

# Facts and Figures

## Content

Facts and Figures	1
International Passenger Car Markets December 2024	1
International Electric Car Markets November 2024	3
German Electric Car Markets December 2024	6

## Facts and Figures

### International Passenger Car Markets December 2024

#### New Passenger Car Registrations/Sales

	December 2024	+/- in %	Jan.-Dec. 2024	+/- in %
Europe (EU, EFTA & UK) <sup>1)</sup>	1,091,100	4.1	12,963,600	0.9
European Union <sup>1)</sup>	910,500	5.1	10,632,400	0.8
W. Europe (EU14, EFTA & UK) <sup>1)</sup>	964,800	1.4	11,557,800	-0.2
New EU Countries (EU13) <sup>1)</sup>	126,300	29.8	1,405,800	10.6
USA* <sup>2)</sup>	1,488,600	2.0	15,851,100	2.2
Mexico* <sup>2)</sup>	146,200	2.4	1,495,000	9.9
China <sup>3)</sup>	2,621,800	11.4	22,987,000	5.9
Japan <sup>4)</sup>	280,500	-7.0	3,725,200	-6.7
India <sup>5)</sup>	270,700	11.4	4,274,800	4.2
Brazil* <sup>6)</sup>	243,800	3.0	2,487,500	14.1

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

\* Light Vehicles

### The majority of international passenger car markets grew in 2024

#### Markets in the United States and Europe grew slightly - Markets in China picked up strongly – Japan slowed down

The majority of international passenger car markets developed positively in 2024. In terms of momentum, however, both economic growth and new car registrations in **Europe** were unable to keep pace with most other automotive core markets. Sales in the **United States** rose slightly thanks to solid overall economic development. For both Europe and the US, however, the sales volume from the last pre-crisis year 2019 remained unattainable in 2024. In **China**, a very strong fourth quarter led to strong growth in new registrations and, accordingly, to a new sales record. The Japanese passenger car market, like some other East Asian markets, slipped significantly into negative territory.

In the **European passenger car market (EU, EFTA & UK)**, a total of just under 13.0 million new vehicles were registered in 2024 -around 1% more than in the previous year. The economic weakness in combination with considerable location problems was a strongly limiting factor in the passenger car markets last year. The number of new registrations in Europe remained well below the pre-crisis level (-18 percent compared to 2019). The five largest individual markets developed differently in 2024: in Spain (+7 percent) and the United Kingdom (+3 percent), more new cars were registered than in the previous year. In Italy, Germany (-1 percent each) and France (-3 percent), declines in sales were recorded despite the already weak previous year's figures. The

European passenger car market was up in December. At the end of the year, a total of just under 1.1 million new vehicles were registered, a good 4 percent more than in the same month last year.

