German Association of the Automotive Industry

Facts and Figures

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International Passenger Car Markets October 2022

New Passenger Car Registrations/ Sales

	October	+/- in %	Jan. - Oct. 2022	+/- in %
Europe (EU27, EFTA & UK)* 1)	910,800	14.1	9,181,700	-7.8
European Union (EU27)* 1)	745,900	12.2	7,530,000	-8.1
W. Europe (EU14, EFTA & UK) 1)	821,700	14.7	8,241,100	-8.1
New EU Countries (EU13)* 1)	89,100	8.8	940,500	-5.6
USA** 2)	1,151,800	9.6	11,314,900	-11.1
China 3)	2,231,000	13.3	18,980,900	14.5
Japan 4)	295,800	28.3	2,855,900	-8.0
India 5)	291,100	28.6	3,148,500	23.6
Brazil** 6)	168,700	12.2	1,566,300	-3.4

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

Significant growth in all major passenger car markets thanks to base effect

The international automotive markets recorded a significant increase in October, due to a pronounced base effect. However, the challenges along the value chains, the general supply situation on numerous markets and the overall economic price trend continue to be a noticeable burden. Despite the already weak prior year, the global lead markets, except for China, continue to be clearly in negative territory over the course of the year.

New registrations in the European passenger car market (EU27, EFTA & UK) increased significantly in October compared to the same month last year. 910,800 newly registered vehicles represented an increase of a good 14 percent. The five largest individual European markets all recorded growth - albeit to varying degrees: While the growth rates in the United Kingdom (+26 percent), Germany (+17 percent), Italy (+15 percent) and Spain (+12 percent) were well into double figures, France had to settle for a smaller increase of 5 percent. The current year's performance of the European market is at a level of 9.2 million vehicles, which is still well down on the previous year (-8 percent).

In the USA, the light vehicle market (cars and light trucks), sales rose to a level of 1.2 million units in October, an increase of almost 10 percent. So far this year, 11.3 million light vehicles have been sold, 11 percent fewer than in the same period last year. The share of the light truck segment has also increased in the year to date, most recently reaching 79 percent. Accordingly, the car segment only accounted for a good 21 percent of the overall market.

The Chinese passenger car market continued its growth path in October, once again expanding by almost 13 percent compared to the same month last year. A good 2.2 million new passenger cars were registered on China's roads. The current annual figure is now almost 15 percent higher than in the same period last year. The current figure of 19.0 million units is already significantly above the pre-crisis level.

In Japan, 295,800 new passenger car registrations were recorded in the past month, representing growth of a good 28 percent. Here, too, the figures clearly benefited from the base effect and its weak prior-year numbers. After the first ten months, just under 2.9 million new registrations were recorded, 8 percent fewer than at the same time last year.

