VDA German Association of the Automotive Industry

Facts and Figures

Content

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International Passenger Car Markets April 2023

New Passenger Car Registrations/ Sales

	Apr. 2023	+/- in %	Jan.-Apr. 2023	+/- in %
Europe (EU, EFTA & UK) [1]	964,900	16.1	4,201,900	17.2
European Union [1]	803,200	17.3	3,454,900	17.7
W. Europe (EU14, EFTA & UK) [1]	865,200	16.8	3,777,100	17.3
New EU Countries (EU13) [1]	99,700	10.3	424,800	16.2
USA* [2]	1,347,200	9.0	4,900,700	8.1
China [3]	1,787,000	88.8	6,868,000	7.2
Japan [4]	289,500	18.5	1,443,600	17.1
India [5]	284,300	13.0	1,302,700	11.1
Brazil* [6]	151,500	10.8	588,400	14.9

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

* Light Vehicles

International passenger car markets continue to show upward trend in April:
All major markets significantly up - China distorted due to lockdown in previous year – Europe: BEV dynamic, PHEV under pressure.

The **international automotive markets** started the second quarter with clearly positive growth rates. With the exception of the US market, all major automotive regions recorded double-digit growth in new registrations compared with April of the previous year. In Europe (EU, EFTA & UK) and Japan, among others, the market is currently benefiting from a gradually improving supply situation and weak prior-year figures, which were significantly impacted by material shortages and the war in Ukraine. The Chinese market has recently shown very strong growth. However, this remarkably high rate of change is distorted by a general social lockdown in the Shanghai metropolitan region last year.

Around 964,900 new vehicles were registered in the **European** passenger car market in April. This is a good 16 percent more than a year earlier. The five largest individual markets developed positively, with Italy (+29 percent) and France (+22 percent) recording the most dynamic growth in April. Germany (+13 percent) and the United Kingdom (+12 percent) also achieved double-digit increases. The Spanish market grew at a slightly more modest rate of 8 percent. In the first four months of the year, the overall European market grew significantly by 17 percent to reach a volume of 4.2 million passenger cars. Compared to pre-crisis 2019, however, it is still a good 23 percent behind. In terms of electromobility,

sales of BEVs have recently been particularly dynamic, while sales of PHEVs have actually declined over the course of the year.

In the **United States**, light vehicle sales (cars and light trucks) increased by 9 percent in April. In total, a good 1.3 million vehicles were sold last month. For the year to date, this represents growth of 8 percent to a volume of 4.9 million units. The light truck segment (+8 percent) and the passenger car segment (+7 percent) developed at a similar pace. However, the popular light truck segment now accounts for a good 79 percent of the overall market.

As expected, sales of new vehicles in the **Chinese** passenger car market increased significantly. Due to a comprehensive lockdown in the Shanghai metropolitan region in the previous year, 89 percent more vehicles were sold than in April 2022, with a volume of just under 1.8 million passenger cars. Over the course of the year, sales rose to 6.9 million new vehicles, thus turning positive (+7 percent).

In **Japan**, sales of brand-new passenger cars continue to develop dynamically. In April, 289,500 passenger cars were sold - almost 19 percent more than in the same month of the previous year. The extremely weak prior-year level combined with an improved supply situation is stimulating the market and production in Japan. Over the course of the year, the Japanese passenger car market has grown, reaching a volume of just over 1.4 million units sold (+17 percent).

