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Electric Vehicle Sales Review

Q3 2021

Foresight to drive the industry
August 2021

This publication has been developed in collaboration between Strategy&, PwC's global strategy consulting business, alongside PwC Autofacts' Automotive industry and function experts. Together, we transform organizations by developing actionable strategies that deliver results.

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China reclaims global BEV leadership

At the end of 2020, the average market share for battery electric vehicles (BEVs) in the Western Europe 5+5 countries was higher than in China. In the six months since, however, BEV market share in China has almost doubled, from 5.2% to 9.8%, propelled by an extension of government subsidies, and has overtaken the WE 5+5 average again (now standing at 8.6%).

Nevertheless, if we break down Europe into its constituent countries, the picture becomes more dynamic. Germany (10.7%), Norway (a huge 57.3%), Sweden (12.6%), Austria (11.4%), the Netherlands (10.7%) and Switzerland (9.9%) are all ahead of China in terms of market share. The UK (8.1%) and France (7.9%) do not lag too far behind, but Italy (3.4%) and Spain (2.3%) have much ground to make up.

Given the EU proposal from the 14th of July for a complete ban on the sale of non-electric cars by 2035, such disparities need inevitably to disappear over time if market shares are to make the necessary consistent strides to meet the eventual target.

Meanwhile, in the United States, the highly successful launch of the Ford F-150 Lightning pickup truck, the electric version of the most popular vehicle in the country, has raised expectations that BEVs are about to enter the mainstream of American driving for the first time.

China has returned to lead the global BEV market. Not only dominating in numbers, but also in growth and market share, China is leading the way to transforming its vehicle market.

59%

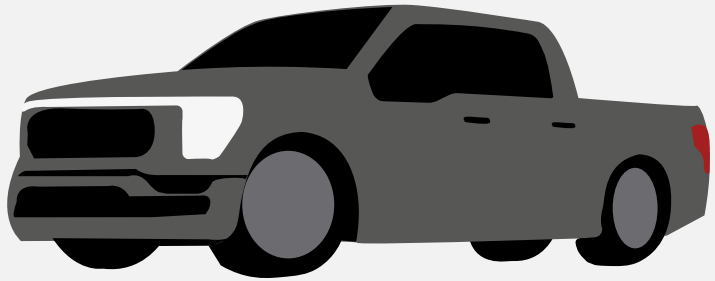
of global BEVs purchased in China in first half of 2021

New models and strategies capture attention

Ford's electric pick-up truck excites customers and rocks competitors

Ford's F-150 Lightning, a battery-powered electric version of the company's popular pick-up truck, registered more than 100,000 customer reservations in the three weeks following its unveiling. The first trucks will be delivered in spring 2022.[1]

The F-150 Lightning will be offered with two battery capacity options, offering driving ranges of around 370 or 480 kilometres (EPA Test Cycle), at lower prices than the equivalent gasoline models.[2]



Tesla extends manufacturing in China

Tesla has received approval from the Chinese government to produce and sell the Model Y Standard Range in the country. The new version uses LFP battery cells like the slightly smaller Model 3 Standard Range.[3] It has a range of 455 kilometres (WLTP Test Cycle).[4]

Early reports in China suggest substantial interest in the model, citing 15,000 orders in the first two days. Despite a delay to the opening of the company's new plant near Berlin, the Shanghai factory will instead initially export the Model Y to Europe as well, for first vehicle deliveries to customers there in August.[5]

The Model Y will be available in Europe in Long Range AWD and Performance versions only, using high-performance NMC battery cells. Tesla CEO Elon Musk has said that the Model Y has the potential to outsell all other vehicles that the company builds.[6]

Volkswagen reveals "New Auto" strategy

Volkswagen has unveiled a strategy that aims to grow revenues through an increased focus on BEVs and software-driven services.[7] VW is expecting BEVs to account for 50% of its global sales by 2030, and 70% in Europe. A new battery production model is projected to reduce costs by half through introducing a variety of chemistries within a single, massive-scale "unified cell" prismatic format. The plan is for the unified cell to enter production in 2023.[8]

NIO ramps up battery-swapping strategy

NIO plans to have 4,000 battery-swap stations available for use by 2025, with 1,000 of them outside China. The company has already built 300 such stations – places where drivers can quickly get their battery swapped for a fully-charged one rather than waiting during a re-charge.[9] Having sold 120,000 BEVs, NIO hopes the expansion will provide an improved service experience to its growing customer base.[10]

Sources
[1] Business Insider, 10 June 2021
[2] Autocar, 21 May 2021
[3] Reuters, 8 July 2021
[4] Electrive.com, 14 July 2021
[5] Automotive News, 13 July 2021
[6] Clean Technica, 13 July 2021
[7] Autocar, 13 July 2021
[8] SAE, 16 March 2021
[9] Bloomberg News, 9 July 2021
[10] Yahoo Finance, 13 July 2021

EU and USA plan far-reaching policy changes

Brussels seeks to reduce carbon footprint

The European Commission has set out major plans to become the world's leader in achieving net zero emissions. In its "Fit for 55" legislative proposal, the commission unveiled 13 policies designed to ensure that Europe meets its goal of reducing average greenhouse emissions gas emissions by 55% by 2030 (from 1990 levels) and net zero by 2050.

The focal point of the new plan is an extension of the Emissions Trading Scheme (ETS), which makes companies pay for the cost of polluting. The mobility sector will now be included in the ETS, and new vehicles will be subject to stricter CO_2 reduction standards. The targets are supported by a ban on selling new diesel and petrol cars by 2035.[1] Member states will also have to expand charging infrastructure in line with zero-emission car sales, and install public charging points at regular intervals on major highways, mimicking today's filling station networks.[2]

The proposed measures are sure to generate continued opposition from member states and industry lobbyists which argue that the speed of change and burgeoning regulation will create major financial and operational challenges.[3]

Biden gets behind infrastructure framework

US President Biden has struck a deal with a group of senators on a US$ 1.2 trillion Bipartisan Infrastructure Framework regulation. This investment plan includes US$ 15 billion that is to be split evenly between the expansion of the BEV infrastructure and the electrification of transit and school buses. The US$ 7.5 billion earmarked for BEV charging infrastructure would help to build a national network of BEV charging stations on highways, and in rural and disadvantaged communities.[4]

Despite representing a substantial reduction from the original proposed sum, this investment would still represent the largest ever spending commitment from the federal government on transit.[5]

Sources
[1] Financial Times, 14 July 2021
[2] European Commission, 14 July 2021
[3] Eurativ, 14 July 2021
[4] The White House, 14 June 2021
[5] The White House, 26 June 2021

Different markets, different paths

The BEV markets of Europe, China and the USA have not been subject to the same driving forces. The driving factors behind market development vary significantly, requiring automakers to adjust their product offering for each region accordingly.

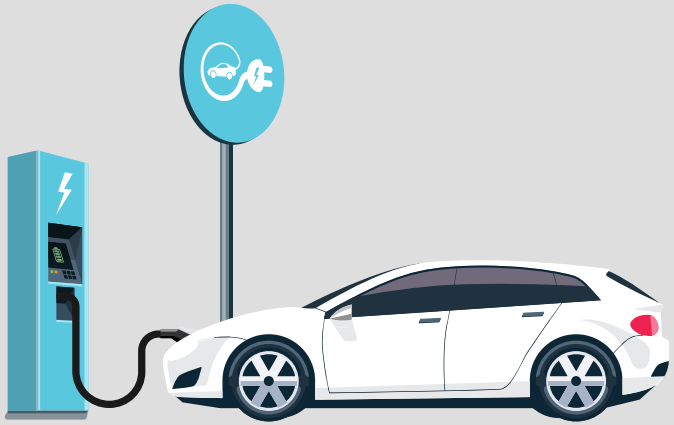
The Chinese market has been powered by a strategic approach. The government has two main motivations for pushing the BEV agenda – technological and environmental. It aspires to make China a leading hi-tech nation, while also cutting premature deaths and improving its citizens' quality of life through reducing pollution. To achieve these goals, it launched a massive subsidy program for BEV R&D, production and sales. The bulk of available BEVs in China has been small and inexpensive, reflecting a mass market attracted by an affordable cost facilitated by the state.

