

# Facts and Figures

## Content

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

## Facts and Figures

### International Passenger Car Markets October 2023

#### New Passenger Car Registrations/Sales

	October 2023	+/- in %	Jan.-Oct. 2023	+/- in %
Europe (EU, EFTA & UK) <sup>1)</sup>	1,039,300	14.1	10,722,900	16.7
European Union <sup>1)</sup>	855,500	14.6	8,795,000	16.7
W. Europe (EU14, EFTA & UK) <sup>1)</sup>	934,000	13.7	9,655,700	17.2
New EU Countries (EU13) <sup>1)</sup>	105,200	17.5	1,067,300	12.8
USA* <sup>2)</sup>	1,200,300	1.6	12,800,200	12.8
Mexico* <sup>2)</sup>	113,500	24.7	1,088,600	25.3
China <sup>3)</sup>	2,461,500	11.6	20,449,500	7.9
Japan <sup>4)</sup>	334,500	13.1	3,347,100	17.2
India <sup>5)</sup>	341,400	17.3	3,430,800	9.0
Brazil* <sup>6)</sup>	206,800	22.6	1,741,700	11.2

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

\* Light Vehicles

### International passenger car markets start the year-end rally

#### Europe catching up, but still far below pre-crisis level – China with record month – United States with only modest growth

The majority of **international automotive markets** have made a positive start to the last quarter of 2023, in most cases with significant double-digit growth. The automotive economy is developing robustly. However, there is still a possibility that the significantly positive growth rates, particularly in the core automotive markets, will slow down somewhat by the end of the year. This could be due to higher comparative figures from the previous year and as yet unmeasurable effects from geopolitical tensions in the Middle East. Real wage losses due to sustained high energy prices in particular and more complicated financing conditions as a result of restrictive monetary policy are dampening overall economic demand, meaning that the automotive industry will continue to face a challenging environment in the upcoming months and next year.

In the **European passenger car market (EU, EFTA & UK)**, 1.0 million new passenger cars were registered at the start of the fourth quarter. In October of this year, sales were therefore a good 14 percent higher than in the previous year. The current year is also clearly positive. From January to October, a good 10.7 million new registrations were recorded on the European passenger car market, which corresponds to an increase of 17 percent compared to the same period last year. However, the catch-up process is still only taking place at a moderate pace. Compared to the pre-crisis level of 2019, the European passenger car market is still down by almost 20 percent. The five largest individual European markets developed positively in October, albeit with

different dynamics: **France (+22 percent), Italy (+20 percent), Spain (+18 percent), the United Kingdom (+14 percent) and Germany (+5 percent).**

The **US light vehicle market** (passenger cars and light duty) has continued to develop positively but lost some of its momentum in October. Sales of 1.2 million units represented an increase of just 2 percent compared to the same month last year. Over the course of the year, however, the US market continues to show double-digit growth. With 12.8 million newly registered light vehicles, almost 13 percent more were registered than in the same period last year. However, this volume is still almost 9 percent below pre-crisis levels.

Passenger car sales in **China** have recently picked up noticeably. Almost 2.5 million new passenger cars were sold at the start of the fourth quarter. Accordingly, October 2023 was almost 12 percent stronger than the same month last year. The Chinese passenger car market is heading for a new record result for the year as a whole. After ten months, a good 20.4 million units have been delivered so far, almost 8 percent more than last year. The pre-crisis level was already exceeded again in 2022.

In **Japan**, the passenger car market remained robust and dynamic in October. A total of 334,500 new passenger cars were delivered to customers, 13 percent more than in the same month last year. Volume growth of 17 percent has been achieved so far this year. A total of 3.3 million new passenger cars were registered.

## Elektro International September 2023

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

	Electric registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change Sep. 2022 vs. Sep. 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	510.886	5%	-35% 📉	2.729.149	23,9%	26,2%	58%	58%	69%
France	321.171	40%	35% 📈	1.366.849	24,9%	20,6%	26%	24%	26%
UK	337.564	34%	27% 📈	1.466.146	23,2%	20,9%	40%	38%	46%
Italy	97.951	15%	8% 📈	451.411	8,3%	8,7%	38%	38%	34%
Netherlands	123.189	69%	51% 📈	628.298	42,6%	32,4%	37%	42%	39%
Norway	86.317	-4%	-26% 📉	826.264	90,4%	87,8%	35%	41%	37%
Sweden	123.938	18%	47% 📈	632.717	59,0%	51,3%	37%	38%	40%
EU+UK+EFTA	2.193.702	29%	11% 📈	10.260.653	22,7%	20,5%	43%	44%	46%
USA (LV)	1.034.148	57%	52% 📈	4.308.757	8,9%	6,5%	12%	10%	9%
Canada (LV)	132.500	49%	62% 📈	539.785	10,2%	7,6%	11%	8%	10%
China	5.990.208	37%	27% 📈	20.504.766	33,4%	26,1%	4%	5%	18%
South Korea	84.432	-10%	-48% 📉	437.263	7,6%	9,0%	25%	19%	13%
Japan	73.455	38%	32% 📈	516.236	2,4%	2,1%	18%	17%	4%