Elektro International March 2023

New Electric Car Registrations in the Most Important Markets Jan.- March. 2023

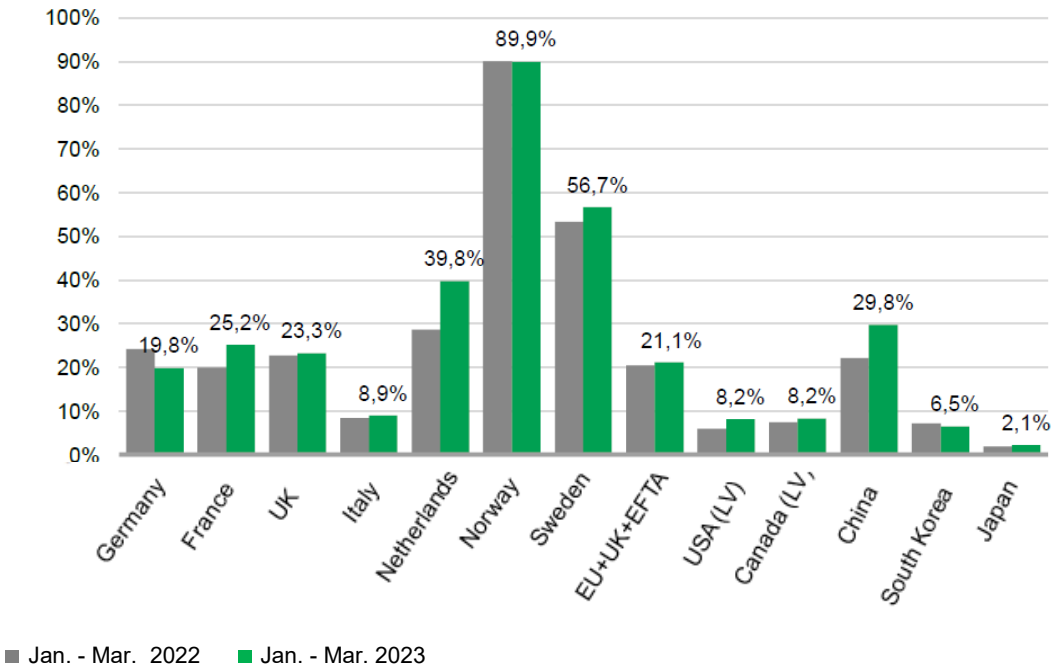
	Electric registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change Mar. 2022 vs. Mar. 2023	Cumulative new registrations / sales since January 2010	Electric proportion of 2023 YTD	Electric proportion of 2022 YTD	Electric market share of German Brand 2023 YTD	Electric market share of German Brand 2022 YTD	German Brand market share in the overall car market 2023 YTD
Germany	132.345	-13%	-1%	1.517.121	19,8%	24,2%	57%	58%	69%
France	105.958	45%	53%	822.103	25,2%	19,9%	22%	23%	26%
UK	115.028	21%	23%	871.725	23,3%	22,8%	36%	38%	45%
Italy	38.097	35%	59%	275.145	8,9%	8,4%	32%	37%	33%
Netherlands	39.130	74%	108%	436.135	39,8%	28,7%	33%	43%	40%
Norway	25.783	-12%	18%	611.313	89,9%	90,1%	27%	38%	29%
Sweden	35.877	-4%	15%	383.490	56,7%	53,3%	33%	35%	37%
EU+UK+EFTA	683.066	21%	33%	6.151.151	21,1%	20,4%	39%	43%	45%
USA (LV)	290.635	49%	44%	2.635.990	8,2%	5,9%	12%	9%	9%
Canada (LV)	29.607	18%	20%	314.827	8,2%	7,5%	13%	8%	9%
China	1.511.726	25%	34%	9.477.802	29,8%	22,1%	7%	5%	19%
South Korea	23.735	2%	12%	243.616	6,5%	7,2%	18%	24%	13%
Japan	24.734	30%	36%	397.141	2,1%	1,9%	17%	14%	4%

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

In March, most markets in Europe showed growth (+33 percent). The strongest increases were recorded in the Netherlands (+108 percent), Italy (+59 percent) and France (+53 percent). Decline was from the major markets Germany only (-1 percent). The non-European markets were all in growth. The USA recorded the greatest increase with 44 percent.

With 1.51 million newly registered e-cars (+25 percent), China was by far the most important e-market in the first quarter worldwide. For comparison: Europe (EU+EFTA+UK) came with a total of 0.68 million units (+21 percent) to less than half. The USA ranked behind with 0.29 million sales (+49 percent).

Electric Share in the Overall Passenger Car Market (Jan.- Mar. 2022 vs Jan.- Mar. 2023)



When it comes to the electric share in the overall market, the e-share consolidated over the course of the year in Norway at 90 percent. The second place was Sweden with 57 percent, which followed by the Netherlands (40 percent), China (30 percent), France (25 percent) and UK (23 percent) ahead of Germany (20 percent) where the environmental bonus has been reduced for BEVs and has expired for PHEVs is still having an effect.