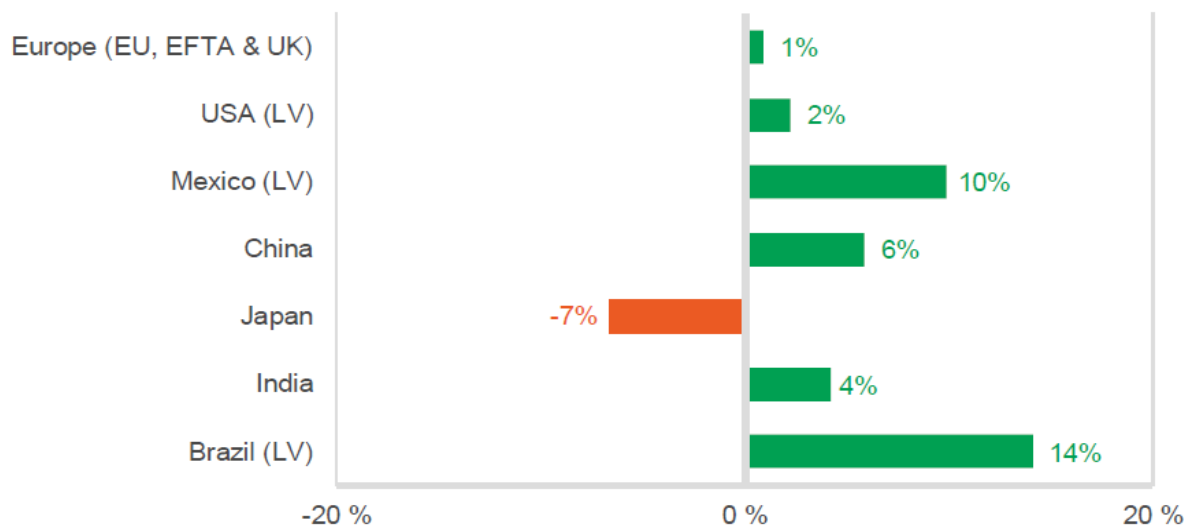
In the **United States**, light vehicle sales (passenger cars and light duty) increased slightly in 2024. A total of 15.9 million new vehicles were registered - a good 2 percent more than in the previous year. The positive development of numerous macroeconomic parameters (economic growth, unemployment rate, private consumption, real wage development) supported vehicle sales. In December, 1.5 million new light vehicles were registered - an increase of 2 percent compared to the same month last year. The light-duty segment accounted for 81 percent of the overall market in 2024, with the passenger car segment accounting for 19 percent.

The **Chinese** passenger car market confirmed its recent momentum in December and grew strongly once again. A good 2.6 million new passenger cars were registered - an increase of 11 percent compared to the same month last year. The recently extended scrappage bonus had significantly accelerated market growth, particularly in the fourth quarter. Almost 23.0 million new units were registered in 2024. Accordingly, the Chinese market grew by just under 6 percent compared to 2023.

In **Japan**, sales of brand-new passenger cars declined in 2024. A volume of just over 3.7 million units was achieved, which corresponded to a significant decline of almost 7 percent. Sales did not recover in December either. In the last month of the year, 280,500 new passenger cars were registered -also 7 percent fewer than in the same month last year.

### Sales of Passenger Cars and Light Vehicles in selected countries and regions

January-December 2024, annual percentage change



Source: ACEA, Wards Intelligence, CPCA, JAMA, SIAM, ANFAVEA

## International Electric Car Markets November 2024

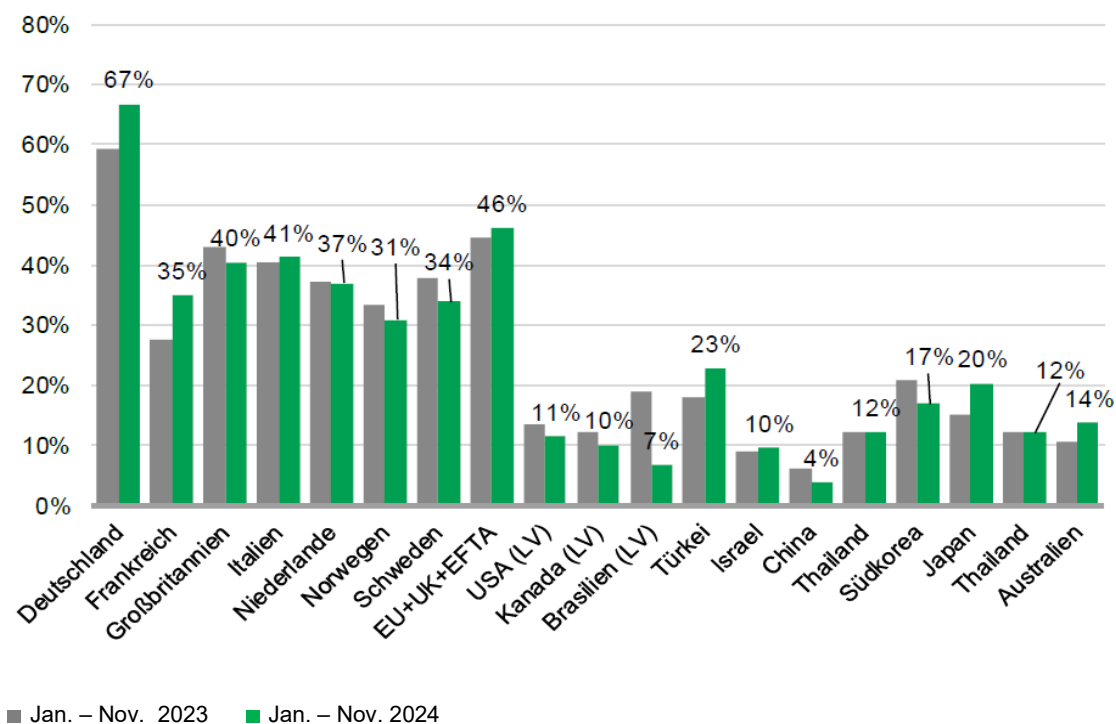
### New Electric Car Registrations in the Most Important Markets Jan.- Nov. 2024

