Facts and Figures

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International Passenger Car Markets September 2022

New Passenger Car Registrations/ Sales

	September	+/- in %	Jan. - Sep. 2022	+/- in %
Europe (EU27, EFTA & UK)* [1]	1,049,900	7.9	8,271,100	-9.7
European Union (EU27)* [1]	787,900	9.6	6,784,300	-9.9
W. Europe (EU14, EFTA & UK) [1]	956,600	7.8	7,419,600	-10.0
New EU Countries (EU13)* [1]	93,300	8.8	851,500	-6.9
USA** [2]	1,112,200	9.5	10,141,500	-13.2
China [3]	2,301,000	32.7	16,750,000	14.7
Japan [4]	324,900	26.4	2,560,100	-10.9
Russia** [5]	-	-	506,700	-59.8
India [6]	307,400	91.9	2,857,400	23.1
Brazil** [7]	180,800	26.8	1,397,600	-5.0

Source: 1) ACEA 2) Wards Intelligence 3) CAAM 4) JAMA 5) AEB 6) SIAM 7) ANFAVEA
* without Malta
** Light Vehicles

International automotive markets: uneven recovery

The international automotive markets have presented a mixed picture so far this year. Challenges along the value chains continue to impact the supply situation on numerous markets. The high price momentum in Europe and the USA is also having a dampening effect. While growth rates were mostly negative in the course of the year, the figures are turning positive at the current margin, also due to the low levels of the previous year.

New registrations in the European passenger car market (EU27, EFTA & UK) fell by 10 percent year-on-year in the first 9 months, reaching a level of just under 8.3 million vehicles. In September, the five major individual markets all grew, with Germany (+14 percent) and Spain (+13 percent) achieving double-digit growth. France, Italy and the United Kingdom each increased by 5 percent. In September, new registrations rose by 8 percent to just over 1 million passenger cars.

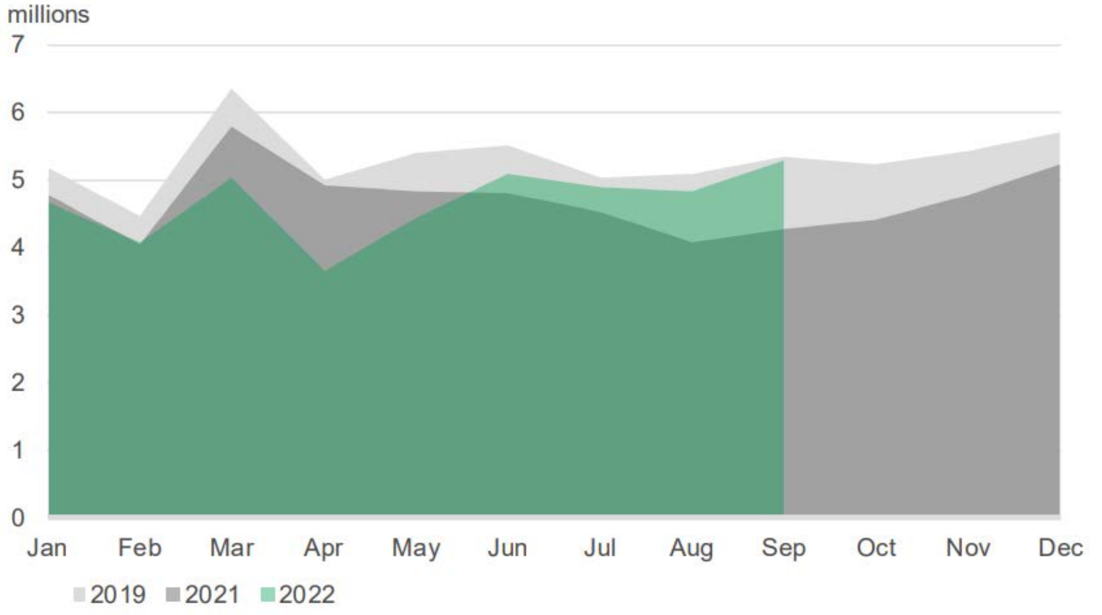
In the USA light vehicle market (cars and light trucks), 10.1 million light vehicles were sold in the year to date, 13 percent fewer than in the same period last year. As the light truck segment performed less weakly than the car segment, the light truck segment's market share increased in the year to date, most recently reaching 79 percent. In September, light vehicle sales rose to 1.1 million (+9 percent).

