VDA German Association of the Automotive Industry

Facts and Figures

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International Passenger Car Markets May 2022

New Passenger Car Registrations/ Sales

	May	+/- in %	Jan. - May 2022	+/- in %
Europe (EU27, EFTA & UK)* [1]	948,100	-12.5	4,531,600	-12.9
European Union (EU27)* [1]	791,500	-11.2	3,721,800	-13.7
W. Europe (EU14, EFTA & UK) [1]	847,900	-12.9	4,067,700	-13.5
New EU Countries (EU13)* [1]	100,200	-8.7	463,900	-7.2
USA** [2]	1,105,000	-29.6	5,640,500	-19.3
China [3]	1,603,000	-0.4	8,004,900	-3.5
Japan [4]	211,900	-19.0	1,444,800	-17.3
India [5]	251,100	185.1	1,423,400	10.9
Brazil** [6]	175,200	-0.2	687,400	-18.0

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

Recovery of International Automotive Markets Delayed

The international automotive markets are still waiting for a recovery. In May, almost all major automotive locations again recorded declines in new registrations. Disruptions in the value and logistics chains and shortages of materials are still impacting markets and production. The war in Ukraine continues to cause great uncertainty at various levels, particularly in Europe, and in the USA the Federal has once again revised its economic forecast significantly downwards in the wake of a more restrictive monetary policy. In China, on the other hand, there are signs of a slight easing for the moment following numerous lockdowns.

In the European passenger car market (EU27, EFTA & UK), just over 948,100 new vehicles were registered in May, 12 percent fewer than a year earlier. The five major individual European markets again suffered double-digit reductions in sales in May: In France and Germany, new registrations fell by 10 percent each. Spain recorded almost 11 percent fewer passenger cars sold. In Italy (-15 percent) and the United Kingdom (-21 percent), new registrations fell at an above-average rate. From January to May, a total of 4.5 million new cars were registered in Europe, almost 13 percent fewer than in the same period last year.

The USA Light Vehicle market (cars and light trucks) was again under considerable pressure in May, continuing its weak performance of the year to date. In May, 1.1 million vehicles were sold, 30 percent fewer than in the previous year. So far this year, just over 5.6 million light vehicles have been delivered to customers, a good 19 percent fewer than in the same period last year. Sales of light trucks (-17 percent) have so far been somewhat less weak than sales of passenger cars (-25 percent).

Following the sharp downturn in April due to numerous lockdowns in key metropolitan regions, the Chinese passenger car market consolidated and in May just returned to the prior-year level (1.6 million passenger cars). On a cumulative basis, the Chinese market recovered somewhat in May and, with a total of 8 million units sold, is just under 4 percent below the level of the prior-year period. Passenger car sales in Japan again failed to gain momentum in May. The number of new registrations fell again by almost 19 percent to a volume of 211,900 vehicles. Year to date, sales stand at just over 1.4 million passenger cars, 17 percent below the previous year's level.

