

# Facts and Figures

## Content

<b>Facts and Figures</b>	1
International Passenger Car Markets July 2023	1
Elektro International July 2023	2
Elektro Germany August 2023	4

## Facts and Figures

### International Passenger Car Markets July 2023

#### New Passenger Car Registrations/ Sales

	July 2023	+/- in %	Jan.-Jul. 2023	+/- in %
Europe (EU, EFTA & UK) <sup>1)</sup>	1,022,500	16.7	7,612,500	17.5
European Union <sup>1)</sup>	851,200	15.2	6,290,800	17.6
W. Europe (EU14, EFTA & UK) <sup>1)</sup>	919,500	17.6	6,852,900	18.0
New EU Countries (EU13) <sup>1)</sup>	103,000	9.3	759,500	13.8
USA* <sup>2)</sup>	1,299,200	15.3	8,949,600	13.1
Mexico* <sup>2)</sup>	110,800	33.4	743,400	23.7
China <sup>3)</sup>	2,080,200	-3.0	13,223,700	7.1
Japan <sup>4)</sup>	321,000	11.4	2,368,700	18.4
India <sup>5)</sup>	302,500	2.9	2,316,900	9.0
Brazil* <sup>6)</sup>	215,700	27.5	1,150,400	12.5

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

\* Light Vehicles

### International passenger car markets off to a positive start in the second half of 2023

#### Europe, United States and Japan continue to grow - China down due to strong prior year

Sales figures on the **international automotive markets** were mostly positive at the beginning of the second half of 2023. A gradual recovery in the automotive sector can be observed, in particular due to solid production figures since the second half of the previous year. However, growth rates are expected to consolidate in the upcoming months. The prior year figures are improving step by step, so growth rates will normalize accordingly. The recent high growth rates, among others in automotive core markets, were largely due to weak prior-year figures. These resulted from the aftermath of the COVID-19 pandemic (e.g., lockdowns in China) and the start of the war in Ukraine. However, the current positive overall trend in car production and markets remains deceptive: In Europe in particular, overall demand is expected to decline in the second half of the year as a result of inflation rates well above the target, high energy prices and currency devaluation.

In the **European passenger car market (EU, EFTA & UK)**, 1.0 million new vehicles were registered in July. This was almost 17 percent more than in the same month of the previous year. The positive trend has continued into the second half of the year. So far this year, a total of 7.6 million passenger cars have been sold, 18 percent more than in the period from January to July of 2022. Positive growth

rates were achieved in July in the major individual European markets, with the markets in the United Kingdom (+28 percent), France (+20 percent) and Germany (+18 percent) recording the strongest increases. Spain also achieved a double-digit increase of +11 percent. As in previous months, the Italian passenger car market grew somewhat more modestly, by +9 percent.

In the **United States**, light vehicle sales (passenger cars and light duty) increased significantly by 15 percent in July. A total of just under 1.3 million vehicles were sold. Over the year, sales climbed 13 percent above the previous year's level to reach a volume of just over 8.9 million units. Although the two sub-segments monitored, passenger cars and light duty, developed at roughly the same rate, the light duty segment has a dominant market share of a good 79 percent.

The **Chinese passenger car market** was down 3 percent in July. Just under 2.1 million new passenger cars were registered. The extremely strong second half of the previous year, in which high sales figures were also achieved thanks to extensive government subsidies, is now having a dampening effect on growth momentum. To put this in perspective, sales on the Chinese market in July 2023 were nonetheless the second-strongest July sales ever achieved in history, following the same month the previous year. For the year, the Chinese passenger car market is up a good 7 percent, reaching a volume of 13.2 million units to date.

In **Japan**, too, the passenger car market got off to a successful start in the second half of the year. 321,000 newly registered passenger cars resulted in growth of 11 percent compared to the same month last year. For the year as a whole, growth was even more pronounced at a good 18 percent. In Japan, just under 2.4 million passenger cars have been sold since the beginning of the year.

