VDA German Association of the Automotive Industry

Facts and Figures

Content

International Passenger Car Markets April 2022

New Passenger Car Registrations/ Sales

	Apr 22	+/- in %	Jan.-Apr. 2022	+/- in %
Europe (EU27, EFTA & UK)* [1]	830,400	-20.2	3,583,600	-13.0
European Union (EU27)* [1]	684,500	-20.6	2,930,400	-14.4
W. Europe (EU14, EFTA & UK) [1]	740,500	-21.0	3,219,900	-13.7
New EU Countries (EU13)* [1]	89,900	-12.3	363,700	-6.8
USA** [2]	1,227,000	-19.2	4,518,100	-16.6
China [3]	947,000	-43.1	6,402,400	-4.2
Japan [4]	244,300	-15.3	1,233,000	-17.0
India [5]	251,600	-3.8	1,172,200	-1.9
Brazil** [6]	136,700	-16.7	512,200	-22.7

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

Global crises weigh heavily on international car markets in April

Nearly all international automotive locations have recorded significant declines in April. Constraints along the automotive value chains continue to determine the supply situation on the automotive markets. The combination of material shortages, transport, and logistics difficulties and high energy price inflation is driving producer prices and placing a significant burden on the automotive sector.

In the European passenger car market (EU27, EFTA & UK) 830,400 new vehicles were registered in April, about 20 percent less than in the previous year. The five large individual European markets all suffered double-digit reductions in April: Spain (-12 percent) and the United Kingdom (-16 percent) were the most moderate in percentage terms. In Germany (-22 percent) and in France (-23 percent) the declines in new registrations were more intense. In Italy, the number of passenger cars sold fell by a third, also due to a solid previous year's figure, and thus significantly above average (-33 percent). In the months of January to April, 3.6 million brand-new passenger cars were registered in Europe, almost 13 percent fewer than in the same period last year.

The weak sales in the USA light vehicle market (passenger cars and light trucks) continued in April. There were 1.2 million vehicles were sold, 19 percent fewer than in the previous year. So far this year, 4.5 million light vehicles have been sold, almost 17 percent fewer than in the same period last year.

The Chinese passenger car market collapsed in April due to recent Corona outbreaks, especially in the mega-cities of Shanghai, Shenyang, Changchun, Shenzhen, Beijing, etc. Only 947 thousand passenger cars were sold, 43 percent less than in April last year. After a good start to the year, the Chinese passenger car market slipped into negative territory for the first time in April, with a sales volume of just over 6.4 million passenger cars. This represented a decline of 4 percent.

In Japan, too, sales of brand-new passenger cars fell significantly again in April. The number of new registrations fell by 15 percent to a volume of 244,300 vehicles. In the first four months of the year, sales of 1.2 million passenger cars were 17 percent below the previous year's level.

Elektro International April 2022

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

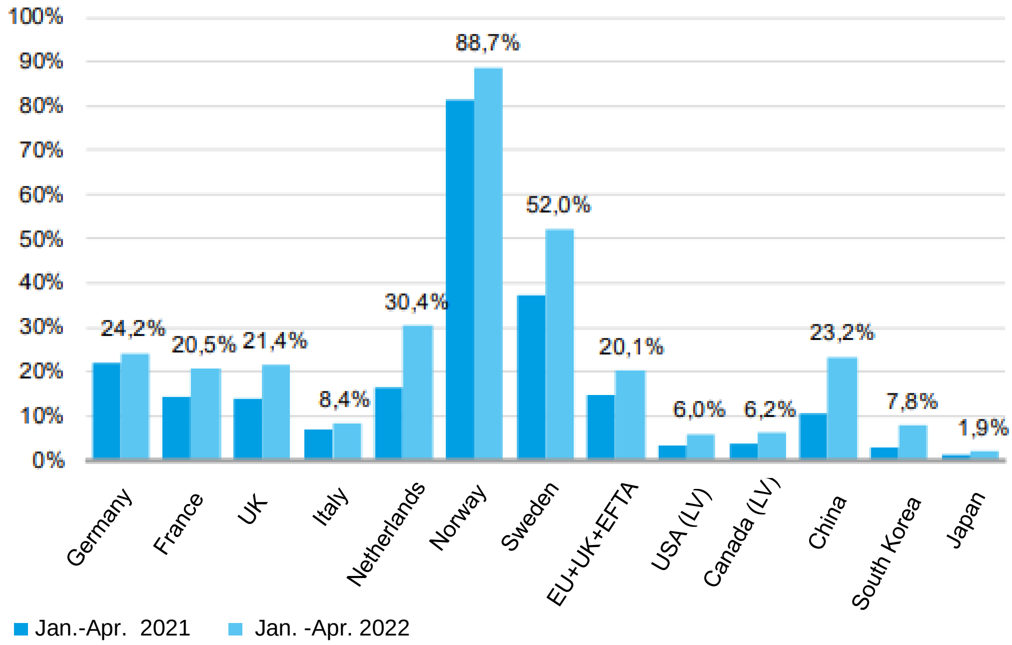
	Electric registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change April. 2022 vs. April 2021	Cumulative new registrations / sales since January 2010	Electric proportion of 2022 YTD	Electric proportion of 2021 YTD	Electric market share of German Brand 2022 YTD	Electric market share of German Brand 2021 YTD	German Brand market share in the overall car market 2022 YTD
Germany	195.464	1%	-14%	1.580.314	24,2%	21,9%	58%	72%	68%
France	97.412	18%	11%	814.003	20,5%	14,2%	25%	31%	26%
UK	114.699	46%	3%	871.396	21,4%	13,8%	39%	41%	45%
Italy	36.785	-11%	-26%	273.810	8,4%	6,9%	37%	39%	35%
Netherlands	30.452	76%	56%	427.591	30,4%	16,6%	42%	47%	42%
Norway	37.330	-7%	-22%	622.860	88,7%	81,5%	38%	38%	41%
Sweden	47.712	14%	12%	395.349	52,0%	37,1%	35%	39%	39%
EU+UK+EFTA	721.706	17%	-2%	6.190.369	20,1%	15,0%	43%	52%	46%
USA (LV)	272.788	56%	50%	2.586.295	6,0%	3,2%	9%	12%	8%
Canada (LV)	30.443	45%	-5%	315.103	6,2%	3,9%	9%	10%	10%
China	1.487.857	114%	45%	9.420.910	23,2%	10,4%	5%	7%	19%
South Korea	34.793	135%	143%	254.674	7,8%	2,9%	22%	43%	15%
Japan	22.957	57%	58%	395.364	1,9%	1,0%	11%	10%	4%