	Electric registrations / sales (YTD)	Change YTD vs. Previous year (2024 vs. 2023)	Change Nov. 2024 vs. Nov. 2023	Cumulative new registrations / sales since January 2010	Electric proportion of 2024 YTD	Electric proportion of 2023 YTD	Electric market share of German Brand 2024 YTD	Electric market share of German Brand 2023 YTD	German Brand market share in the overall car market 2024 YTD
Germany	520.000	-17%	-12% ↘	3.438.469	20,1%	24,1%	67%	59%	69%
France	384.049	-6%	-23% ↘	1.890.778	25,0%	25,5%	35%	28%	28%
UK	493.677	19%	36% ↗	2.076.744	27,2%	23,6%	40%	43%	45%
Italy	105.726	-14%	-26% ↘	594.169	7,3%	8,5%	41%	40%	33%
Netherlands	163.891	11%	45% ↗	830.134	47,6%	43,0%	37%	37%	36%
Norway	105.633	2%	18% ↗	960.340	91,8%	90,5%	31%	33%	33%
Sweden	139.501	-10%	-3% ↘	821.268	57,3%	59,3%	34%	38%	39%
<b>EU+UK+EFTA</b>	<b>2.646.326</b>	<b>-3%</b>	<b>-2%</b> ↘	<b>13.724.659</b>	<b>22,3%</b>	<b>23,0%</b>	<b>46%</b>	<b>45%</b>	<b>46%</b>
USA (LV)	1.375.220	6%	7% ↗	6.094.079	9,6%	9,2%	11%	13%	9%
Canada (LV)	244.868	46%	54% ↗	843.910	14,3%	10,5%	10%	12%	10%
China	9.486.479	48%	61% ↗	29.180.993	46,6%	33,1%	4%	6%	19%
South Korea	129.493	7%	-3% ↘	663.519	9,9%	8,9%	17%	21%	12%
Japan	70.185	-21%	-1% ↘	542.055	2,0%	2,4%	20%	15%	4%