BEV and PHEV new registrations of cars in the most important markets Jan.- Mar. 2023

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change Mar. 2023 vs. Mar 2022	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change Mar. 2023 vs. Mar. 2022
Germany	94.736	13%	28%	72%	37.545	-45%	-39%
France	64.859	49%	54%	61%	41.074	40%	50%
UK	76.205	19%	19%	66%	38.798	25%	33%
Italy	16.372	45%	82%	43%	21.723	28%	43%
Netherlands	25.155	103%	133%	64%	13.969	39%	66%
Norway	24.231	-10%	20%	94%	1.552	-34%	-11%
Sweden	22.904	16%	38%	64%	12.971	-26%	-16%
EU+UK+EFTA	434.352	33%	43%	64%	248.513	5%	15%
USA (LV)	232.524	52%	47%	80%	57.378	39%	36%
Canada (LV)	22.846	16%	12%	77%	6.752	24%	48%
China	1.080.268	12%	22%	71%	431.458	75%	85%
South Korea	19.914	13%	24%	84%	1.936	-53%	-52%
Japan	12.158	48%	22%	49%	12.465	21%	57%

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

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

In March, all major BEV markets were clearly in the positive growth. The Netherlands was at the forefront with +133 percent, Canada had the lowest growth with +12 percent. With +43 percent, Europe performed better than China with 22 percent. In China, the national e-subsidy ended at the end of 2022, while many local governments still introduced subsidies for e-cars.

In the 1st quarter, all important BEV markets except Norway (-10 percent, because sales tax from Jan 2023 on e-cars) recorded significant double-digit percentage growth. The highest growth is in the Netherlands (+103 percent), where there is a "first come, first serve" subsidy available for this year is fixed. It was followed by the USA (+52 percent) ahead of France (+49 percent) and Japan (+48 percent). In Italy, the increase was 45 percent. The rather weak development in Sweden (+16 percent) resulted from the fact that after November 8th ordered e-cars no longer receive a climate bonus. Both South Korea and Germany (environmental bonus reduced) recorded an even lower figure of +13 percent Growth. Bringing up the rear is the world's largest BEV car market, China (+12 percent), which is already in first place million in the first three months.

The development of the PHEV was heterogeneous in March. South Korea recorded the highest decline with -52 percent. In Germany, the decline was -39 percent due to the subsidy ended last year. New PHEV registrations were also declining in Sweden (-16 percent), where e-car subsidies have generally expired. In Norway, the decrease was -11 percent.

Since the beginning of the year, VAT has been applied to e-cars over approx. EUR 50,000 in Norway and there has also been a new important tax for all passenger cars since Jan 2023. However, there are high increases in France (+50 percent), Japan (+57 percent), the Netherlands (+66 percent) and China (+85 percent). In rural China, PHEVs are currently very popular due to their long range.

By far the most important plug-in hybrid market in the 1st quarter was China with 0.43 million units (+75 percent). Europe came to just under 249 thousand (+5 percent). The USA followed at a great distance with 57 thousand (+39 percent). In Europe, France (41 thousand, +40 percent) and UK (39 thousand, +25 percent) have replaced Germany (38 thousand, -45 percent) as the largest PHEV market.