Elektro International May 2022

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

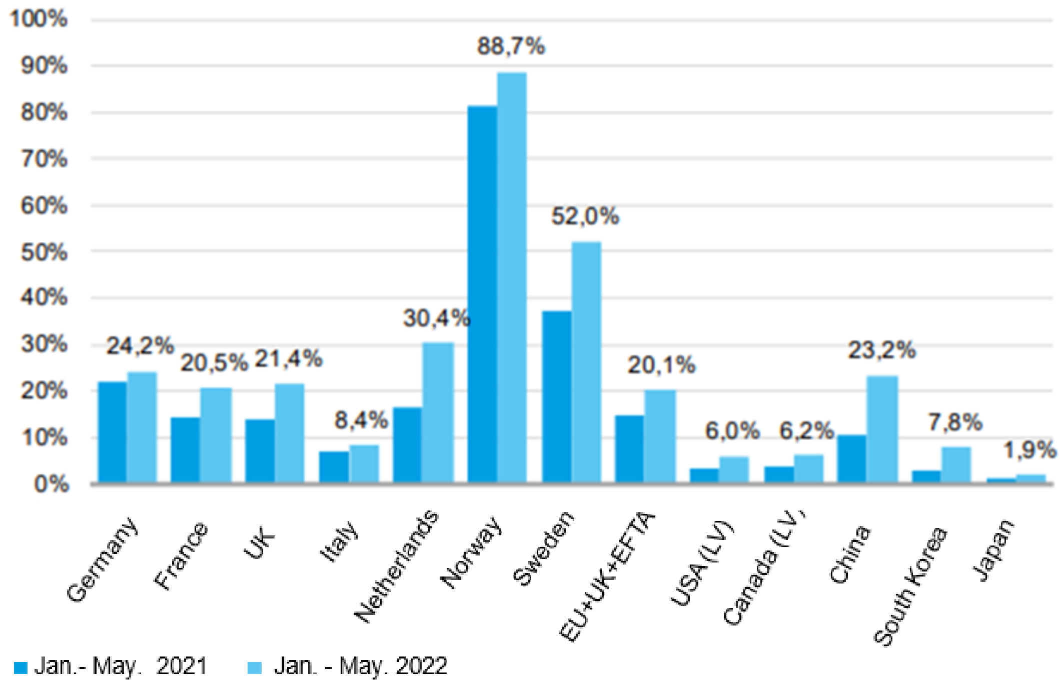
	Electric registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change May. 2022 vs. May 2021	Cumulative new registrations / sales since January 2010	Electric proportion of 2022 YTD	Electric proportion of 2021 YTD	Electric market share of German Brand 2022 YTD	Electric market share of German Brand 2021 YTD	German Brand market share in the overall car market 2022 YTD
Germany	247.891	0%	-3%	1.632.741	24,5%	22,2%	58%	72%	68%
France	122.297	14%	8%	838.888	20,4%	14,8%	24%	31%	27%
UK	138.414	36%	2%	895.111	20,9%	14,0%	39%	42%	46%
Italy	48.681	-10%	-7%	285.706	8,7%	7,3%	37%	40%	35%
Netherlands	38.305	65%	33%	435.444	31,0%	17,9%	43%	48%	42%
Norway	47.150	-9%	-16%	632.680	88,0%	81,9%	39%	39%	42%
Sweden	60.151	17%	31%	407.788	50,9%	37,4%	36%	41%	40%
EU+UK+EFTA	904.883	14%	4%	6.373.546	20,0%	15,3%	44%	52%	46%
USA (LV)	345.978	53%	43%	2.659.485	6,1%	3,2%	9%	13%	9%
Canada (LV)	41.197	51%	79%	325.857	6,4%	3,9%	9%	10%	10%
China	1.914.731	113%	109%	9.847.784	23,9%	10,9%	5%	7%	20%
South Korea	45.749	111%	61%	265.630	8,0%	3,4%	20%	40%	15%
Japan	27.510	55%	49%	399.917	1,9%	1,0%	16%	11%	4%

Source: KBA, Ward's, Fourin, IHS

With 1.915 million newly registered e-cars (+113 percent) in the first 5 months, China remains by far the most important e-market worldwide. While Europe (EU+EFTA+UK) comes with overall 905 thousand units (only +14 percent due to a lack of chips and the weak PHEV market). The USA ranks behind with 346 thousand sales (+53 percent), while Germany follows with 248 thousand sales (+0 percent). Except for Italy (-10 percent) and Norway (-9 percent), the other major European markets are growing. The most dynamic market is in the Netherlands (+65 percent) ahead of the UK (+36 percent) and Sweden (+17 percent).

The market share of German brands on the e-car market is as high as the share of the overall car market in many countries, e.g., France, Italy, Netherlands, USA, Canada, etc. However, there are some exceptions: In Germany, the market share of e-cars was 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 15 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.- May. 2021 vs Jan.- May. 2022)



When it comes to the electric share in the overall market, the proportion of e-cars in Norway now consolidates at 88 percent. The second place is Sweden with 52 percent, which followed by the Netherlands (30 percent), Germany (24 percent) and China (23 percent), UK (21 percent), and France (21 percent).

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

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change May 2022 vs. May 2021	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change May 2022 vs. May 2021
Germany	135.029	17%	9%	54%	112.677	-15%	-15%
France	71.439	38%	32%	58%	50.852	-8%	-13%
UK	92.508	71%	18%	67%	45.902	-4%	-18%
Italy	18.815	-19%	-13%	39%	29.866	-2%	-3%
Netherlands	22.195	116%	51%	58%	16.083	24%	9%
Norway	42.445	22%	-1%	90%	4.695	-73%	-57%
Sweden	31.524	126%	62%	52%	28.625	-23%	9%
EU+UK+EFTA	513.030	42%	20%	57%	391.508	-9%	-10%
USA (LV)	264.460	71%	87%	76%	79.988	16%	-18%
Canada (LV)	30.887	48%	83%	75%	10.303	64%	70%
China	1.500.254	102%	97%	78%	414.477	167%	160%
South Korea	35.636	304%	120%	78%	6.135	-33%	-57%
Japan	11.373	60%	27%	41%	15.558	70%	95%

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

Source: KBA, Ward's, Fourin, IHS

In the first five months, almost all the important BEV markets have recorded double-digit percent growth. The Chinese market clearly dominates with 1.5 million (+102 percent). Europe reaches 513 thousand new BEV registrations (+42 percent). The USA is in the third place with 264 thousand electric light vehicles (+71 percent). High growth rates are recorded in South Korea (+304 percent), where funding is expanded in 2022, as well as Sweden (+126 percent) and the Netherlands (+116 percent). Declining figures can be found in Italy (-19 percent), where incentives for zero and low-emission vehicles were decided at the end of May.

