

Press release

E-mobility in international comparison.

Sales trends in the first quarter of 2019

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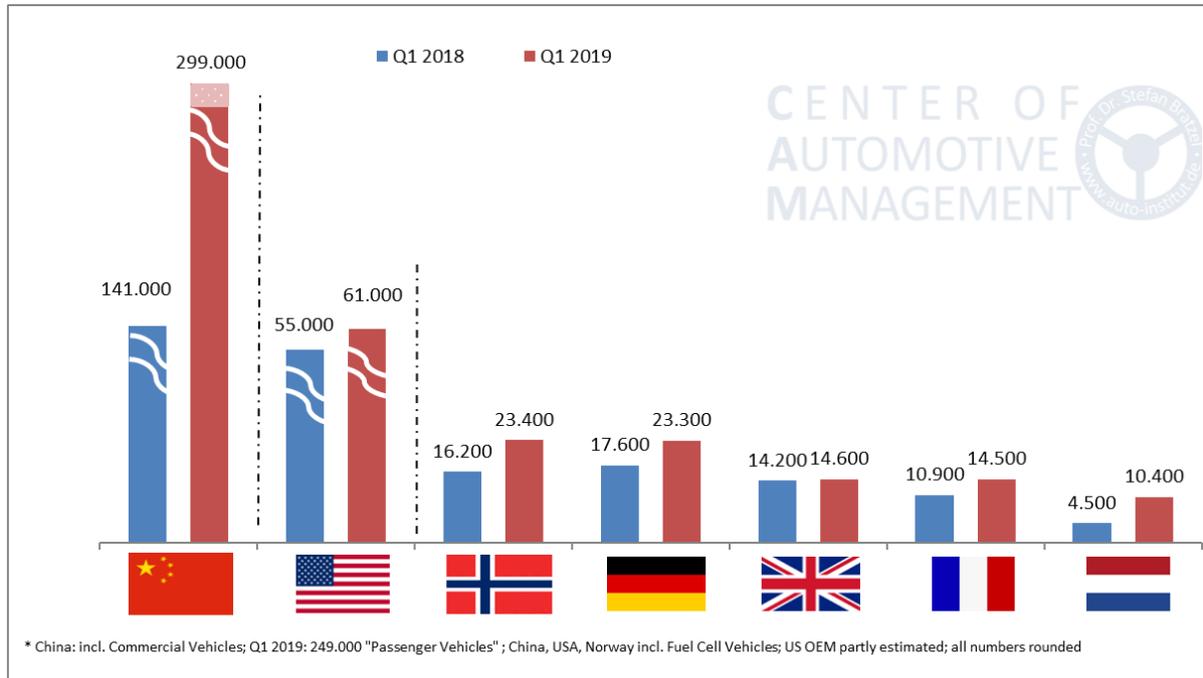
Bergisch Gladbach, 13. April 2019

- *E-vehicles in the first quarter of 2019 with high momentum with declining overall automotive market*
- *Doubling of e-vehicle sales in China*
- *In Norway, the market share of e-vehicles is increasing to 61 percent*
- *Germany with moderate growth of 33 percent and an increasing market share to 2.6 percent*

Electromobility will continue 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) more than doubled in the first quarter of 2019, while the overall market fell by 11 percent (including commercial vehicles, only passenger vehicles: -14 percent). In the first three months, sales increased to 299,000 electric vehicles compared to the previous year's first quarter (New Energy Vehicles, including fuel cell, commercial vehicles, buses, including: 249,000 passenger cars). At the same time, the market share of e-cars for new car registrations has increased from 2.0 to 4.7 percent. Around 80 percent of these are pure electric vehicles (BEV) (see Figure 1).

In Norway, the market share of electric vehicles in the first quarter of 2019 rises to a record of now 61 percent (!) of new registrations (Q1 2018: 48%). There was an increase of 45 percent with 23,405 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 (see Figure 2). These are the core findings of the industry study "Electromobility in International Comparison" by the Center of Automotive Management (CAM) in Bergisch Gladbach near Cologne, in which current market trends and product strategies of global automobile manufacturers are regularly balanced.

Figure 1: Sales trends of electric cars (BEV, PHEV) in key markets 2019-Q1 (2018-Q1)