Elektro International September 2022

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

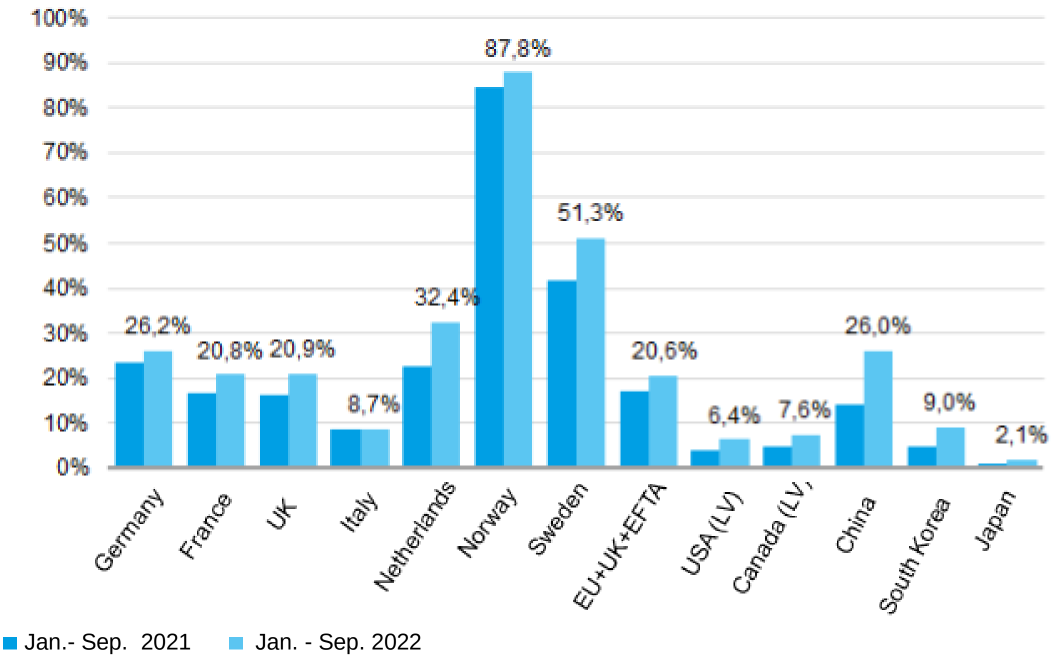
	Electric registra-tions / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change Sep. 2022 vs. Sep 2021	Cumulative new regis-trations / sales since January 2010	Electric proportion of 2022 YTD	Electric proportion of 2021 YTD	Electric market share of German Brand 2022 YTD	Electric market share of German Brand 2021 YTD	German Brand mar-ket share in the overall car market 2022 YTD
Germany	488.748	2%	29%	1.873.598	26,2%	23,7%	58%	68%	68%
France	231.552	11%	22%	948.143	20,8%	16,6%	24%	30%	26%
UK	253.013	18%	6%	1.009.710	20,9%	16.4%	38%	43%	43%
Italy	84.995	-15%	-32%	322.020	8,7%	8,6%	38%	40%	34%
Netherlands	72.901	37%	17%	470.040	1,0%	22,6%	42%	45%	41%
Norway	90.253	-17%	-21%	675.783	87,8%	84,7%	41%	37%	43%
Sweden	104.913	8%	0%	452.550	51,3%	41,7%	38%	40%	41%
EU+UK+EFTA	1.700.382	8%	12%	7.169.045	20,6%	17,2%	44%	50%	46%
USA (LV)	653.206	46%	52%	2.966.713	6,4%	3,8%	10%	12%	9%
Canada (LV)	88.829	45%	56%	373.489	7,6%	4,6%	8%	8%	10%
China	4.363.108	111%	94%	12.296.161	26,0%	14,1%	5%	7%	20%
South Korea	94.206	68%	64%	314.087	9,0%	5,0%	19%	29%	15%
Japan	53.414	59%	81%	425.821	2,1%	1,2%	14%	25%	5%

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

In September, the picture in Europe is mixed (+12 percent). Germany (+29%), France (+22 percent), and the Netherlands (+17 percent) record double-digit growth, while the saturated Norwegian market (-21 percent) and Italy (-32 percent) developed slowly. The non-European markets are all clearly growing. Above all China with +94 percent is at the top.

With 4.36 million newly registered e-cars (+111 percent) in the first 9 months, China remains by far the most important e-car market worldwide. While Europe (EU+EFTA+UK) comes with 1.70 million units overall (+8 percent). The USA ranks behind with 0.65 million sales (+46 percent), while Germany follows with 0.49 million sales (+2 percent).

Electric Share in the Overall Passenger Car Market (Jan.- Sep. 2021 vs Jan.- Sep. 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 9 months of this year. The second place is Sweden with 51 percent, which followed by the Netherlands (32 percent), China and Germany each (26 percent), UK (21 percent), and France (21 percent).

