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First global e-mobility ranking

Europe overtakes China in new electric car registrations

More and more vehicles with electric drive trains are coming onto the market worldwide. They are an important factor in achieving the Paris climate goals 195 countries worldwide have subscribed to and making mobility climate-neutral by no later than 2050. The Munich Mobility Show, which will present world premieres on the road to climate-neutral mobility from 7-12 September 2021, is now also presenting the world's first ranking of development in e-mobility. Going forward, this e-mobility ranking will be compiled on an annual basis to document progress worldwide: Which countries are driving the shift in mobility, how are markets worldwide developing and where are the biggest changes taking place? For this purpose, the Munich Mobility Show has evaluated the global registration data of all vehicles with battery electric (BEVs) and plug-in hybrid drive trains (PHEVs).

Approx. ten million vehicles already on the roads worldwide

The total number of electric cars worldwide can be estimated at approx. ten million vehicles. In absolute numbers, the most electric cars are in China (4.2 million), followed by Europe (3.2 million) and the US (1.7 million).

Europe number one in new vehicle registrations in 2020 - ahead of China for the first time

The differences in market development between continents became especially clear last year. In absolute numbers, Europe

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registered the most new electric cars in 2020, with a total of 1,368,167 vehicles: As a result, it overtook China (1,246,289 cars) for the first time (see table below). Germany once again stands out among European countries with a total of 394,943 new vehicle registrations.

By comparison, 338,359 new electric vehicles were registered in China in 2016, 152,326 in the US (2020: 302,929) and 25,214 in Germany. Five years ago, the total for the whole of Europe was 210,150. This means European sales more than quadrupled during the five years to 2020.

If we count the number of electric cars per 1,000 inhabitants, Europe also leads the way: Statistically, there are 6.1 electrified vehicles per 1,000 inhabitants, compared to the global average of 1.4. The figures for international leaders Norway (81.0), Iceland (36.8) and Sweden (20.6) are significantly higher. These examples illustrate how the European market is now setting the pace internationally for development of e-mobility.

Data in detail:

Total number of electric cars worldwide: More than 40 percent of all electric vehicles drive on Chinese roads

Electric vehicles (BEVs and PHEVs) are currently distributed very unevenly between different regions of the world: With 4.2 million vehicles, China currently tops registrations worldwide and has done so since 2010 (cumulative total 9.88 million). However, this lead is shrinking: The European market, which includes the members of the European Free Trade Association (EFTA), in addition to the European Union, accounts for a total of 3.2 million electric vehicles. The US comes in third with 1.7 million vehicles. If we break down the European countries individually, Germany ranks third (702,981) behind the US. If the number of vehicles in Germany is added to the other top European markets – the UK (447,486), Norway (433,609) and France (413,212) – the figure even exceeds that for the US. These four countries combined (Germany, the UK, Norway and France) account for more than half the vehicles currently on the roads in the European market.

Electric cars per 1,000 inhabitants: Norway leads the way; US ahead of China

Europe is calculated to have 6.1 electric vehicles per thousand inhabitants – ahead of the US (5.2) and China (3.0). The global leader is Norway (81 per 1,000 inhabitants), followed by Iceland (36.8) and Sweden (20.6). Germany has 8.5 electric cars per 1,000 inhabitants. There are considerable differences between European regions: Northern and central Europe have a relatively high number of electric vehicles per

1,000 inhabitants, while the figure for southern and eastern Europe remains low.

Achieving climate neutrality will require a large number of pure battery-electric vehicles driving locally emission-free. By 2020, thanks to high subsidies, pure electric vehicles accounted for 79% of new electrified vehicles registered in the US, an important market for e-mobility. China even reached a ratio of 80%. With a share of 54%, Europe is still below the global average of 68% for pure battery-electric vehicles - but plug-in hybrids are very popular here. They also play an important part in lowering emissions in cities, while guaranteeing a high range for longer trips. The overall growth in the market for electric vehicles shows that PHEVs serve as an entry-level product that attracts customers to e-mobility in the long term.

Country/region	Cumulative new vehicle registrations up to 2020 (total number of vehicles)	Electric cars per 1,000 inhabitants	BEV percentage of new electric vehicle registrations in 2020
Worldwide	9,880,526	1.4	68%
China	4,190,273	3.0	80%
Europe (EU+EFTA, incl. UK)	3,201,644	6.1	54%
USA	1,700,825	5.2	79%
Germany	702,981	8.5	49%
UK	447,486	6.7	61%
Norway	433,609	81.0	73%
France	413,212	6.4	60%
Sweden	212,477	20.6	30%
South Korea	152,652	2.9	66%
Italy	100,680	1.7	54%
Poland	14,419	0.4	44%
Australia	12,578	0.5	51%
Iceland	12,440	36.8	56%
Greece	3,410	0.3	31%
Russia	1,760	0.0	66%