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

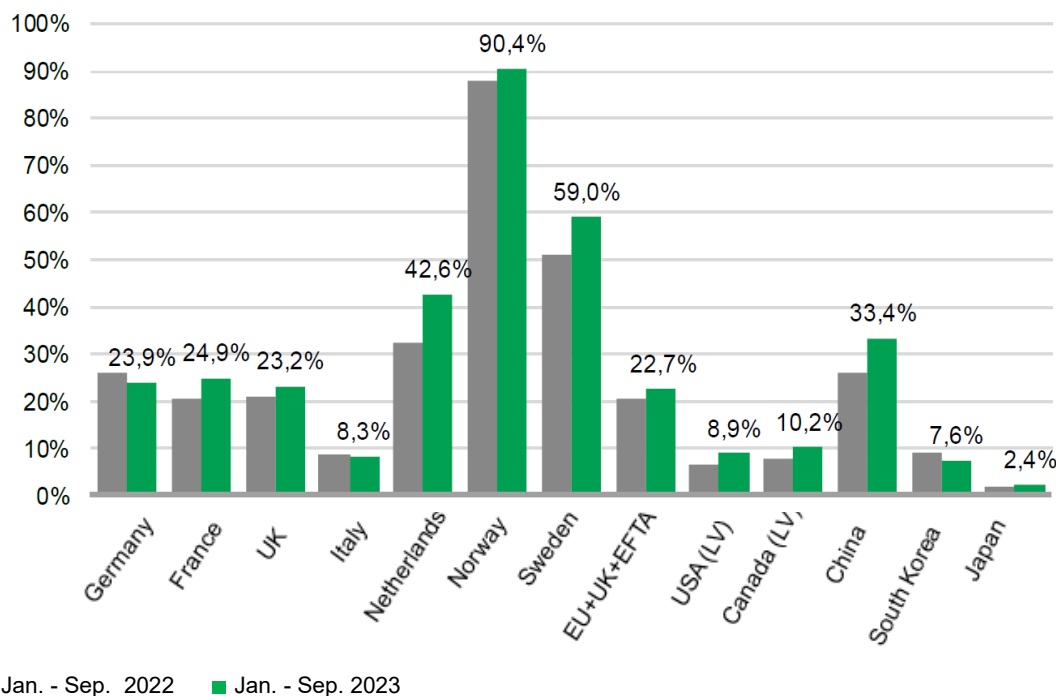
In September, the North American markets of **Canada (+62 percent)** and **the USA (+52 percent)** experienced the highest growth rates. However, this is also where the need for catching up is the highest, considering the EV market share is around 10 percent. **China (+27 percent)** and **Japan (+32 percent)** achieved relatively similar growth rates, but in China, every third new car is already electric, while in Japan, it's less than one in forty. **Europe** only saw an increase of 11 percent. The saturated **Norwegian market**, with an EV market share of over 90 percent, experienced a decline of 26 percent. **Germany** also had a significant decline of 35 percent, attributed to the expiration of environmental incentives for commercial customers. Among the major European markets, **the Netherlands** realized the highest growth rate at +51 percent. The Netherlands stands out for having one of the most generous incentive programs worldwide.

These figures highlight the varying progress and challenges faced by different markets in adopting electric vehicles. While North America shows impressive growth, there is still considerable room for expansion. Meanwhile, China leads in terms of EV market penetration, and Europe experiences mixed results due to differing market dynamics and incentive schemes across countries. The Netherlands stands as a notable success story in Europe, thanks to its generous support system for electric vehicles.

**German automakers** have a **market share** in the electric mobility market that generally aligns with their overall market share in many countries. In **Europe**, their EV market share is 43 percent, close to the overall market share of 46 percent. Notably, in **Italy**, German automakers have a higher EV market share at 38 percent

compared to the overall market share. However, there is a significant gap between the overall market share and EV market share in **China**, where German automakers hold an 18 percent overall market share but only a 4 percent EV market share. In overseas markets like the **United States**, German manufacturers are more successful in the EV segment, with a 12 percent EV market share compared to a 9 percent overall market share. In **South Korea and Japan**, they lead the transformation towards electric mobility with EV market shares over ten percentage points higher than the overall market share. Overall, German automakers are actively participating in the global shift to electric mobility while experiencing varying levels of success in different markets.