Source: KBA, Ward's, Fourin, CPCA, S&P Global Mobility

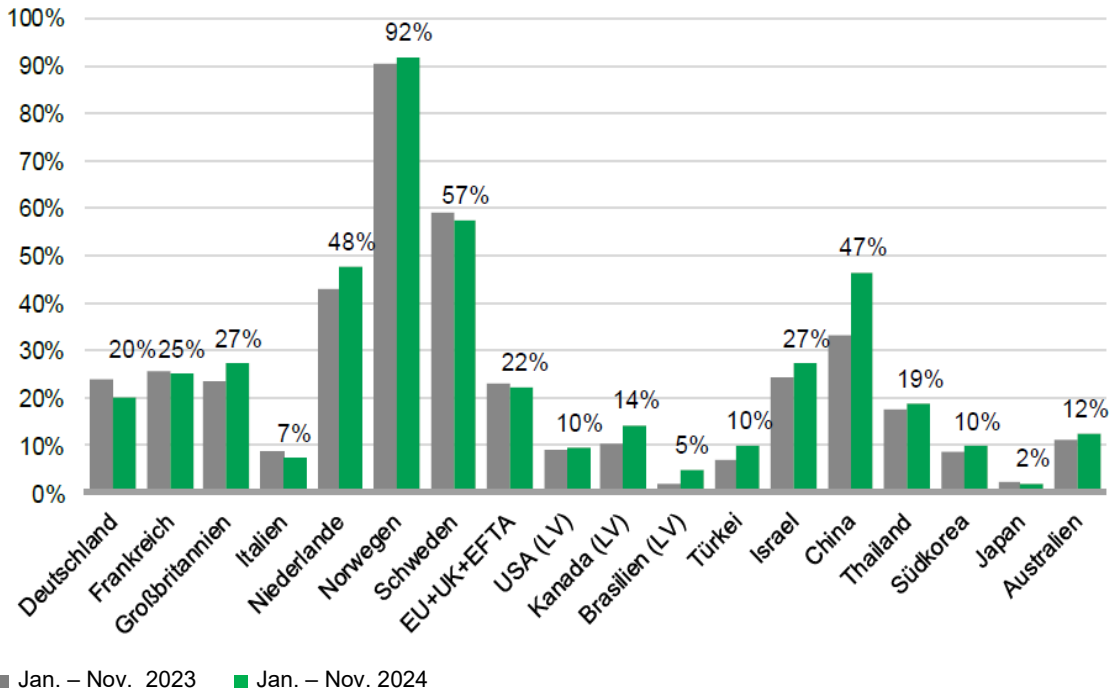
In **November**, new electric vehicle registrations in **Europe** recorded a slight decline of -2%. The **Netherlands** (+45%), **Great Britain** (+36%) and **Norway** (+18%) were the drivers, **Italy** (-26%), **France** (-23%) and **Germany** (-12%) were slowing down. Outside of Europe, the momentum in **China**, the largest EV market, remained high at +61%. In the **USA**, it continued to rise with a 7% increase. With an increase of 54%, **Canada** extended its lead as the third largest market outside of Europe, ahead of **South Korea** (-3%).

### Market Shares of Electric Passenger Car of German Brand Manufacturers



The market share of German automotive brands in Europe increased by one percentage point to 46% over the course of the year. This was due to the growing popularity of German brands in Germany (+8 percentage points), France (+7 percentage points), while 4 percentage points of market share were lost in Sweden, 3 percentage points in the UK and 2 percentage points in Norway. In China, by far the largest EV market in the world, the already low market share of 6% has further declined to 4%. The reason for this decline was the plug-in hybrids and range extenders, in which German brands no longer played a significant role. The BEV market share fell by one percentage point to 6%. In the USA, the EV market share fell from 13% to 11%. In South Korea, German brands held a double-digit market share in electric cars at 17% (-4 percentage points) as well as in Japan (20%, +5 percentage points).

Electric Share in the Overall Passenger Car Market (Jan.- Nov. 2023 vs Jan.- Nov. 2024)



Over the course of the year, the share of electric vehicles in Europe fell by 0.7 percentage points to 22.3%. The highest shares of electric mobility in Europe over the course of the year were achieved in Norway with 91.8% and Sweden (57.3%, a decline of 2 percentage points). This was followed by Denmark (55.1%), Finland (49.0%, down 4.8 percentage points), the Netherlands (47.6%), Iceland (42.2%, down 15 percentage points), Belgium (42.0%) and Malta (41.7%). The next places were occupied by Luxembourg (35.6%), Portugal (33.0%), Switzerland (27.3%, down 1.9 percentage points), the UK (27.2%), France (25.0%), Ireland (24.5%, down 3.6 percentage points), Austria (24.1%, down 2.8 percentage points) and Germany (20.1%, down 4 percentage points). China now achieved 47% electric share.

