Facts and Figures

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International Passenger Car Markets August 2022

New Passenger Car Registrations/ Sales

	August	+/- in %	Jan. - Aug. 2022	+/- in %
Europe (EU27, EFTA & UK)* 1)	748,900	3.4	7,221,400	-11.8
European Union (EU27)* 1)	650,300	4.4	5,996,600	-11.9
W. Europe (EU14, EFTA & UK) 1)	654,200	4.1	6,463,200	-12.2
New EU Countries (EU13)* 1)	94,700	-1.6	758,200	-8.5
USA** 2)	1,128,200	3.3	9,034,200	-15.3
China 3)	2,104,000	38.7	14,449,000	12.3
Japan 4)	234,100	-11.2	2,235,200	-14.6
India 5)	281,200	21.1	2,406,200	15.9
Brazil** 6)	194,400	22.6	1,216,700	-8.4

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

* without Malta

** Light Vehicles

International automotive markets pick up again after long lean period

Most of the international automotive markets recorded growth rates again after a long period. Due to the low starting values from the previous year, increases in new registrations were even recorded in the United States and Europe. In China and some emerging markets, growth was even well into double digits. Last year, the shortage of semiconductors and other preliminary and intermediate products had a negative impact, so that the markets were significantly limited. A negative exception is currently the Japanese market. This market continued the weak trend of the past months in August.

In August, the European passenger car market (EU27, EFTA & UK) recorded a slight increase in new registrations for the first time after 13 consecutive months of negative growth rates. 748,900 newly registered passenger cars represented growth of 3 percent compared to the same month last year. Over the course of the year, the European market, with a volume of just over 7.2 million vehicles, is still in double-digit decline (-12 percent). The five major individual markets all achieved positive sales growth in August, albeit to varying degrees: Growth was strongest in Italy (+10 percent) and Spain (+9 percent), and moderate in France (+4 percent) and Germany (+3 percent). The United Kingdom had to be satisfied with a slight increase of +1 percent.

In the USA, light vehicle market (cars and light trucks), 1.1 million new factory vehicles were sold in August (+3 percent). Sales of passenger cars fell by 5 percent, while light truck sales (+6 percent) consolidated somewhat. The latter most recently accounted for almost 79 percent of the total market. Over the course of the year, sales of 9.0 million light vehicles were still a good 15 percent below the previous year's level. The Chinese passenger car market continued to grow significantly in August and, with a volume of 2.1 million units, recorded 39 percent more passenger cars sold than in the same month last year. This is the highest August figure ever achieved. So far, just over 14.4 million passenger cars have been sold between January and August, 12 percent more than in the same period last year.

In Japan, the recovery in passenger car sales continues to be a long time coming. In August, a volume of 234,100 units was realized (-11 percent). Accordingly, the Japanese market is unable to match the growth rates in other major markets and has now had to wait 14 consecutive months for an increase in passenger car sales. Over the course of the year, 2.2 million vehicles sold represent a 15 percent decline in the market.

Elektro International July 2022

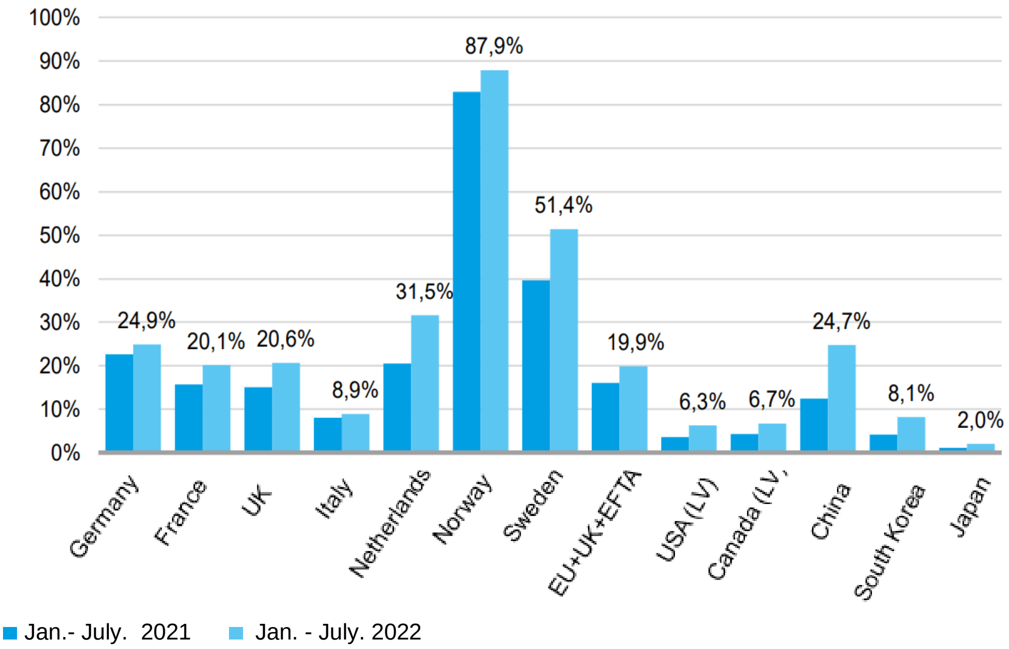
New Electric Car Registrations in the Most Important Markets Jan.- July. 2022