The Chinese passenger car market was well above pre-Corona levels in the period from January to September and is now on a par with the record years of 2016 to 2018. At just over 16.8 million passenger cars, sales were 15 percent higher than a year earlier. In September, the growth rally of the previous months continued, with a volume of 2.3 million new vehicles representing an increase of 33 percent. Since the middle of the year, sales of passenger cars have been boosted by a tax cut, among other things.

In Japan, a total of 2.6 million new passenger cars have been sold since the beginning of the year (-11 percent). At 324,900 units, sales in September remained at a weak level in absolute terms but were up by a good 26 percent due to the low prior-year figure.

International passenger car sales largely driven by Chinese market

Monthly Passenger Car and Light-Vehicle Sales in the major markets (EUR, US, CN, JP, IN, BR)



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

Elektro International August 2022

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

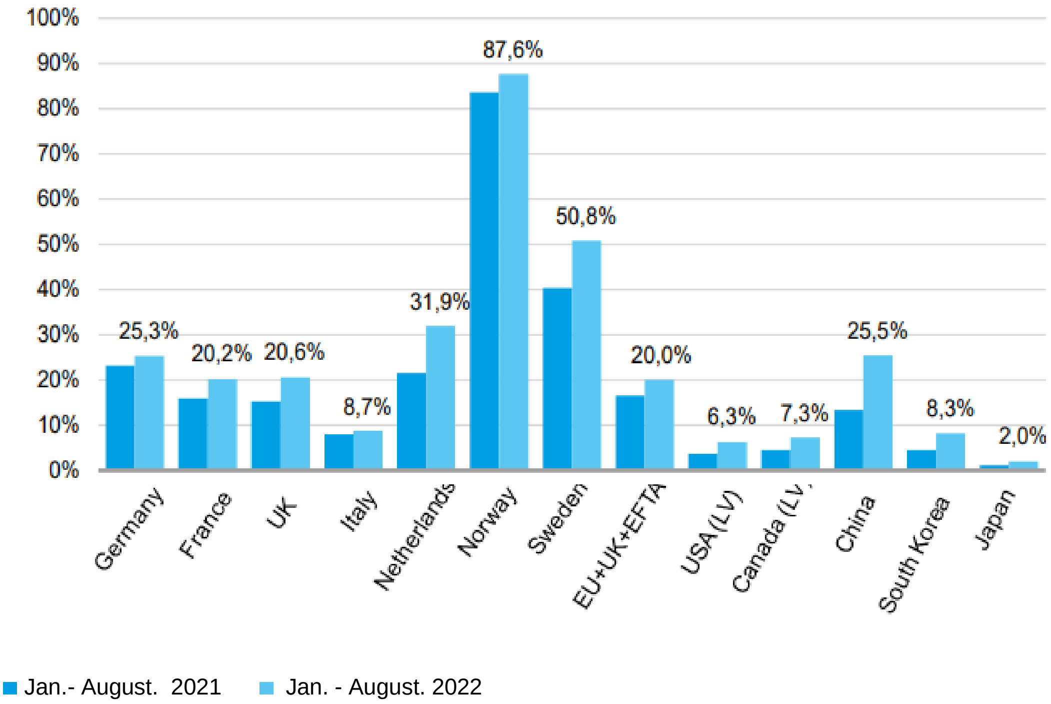
	Electric registra-tions / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change August. 2022 vs. August 2021	Cumulative new regis-trations / sales since January 2010	Electric proportion of 2022 YTD	Electric proportion of 2021 YTD	Electric market share of German Brand 2022 YTD	Electric market share of German Brand 2021 YTD	German Brand mar-ket share in the overall car market 2022 YTD
Germany	416.002	-1%	-7%	1.800.852	25,3%	23,2%	59%	70%	69%
France	196.362	9%	12%	912.953	20,2%	16,0%	24%	30%	26%
UK	202.439	21%	10%	959.136	20,6%	15,2%	39%	44%	44%
Italy	75.515	-12%	-23%	312.540	8,7%	8,1%	38%	41%	34%
Netherlands	63.592	40%	24%	460.731	31,9%	21,5%	42%	46%	41%
Norway	77.198	-17%	-26%	662.728	87,6%	83,6%	42%	39%	44%
Sweden	92.774	10%	2%	440.411	50,8%	40,4%	38%	41%	41%
EU+UK+EFTA	1.447.099	7%	3%	6.915.762	20,0%	16,5%	45%	52%	46%
USA (LV)	568.897	44%	44%	2.882.404	6,3%	3,7%	10%	13%	9%
Canada (LV)	75.767	43%	60%	360.427	7,3%	4,5%	8%	8%	10%
China	3.688.268	115%	105%	11.621.321	25,5%	13,3%	5%	7%	20%
South Korea	76.842	67%	19%	296.723	8,3%	4,5%	18%	30%	15%
Japan	45.481	56%	34%	417.888	2,0%	1,1%	14%	24%	4%