## Elektro International July 2023

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

	Electric registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change July. 2022 vs. July. 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	362.534	1%	20% ↗	2.580.797	22,1%	24,9%	59%	58%	69%
France	246.092	40%	49% ↗	1.293.440	24,2%	20,0%	26%	24%	26%
UK	249.857	33%	84% ↗	1.382.511	22,8%	20,6%	39%	39%	47%
Italy	80.403	14%	7% ↘	434.774	8,4%	8,9%	37%	37%	34%
Netherlands	96.530	74%	68% ↘	601.638	41,7%	31,6%	36%	42%	40%
Norway	66.726	0%	12% ↗	806.673	90,1%	87,9%	35%	41%	37%
Sweden	91.815	10%	16% ↗	600.698	58,1%	51,4%	36%	37%	40%
<b>EU+UK+EFTA</b>	<b>1.650.865</b>	<b>28%</b>	<b>44%</b> ↗	<b>9.726.150</b>	<b>21,7%</b>	<b>19,9%</b>	<b>43%</b>	<b>44%</b>	<b>46%</b>
USA (LV)	778.618	55%	57% ↗	4.048.704	8,7%	6,3%	12%	10%	8%
Canada (LV)	92.428	49%	116% ↗	499.713	9,5%	6,9%	12%	9%	10%
China	4.322.673	42%	32% ↘	18.837.149	32,7%	24,7%	4%	5%	18%
South Korea	67.843	0%	-26% ↘	421.261	7,7%	8,3%	23%	18%	13%
Japan	55.839	38%	20% ↘	498.449	2,4%	2,0%	14%	18%	4%

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

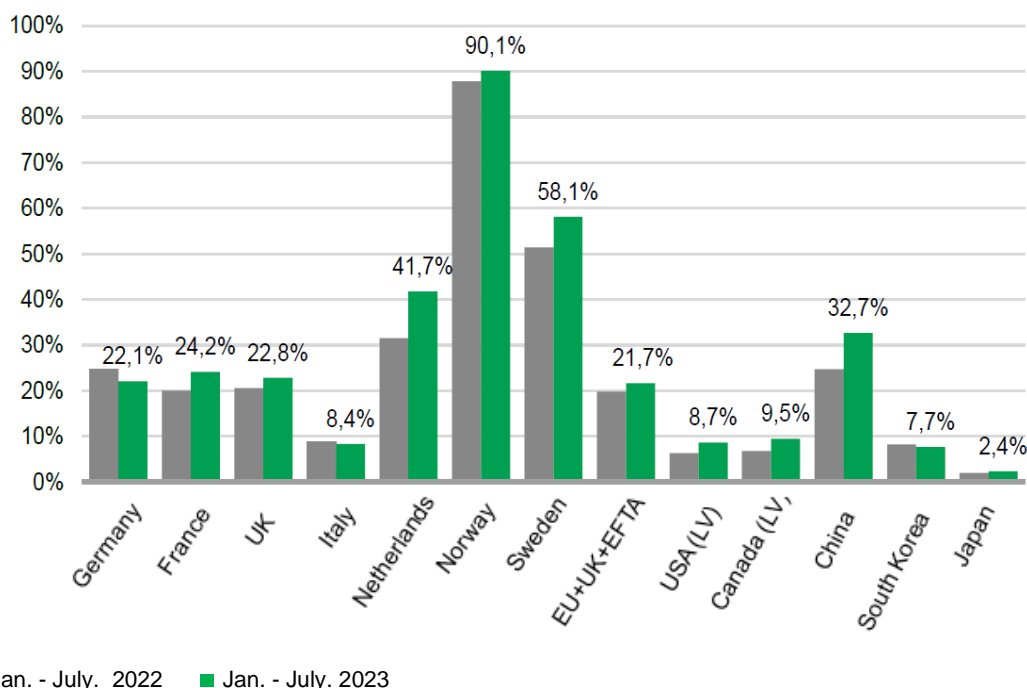
In July, all markets in Europe showed growth (+44 percent). The strongest increases were recorded in UK (+84 percent), the Netherlands (+68 percent), and France (+49 percent). The weakest growth was achieved in Italy (+7 percent) and Norway (+12 percent). The non-European markets except South Korea all recorded double-digit growth: Canada recorded the largest increase with 116 percent.

With 4.32 million newly registered e-cars (+42 percent), China was by far the most important e-market worldwide. For comparison: Europe (EU+EFTA+UK) came with a total of 1.65 million units (+28 percent) to less than half. The USA ranked behind with 0.78 million sales (+55 percent).

The market share of German brands on the e-market is roughly as high as the overall market share in many countries. In Europe it was 43 percent (overall market share 46 percent). There was a large discrepancy between the overall market share (18 percent) and the e-market share (4 percent) in China.

In the USA (12 percent e-market share out of 8 percent overall market share), the German OEMs were more successful with electric cars than with combustion cars. In South Korea and Japan in particular, German manufacturers achieved e-market shares of 10 percent above the overall market share, at the forefront of the transformation.