In Europe, on the other hand, the authorities responded, albeit belatedly, to a significant grass-roots movement galvanized by concerns about pollution and climate change. Manufacturers first offered models that failed to ignite customer interest, despite the desire for BEVs. Subsequently, it was the high acquisition price that deterred private customers. Governments stepped in to offer incentives, merely accelerating the development of a market that was on course anyhow for eventual rapid expansion. Falling manufacturing costs will lead to a natural reduction in prices and soak up latent demand. The most popular BEV models in Europe, such as the Renault ZOE in France and the Golf-sized VW ID.3 in Germany, demonstrate the mainstream nature of the European market.

In the United States, demand has been mostly confined to the luxury market, with high-tech customers seeking the latest gadgets. The Biden administration's investment and planned incentives, increasing environmental awareness, and continually advancing technology can all play a role in moving the market into the mainstream. The initial success of the Ford F-150 Lightning reservations suggest a major step in that direction.

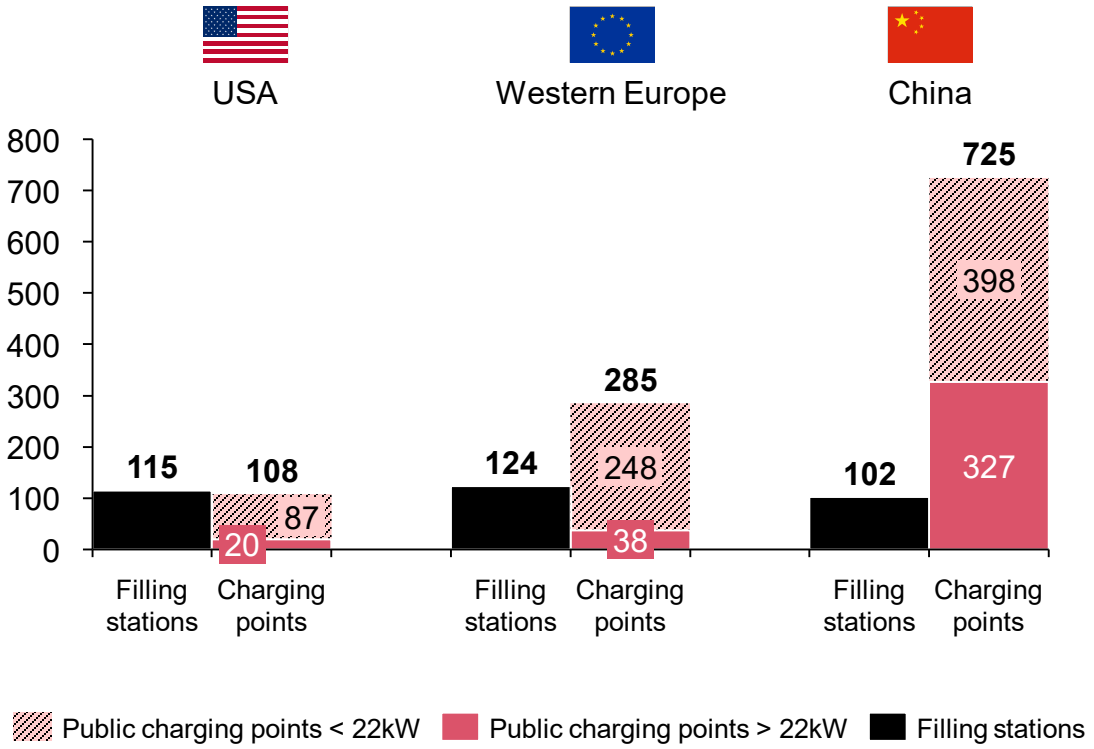
+182%

Year-on-year increase in BEV sales for all analyzed markets combined for the first half of 2021



China has 3 times more public high-power charging points than filling stations, while other regions lag behind

Filling stations vs. BEV charging points year-end 2020 (in '000 units)



Key insights

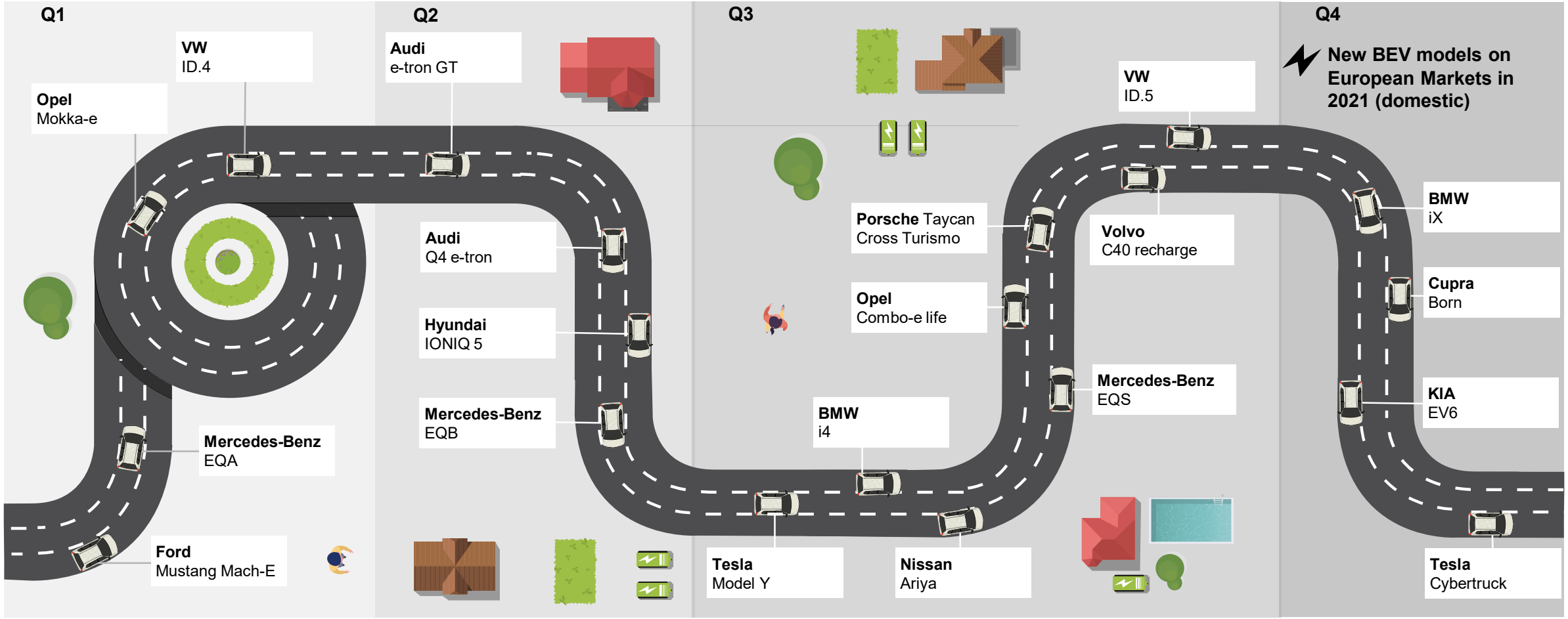
- Charging infrastructure is generally categorized into domestic charging at home or work (<22 kW charging power), destination charging at publicly accessible commercial locations such as shopping malls (<50 kW), and en-route charging at public roadside locations (>50 kW).
- Market research suggests that in 80% of all cases, BEVs are charged at home and/or at the work place. At the end of 2020, we estimated there were around 1.5 million private chargers installed in Western Europe, 1.7 million in the USA, and 2.4 million in China, plus 1.2 million, 300 k, and 1.0 million chargers in workplaces or parking garages, respectively.
- Governments are calling out new targets for public-access BEV charging infrastructure. The US administration plans to establish 0.5 million BEV chargers (final decision pending), the European Union plans 1 million charging points by 2025 (Green Deal) while already in 2015 China targeted 4.8 million home and public charging points by 2020.[3]