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

In August, the picture in Europe is mixed (+3 percent). The Netherlands (+24 percent), France (+12 percent) and UK (+10 percent) record double-digit growth, while the Norwegian market (-26 percent) and Italy (-23 percent) developed slowly. The non-European markets are all clearly growing. Above all China with +105 percent is at the top.

With 3.69 million newly registered e-cars (+115 percent) in the first 8 months, China remains by far the most important e-car market worldwide. While Europe (EU+EFTA+UK) comes with overall 1.45 million units (+7 percent). The USA ranks behind with 0.57 million sales (+44 percent), while Germany follows with 0.42 million sales (-1 percent).

Electric Share in the Overall Passenger Car Market (Jan.- August. 2021 vs Jan.- August. 2022)



When it comes to the electric share in the overall market, the proportion of e-cars in Norway now consolidates at 88 percent in the 9 months of this year. The second place is Sweden with 51 percent, which followed by the Netherlands (32 percent), China (26 percent), Germany (25 percent), UK (21 percent), and France (20 percent).

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

	BEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change Aug 2022 vs. Aug 2021	Share of BEV to electric YTD	PHEV* New registrations / sales (YTD)	Change YTD vs. Previous year (2022 vs. 2021)	Change Aug 2022 vs. Aug 2021
Germany	228.084	12%	11%	55%	18.311	-14%	1%
France	118.361	32%	24%	60%	77.888	-13%	-4%
UK	137.492	49%	35%	68%	64.941	-14%	-26%
Italy	30.849	-20%	-29%	41%	44.659	-5%	-16%
Netherlands	40.256	63%	34%	63%	23.255	12%	-4%
Norway	68.528	3%	-22%	89%	8.651	-67%	-46%
Sweden	50.251	68%	22%	54%	42.521	-22%	-19%
EU+UK+EFTA	837.033	28%	12%	58%	609.081	-12%	-8%
USA (LV)	445.898	60%	59%	78%	121.046	6%	9%
Canada (LV)	59.927	50%	100%	79%	15.817	22%	-35%
China	2.871.898	104%	93%	78%	816.247	168%	159%

South Korea	61.470	129%	19%	80%	8.934	-35%	-10%
Japan	18.955	52%	-6%	42%	25.874	77%	105%

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

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

In August, all major BEV markets outside of Europe recorded double-digit percent growth except Japan. The markets in China and Canada increased roughly even double, while in the USA there is a growth of 59 percent. In Europe (total +12 percent), all major markets except Italy (-29 percent) and Norway (-22 percent) are growing. The strongest momentum is recorded in UK (+35 percent) and the Netherlands (+34 percent), where subsidies will be reduced at the end of the year.

Over the course of the year, the Chinese BEV market clearly dominates with 2.87 million (+104 percent). Europe achieves 0.84 million new BEV registrations (+28 percent). The USA is in the third place with 0.45 million electric light vehicles (+60 percent). South Korea (+129 percent), where production is expanding in 2022, as well as Sweden (+68 percent) and the Netherlands (63 percent) are recorded high growth rates. Declining figures are only found in Italy (-20 percent), where incentives for zero and low-emission vehicles were decided at the end of May.

In August, all major European PHEV markets (Europe total -8 percent) are showing declines except the Netherlands and Germany, where sales are rising moderately. Norway (-46 percent), UK (-26 percent) and Sweden (-19 percent) declined the most. It can be assumed that the relative importance of PHEVs in Europe will continue to decrease as the electric ramp-up gains momentum. This also has to do with the fact that these are usually not volume models. In addition, the subsidy regimes in many countries are under pressure.

Outside of Europe, PHEVs are now in reverse in Canada (-35 percent) and South Korea (-10 percent). However, this is compensated for by the largest market, China, where the PHEV growth is even exceeding the BEV growth at +159 percent.