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



■ Jan. - Sep. 2022 ■ Jan. - Sep. 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 59 percent, which followed by the Netherlands (43 percent), China (33 percent), France (25 percent) and Germany (24 percent) and UK (23 percent).

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

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change Sep. 2023 vs. Sep. 2022	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2023 vs. 2022)	Change Sep. 2023 vs. Sep. 2022
Germany	387.289	42%	-29% ↓	76%	123.345	-43%	-46% ↓
France	204.611	45%	34% ↑	64%	116.332	31%	35% ↑
UK	238.516	36%	19% ↑	71%	99.023	28%	51% ↑
Italy	45.836	28%	-2% ↓	47%	52.113	6%	20% ↑
Netherlands	84.987	84%	71% ↑	69%	38.163	44%	15% ↓
Norway	79.672	0%	-21% ↓	92%	6.643	-36%	-63% ↓
Sweden	81.217	40%	61% ↑	66%	42.719	-9%	22% ↑
EU+UK+EFTA	1.474.390	47%	13% ↑	67%	718.617	3%	5% ↑
USA (LV)	815.340	57%	44% ↑	79%	216.031	56%	90% ↑
Canada (LV)	102.807	44%	46% ↑	78%	29.672	68%	166% ↑
China	4.190.466	24%	15% ↓	70%	1.799.442	83%	63% ↓
South Korea	72.161	-6%	-49% ↓	85%	8.443	-14%	11% ↑
Japan	33.475	51%	47% ↓	46%	39.697	30%	23% ↓

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

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

In September, the performance of major BEV markets varied. The Netherlands led with a growth rate of 71 percent, followed by Sweden (+61 percent), Japan (+47 percent), Canada (+46 percent), and the USA (+44 percent). However, South Korea experienced a significant decline of 49 percent in the BEV market. Europe and China performed similarly, with growth rates of +13 percent and +15 percent, respectively. In China, there are signs of saturation due to the already high market penetration of BEVs.

Throughout the year, all key BEV markets, except for South Korea (-6 percent due to upcoming VAT on electric cars) and Norway ( $\pm 0$  percent), witnessed double-digit percentage growth. The highest growth rate was observed in the Netherlands (+84 percent), where a limited funding pool resulted in a "first come, first serve" approach. The USA (+57 percent), Japan (+51 percent), France (+45 percent), Canada (+44 percent), and Germany (+42 percent) also recorded significant growth.

The PHEV market in Europe showed mixed results in September. Norway (-63 percent) and Germany (-46 percent) experienced the largest declines. In Norway, EVs above a certain price threshold became subject to VAT at the beginning of the year. In Germany, the expiration of previous incentives contributed to the downturn. On the other hand, significant growth was seen in the UK (+51 percent) and France (+35 percent). Outside of Europe, PHEV growth was consistently strong, with Canada (+166 percent) leading, followed by the USA (+90 percent) and China (+63 percent).

China remained the dominant market for plug-in hybrids throughout the year, with 1.8 million units sold (+83 percent). Europe reached 719 thousand units (+3 percent), with Germany leading at 123 thousand units (-43 percent), followed by France at 116 thousand units (+31 percent), and the UK at 99 thousand units (+28 percent).

## Elektro Germany October 2023

### Overview of New Electric Car Registrations Germany

	Okt. 2023	Okt. 2022	23/22 in %	Jan.-Okt. 2023	Jan.-Okt. 2022	23/22 in %	Anteil Okt. 2023	Anteil Okt. 2022	Anteil Jan.-Okt. 2023	Anteil Jan.-Okt. 2022
<b>Elektro gesamt</b>	<b>53.698</b>	<b>67.883</b>	<b>-21%</b>	<b>564.584</b>	<b>556.631</b>	<b>1%</b>	<b>24,5%</b>	<b>32,5%</b>	<b>24,0%</b>	<b>26,8%</b>
<b>darunter</b>										
<b>BEV</b>	37.334	35.781	4%	424.623	308.254	38%	17,1%	17,1%	18,0%	14,8%
<b>Brennstoffzelle</b>	3	38	-92%	255	666	-62%	0,0%	0,0%	0,0%	0,0%
<b>Plug-In Hybrid (PHEV)</b>	16.361	32.064	-49%	139.706	247.711	-44%	7,5%	15,4%	5,9%	11,9%
<b>Zum Vergleich:</b>										
<b>Hybrid (ohne Plug-In)</b>	57.575	36.469	58%	548.430	381.171	44%	26,3%	17,5%	23,3%	18,4%
<b>dar. Mild-Hybrid*</b>	48.775	30.378	61%	469.348	321.746	46%	22,3%	14,6%	19,9%	15,5%
<b>Erdgas</b>	65	126	-48%	1.254	1.609	-22%	0,0%	0,1%	0,1%	0,1%
<b>LPG</b>	1.089	927	17%	10.914	12.332	-11%	0,5%	0,4%	0,5%	0,6%
<b>Alternative Antriebe ges</b>	112.427	105.405	7%	1.125.182	951.743	18%	51,3%	50,5%	47,7%	45,8%
<b>Neuwagen gesamt</b>	<b>218.959</b>	<b>208.642</b>	<b>5%</b>	<b>2.357.025</b>	<b>2.076.527</b>	<b>14%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>	<b>100,0%</b>