	USA	W. Europe	China
BEV[1] per charging point (>22kW)	91	49	16
ICE[2] per filling station	2,415	2,501	1,883

[1] Vehicle Parc BEV [2] Vehicle Parc ICE incl. Hybrid
[3] Ministry of Industry and Information Technology

Source: Autofacts analysis, Reuters, European Union, Chinese Govt., EAFO, FuelsEurope, IEA

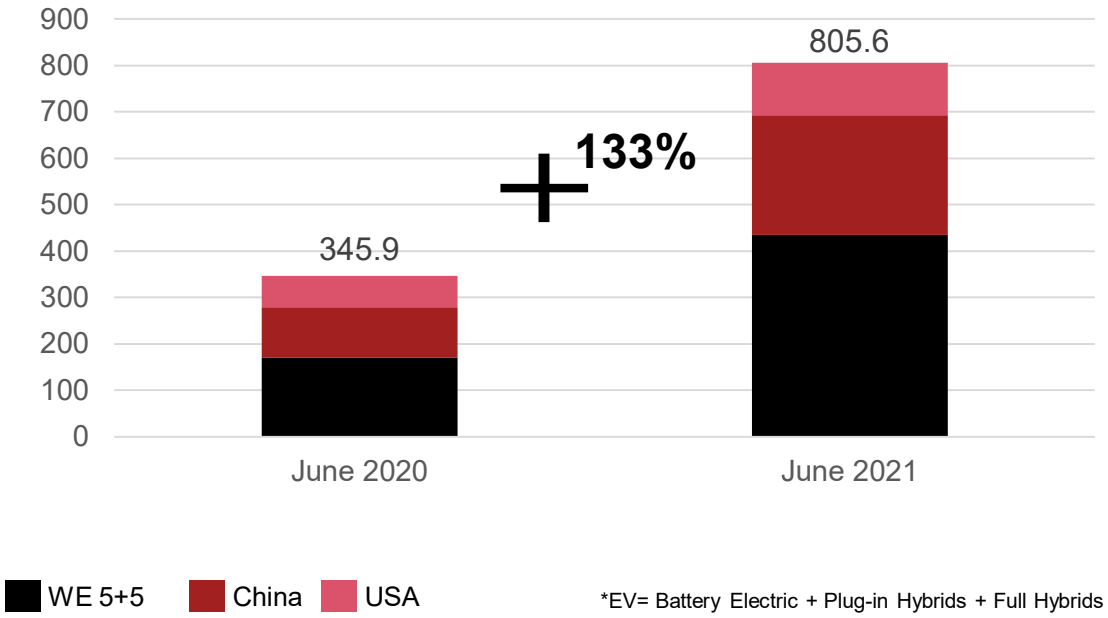
New BEV models drive ongoing market growth



High EV growth continues globally

Key Markets

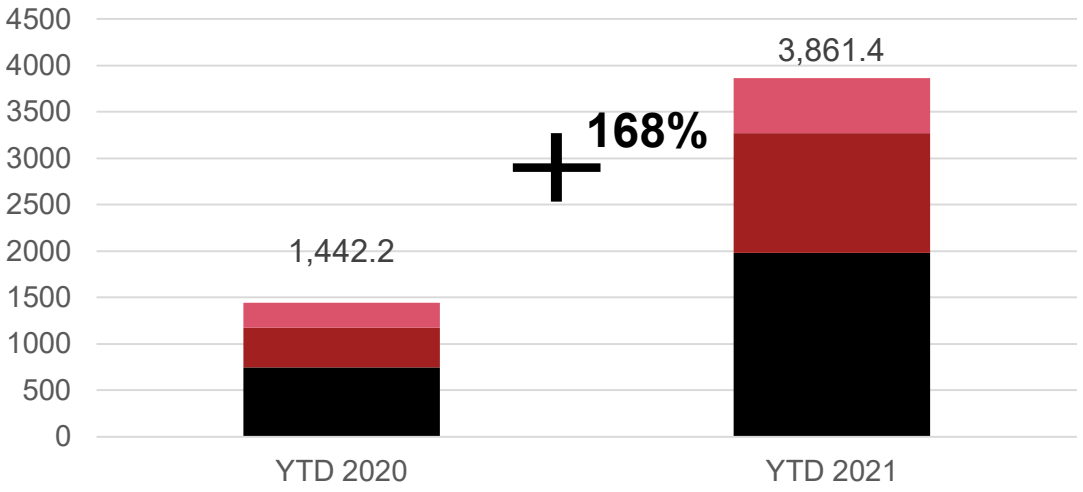
June 20 vs. June 21 (in ‘000 units)



*EV= Battery Electric + Plug-in Hybrids + Full Hybrids

Electric Vehicles (EVs*)

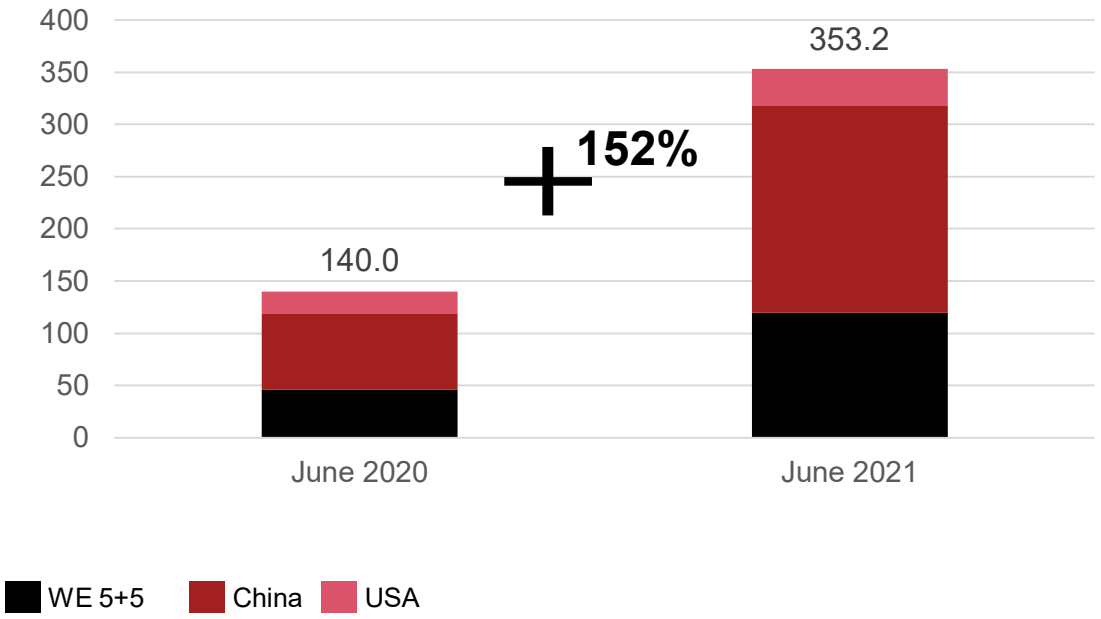
YTD June 20 vs. YTD June 21 (in ‘000 units)