Source: Fourin, IHS, KBA, Ward's

New registrations of electric cars in 2020: Germany sees significant growth, moves into second place behind China

In absolute numbers, China was number one worldwide with 1.25 million new electric vehicles registered in 2020 alone (2019: 1.09 million). Germany came second with 394,943 new vehicle registrations (2019: 108,839) – making it Europe’s leading market. With a total of 302,929 new vehicles registered over the past year (2019: 321,702), the US took third place. France is also among the European leaders, with 185,785 new vehicle registrations, compared to 61,434 the previous year; the UK also saw significant growth, with 177,022 new electric vehicles registered (2019: 72,993). If the European countries are viewed as a whole (EU27, EFTA & UK), this market would, in fact, occupy the leading position internationally, with 1.37 million new vehicle registrations in 2020 (2019: 562,049).

Europe posts strongest growth worldwide

In percentage terms, European markets reported significant growth in 2020. The number of new vehicle registrations in Germany increased by 263%, followed by Italy (247%) and Denmark (246%). France came next with 202%, while the UK posted growth of 143%. In China, the number of new vehicle registrations climbed 15% from the previous year.

The rate of growth in China is now much slower than in Europe, where the market has grown to almost five times the size it had in 2015, thanks to high subsidies. Growth in the US has now also slowed, as a result of support programmes coming to an end.

Country/region	New vehicle registrations 2019	New vehicle registrations 2020	% growth
Worldwide	2,136,036	3,089,221	+ 45
Europe (EU+EFTA, incl. UK)	562,049	1,368,167	+ 143
China	1,088,214	1,246,289	+ 15
Germany	108,839	394,943	+ 263
USA	321,702	302,949	- 6
France	61,434	185,785	+ 202
UK	72,993	177,022	+ 143
Norway	79,642	105,709	+ 33
Sweden	40,327	93,879	+ 133
Italy	17,238	59,792	+ 247
South Korea	43,908	48,279	+ 10
Denmark	9,410	32,534	+ 246

Australia	2,915	3,414	+ 17
Russia	317	591	+ 86

Source: Fourin, IHS, KBA, Ward's

Market share of electric cars: Norway leads the World

Norway topped the global statistics for 2020, with electric vehicles accounting for 74.8% of total registrations, followed by Iceland (44.6%) and Sweden (32.1%). Compared to 2019, the percentage of electric vehicles sold in these three countries increased by more than percentage points (Norway +18.8; Iceland +25.8; Sweden +20.8).

These were followed by the Netherlands (24.7%, +9.6) and Finland (17.7%, +10.9). The bottom half of the top ten was occupied by Denmark (16.4%, +12.2), Switzerland (14.3%, +8.7), Germany (13.5%, +10.5), Portugal (13.5%, +7.9), and Luxembourg (11.4%, 8.1). Although the US ranks third internationally in terms of new vehicle registrations, it only appears towards the bottom of this table, at 2.1% (+0.2).

Country/region	Market share 2019	Market share 2020	Difference in percentage points
Norway	55.9%	74.8%	+ 18.8
Iceland	18.8%	44.6%	+ 25.8
Sweden	11.3%	32.1%	+ 20.8
Netherlands	15.1%	24.7%	+ 9.6
Finland	6.8%	17.7%	+ 10.9
Denmark	4.2%	16.4%	+ 12.2
Switzerland	5.6%	14.3%	+ 8.7
Germany	3.0%	13.5%	+ 10.5
Portugal	5.7%	13.5%	+ 7.8
Luxembourg	3.4%	11.4%	+ 8.0
Europe (EU+EFTA, incl. UK)	3.6%	11.4%	+ 7.8
France	2.8%	11.3%	+ 8.5
UK	3.2%	10.9%	+ 7.7
China	5.2%	6.3%	+ 1.1
Worldwide	2.7%	4.6%	+ 1.9

Italy	0.9%	4.3%	+ 3.4
South Korea	2.9%	2.9%	0
USA	1.9%	2.1%	+ 0.2
Australia	0.4%	0.5%	+ 0.1
Russia	0.0%	0.0%	0

Source: Fourin, IHS, KBA, Ward's

About the Munich Mobility Show

Under the motto "What will move us next", the Munich Mobility Show 2021 will present all major world premieres and trends for digital and climate-neutral mobility. A large number of international exhibitors from the automotive, bicycle and tech industries will showcase what people will be able to use on the roads in the future at the Munich Mobility Show. The *Summit* will be a meeting place for the media and professionals; at the *Conference*, international guests will discuss key trends; along the *Blue Lane*, new products will be tested by visitors; while the *Open Spaces* in the city centre will make innovations accessible to the general public. This new concept will make the Munich Mobility Show, which opens to visitors from 7-12 September, the leading international mobility platform. The Media Days will be held on 6-7 September.