BEV and PHEV new registrations of cars in the most important markets Jan.- Nov. 2024							
	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2024 vs. 2023)	Change Nov. 2024 vs. Nov. 2023	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2024 vs. 2023)	Change Nov. 2024 vs. Nov. 2023
Germany	347.048	-26%	-22% ↗	67%	172.802	9%	14% ↗
France	260.992	0%	-24% ↘	68%	122.528	-16%	-21% ↘
UK	338.314	18%	58% ↗	69%	155.363	20%	0% ↘
Italy	59.826	1%	-17% ↘	57%	45.899	-28%	-37% ↘
Netherlands	114.763	12%	42% ↗	70%	49.128	10%	54% ↗
Norway	102.728	7%	30% ↗	97%	2.896	-65%	-84% ↘
Sweden	83.630	-17%	-11% ↗	60%	55.864	4%	11% ↗
<b>EU+UK+EFTA</b>	<b>1.787.637</b>	<b>-2%</b>	<b>1%</b> ↗	<b>68%</b>	<b>857.952</b>	<b>-5%</b>	<b>-8%</b> ↘
USA (LV)	1.086.357	4%	9% ↗	79%	288.326	14%	-2% ↘
Canada (LV)	179.260	40%	47% ↗	73%	65.588	69%	76% ↗
China	5.555.420	28%	46% ↗	59%	3.930.997	91%	94% ↗
South Korea	118.968	11%	-6% ↘	92%	7.822	-20%	55% ↗
Japan	30.603	-24%	-8% ↗	44%	38.909	-20%	4% ↗

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

Source: KBA, Ward's, Fourin, CPCA, S&P Global Mobility

In **November**, new **BEV registrations in Europe** showed only a slight increase of 1%, indicating further show-down growth. Next year, the CO2 interim targets are expected to provide new impetus. High growth was recorded in the **Netherlands** (+42%), where e-cars will have to pay vehicle tax starting in 2025. In **Norway**, the ban on internal combustion engines set for next year is already casting a shadow, boosting new electric registrations to +30%. In the **UK**, the ZEV (Zero Emission Vehicle) share, mandated by the "car registration trading scheme" for 2024 at 22%, is leading to increased momentum. However, this share was unlikely to be reached on average, as it stands at 18.7% over the course of the year. In Sweden, the weak trend continues with a decline of -17%, reflecting the overall downward market trend. In overseas markets, there were increases in November in **China** (+46%), **Canada** (+47%) and the **USA** (+9%).

**So far this year**, China is the only one of the three major BEV markets to record significant growth at 8%. The USA is recording moderate growth at a low level (+4%), Europe (-2%) is currently dragging down the global development.

The development of **PHEVs in Europe** has been rather challenging this year (-5 percent). **Norway** (-65%, ban on internal combustion engines in 2025) and **Italy** (-28%) recorded high declines. In **Germany**, there was a certain rebound of +9% after a weak previous year due to the expiration of incentives on January 1, 2023. **China** had a very high growth of +91 percent, where 41% of newly registered electric cars were now PHEVs including range extenders. Growth was also very high in **Canada** (+69%).