1.6 Million BEVs sold in the first half of 2021

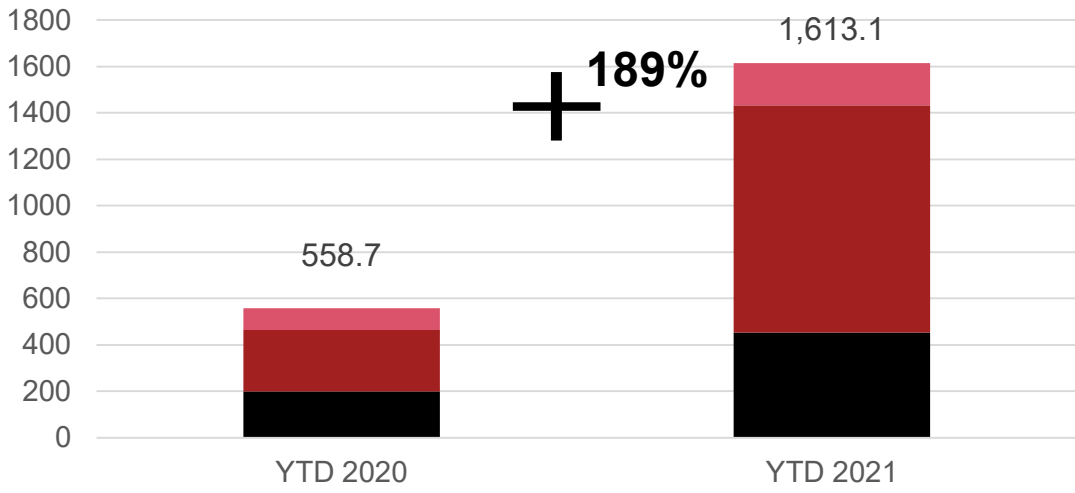
Key Markets

June 20 vs. June 21 (in ‘000 units)



Battery Electric Vehicles

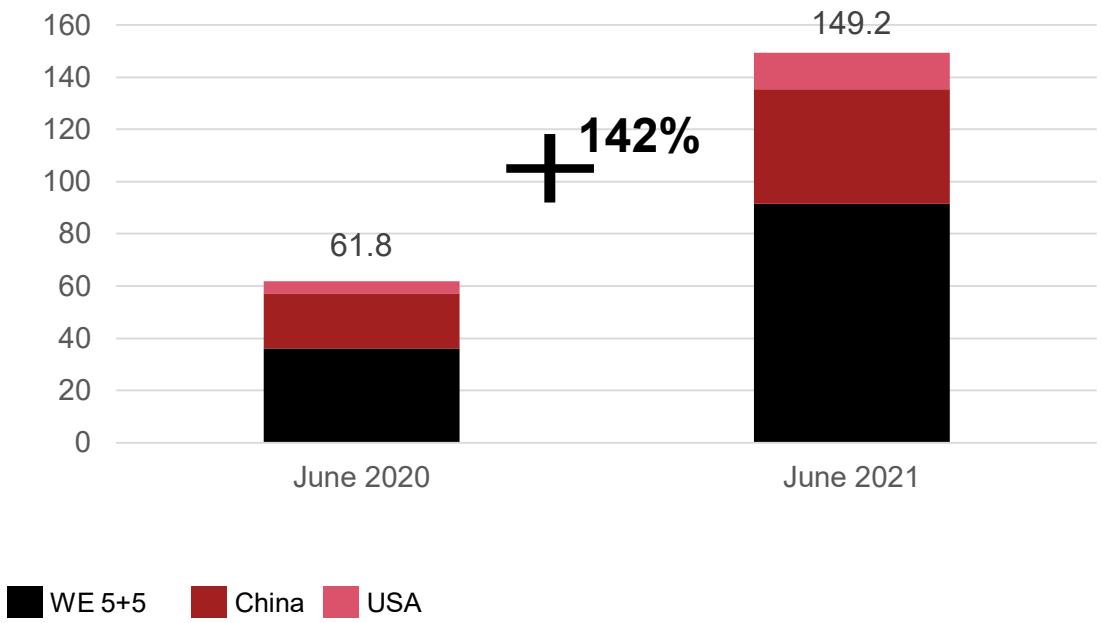
YTD June 20 vs. YTD June 21 (in ‘000 units)



Plug-ins with major growth in WE 5+5

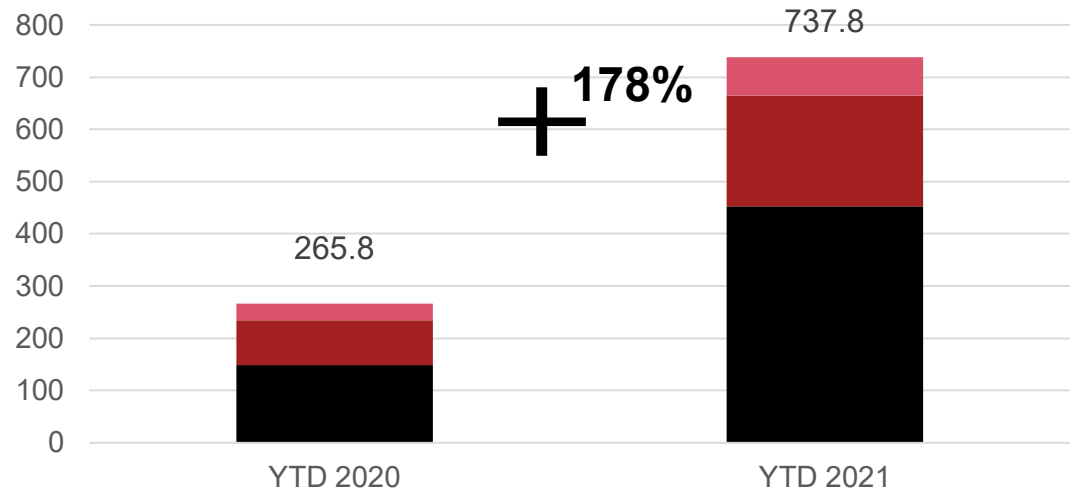
Key Markets

June 20 vs. June 21 (in ‘000 units)

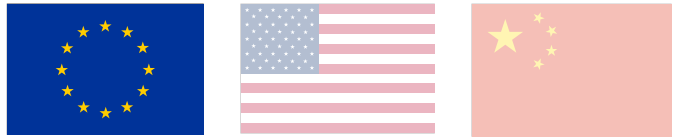


Plug-in Hybrid

YTD June 20 vs. YTD June 21 (in ‘000 units)



Western Europe 5+5



European Top 5: France, Germany, Italy, Spain, and UK

In the first half of 2021, BEV sales in the top 5 European markets jumped by 147% in a year-on-year comparison, reaching 336,000 units sold. PHEV sales also thrived, up by 248% to 350,000 units. However, when we drill down into the respective countries, a more varied picture emerges.

Helped in part by generous subsidies, Germany is the dominant market, boasting 44% of all BEV sales in the five countries in the first half of the year, and 47% of PHEV sales. BEV market share within Germany has increased dramatically in 12 months, from 3.7% in June 2020 to 10.7% now. The UK, too, has shown a significant rise in BEV market share in the same period, up from 4.7% to 8.1%. France sells a similar number of BEV units as the UK, with a similar market share (7.9%). The combined total of BEV sales in Italy (30,000 units) and Spain (11,000 units), however, accounted for just 12% of the total in the top five markets.

In the first half of 2021, BEV sales worldwide by German OEMs grew as strongly as the global market, while their global PHEV sales increased by 20 percentage points more than the global market. German OEMs were able to defend their global market share of BEV sales (15%) in the first half of 2021. As for PHEVs, almost one in two PHEVs (49%) worldwide comes from a German manufacturer.

