

Press release (Embargoed until July 11, 2019, 6:00 a.m. CEST)

Electromobility Report 2019.

Sales trends in core markets (Update: Jan-June 2019)

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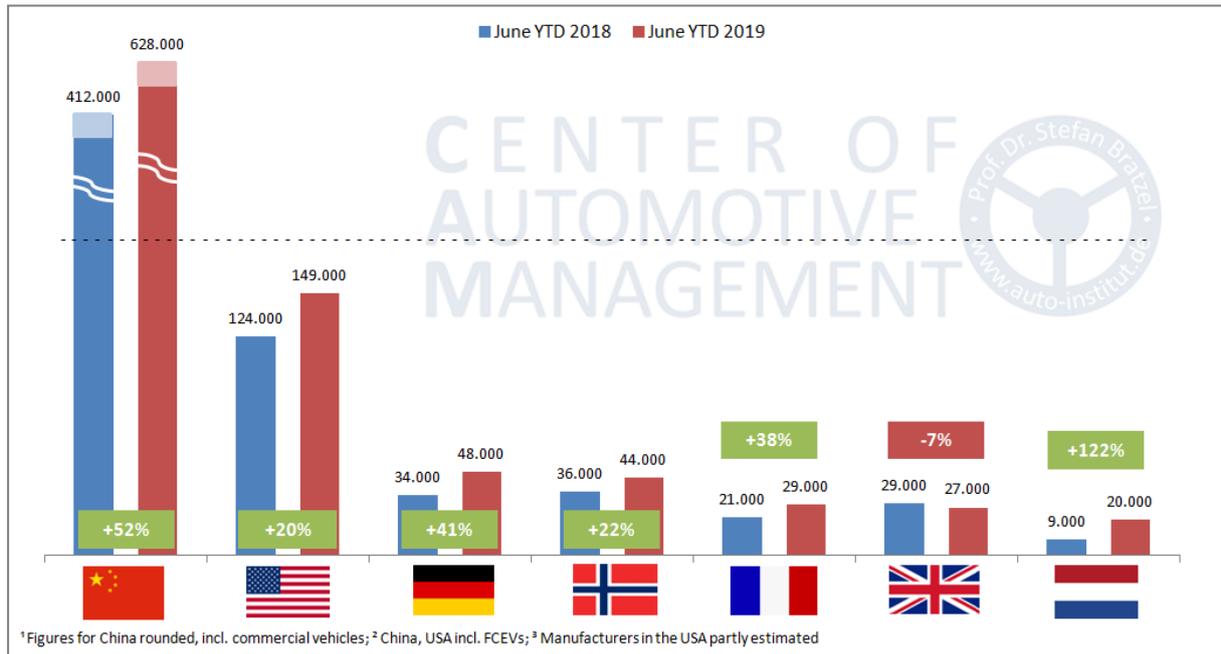
Bergisch Gladbach, 10th of June 2019

- *E-Mobility increases in China despite negative overall market trend.*
- *In Norway, the market share of e-vehicles is increasing to 56 percent.*
- *Germany is rising to become the third largest electromobility market in absolute sales figures.*

Electromobility continues to gain momentum in 2019, despite a decline in overall registration figures in key automotive markets. China and Norway remain the drivers and exceptions to global electromobility. In China, the demand for electric vehicles (BEV, PHEV) increased by 52 percent in the first half of 2019, even though the overall market fell by more than 12 percent (including commercial vehicles). In the first six months, sales increased to 628,000 electric vehicles compared to the prior-year period (New Energy Vehicles, including fuel cell, commercial vehicles, buses). E-Sales of passenger cars sum up to half a million in 2019. At the same time, the market share of new e-cars car registrations has increased from 2.9 to 5.1 percent. In China sales of PHEV decrease whereas BEV are booming. Around 80 percent of all electric vehicle sales are pure electric (BEV) (see Figure 1).

In Norway, the market share of electric vehicles in the first half of 2019 rises to “just” 56 percent of new registrations (1st half-year 2018: 47%) after a record-breaking Q1 (61% market share). There was an increase of 22 percent with 23,400 electric vehicles. The share of pure e-vehicles alone has grown to almost 50 percent, while new registrations of plug-in hybrids (PHEV) have dropped significantly to around 10 percent (see Figure 2). These are the core findings of the new “Electromobility Report 2019” released by the Center of Automotive Management (CAM) in Bergisch Gladbach near Cologne. The report analyses current market trends and product strategies of global automobile manufacturers on a regular basis.

Figure 1: Sales trends of electric cars (BEV, PHEV) in key markets 2019-June YTD 2019