Elektro Germany September 2022

Overview of New Electric Car Registrations Germany

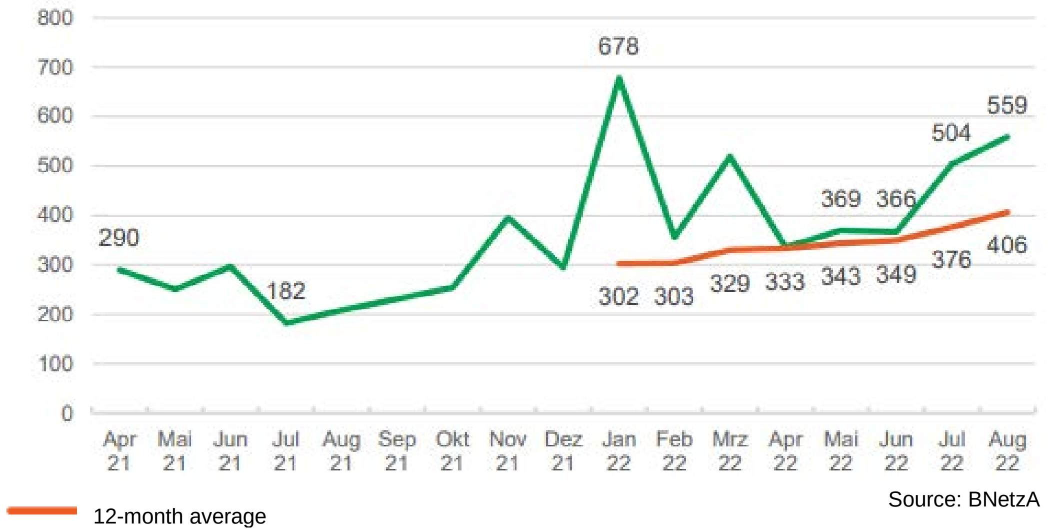
	Sep. 2022	Sep. 2021	22/21 in %	Jan.-Sep. 2022	Jan.-Sep. 2021	22/21 in %	Anteil Sep. 2022	Anteil Sep. 2021	Anteil Jan.-Sep. 2022	Anteil Jan.-Sep. 2021
Elektro gesamt	**72.746**	**56.554**	**29%**	**488.748**	**478.121**	**2%**	**32,4%**	**28,7%**	**26,2%**	**23,7%**
darunter										
BEV	44.389	33.655	32%	272.473	236.695	15%	19,7%	17,1%	14,6%	11,7%
Plug-In Hybrid (PHEV)	28.336	22.842	24%	215.647	241.064	-11%	12,6%	11,6%	11,5%	11,9%
Brennstoffzelle	21	57	-63%	628	362	73%	0,0%	0,0%	0,0%	0,0%
Zum Vergleich:										
Hybrid (ohne Plug-In)	*40.097*	*37.317*	*7%*	*344.702*	*334.008*	*3%*	*17,8%*	*18,9%*	*18,5%*	*16,6%*
dar. Mild-Hybrid*	*35.097*	*30.170*	*16%*	*292.739*	*287.971*	*2%*	*15,6%*	*15,3%*	*15,7%*	*14,3%*
Erdgas	*159*	*190*	*-16%*	*1.483*	*3.262*	*-55%*	*0,1%*	*0,1%*	*0,1%*	*0,2%*
LPG	*1.274*	*906*	*41%*	*11.405*	*6.221*	*83%*	*0,6%*	*0,5%*	*0,6%*	*0,3%*
Alternative Antriebe ges.	114.276	94.967	20%	846.338	821.612	3%	50,8%	48,2%	45,3%	40,7%
Neuwagen gesamt	224.816	196.972	14%	1.867.885	2.017.561	-7%	100,0%	100,0%	100,0%	100,0%

* Akt. Monat sowie bis 2021 geschätzt.

Quelle: KBA, VDA

New registrations of electric cars increased by nearly 29% in September, thereby achieving a volume of 72,800 units. The number of electric cars among all new registrations in September was 32.4%, the highest level this year so far. The new registrations of purely battery-powered cars (BEV) increased by 32%, while plug-in hybrids (PHEV) rose by 24%. A total of 488,800 electric cars have been approved since the year began. Sales are thus 2% higher than the same period last year.

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



Source: BNetzA

Till September 1, 2022, 68,275 charging points (of which 11,044 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 1.535 million e-cars till September 1, there are only 43 charging points left for 1,000 e-cars (or 23 e-cars per charging point). In August, the BNetzA reported an additional 2,474 charging points, which corresponded to 559 charging points per week, including late-reported registrations.

The speed of expansion increased the moving twelve-month average to 406 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 more than fivefold.

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VDA German Association of the Automotive Industry