Other European markets: (+5)

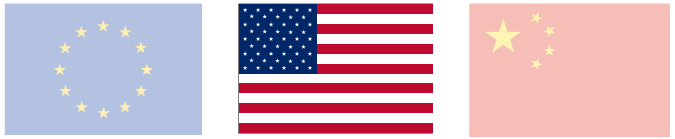
BEV sales in Austria demonstrated the largest growth among the five other European markets covered, with a rise of 219% relative to the first half of 2020. Sweden and Switzerland (145% and 117% respectively) also registered very sizeable increases. In the Netherlands, however, BEV sales only went up by 17%.

WE 5+5	2021 Q2	Comparison to 2020 Q2
BEV	267,000	+223%
PHEV	240,000	+258%
Hybrid	580,000	+280%
Total	**1,087,000**	**+259%**

Focus Market: Turkey

Turkey, as a potential future BEV producer, has voiced major ambitions to become a leading BEV market. While the overall sales of BEVs (891 units) and PHEVs (295 units) are still low through June 2021, Hybrids were able to increase their market share to 6.3% – similar to the share of Hybrids in Norway (7.1%).

United States



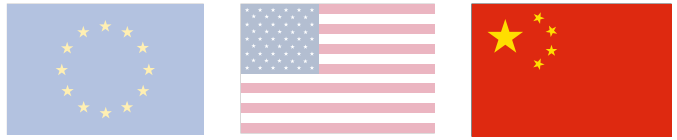
USA

The United States have recorded a significant increase in BEV and PHEV sales in the first half of 2021, up by 92% and 137% respectively. However, this growth starts from a low base, with market shares now standing at 2.2% for BEVs, and 0.9% for PHEVs.

These market shares have only registered marginal increases in recent years. The BEV market share was 1.3% in June 2019 and 1.5% in June 2020. A much-anticipated big bang has yet to arrive, although there are strong hopes that the commitment to the BEV sector shown to date by the Biden administration may ultimately reap its rewards.

USA	2021 Q2	Comparison to 2020 Q2
BEV	106,000	+121%
PHEV	43,000	+264%
Hybrid	160,000	+104%
Total	**309,000**	**+123%**

China and other countries in Asia



China

Almost a million BEVs were sold in China in the first half of 2021, with the market almost quadrupling in size from the Covid-affected first half of last year, and more than doubling in size from a similar period in 2019. Plug-in sales of 212,000 are almost double those recorded in the first half of 2019.

Japan

Japan's EV market continues to rely almost exclusively on the sale of hybrids, sales of which surpassed 500,000 in the first half of 2021. BEV sales remain low (just 8,000 units), with a market share of 0.6%. While it may seem paradox that the inventors of Hybrid vehicles are reluctant to embrace BEVs, it is easily explained by the fact that Japan's electricity mix relies heavily on CO2-intensive coal and oil firing, making highly-efficient combustion engines still more environmentally friendly.

South Korea

EV penetration remains low in South Korea, although there has been a small increase in BEV market share, from 2.2% June 2019 to 3.5% two years later. A policy to support BEV adoption has been announced.

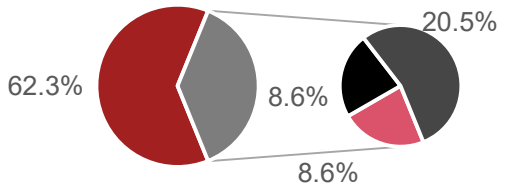
China	2021 Q2	Comparison to 2020 Q2
BEV	548,000	+192%
PHEV	130,000	+121%
Hybrid	53,000	+19%
Total	**731,000**	**+151%**

Shares of EV registrations

EV registrations YTD June 2021

WE 5+5

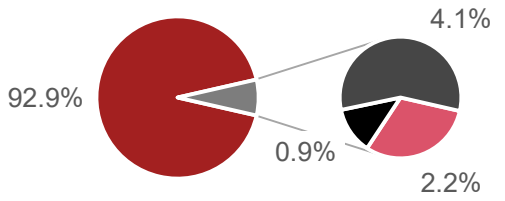
Total registrations	5,251,706
EV registrations	1,979,373



of which BEV	451,828
of which PHEV	452,635
of which Hybrid	1,074,910

USA

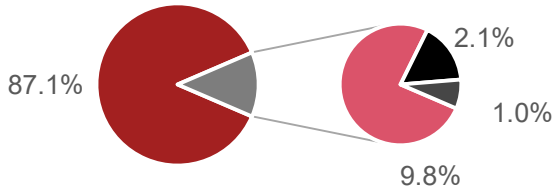
Total registrations	8,273,426
EV registrations	589,906



of which BEV	181,242
of which PHEV	73,400
of which Hybrid	335,264

China

Total registrations	9,994,000
EV registrations	1,292,076



of which BEV	980,000
of which PHEV	211,800
of which Hybrid	100,276

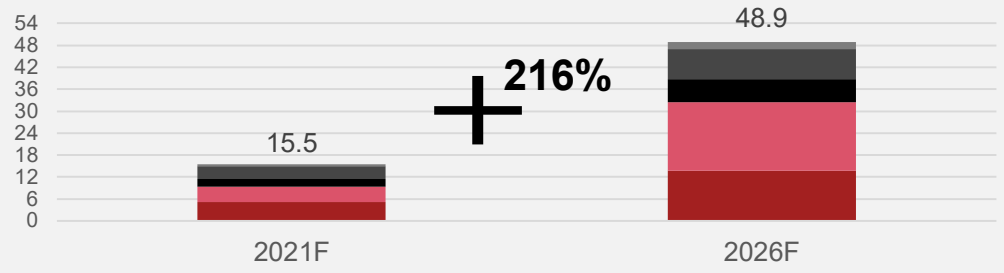
ICE BEV PHEV Hybrid

Electrified vehicle assembly forecast by region

1

EV Assembly by Region

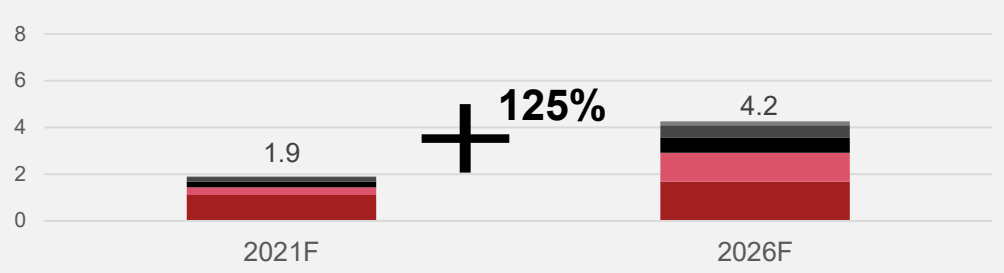
2021F vs. 2026F (in million units)



2

Plug-in Hybrid Vehicle Assembly

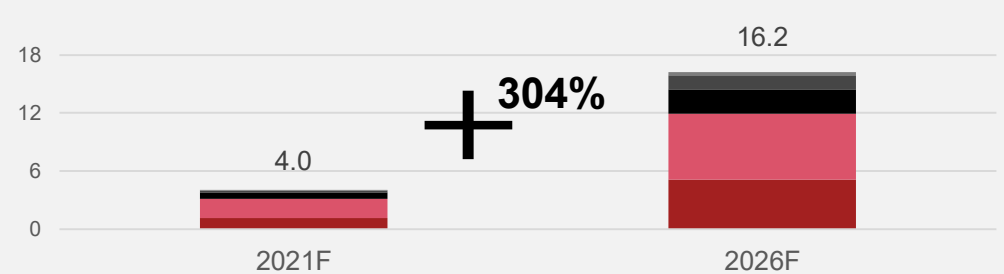
2021F vs. 2026F (in million units)