Source: KBA, Ward's, Fourin, IHS

With 1.488 million newly registered e-cars (+114 percent), China remains by far the most important e-market worldwide. Europe (EU+EFTA+UK) comes up overall 722 thousand units (+17 percent). The USA ranks behind with 273 thousand sales (+56 percent). Germany follows with 195 thousand sales (+1 percent). Except for Italy (-11 percent) and Norway (-7 percent), the other major European markets are growing. The most dynamic market is the Netherlands (+76 percent) ahead of the UK (+46 percent) and France (+18 percent).

The e-market share of German brands is equal to that of the overall market share in many countries, e.g., France, Italy, Netherlands, USA, Canada, etc. However, there are some exceptions: In Germany, the market share of e-cars are 58 percent over the course of the year, while 10 percent below the overall market share. With 5 percent of the e-share in China, it's even 14 percent below the overall market. In South Korea and Japan, the market shares of German e-cars are significantly higher than overall market share.

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



When it comes to the electric share in the overall market, the proportion of e-cars in Norway now consolidates at 89 percent. The second place for the share of e-cars is Sweden with 52 percent, which is followed by the Netherlands (30 percent), Germany (24 percent), China (23 percent), UK (21 percent), and France (21 percent).

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

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change April 2022 vs. April 2021	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change April 2022 vs. April 2021
Germany	105.847	20%	-7%	54%	89.468	-15%	-20%
France	56.195	40%	33%	58%	41.213	-3%	-8%
UK	77.060	88%	41%	67%	37.635	0%	-32%
Italy	14.329	-21%	-37%	39%	22.456	-2%	-17%
Netherlands	17.197	149%	101%	56%	13.236	28%	17%
Norway	34.002	29%	0%	91%	3.320	-76%	-70%
Sweden	25.141	152%	11%	53%	22.569	-29%	12%
EU+UK+EFTA	410.198	48%	14%	57%	311.224	-8%	-15%
USA (LV)	209.051	67%	82%	77%	62.486	30%	-5%
Canada (LV)	22.797	38%	-14%	75%	7.646	69%	12%
China	1.173.170	103%	34%	79%	314.687	170%	94%
South Korea	26.833	456%	436%	77%	5.252	-26%	-36%
Japan	9.801	67%	135%	43%	12.605	65%	42%

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

Source: KBA, Ward's, Fourin, IHS

In the first four months, almost all the important BEV markets record double-digit percent growth. The Chinese market clearly dominates with 1.173 million (+103 percent). Europe reaches 410 thousand new BEV registrations (+48 percent). The USA is in the third place with 209 thousand electric light vehicles (+67 percent). High growth rates are recorded in South Korea (+456 percent), where funding is expanded in 2022, as well as Sweden (+152 percent) and the Netherlands (+149 percent). Declining figures are found in Italy (-21 percent).

BEVs play a dominant role, especially in non-European markets. The highest share over the course of the year is in Norway (91 percent), China (79 percent), South Korea and the USA (77 percent each), Canada (75 percent).

New registrations of plug-in hybrids in China increases by 170 percent to 315 thousand. China remains the world's largest PHEV market, which is just ahead of Europe with 311 thousand (-8 percent). The most important European market is still in Germany, which is recorded a decline of 15 percent to 89 thousand. The USA follows with 62 thousand (+30 percent). Many markets are now showing declines: France, Germany, Sweden, South Korea, and Norway in particular with decrease by 76 percent.