\* Aktueller Monat geschätzt.

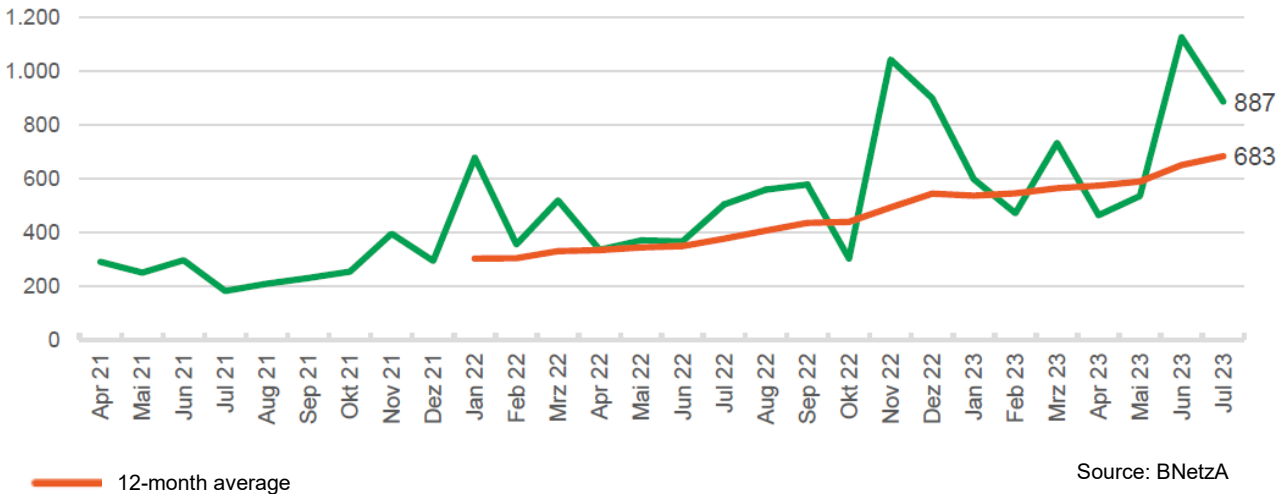
Quelle: KBA, VDA

In October, new registrations on the German car market rose again after a sluggish previous month. Compared to the same month last year, 5% more new cars were registered at 219,000 units. From January to October, the German registration offices registered a total of almost 2.4mn vehicles. In the current year, the German car market is still up almost 14%.

After the expired environmental bonus for commercial vehicles had a clear impact on the electric vehicle market in September, sales of purely battery-electric vehicles (BEVs) rose slightly again in October: 37,300 newly registered units correspond to an increase of a good 4% compared to the same month last year. Meanwhile, the crash on the plug-in hybrid (PHEV) market continued last month. In October 2023, 16,400 PHEVs were newly registered, 49% fewer than in October 2022. The electric market as a whole shrank by almost 21% to a level of 53,700 vehicles in October. A similar picture emerges when looking at the year to date. While BEVs grew by a total of 38% in the first ten months compared to the same period last year, the market for PHEVs shrank by

44%. From January till the end of October, these contrasting developments resulted in a small growth in the electrical market of just over 1% to around 564,600 units.

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



As of August 1, 2023, Germany had reported 101,421 charging points (LP) to the Federal Network Agency (BNetzA), including 19,859 fast-charging points with a power capacity over 22 kW. For detailed info, please refer to [Link](#).

With a fleet of 2.1 million electric cars on that date, there were approximately 48 charging points per 1,000 electric vehicles (or around 21 electric vehicles per charging point). In July alone, BNetzA reported an additional 3,926 charging points, including 1,838 retroactively added points. This corresponds to an average of 887 charging points per week, leading to a rolling 12-month average of 683 charging points per week.

To reach 1 million charging points by 2030, Germany would need to build around 2,300 charging points per week. Achieving this goal would require more than tripling the expansion rate of the last 12 months.

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 November 29<sup>th</sup>, 2023