3

BEV Vehicle Assembly

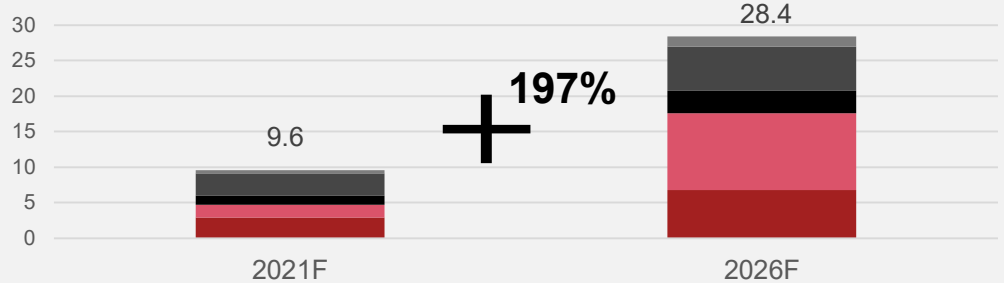
2021F vs. 2026F (in million units)



4

Full and Mild Hybrid Vehicle Assembly

2021F vs. 2026F (in million units)



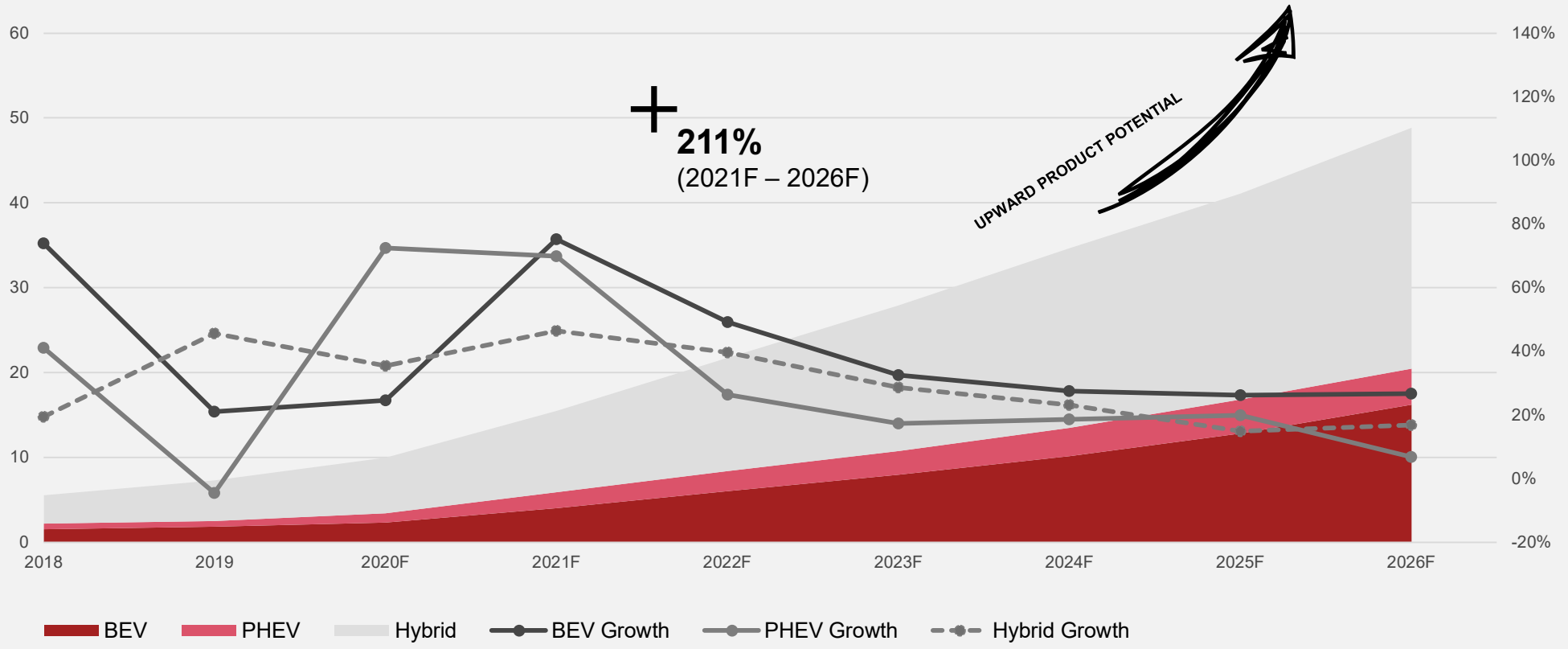
Western + Central Europe | China | NAFTA | Asia-Pacific (w/o China) | RoW

Source: Assembly Forecast by IHS Markit, June 2021 Release

Electric vehicle assembly forecast

5

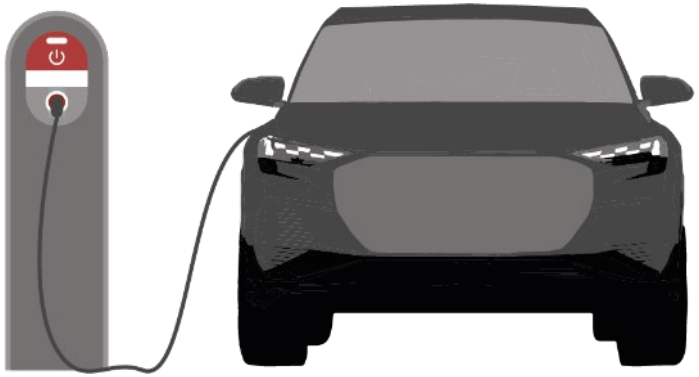
EV assembly by powertrain type
2018 – 2026F (in million units, percent)



Source: Assembly Forecast by IHS Markit, June 2021 Release

Overview: BEV model launches

2021 not exhaustive

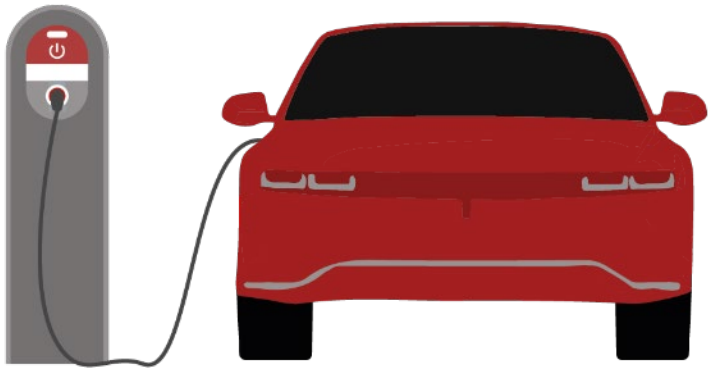


Brand	Model	Launch	Quarter
Audi	e-tron GT	2021	Q2
Audi	Q4 e-tron	2021	Q2
BMW	i4	2021	Q3
BMW	iX	2021	Q4
Chevrolet	Bolt EUV	2021	Q2
Cupra	el-Born	2021	Q4
Dacia	Spring Electric	2021	Q1
Ford	Mustang Mach-E	2021	Q1
GMC	Hummer EV	2021	Q4
Hyundai	IONIQ 5	2021	Q2
Kia	EV6	2021	Q4
Mercedes-Benz	EQA	2021	Q1
Mercedes-Benz	EQE	2021	Q1
Mercedes-Benz	EQB	2021	Q2
Mercedes-Benz	EQS	2021	Q3
Micro Mobility	Microlino	2021	Q3