## German Electric Car Markets December 2024

### Overview of New Electric Car Registrations Germany

	Dez. 2024	Dez. 2023	24/23 in	Jan.-Dez. 2024	Jan.-Dez. 2023	24/23 in	Anteil Dez. 2024	Anteil Dez. 2023	Anteil Jan.-Dez. 2024	Anteil Jan.-Dez. 2023
<b>Elektro gesamt</b>	<b>52.672</b>	<b>72.554</b>	<b>-27%</b>	<b>572.672</b>	<b>700.206</b>	<b>-18%</b>	<b>23,4%</b>	<b>30,0%</b>	<b>20,3%</b>	<b>24,6%</b>
<b>darunter</b>										
<b>BEV</b>	33.561	54.654	-39%	380.609	524.219	-27%	14,9%	22,6%	13,5%	18,4%
<b>Brennstoffzelle</b>	8	6	33%	158	263	-40%	0,0%	0,0%	0,0%	0,0%
<b>Plug-In Hybrid (PHEV)</b>	19.103	17.894	7%	191.905	175.724	9%	8,5%	7,4%	6,8%	6,2%
<b>Zum Vergleich:</b>										
<b>Hybrid (ohne Plug-In)</b>	70.570	55.687	27%	755.493	664.580	14%	31,4%	23,0%	26,8%	23,4%
<b>dar. Mild-Hybrid*</b>	58.082	48.146	21%	625.146	571.018	9%	25,8%	19,9%	22,2%	20,1%
<b>Erdgas</b>	0	23	-100%	137	1.327	-90%	0,0%	0,0%	0,0%	0,0%
<b>LPG</b>	1.113	1.320	-16%	13.711	13.147	4%	0,5%	0,5%	0,5%	0,5%
<b>Alternative Antriebe ges</b>	124.355	129.584	-4%	1.342.013	1.379.260	-3%	55,3%	53,6%	47,6%	48,5%
<b>Neuwagen gesamt</b>	224.721	241.883	-7%	2.817.331	2.844.609	-1%	100,0%	100,0%	100,0%	100,0%

\* Aktueller Monat geschätzt.

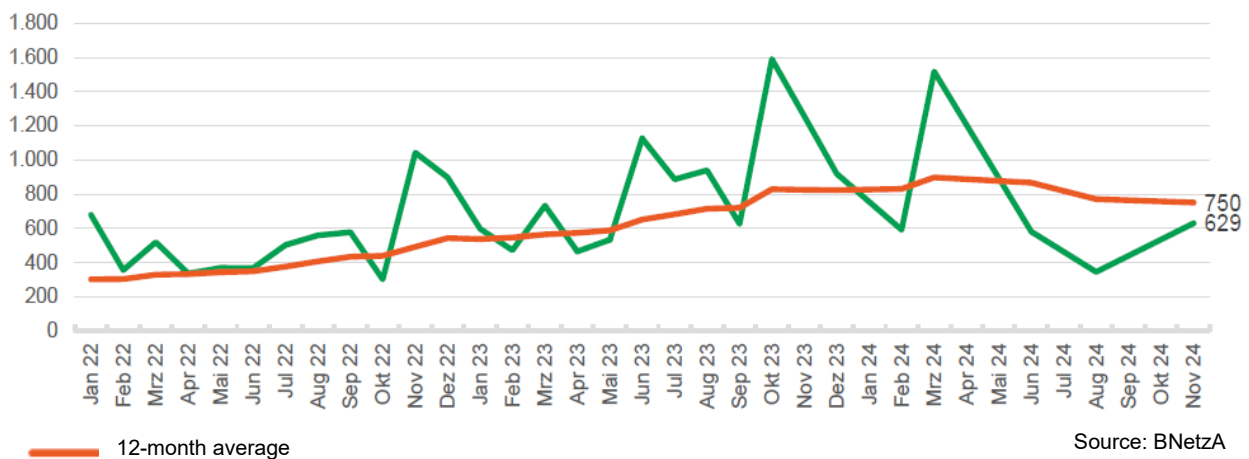
Quelle: KBA, VDA

In December, **new e-car registrations consolidated at 52,672 units, which was at the level of the previous three months**, despite a decline of 27 percent compared to the previous year (pre-emption effect of the previous year due to announced premium reduction). The BEV share rose slightly to 14.9 percent (previous month: 14.4 percent) but was still well below the 2023 average of 18.4 percent. For **15 million EVs** in the portfolio in 2030, **more than a quadrupling of new electric vehicle registrations** in the last 12 months to 2.42 million per year would be necessary. Such a scenario is completely unrealistic. If you extrapolate the new BEV registrations from December, this will result in just around 3.7 million existing BEVs in 2030.