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

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change Sep 2022 vs. Sep 2021	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change Sep 2022 vs. Sep 2021
Germany	272.473	15%	32%	56%	215.647	-11%	24%
France	140.841	32%	32%	61%	90.594	-11%	8%
UK	175.607	40%	16%	69%	77.399	-14%	-16%
Italy	35.924	-24%	-40%	42%	49.064	-7%	-20%
Netherlands	46.315	55%	17%	64%	26.503	13%	19%
Norway	79.910	-1%	-18%	89%	10.322	-64%	-33%
Sweden	58.028	55%	4%	55%	46.883	-21%	-8%
EU+UK+EFTA	1.002.305	26%	17%	59%	697.057	-11%	5%
USA (LV)	514.160	60%	56%	79%	137.059	10%	39%
Canada (LV)	71.259	57%	107%	80%	17.545	11%	-40%
China	3.378.319	99%	76%	77%	984.661	170%	178%
South Korea	76.916	128%	111%	82%	9.769	-39%	-62%
Japan	22.234	49%	32%	42%	30.497	85%	153%

* BEV = Battery Electric Vehicle, PHEV = Plug-in Hybrid EV Source: KBA, Ward's, Fourin, S&P

In September, all major BEV markets outside of Europe recorded double-digit percent growth. The markets in China and Canada increased dynamically, while in the USA there is a growth of 56 percent. In Europe (total +17 percent), all major markets except Italy (-40 percent) and Norway (-18 percent) are growing. The strongest momentum is recorded in Germany and France (+32 percent), and the Netherlands (+17 percent), where subsidies will be reduced at the end of the year.

Over the course of the year, the Chinese BEV market clearly dominates with 3.38 million (+99 percent). Europe achieves 1 million new BEV registrations (+26 percent). The USA is in the third place with 0.51 million electric light vehicles (+60 percent). South Korea (+128 percent), where production is expanding in 2022, as well as Sweden (+55 percent) and the Netherlands (+55 percent) recorded high growth rates. Declining figures are only found in Italy (-24 percent), where incentives for zero and low-emission vehicles were decided at the end of May.

In September, the picture of PHEV in Europe is mixed. Germany recorded the greatest growth (+24 percent), where purchases are brought forward due to the end of subsidies. The markets are also growing in the Netherlands (+19 percent) and France (+8 percent). At Norway (-33 percent), Italy (-20 percent) and UK (-16 percent) decreased the most. The relative importance of PHEVs in Europe is expected to continue to decline as electric ramp-up gains momentum. This also has to do with the fact that these are usually not volume models. In addition, the subsidy regimes in many countries are under pressure.

Outside of Europe, PHEVs are only declined in Canada (-40 percent) and South Korea (-62 percent). However, this is compensated by the largest market, China, where PHEV growth is even outperforming BEV growth at +178 percent.

New registrations of PHEV in China rose by 170 percent to 985 thousand over the course of the year. China remains the world's largest PHEV market ahead of Europe (697 thousand, -11 percent). The most important European market is still in Germany, which recorded a decline of 11 percent to 216 thousand. The USA follows with 137 thousand (+10 percent).

Elektro Germany October 2022

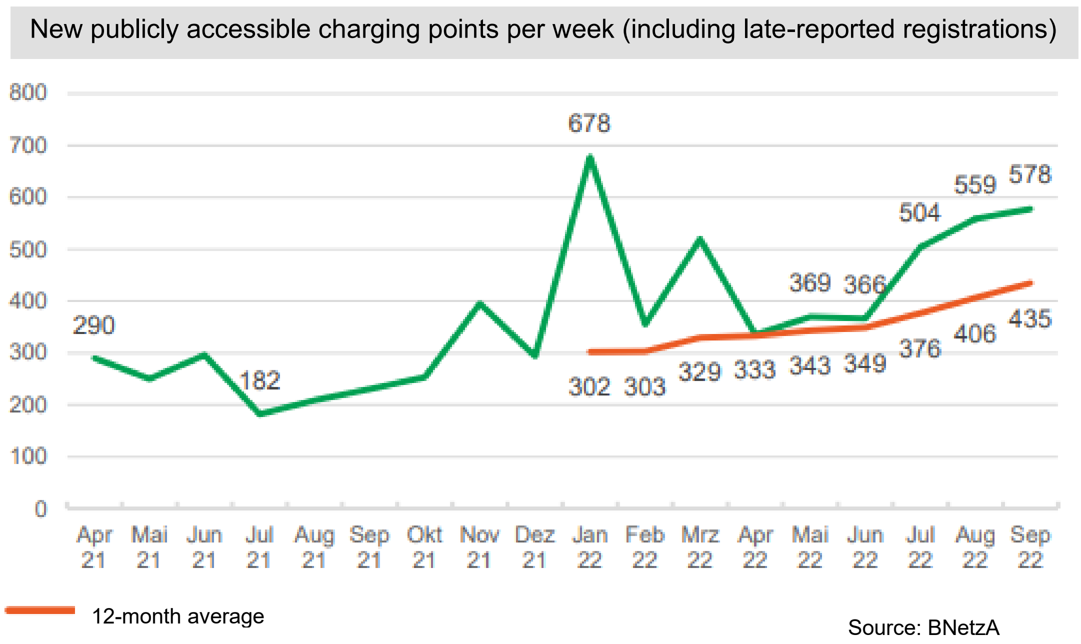
Overview of New Electric Car Registrations Germany