Source: Automotive News, JPMorgan, IHS Markit

Overview: BEV model launches

2021 not exhaustive

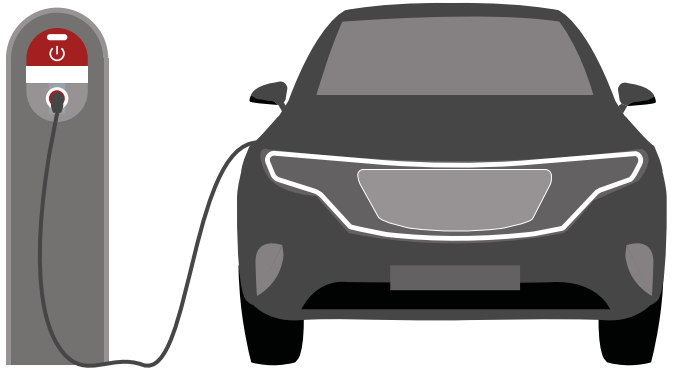


Brand	Model	Launch	Quarter
Nissan	Ariya	2021	Q3
Opel	Mokka-e	2021	Q1
Opel	Combo-e Life	2021	Q3
Peugeot	E-308	2021	Q2
Porsche	Taycan Cross Turismo	2021	Q3
Renault	Mégane Electric-SUV	2021	Q3
Rivian	R1T	2021	Q4
Rivian	R1S	2021	Q4
Skoda	Enyaq iV	2021	Q2
SsangYong	E100	2021	Q3
Tesla	Model Y	2021	Q3
Tesla	Cybertruck	2021	Q4
Volvo	C40 Recharge	2021	Q3
VW	ID.4	2021	Q1
VW	ID.5	2021	Q3

Source: Automotive News, JPMorgan, IHS Markit

Overview: BEV model launches

2022–2025 not exhaustive

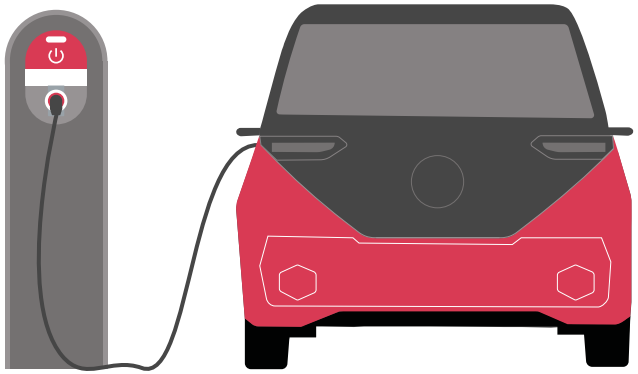


Brand	Model	Launch
Alfa Romeo	City-SUV	2022
Audi	e-tron GT Sportback	2022
Audi	Artemis (Landjet)	2024
BMW	i7	2022
Bollinger	B2	2022
Cadillac	Lyriq	2022
Cadillac	Celestiq	2025
Chevrolet	Silverado Electric	2024
Cupra	Tavascan	2023
Faraday Future	Ocean	2022
Fisker	Polestar 3	2022
Ford	F-150 Lightning	2022
Hyundai	IONIQ 6	2022
Lagonda	All-Terrain	2023
Lucid	SUV	2023

Source: Automotive News, JPMorgan, IHS Markit

Overview: BEV model launches

2022–2025 not exhaustive



Brand	Model	Launch
NIO	ES6	2022
NIO	EC6	2022
Porsche	E-Macan	2023
Renault	Zoe RS	2022
Renault	5	2022
Smart	formore	2022
Sono Motors	Sion	2022
Tesla	Roadster	2023
Tesla	Model 2	2024
Volvo	XC20	2025
VW	ID Buzz	2022
VW	ID Vizzion	2022
VW	ID.1	2023
VW	ID Space Vizzion	2023
VW	ID.6	2023
VW	ID.3 R	2024

Source: Automotive News, JPMorgan, IHS Markit

Electric vehicle sales data

Germany, UK, France, Italy, Spain, WE-5

		YTD 2021	Market Share	YTD 2020	YoY YTD	21 Q2	QoY 21 Q2	Jun 21	MoY Jun 21	May 21	MoY May 21	Apr 21	MoY Apr 21
	BEV	148,716	10.7%	44,317	235.6%	84,022	358.1%	33,420	311.6%	26,786	380.2%	23,816	412.7%
	PHEV	163,571	11.8%	49,541	230.2%	85,524	269.9%	31,314	191.3%	27,222	303.0%	26,988	380.4%
	Hybrid	220,827	15.9%	109,670	101.4%	119,501	156.7%	45,250	132.0%	37,145	130.9%	37,106	238.7%
Germany	Total EV	533,114	38.3%	203,528	161.9%	289,047	228.4%	109,984	186.6%	91,153	220.7%	87,910	314.3%
	BEV	73,893	8.1%	30,957	138.7%	42,114	231.6%	19,842	122.9%	13,120	441.3%	9,152	566.1%
	PHEV	58,179	6.4%	19,562	197.4%	31,594	440.4%	12,139	146.4%	9,855	1094.5%	9,600	10005.3%
	Hybrid	242,231	26.6%	91,418	165.0%	132,856	471.2%	52,709	155.4%	42,501	1670.9%	37,646	17011.8%
UK	Total EV	374,303	41.1%	141,937	163.7%	206,564	394.1%	84,690	145.7%	65,476	1059.1%	56,398	3239.1%
	BEV	72,454	7.9%	44,936	61.2%	42,015	120.5%	20,862	52.0%	11,555	180.9%	9,598	692.6%
	PHEV	71,708	7.8%	20,360	252.2%	40,562	277.2%	16,482	125.7%	12,858	326.6%	11,222	2479.8%
	Hybrid	152,124	16.5%	35,854	324.3%	81,587	466.7%	36,390	292.5%	23,335	375.1%	21,862	10115.9%
France	Total EV	296,286	32.1%	101,150	192.9%	164,164	271.4%	73,734	143.3%	47,748	296.6%	42,682	2194.7%
	BEV	30,241	3.4%	9,938	204.3%	16,977	274.0%	7,007	215.1%	5,125	182.5%	4,845	867.1%
	PHEV	37,750	4.3%	5,801	550.7%	21,647	659.5%	7,168	336.0%	7,755	557.2%	6,724	25761.5%
	Hybrid	243,081	27.5%	62,279	290.3%	122,523	344.5%	40,844	155.2%	40,003	253.6%	41,676	16841.5%
Italy	Total EV	311,072	35.2%	78,018	298.7%	161,147	361.1%	55,019	176.9%	52,883	269.7%	53,245	6788.1%
	BEV	10,578	2.3%	5,823	81.7%	6,646	369.0%	2,851	222.1%	2,038	370.7%	1,757	1674.7%
	PHEV	19,171	4.2%	5,576	243.8%	12,012	429.6%	4,472	206.7%	4,461	495.6%	3,079	4947.5%
	Hybrid	110,118	24.1%	47,057	134.0%	67,924	298.4%	26,595	122.2%	22,645	377.3%	18,684	5411.5%
Spain	Total EV	139,867	30.6%	58,456	139.3%	86,582	317.6%	33,918	137.0%	29,144	391.8%	23,520	4613.4%
	BEV	335,882	7.4%	135,971	147.0%	191,774	242.1%	83,982	148.0%	58,624	308.2%	49,168	527.9%
	PHEV	350,379	7.7%	100,840	247.5%	191,339	326.7%	71,575	174.4%	62,151	396.3%	57,613	824.0%
	Hybrid	968,381	21.2%	346,278	179.7%	524,391	307.1%	201,788	160.7%	165,629	319.8%	156,974	1211.0%
WE-5	Total EV	1,654,642	36.2%	583,089	183.8%	907,504	295.1%	357,345	160.2%	286,404	331.7%	263,755	912.9%

Legend

MoY = Month-on-Year
QoY = Quarter-on-Year
YoY = Year-on-Year
YTD = Year-to-Date

Source: Autofacts Analysis, Autoactu, ANFAC, ANFIA, BOVAG, Fourin, KBA, SMMT, Marklines, ODD

