4%*
Alternative Antriebe ges.	147.962	100.982	47%	1.099.705	1.005.678	9%	56,8%	50,9%	47,1%	42,0%
Neuwagen gesamt	260.512	198.258	31%	2.337.039	2.394.502	-2%	100,0%	100,0%	100,0%	100,0%

* Akt. Monat sowie bis 2021 geschätzt.

Quelle: KBA, VDA

New registrations of electric cars increased significantly in November – plus 50% compared to the same month last year – and reached a volume of 102,600 units. For the first time ever, more than 100,000 e-cars were sold in one month. The share of electric cars in total registrations rose to 39.4% in November – also a new record.

New registrations of purely battery-electric passenger cars (BEV) rose by 44% compared to the same month last year, and those of plug-in hybrids (PHEV) even by 60% compared to the same month last year. A total of around 659,200 electric cars have been registered since the beginning of the year. The sales are thus 10% above the same period of the previous year.

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Date	December 20, 2022

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