It can be assumed that the relative importance of the PHEV will continue to decrease while more electric ramp-up gains momentum. This also has to do with the fact that these are usually not volume models. Subsidies tend to be reduced, which also plays a role. Plug-in hybrids are particularly popular in Italy, with a 61 percent share of the electric car market, and in Japan with 57 percent. Plug-in hybrids are often the entry-level vehicles in markets who are still at the beginning of electromobility. In the traditionally strong plug-in hybrid country of Sweden and Germany, less than half of the e-cars are PHEVs.

Elektro Germany May 2022

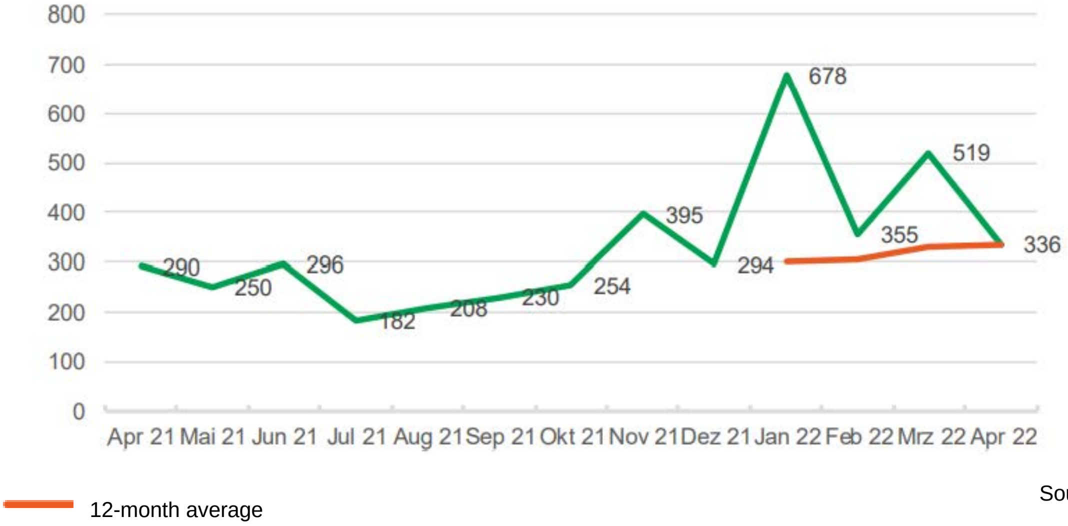
Overview of New Electric Car Registrations Germany

	Mai 2022	Mai 2021	22/21 in %	Jan.-Mai 2022	Jan.-Mai 2021	22/21 in %	Anteil Mai 2022	Anteil Mai 2021	Anteil Jan.-Mai 2022	Anteil Jan.-Mai 2021
Elektro gesamt	**52.427**	**54.041**	**-3%**	**247.891**	**247.736**	**0%**	**25,3%**	**23,4%**	**24,5%**	**22,2%**
darunter										
BEV	29.182	26.786	9%	135.029	115.296	17%	14,1%	11,6%	13,3%	10,3%
Plug-In Hybrid (PHEV)	23.209	27.222	-15%	112.677	132.257	-15%	11,2%	11,8%	11,1%	11,8%
Zum Vergleich:										
Hybrid (ohne Plug-In)	*37.450*	*37.145*	*1%*	*194.080*	*175.577*	*11%*	*18,1%*	*16,1%*	*19,2%*	*15,7%*
dar. Mild-Hybrid	*32.629*	*32.512*	*0%*	*168.414*	*154.815*	*9%*	*15,7%*	*14,1%*	*16,6%*	*13,9%*
Erdgas	*124*	*516*	*-76%*	*853*	*2.121*	*-60%*	*0,1%*	*0,2%*	*0,1%*	*0,2%*
LPG	*619*	*618*	*0%*	*6.522*	*2.947*	*121%*	*0,3%*	*0,3%*	*0,6%*	*0,3%*
Alternative Antriebe ges.	90.620	92.320	-2%	449.346	428.381	5%	43,7%	40,0%	44,3%	38,4%

Quelle: KBA

In May, the new registration of e-cars decreased by 3% compared to the same month of last year. The continued semiconductor shortage has led to longer delivery times and the difficult supply chain situation which also having a slowing effect. In particular, new PHEV registrations (-15 percent) are slowing down. The BEV increase by 9 percent. As a result, the share of BEVs in e-cars increases to 56 percent (previous month 47 percent). The share of e-cars rises to 25.3 percent in May (April: 24.4 percent, same month last year 23.4 percent).

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



Source: BNetzA

Till May 1, 2022, 60,354 charging points (of which 9,102 were rapid charging points) were registered with the Federal Network Agency (BNetzA) in Germany. For detailed info, please refer to Link.

With an estimated total of 1.35 million e-cars till May 1, there are still 45 charging points for 1,000 e-cars (or 22 e-cars per charging point). In April, the BNetzA reported an additional 1,438 charging points, which corresponded to 336 charging points per week, including late-reported registrations.

After the upward swings of the last few months, the speed of expansion has leveled off with the moving twelve-month average (333 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 sixfold.

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