Electric vehicle sales data

Sweden, Norway, Netherlands, Switzerland, Austria, WE 5+5

		YTD 2021	Market Share	YTD 2020	YoY YTD	21 Q2	QoY 21 Q2	Jun 21	MoY Jun 21	May 21	MoY May 21	Apr 21	MoY Apr 21
	BEV	22,768	12.6%	9,310	144.6%	17,566	388.5%	8,706	410.3%	3,972	372.3%	4,888	366.0%
	PHEV	46,741	25.9%	23,413	99.6%	19,282	83.3%	9,146	94.8%	5,558	114.5%	4,578	41.6%
	Hybrid	13,897	7.7%	8,263	68.2%	7,318	94.8%	2,922	153.6%	2,404	90.3%	1,992	48.5%
Sweden	Total	83,406	46.3%	40,986	103.5%	44,166	147.1%	20,774	175.0%	11,934	154.2%	11,458	103.8%
	BEV	48,062	57.3%	28,503	68.6%	28,909	137.8%	13,184	161.5%	8,498	146.7%	7,227	96.9%
	PHEV	21,281	25.4%	12,069	76.3%	10,676	82.6%	4,139	62.6%	3,221	78.4%	3,316	121.5%
	Hybrid	5,989	7.1%	5,940	0.8%	3,416	33.0%	1,400	31.5%	1,098	19.9%	918	56.4%
Norway	Total	75,332	89.8%	46,512	62.0%	43,001	109.0%	18,723	116.4%	12,817	107.9%	11,461	99.1%
	BEV	17,450	10.7%	14,945	16.8%	12,359	106.5%	6,196	113.7%	3,630	152.1%	2,533	54.1%
	PHEV	15,938	9.7%	5,619	183.6%	8,221	251.3%	2,879	157.1%	2,631	311.1%	2,711	367.4%
	Hybrid	38,371	23.5%	18,413	108.4%	19,075	177.5%	7,496	174.0%	5,777	177.7%	5,802	182.1%
Netherlands	Total	71,759	43.9%	38,977	84.1%	39,655	160.9%	16,571	145.3%	12,038	189.4%	11,046	158.0%
	BEV	12,319	9.9%	5,688	116.6%	7,583	195.4%	3,690	173.9%	1,919	178.9%	1,974	271.1%
	PHEV	10,356	8.3%	4,410	134.8%	6,041	184.0%	2,286	112.8%	1,837	192.1%	1,918	352.4%
	Hybrid	25,698	20.6%	11,803	117.7%	14,074	144.7%	5,288	78.5%	4,008	128.9%	4,778	360.3%
Switzerland	Total	48,373	38.8%	21,901	120.9%	27,698	165.2%	11,264	109.3%	7,764	153.1%	8,670	334.8%
	BEV	15,347	11.4%	4,805	219.4%	8,727	267.1%	3,614	233.1%	2,709	268.6%	2,404	331.6%
	PHEV	7,940	5.9%	2,575	208.3%	4,217	204.3%	1,399	107.6%	1,507	202.6%	1,311	512.6%
	Hybrid	22,574	16.8%	9,524	137.0%	12,352	141.6%	4,779	104.2%	4,041	117.1%	3,532	287.7%
Austria	Total	45,861	34.1%	16,904	171.3%	25,296	185.0%	9,792	138.9%	8,257	166.9%	7,247	330.9%
	BEV	451,828	8.6%	199,222	126.8%	266,918	222.6%	119,372	159.9%	79,352	268.9%	68,194	346.2%
	PHEV	452,635	8.6%	148,926	203.9%	239,776	257.6%	91,424	152.6%	76,905	311.6%	71,447	486.4%
	Hybrid	1,074,910	20.5%	400,221	168.6%	580,626	279.8%	223,673	155.2%	182,957	286.6%	173,996	871.6%
WE 5+5	Total	1,979,373	37.7%	748,369	164.5%	1,087,320	259.2%	434,469	155.9%	339,214	287.6%	313,637	591.2%

Legend

MoY = Month-on-Year
QoY = Quarter-on-Year
YoY = Year-on-Year
YTD = Year-to-Date

Source: Autofacts Analysis, Autoactu, ANFAC, ANFIA, BOVAG, Fourin, KBA, SMMT, Marklines, ODD

Electric vehicle sales data

China, Japan, USA South Korea, Analyzed Markets

		YTD 2021	Market Share	YTD 2020	YoY YTD	21 Q2	QoY 21 Q2	Jun 21	MoY Jun 21	May 21	MoY May 21	Apr 21	MoY Apr 21
	BEV	980,000	9.8%	265,257	269.5%	548,000	191.5%	198,000	171.2%	179,000	179.7%	171,000	235.3%
	PHEV	211,800	2.1%	85,897	146.6%	130,400	121.4%	44,000	110.5%	38,400	113.3%	48,000	140.0%
	Hybrid	100,276	1.0%	75,516	32.8%	53,270	18.7%	16,713	11.9%	17,456	26.2%	19,101	18.5%
China	Total	1,292,076	12.9%	426,670	202.8%	731,670	150.8%	258,713	137.7%	234,856	145.1%	238,101	173.3%
	BEV	8,407	0.6%	6,897	21.9%	3,231	138.6%	1,307	102.3%	1,238	227.5%	686	107.9%
	PHEV	11,472	0.9%	6,189	85.4%	5,426	149.4%	2,316	126.6%	1,512	191.3%	1,598	151.7%
	Hybrid	518,546	39.5%	444,921	16.5%	216,153	28.3%	79,750	19.2%	65,539	42.8%	70,864	27.2%
Japan	Total	538,425	41.1%	458,007	17.6%	224,810	30.7%	83,373	21.6%	68,289	46.0%	73,148	29.0%
	BEV	181,242	2.2%	94,205	92.4%	105,895	121.3%	35,813	70.3%	37,967	165.8%	32,115	156.1%
	PHEV	73,400	0.9%	30,978	136.9%	42,610	264.4%	13,808	195.8%	15,812	264.4%	12,990	383.8%
	Hybrid	335,264	4.1%	141,978	136.1%	160,028	103.5%	62,833	51.2%	75,025	209.0%	22,170	72.9%
USA	Total	589,906	7.1%	267,161	120.8%	308,533	123.2%	112,454	67.2%	128,804	200.2%	67,275	139.8%
	BEV	30,922	3.5%	20,193	53.1%	18,287	61.4%	4,750	-6.4%	9,223	224.5%	4,314	26.4%
	PHEV	9,883	1.1%	2,899	240.9%	5,743	211.3%	1,889	151.5%	2,043	301.4%	1,811	209.6%
	Hybrid	91,766	10.5%	64,739	41.7%	48,763	13.9%	15,923	-0.7%	14,961	7.7%	17,879	38.9%
South Korea	Total	132,571	15.2%	87,831	50.9%	72,793	30.1%	22,562	3.2%	26,227	52.1%	24,004	42.3%
	BEV	1,652,399	6.4%	585,774	182.1%	942,331	184.5%	359,242	146.6%	306,780	197.8%	276,309	234.6%
	PHEV	759,190	3.0%	274,889	176.2%	423,955	199.2%	153,437	141.5%	134,672	220.2%	135,846	276.4%
	Hybrid	2,120,762	8.3%	1,127,375	88.1%	1,058,840	117.1%	398,892	75.7%	355,938	145.1%	304,010	163.3%
Analyzed Markets	Total	4,532,351	17.6%	1,988,038	128.0%	2,425,126	152.4%	911,571	108.9%	797,390	174.7%	716,165	205.9%

Legend

MoY = Month-on-Year
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YTD = Year-to-Date

Source: Autofacts Analysis, Autoactu, ANFAC, ANFIA, BOVAG, Fourin, KBA, SMMT, Marklines, ODD

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