#### Electric Share in the Overall Passenger Car Market (Jan.- July. 2022 vs Jan.- July. 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 58 percent, which followed by the Netherlands (42 percent), China (33 percent), France (24 percent) and UK (23 percent) ahead of Germany (22 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.- July. 2023

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change July. 2023 vs. July. 2022	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change July. 2023 vs. July. 2022
Germany	268.926	37%	69% ↗	74%	93.410	-43%	-40% ↘
France	154.781	46%	32% ↘	63%	91.123	30%	80% ↗
UK	175.950	38%	88% ↗	70%	73.882	21%	77% ↗
Italy	36.805	29%	14% ↘	46%	43.596	4%	1% ↘
Netherlands	65.501	90%	52% ↘	68%	30.989	48%	107% ↗
Norway	61.422	4%	20% ↗	92%	5.302	-27%	-31% ↘
Sweden	58.933	33%	39% ↗	64%	32.880	-15%	-9% ↘
EU+UK+EFTA	1.089.921	47%	62% ↗	66%	560.350	3%	19% ↗
USA (LV)	619.799	58%	58% ↗	80%	156.495	45%	52% ↗
Canada (LV)	71.449	50%	97% ↗	77%	20.960	47%	201% ↗
China	3.062.379	29%	17% ↘	71%	1.259.994	87%	77% ↘
South Korea	57.497	6%	-31% ↘	85%	7.169	-10%	69% ↗
Japan	25.536	51%	24% ↘	46%	30.070	31%	18% ↘

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

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

In July, all major BEV markets were clearly in growth. Canada was at the forefront with +97 percent. The UK was with +88 percent and Germany with +69 percent (preferential effect on September 1st. expiring commercial funding) and the USA was with +58 percent, where e-mobility was slowly gaining momentum. In South Korea, the BEV market declined significantly in July. At +62 percent, Europe performed better than China at 17 percent. A \$72 billion program is underway in China over the next four years which includes the elimination of the purchase tax for electric vehicles in 2024/2025.

Over the course of the year, all important BEV markets except Norway (+4 percent, because from Jan 2023 sales tax applies on e-cars) and South Korea (+6 percent) recorded significant double-digit percentage growth. The highest growth was in the Netherlands (+90 percent), where there is a "first come, first serve" subsidy available for this year fixed, which followed by the USA (+58 percent) and Japan (+51 percent), Canada (+50 percent) and France (+46 percent).

The development of the PHEV was also heterogeneous across Europe in July. Due to the subsidies ended last year, Germany recorded the highest decline at -40 percent. In Norway, the decrease was -31 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. In Sweden, where e-subsidies generally ended at the end of November, there was a decline of 9 percent. However, there were high increases in the Netherlands (+107 percent), France (+80 percent) and UK (+77 percent). Outside of Europe, growth was consistently double-digit, Canada achieved the highest growth at +201 percent, ahead of China at +77 percent. In rural China, PHEVs were currently very popular due to their long range.

By far the most important plug-in hybrid market over the course of the year is China with 1.26 million units (+87 percent). Europe came to 560 thousand (+3 percent). The USA followed at a great distance with 156 thousand (+45 percent). In Europe, Germany was back to the first place with 93 thousand (-43 percent), ahead of France with 91 thousand (+30 percent). UK followed with 74 thousand (+21 percent).