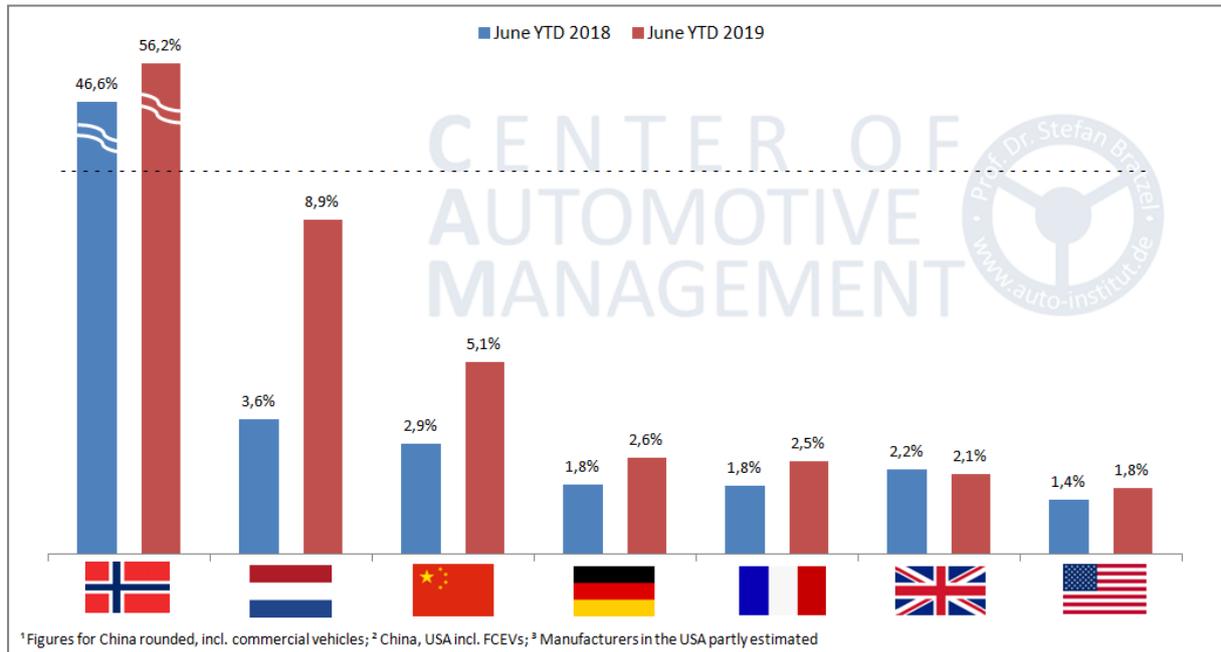


Source: CAM

USA remain the second largest e-vehicle market in of 2019. After six months new registrations of electric cars rose only moderately by 20 percent to 149,000 e-vehicles. While sales of PHEVs are declining, BEVs were able to earn their share in around two-thirds of e-vehicle sales. The market share of e-vehicles is growing in a declining overall market (-2.3 percent) from 1.4 to now 1.8 percent of new registrations and thus remains at a low level in international comparison. The market leader is by far Tesla, which accounts for 56 percent of the e-vehicle sales. In June alone around 21,000 Tesla Model 3 were sold in the US.

Germany is rising to become the third largest electromobility market outpacing Norway for the first time in absolute sales figures. The German automobile market stagnated overall (+ 0.5%), while the e-vehicles, however, can increase significantly. In the first six months of 2019, there was an increase of 41 percent to 48,000 newly registered electric vehicles (2018 June YTD: 34,000). This increases the market share from 1.8 to 2.6 percent. At around 31,000 BEVs, sales of pure electric vehicles are up 80 percent, while plug-in hybrids (PHEV) are down 0.9 percent to just 16,500. At the same time, new registrations for Diesel in Germany are stabilizing in Germany. In the half year of 2019 the market share of Diesel vehicles is 33 percent (2018 June YTD: 32.1 %). New registrations of gasoline vehicles fall again to a share of 59.4 percent (2018: 63.1 %).

Figure 2: Market shares of electric cars (BEV, PHEV) in major automotive markets 2019-1st half-year



Source: CAM

In France, new registrations of e-cars also increased rapidly in 2019 (June YTD) to 29,000 passenger cars (+ 38%). This elevates the market share to 2.5 percent (2018: 1.8 %). Around 73 percent of the electric car sales are BEVs, while plug-in hybrids corresponding to 27 percent.

In the UK, the momentum of e-vehicle sales is declining in a Brexit-frightened market (-3.4 percent overall market decline). In the half-year of 2019, there was a decrease of seven percent to 27,000 e-vehicles. The market share also decreases slightly from 2.2 to now 2.1 percent.

The Netherlands e-mobility is showing tremendous dynamism. Electric vehicle sales there increased by 122 percent to 20,000 units in a strongly declining overall market (-10.4 percent). The market share thus increases from 3.6 to now far above average 8.9 percent. At the same time, BEVs, with 86 percent of the e-vehicle registrations, ensure great dynamism, whereby the Tesla Model 3 is also by far the sales racer here.

Study director Stefan Bratzel comments: "Electric mobility is about to make its breakthrough in the core automotive markets, but we expect this from 2020 onwards. It is striking that e-vehicle sales are already able to tackle a generally declining overall market. The dynamics are based on the pure electric vehicles, while the sales figures of plug-in hybrids are currently declining. "

Electromobility Report

The Electromobility Report of CAM analyses e-mobility market and sales trends of automobile manufacturers on a regularly basis. Main focus are the core markets of China, USA, and the European Union. Different market ramp-up scenarios for 2025/2030 are designed considering key-influencing factors like charging infrastructures, regulations, products and the e-mobility strategies of OEM. The report uses different methods and sources of information like the CAM AutomotiveINNOVATIONS and PERFORMANCE data bases, web research and expert interviews to offer reliable insights on electromobility for decision-makers.



ELECTROMOBILITY REPORT 2019

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For more information: <http://auto-institut.de/e-mobility-studien.htm>

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