	Okt. 2022	Okt. 2021	22/21 in %	Jan.-Okt. 2022	Jan.-Okt. 2021	22/21 in %	Anteil Okt. 2022	Anteil Okt. 2021	Anteil Jan.-Okt. 2022	Anteil Jan.-Okt. 2021
Elektro gesamt	**67.883**	**54.327**	**25%**	**556.631**	**532.448**	**5%**	**32,5%**	**30,4%**	**26,8%**	**24,2%**
darunter										
BEV	35.781	30.560	17%	308.254	267.255	15%	17,1%	17,1%	14,8%	12,2%
Plug-In Hybrid (PHEV)	32.064	23.734	35%	247.711	264.798	-6%	15,4%	13,3%	11,9%	12,1%
Brennstoffzelle	38	33	15%	666	395	69%	0,0%	0,0%	0,0%	0,0%
Zum Vergleich:										
Hybrid (ohne Plug-In)	*36.469*	*27.593*	*32%*	*381.171*	*361.601*	*5%*	*17,5%*	*15,4%*	*18,4%*	*16,5%*
dar. Mild-Hybrid*	*30.969*	*23.442*	*32%*	*322.337*	*311.413*	*4%*	*14,8%*	*13,1%*	*15,5%*	*14,2%*
Erdgas	*126*	*165*	*-24%*	*1.609*	*3.427*	*-53%*	*0,1%*	*0,1%*	*0,1%*	*0,2%*
LPG	*927*	*999*	*-7%*	*12.332*	*7.220*	*71%*	*0,4%*	*0,6%*	*0,6%*	*0,3%*
Alternative Antriebe ges.	105.405	83.084	27%	951.743	904.696	5%	50,5%	46,5%	45,8%	41,2%
Neuwagen gesamt	208.642	178.683	17%	2.076.527	2.196.244	-5%	100,0%	100,0%	100,0%	100,0%

* Akt. Monat sowie bis 2021 geschätzt. Quelle: KBA, VDA

New registrations of electric vehicles increased by 25% in October compared to the same month of last year and reached a volume of 67,900 units. The share of electric cars in October was 32.5% - the highest one this year.

New registrations of BEV rose by 17% to 35,800 units compared to the same month of last year. New registrations of PHEV increased by 35% to 32,100 units compared to the same month of last year. A share of 15.4% of all new registrations means the highest one ever for the PHEV segment. This suggests early purchases due to the phase-out of the subsidy at the end of the year. A total of almost 556,600 electric cars have been registered since the beginning of the year. Sales are thus 5% above the same period of the previous year.



Till October 1, 70,751 charging points (of which 11,523 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 estimated total of 1.535 million e-cars till October 1, there are 44 charging points left for 1,000 e-cars (or 23 e-cars per charging point). In September, the BNetzA reported an additional 2,476 charging points, which corresponded to 578 charging points per week, including late-reported registrations.

The speed of expansion increased the moving twelve-month average to 435 charging points per week. To reach 1 million in 2030 would require building around 2,000 charging points per week. To achieve this, the expansion rate would have to be increased fivefold.

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