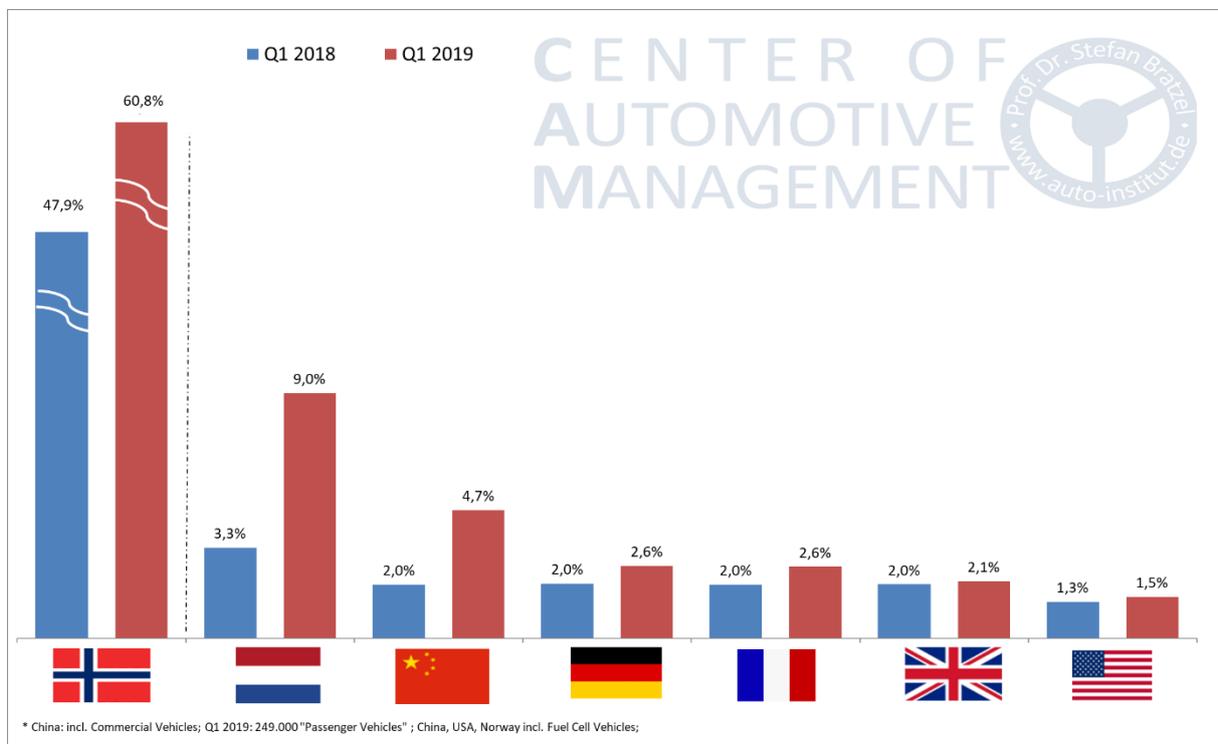


Quelle: CAM

After sales figures the second largest e-vehicle market remains the USA. There, new registrations of electric cars in the first quarter of 2019 rose only moderately by 11 percent to 61,000 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 from 1.3 to now 1.5 percent of new registrations and thus remains at a low level in international comparison. The market leader is by far Tesla, which account for about half of the vehicle sales there.

The German automobile market stagnated overall (+ 0.2%), while the e-vehicles, however, can increase significantly. In the first quarter of 2019, there was an increase of 33 percent to 23,300 newly registered electric vehicles (Q1 2018: 17,600). This increases the market share from 2.0 to 2.6 percent. At around 15,900 BEVs, sales of pure electric vehicles are up 75 percent, while plug-in hybrids (PHEV) are down 13 percent to just 7,400. The best-selling model is the Tesla Model 3 with 3,200 units, followed by Renault Zoe with 2,700 and BMW i3 with nearly 2,000 cars sold. At the same time, new registrations for Diesel in Germany are stabilizing in Germany. In March 2019, the market share of Diesel vehicles is 33 percent (March 2018: 31.3 percent). New registrations of gasoline vehicles fall again to a share of 59.3 percent (64%)

Figure 2: Market shares of electric cars (BEV, PHEV) in major automotive markets 2019-Q1 (2018-Q1)



Quelle: CAM

In the UK, the momentum of e-vehicle sales is low in a declining overall market (-2.4%). In the first quarter of 2019, there was an increase of 2.8 percent to 14,600 units. The market share thus increases slightly from 2.0 to now 2.1 percent.

In France, new registrations of e-cars also increased in the first quarter of 2019 to 14,500 passenger cars (+ 33%). This increases the market share to 2.6 percent (2018 Q1: 2.0 percent). Around 73 percent of the BEVs are the electric car sales, while accounts for plug-in hybrids corresponding to 27 percent.

The Netherlands is showing tremendous dynamism. Electric vehicle sales there increased by 132 percent to 10,400 units in a strongly declining overall market (-14.4 percent). The market share thus increases from 3.3 to now far above average 9.0 percent. At the same time, BEVs, with 83 percent of the e-vehicle registrations, ensure great dynamism, whereby the Tesla Model 3 is also the sales racer here.

Study Director Stefan Bratzel comments: "Electric mobility is about to make its breakthrough in the central 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. "

The Center of Automotive Management (CAM) at the University of Applied Sciences in Bergisch Gladbach (near Cologne) regularly examines the sales trends and trends in key automotive markets as well as the innovations of automobile manufacturers as part of the industry study "Electromobility in International Comparison". The sales trends and framework conditions in relevant countries as well as the vehicle technology innovations of more than 30 automotive groups and 90 car manufacturers since 2005 are analyzed. Altogether more than 12,000 innovations are currently inventoried in the CAM Innovations database. Every single innovation is systematically evaluated and weighted according to the M.O.B.I.L approach (maturity, originality, benefit / customer benefit, innovation level / degree of innovation). The sum of the weighted innovations is used to calculate the innovative strength of an automobile manufacturer.

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