BEVs play a dominant role, especially in non-European markets. The highest share over the course of the year is in Norway (90 percent), China and South Korea (78 percent each), the USA (76 percent) and Canada (75 percent).

New registrations of plug-in hybrids in China increases by 167 percent to 414 thousand over the course of the year and China remains the world's largest PHEV market, which is just ahead of Europe (392 thousand (-9 percent). The most important European market is still in Germany, which recorded a decline of 15 percent to 113 thousand units. The USA follows with 80 thousand (+16 percent). In Europe, all the major markets except for the Netherlands (+24 percent) are showing declines: in Norway there is decrease by 73 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 59 percent. Plug-in hybrids are often the entry-level vehicles in markets where 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 June 2022

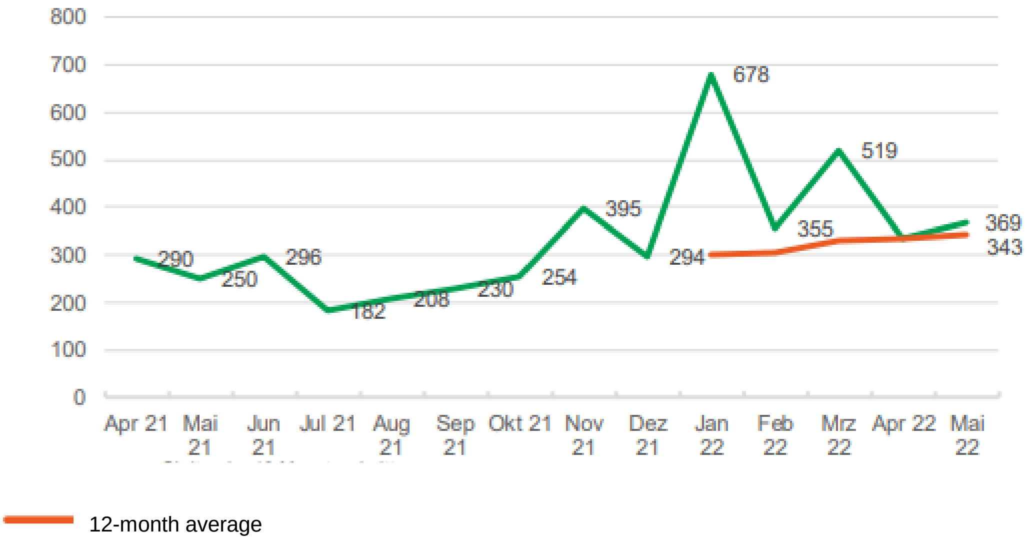
Overview of New Electric Car Registrations Germany

	Juni 2022	Juni 2021	22/21 in %	Jan.-Juni 2022	Jan.-Juni 2021	22/21 in %	Anteil Juni 2022	Anteil Juni 2021	Anteil Jan.-Juni 2022	Anteil Jan.-Juni 2021
Elektro gesamt	**58.492**	**64.771**	**-10%**	**306.383**	**312.507**	**-2%**	**26,0%**	**23,6%**	**24,7%**	**22,5%**
darunter										
BEV	32.234	33.420	-4%	167.263	148.716	12%	14,4%	12,2%	13,5%	10,7%
Plug-In Hybrid (PHEV)	26.203	31.314	-16%	138.880	163.571	-15%	11,7%	11,4%	11,2%	11,8%
Zum Vergleich:										
Hybrid (ohne Plug-In)	*39.159*	*45.250*	*-13%*	*233.239*	*220.827*	*6%*	*17,4%*	*16,5%*	*18,8%*	*15,9%*
dar. Mild-Hybrid	*34.631*	*38.930*	*-11%*	*203.045*	*193.745*	*5%*	*15,4%*	*14,2%*	*16,4%*	*13,9%*
Erdgas	*116*	*467*	*-75%*	*969*	*2.588*	*-63%*	*0,1%*	*0,2%*	*0,1%*	*0,2%*
LPG	*1.120*	*682*	*64%*	*7.642*	*3.629*	*111%*	*0,5%*	*0,2%*	*0,6%*	*0,3%*
Alternative Antriebe ges.	98.887	111.170	-11%	548.233	539.551	2%	44,0%	40,6%	44,3%	38,8%

Quelle: KBA

In June the new registration of e-cars decreased by 10% compared to the same month of last year, which is the fourth decline in a row. The semiconductor shortage continues to have an impact. In particular, new PHEV registrations (-16 percent) are slowing down. The BEV decreased by 4 percent. The share of e-cars rises slightly to 26 percent in June (May: 25.3 percent, same month last year 23.6 percent).

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



Source: BNetzA

Till June 1, 2022, 62,000 charging points (of which 9,395 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 1.39 million e-cars till June 1, there are now only 43 charging points for 1,000 e-cars (or 23 e-cars per charging point). In May, the BNetzA reported an additional 1,636 charging points, which corresponded to 369 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 (343 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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