## Elektro Germany August 2023

### Overview of New Electric Car Registrations Germany

	Aug. 2023	Aug. 2022	23/22 in %	Jan.-Aug. 2023	Jan.-Aug. 2022	23/22 in %	Anteil Aug. 2023	Anteil Aug. 2022	Anteil Jan.- Aug. 2023	Anteil Jan.- Aug. 2022
<b>Elektro gesamt</b>	<b>101.252</b>	<b>57.040</b>	<b>78%</b>	<b>463.786</b>	<b>416.002</b>	<b>11%</b>	<b>37,0%</b>	<b>28,6%</b>	<b>24,2%</b>	<b>25,3%</b>
<b>darunter</b>										
<b>BEV</b>	86.649	32.006	171%	355.575	228.084	56%	31,7%	16,1%	18,6%	13,9%
<b>Brennstoffzelle</b>	51	315	-84%	249	607	-59%	0,0%	0,2%	0,0%	0,0%
<b>Plug-In Hybrid (PHEV)</b>	14.552	24.719	-41%	107.962	187.311	-42%	5,3%	12,4%	5,6%	11,4%
<b>Zum Vergleich:</b>										
<b>Hybrid (ohne Plug-In)</b>	55.844	35.116	59%	433.060	304.605	42%	20,4%	17,6%	22,6%	18,5%
<b>dar. Mild-Hybrid*</b>	45.244	30.325	49%	368.140	257.642	43%	16,5%	15,2%	19,2%	15,7%
<b>Erdgas</b>	130	160	-19%	1.130	1.324	-15%	0,0%	0,1%	0,1%	0,1%
<b>LPG</b>	920	1.088	-15%	9.159	10.131	-10%	0,3%	0,5%	0,5%	0,6%
<b>Alternative Antriebe ges</b>	158.146	93.404	69%	907.135	732.062	24%	57,8%	46,9%	47,4%	44,6%
<b>Neuwagen gesamt</b>	273.417	199.183	37%	1.913.564	1.643.069	16%	100,0%	100,0%	100,0%	100,0%

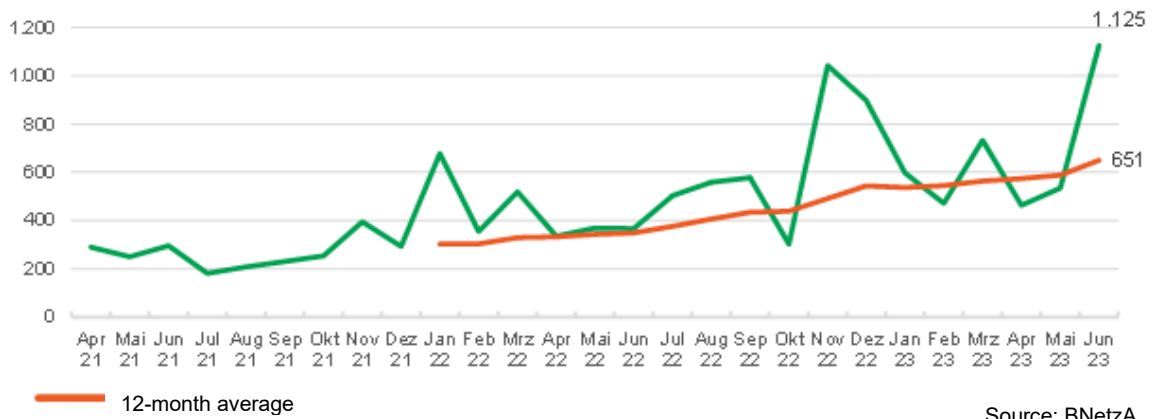
\* Aktueller Monat geschätzt.

Quelle: KBA, VDA

In August, 273,400 new cars were registered in Germany. This corresponds to an increase of 37% compared to the same month last year and is due to a pre-purchase effect: since September 1st, the environmental bonus is no longer available to commercial owners, only to private ones. Thus, a temporary boom in new BEV registrations occurred, rising them by 171% to 86,650 units. This is the second highest monthly value after December 2022, when the environmental bonus for PHEVs was imminent and there was also a pre-purchase effect. The 86,650 newly registered BEVs in August also means that almost one in three newly registered cars this month is purely electrically powered. In the year to date, the

German passenger car market has grown by 16% to 1.91mn vehicles. This means that the pre-crisis level of 2019 has clearly been undercut by 23%.

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



Source: BNetzA

Till July 1<sup>st</sup>, 97,495 charging points (of which 18,557 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 2.058 million e-cars until July 1<sup>st</sup>, there were 47 charging points for 1,000 e-cars (or 21 e-cars per charging point). In June, the BNetzA reported an additional 4,832 charging points (including 2,511 late registrations), which corresponds to 1,125 charging points per week, so the moving twelve-month average rose further to 651 charging points per week.

To reach 1 million LP in 2030 would require building around 2,300 charging points per week. To achieve this, the expansion rate of the last 12 months would have to be quadrupled.

Copyright German Association of the Automotive Industry (VDA) China

Editor Mr. Lin Zhang | Ms. Lucia Liu | Ms. Stacy Dong  
Ms. Amy Sun

Address Unit 0501A, DRC Liangmaqiao Tower D1,  
19 Dongfang East Road, Chaoyang District,  
Beijing 100600, P. R. China

Contact [info@vda.cn](mailto:info@vda.cn)

Date Sep 28<sup>th</sup>, 2023