The market share of **German manufacturers** rose to 67 percent in December (previous year: 66 percent) and was thus above the overall market share of 66 percent. The German OEMs expanded their BEV market share to 69 percent (previous year: 62 percent) but lost 14 percentage points to 63 percent for PHEVs.

The **electric car market forecast for 2025 is 873,000 units (+53 percent)**. This is based on individual forecasts of 666,000 BEVs (+75 percent) and 207,000 PHEVs (+8 percent). This would correspond to an electric share of 31%, which is expected to be necessary to achieve the EU CO<sub>2</sub> target in 2025.

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



Source: BNetzA

As of December 1<sup>st</sup>, 2024, **154,037 charging points** (LP, of which 33,419 were fast charging points with an output of over 22kW and of which 22,624 were high-performance charging points with over 149 kW) were registered with the Federal Network Agency (BNetzA) in Germany. With a stock of 2.6 million e-cars on December 1<sup>st</sup>, there were now 59 charging points for every 1,000 EVs (or 17 EVs per charging point). The **twelve-month moving average** has now decreased to 750 LP per week. For detailed info, please refer to [Link](#).

To reach the 1 million charging points by 2030 announced by the federal government, the installation rate of 2,700 LP per week would be necessary. To achieve this, the expansion rate of the last 12 months would have to be more than tripled. At the current rate, around 400,000 LP would be available by 2030. The National Centre for Charging Infrastructure (NLL) estimates that the demand will be between 380,000 and 680,000 charging points in 2023. In three out of ten municipalities, there are still no charging points. More than seven out of ten of all municipalities (71 percent) have not yet installed a fast-charging point (as of December 1<sup>st</sup>, 2024).

#### New Electric Car Registrations in Germany by Group

Rang	Hersteller	1-12/2024	1-12/2023	Veränd.	BEV 1-12/2024	BEV-Anteil
1	VW	186.164	197.539	-6%	134.752	72%
2	Mercedes-Benz	90.849	96.275	-6%	47.158	52%
3	BMW	76.993	77.564	-1%	52.088	68%
4	Geely	42.960	26.658	61%	16.973	40%
	dar. Volvo	39.467	17.485	126%	13.535	34%
5	Tesla	37.574	63.685	-41%	37.574	100%
6	Hyundai	37.485	55.332	-32%	28.792	77%
7	Stellantis	30.518	86.430	-65%	21.883	72%
8	Ford	16.731	15.250	10%	5.549	33%
9	Renault-Nissan	16.630	34.136	-51%	10.872	65%
10	SAIC	14.596	18.613	-22%	14.436	99%
	GESAMT	572.672	700.206	-18%	380.609	66%
	dar. chinesische Herst.*	24.826	38.043	-35%	23.596	95%
	Marktanteil	4,3%	5,4%		6,2%	
	Volvo EX30 (aus China)	8.777			8.777	100%

\* BYD, Geely (ohne Volvo), Great Wall, Nio, SAIC etc.

Quelle: KBA

**VW** ranked ahead of **Mercedes-Benz at the top** for new electric vehicle registrations in Germany in 2024. **BMW** and Geely followed ahead of Tesla, which overtook Hyundai again. **Stellantis** was in 7th place, ahead of **Ford**, ahead of Renault-Nissan, who left SAIC behind. If you only look at BEVs, **VW** led ahead of **BMW, Mercedes-Benz** and Tesla. This was followed by Hyundai, **Stellantis**, Geely, SAIC, Renault-Nissan and **Ford**. The market share of Chinese manufacturers (excluding Volvo) in EV fell by one percentage point to 4.3 percent. With Volvo, it was 11.2 percent.

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