Elektro Germany April 2023

Overview of New Electric Car Registrations Germany

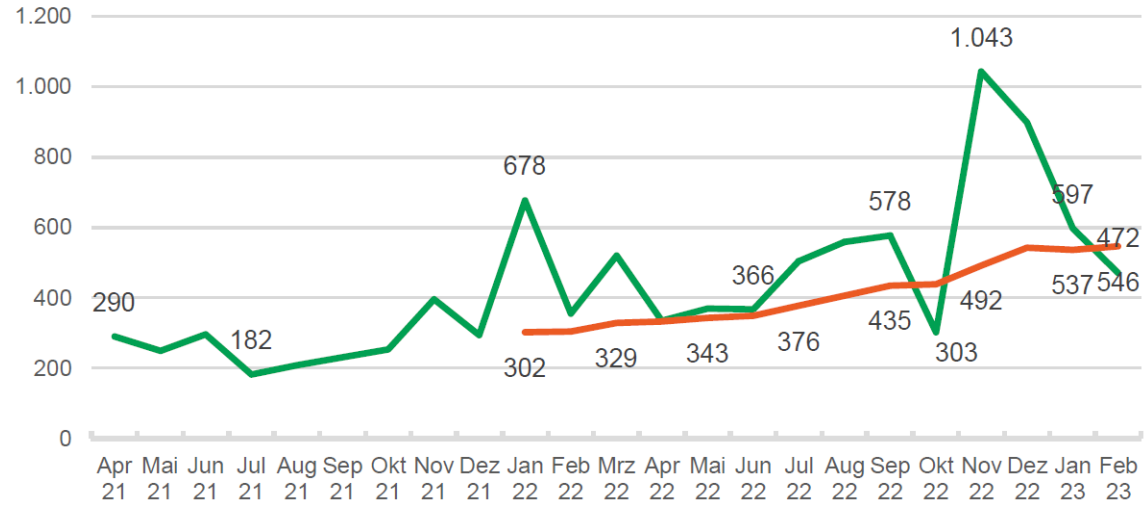
	April 2023	April 2022	23/22 in %	Jan.-April 2023	Jan.-April 2022	23/22 in %	Anteil April 2023	Anteil April 2022	Anteil Jan.-April 2023	Anteil Jan.-April 2022
Elektro gesamt	**41.551**	**43.919**	**-5%**	**173.896**	**195.464**	**-11%**	**20,5%**	**24,4%**	**20,0%**	**24,2%**
darunter										
BEV	29.740	22.175	34%	124.476	105.847	18%	14,7%	12,3%	14,3%	13,1%
Plug-In Hybrid (PHEV)	11.787	21.697	-46%	49.332	89.468	-45%	5,8%	12,0%	5,7%	11,1%
Brennstoffzelle	24	47	-49%	88	149	-41%	0,0%	0,0%	0,0%	0,0%
Zum Vergleich:										
Hybrid (ohne Plug-In)	*47.681*	*35.089*	*36%*	*203.917*	*156.630*	*30%*	*23,5%*	*19,5%*	*23,4%*	*19,4%*
dar. Mild-Hybrid*	*40.305*	*28.823*	*40%*	*172.573*	*131.812*	*31%*	*19,9%*	*16,0%*	*19,8%*	*16,3%*
Erdgas	*153*	*94*	*63%*	*503*	*729*	*-31%*	*0,1%*	*0,1%*	*0,1%*	*0,1%*
LPG	*903*	*838*	*8%*	*3.971*	*5.903*	*-33%*	*0,4%*	*0,5%*	*0,5%*	*0,7%*
Alternative Antriebe ges.	90.288	79.940	13%	382.287	358.726	7%	44,5%	44,3%	44,0%	44,5%
Neuwagen gesamt	202.947	180.264	13%	869.765	806.218	8%	100,0%	100,0%	100,0%	100,0%

* Aktueller Monat geschätzt.

Quelle: KBA, VDA

New registrations of electric cars fell in April and were therefore down for the fourth month in a row compared to the same month of the previous year. Almost 41,600 electric cars were newly registered in April. This was around 5% less than in the same month last year. The decisive factor for the decline was once again a slump in new registrations of plug-in hybrids (PHEV): almost 11,800 registered PHEVs in April of this year were 46% fewer than in April of the previous year. This could not be compensated to the full by the continued dynamic growth in new registrations of purely battery electric vehicles (BEV) last month by 34% to 29,700 cars. As a result, new registrations of electric vehicles declined overall over the course of the year. In the first four months of the year, 173,900 cars with electric drives (BEV, PHEV & FCEV) were newly registered (-11%).

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



Source: BNetzA

On March 1st, 2023, 85,073 charging points (of which 14,378 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 estimate total of 1.935 million e-cars on March 1st, there were 44 charging points for 1,000 e-cars (or 23 e-cars per charging point). In February, the BNetzA reported an additional 1,887 charging points (including late registrations), with about half of the cases being late registrations. This increases the moving twelve-month average to 546 charging points per week.

To reach 1 million LP in 2030 would require building around 2,200 charging points per week. To achieve this, the expansion rate of the last 12 months would have to be quadrupled.

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