	Electric registra-tions / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change July. 2022 vs. July 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	358.962	-2%	-6%	1.743.812	24,9%	22,6%	59%	70%	69%
France	176.882	9%	14%	893.473	20,1%	15,6%	24%	30%	26%
UK	188.541	22%	-12%	945.238	20,6%	15,0%	39%	44%	46%
Italy	70.546	-11%	-24%	307.571	8,9%	8,0%	37%	40%	34%
Netherlands	55.449	43%	5%	452.588	31,5%	20,5%	42%	46%	41%
Norway	66.551	-15%	-32%	652.081	87,9%	82,9%	41%	38%	43%
Sweden	83.316	11%	42%	430.953	51,4%	39,7%	37%	41%	40%
EU+UK+EFTA	1.286.237	8%	-2%	6.754.900	19,9%	16,0%	44%	52%	46%
USA (LV)	497.153	44%	34%	2.810.660	6,3%	3,6%	10%	13%	9%
Canada (LV)	61.695	41%	16%	346.355	6,7%	4,3%	9%	9%	10%
China	3.051.146	117%	120%	10.984.199	24,7%	12,4%	5%	7%	20%
South Korea	66.684	77%	77%	286.565	8,1%	4,1%	19%	34%	14%
Japan	40.574	59%	63%	412.981	2,0%	1,1%	16%	22%	4%

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

With 3.05 million newly registered e-cars (+117 percent) in the first 7 months, China remains by far the most important e-car market worldwide. While Europe (EU+EFTA+UK) comes with overall 1.29 million units (+8 percent). The USA ranks behind with 0.5 million sales (+44 percent), while Germany follows with 359 thousand sales (-2 percent).

Electric Share in the Overall Passenger Car Market (Jan.- July. 2021 vs Jan.- July. 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 first half of the year. The second place is Sweden with 51 percent, which followed by the Netherlands (32 percent), Germany (25 percent) and China (25 percent), UK (21 percent), and France (20 percent).

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

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change July 2022 vs. July 2021	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change July 2022 vs. July 2021
Germany	196.078	13%	13%	55%	162.592	-16%	-21%
France	106.059	33%	69%	60%	70.734	-14%	-26%
UK	127.486	50%	10%	68%	61.049	-13%	-35%
Italy	28.562	-19%	-30%	40%	41.977	-4%	-20%
Netherlands	34.489	70%	20%	62%	20.881	13%	-18%
Norway	59.283	8%	-24%	89%	7.251	-69%	-59%
Sweden	44.438	77%	84%	53%	38.876	-23%	13%
EU+UK+EFTA	739.496	30%	20%	57%	546.107	-13%	-22%
USA (LV)	389.481	60%	52%	78%	105.747	5%	-11%
Canada (LV)	47.657	41%	37%	77%	14.023	41%	-33%
China	2.379.089	106%	108%	78%	672.057	170%	172%
South Korea	53.261	167%	116%	80%	7.965	-37%	-37%
Japan	16.921	64%	13%	42%	23.011	74%	138%

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

Source: KBA, Ward's, Fourin, IHS

In July, all major BEV markets except Europe recorded double-digit percent growth. The markets in China and South Korea increased more than double, while in the USA there is a growth of 60 percent. In Europe (total +20 percent), all major markets except Italy (-30 percent) and Norway (-24 percent) are growing. The strongest momentum is recorded in Sweden (+84 percent) and France (+69 percent), which is ahead of the Netherlands (+20 percent), where subsidies will be reduced at the end of the year.

Over the course of the year, the Chinese BEV market clearly dominated with 2.38 million (+106 percent). Europe achieves 0.74 million new BEV registrations (+30 percent). The USA is in the third place with 0.39 million electric light vehicles (+60 percent). South Korea (+167 percent), where production is expanding in 2022, as well as Sweden (+77 percent) and the Netherlands (70 percent) are recorded high growth rates. Declining figures are only found in Italy (-19 percent), where incentives for zero and low-emission vehicles were decided at the end of May.

In July, all major European PHEV markets (Europe total -22 percent) except Sweden (+13 percent) recorded declines, most notably Norway (-59 percent), UK (-35 percent), and France (-26 percent). It can be assumed that the relative importance of PHEVs in Europe will continue to decrease as the 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 now in reverse in the USA (-11 percent), Canada (-33 percent) and South Korea (-37 percent). However, this is compensated for by the largest market, China, where the PHEV growth is even exceeding the BEV growth at +170 percent.

Elektro Germany August 2022

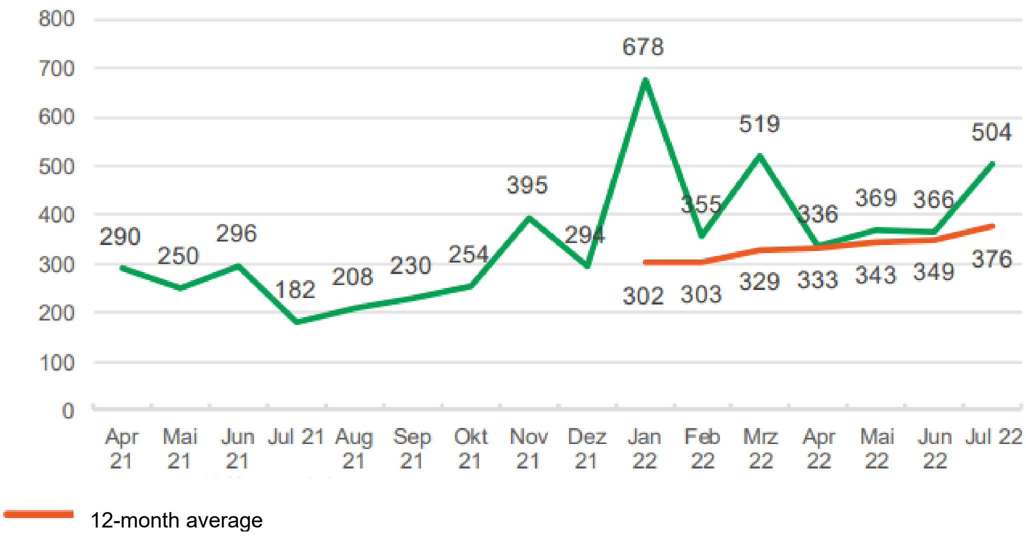
Overview of New Electric Car Registrations Germany

	Aug. 2022	Aug. 2021	22/21 in %	Jan.-Aug. 2022	Jan.-Aug. 2021	22/21 in %	Anteil Aug. 2022	Anteil Aug. 2021	Anteil Jan.-Aug. 2022	Anteil Jan.-Aug. 2021
Elektro gesamt	**57.040**	**53.404**	**7%**	**416.002**	**421.567**	**-1%**	**28,6%**	**27,6%**	**25,3%**	**23,2%**
darunter										
BEV	32.006	28.860	11%	228.084	203.040	12%	16,1%	14,9%	13,9%	11,2%
Plug-In Hybrid (PHEV)	24.719	24.497	1%	187.311	218.222	-14%	12,4%	12,7%	11,4%	12,0%
Zum Vergleich:										
Hybrid (ohne Plug-In)	*35.116*	*36.223*	*-3%*	*304.605*	*296.691*	*3%*	*17,6%*	*18,7%*	*18,5%*	*16,3%*
dar. Mild-Hybrid*	*31.076*	*29.804*	*4%*	*258.392*	*257.801*	*0%*	*15,6%*	*15,4%*	*15,7%*	*14,2%*
Erdgas	*160*	*199*	*-20%*	*1.324*	*3.072*	*-57%*	*0,1%*	*0,1%*	*0,1%*	*0,2%*
LPG	*1.088*	*711*	*53%*	*10.131*	*5.315*	*91%*	*0,5%*	*0,4%*	*0,6%*	*0,3%*
Alternative Antriebe ges.	93.404	90.537	3%	732.062	726.645	1%	46,9%	46,8%	44,6%	39,9%
Neuwagen gesamt	199.183	193.307	3%	1.643.069	1.820.589	-10%	100,0%	100,0%	100,0%	100,0%

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

In August, the new registration of e-cars increased by 7 percent for the first time after 5 consecutive declines to 57,040 units. In addition to the shortage of chips, there is uncertainty among customers due to rising electricity prices. The subsidy, which expires at the end of the year, leads to a pre-purchase effect in the recent significant decline in new PHEV registrations, which are consolidating at +1%. The BEV even increase by 11 percent. The share of BEVs in e-cars is now 56 percent. The proportion of e-cars rise to 28.6 percent in August (July: 25.5 percent, same month last year 27.6 percent). 14.9 percent of all cars are BEVs.

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



Source: BNetzA

Till August 1, 2022, 65,801 charging points (of which 10,231 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 1.48 million e-cars till August 1, there are now 44 charging points for 1,000 e-cars (or 22 e-cars per charging point). In July, the BNetzA reported an additional 2,231 charging points, which corresponded to 504 charging points per week, including late-reported registrations.

The speed of expansion increased the moving twelve-month average to 376 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 more than sixfold.

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VDA German Association of the Automotive Industry