

strategy&

E-Mobility Sales Review Q3 2020



Foresight to drive the industry
July 2020



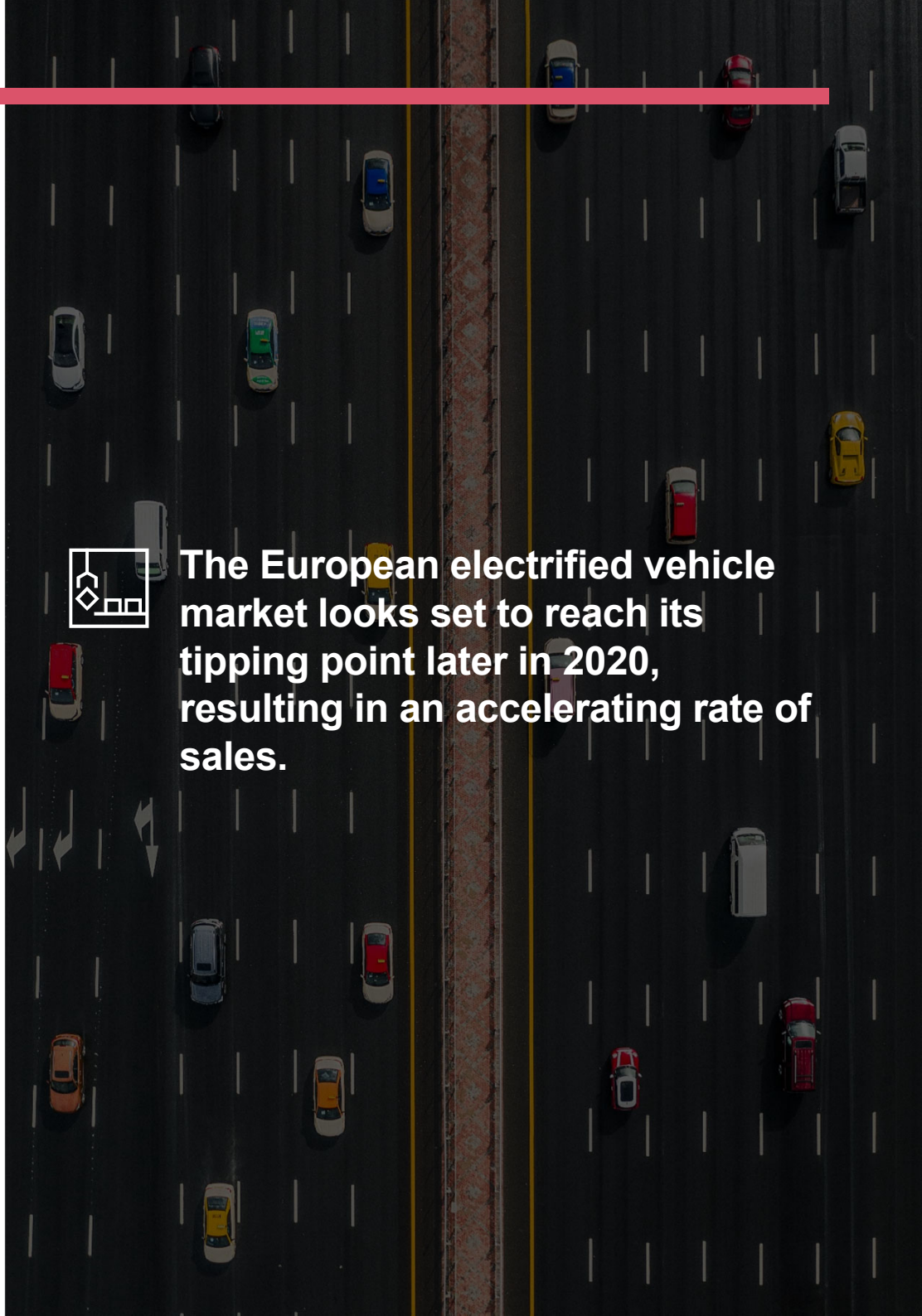


EV market provides islands of stability

As the COVID-19 crisis created havoc in automobile sales throughout the world, the electric vehicle segments held up comparatively well in the second quarter of 2020. It now appears that e-mobility will be one of the few winners to emerge from this crisis.

This is particularly true of Europe, where EV sales remained virtually unchanged from the equivalent quarter of last year. As a result, the fleets of European car manufacturers look increasingly well placed to comply with the average CO₂ fleet emission target of 95 g/km.¹

With factories having been shut for an extensive period due to lockdown measures, there will be some delay before European production can satisfy the existing order backlog – while waiting for new demand. At that point, probably later in 2020, EV sales in Europe are likely to reach their tipping point, accelerating more rapidly due to increasing product availability and the beneficial impact of recently implemented government incentives. Regional differences in EV market performance are becoming ever more salient. Regulation, mobility habits, and product offerings are following entirely different paths in each region.



The European electrified vehicle market looks set to reach its tipping point later in 2020, resulting in an accelerating rate of sales.



1. Introduction

PHEV sales grow rapidly in Q2



In the second quarter of 2020, sales of fully electric and electrified vehicles (xEVs) – mild, full and plug-in hybrid as well as battery electric vehicles – registered a decline of 16% in key markets compared to the equivalent quarter of 2019.

However, there was significant variation in the results for the various technologies. Whereas sales of battery electric vehicles (BEVs) and hybrids declined by 22% and 19% respectively (to 318,000 and 300,000 units sold), registrations of plug-in hybrids (PHEV) increased by 15% (to 143,000 units).

The rise in global PHEV sales was mostly due to Europe. In the top five markets of France, Germany, Italy, Spain and the United Kingdom, PHEV registrations increased by 121% in relation to the second quarter of 2019, despite the crisis.

Although China recovered somewhat from the first quarter of 2020 after coming out of lockdown, Europe continues to display the highest market share for electric vehicles by a significant margin. When we include the five leading EV markets of Austria, Netherlands, Norway, Switzerland and Sweden, the relevant market share for Europe stands at 19%, in comparison to less than 5% in both China and the United States.

121%

Increase in PHEV sales in EU top 5 markets: Q2 2020 vs. Q2 2019





Unlimited charging

Million-mile battery

Chinese battery manufacturer CATL introduced a power pack to the market that lasts for more than a million miles, while Tesla also announced a long-life battery.

Theoretically, batteries with such a long lifespan have the potential to be reused in a second vehicle, thus lowering costs and making electric cars more attractive to customers. As batteries will in practice seldom

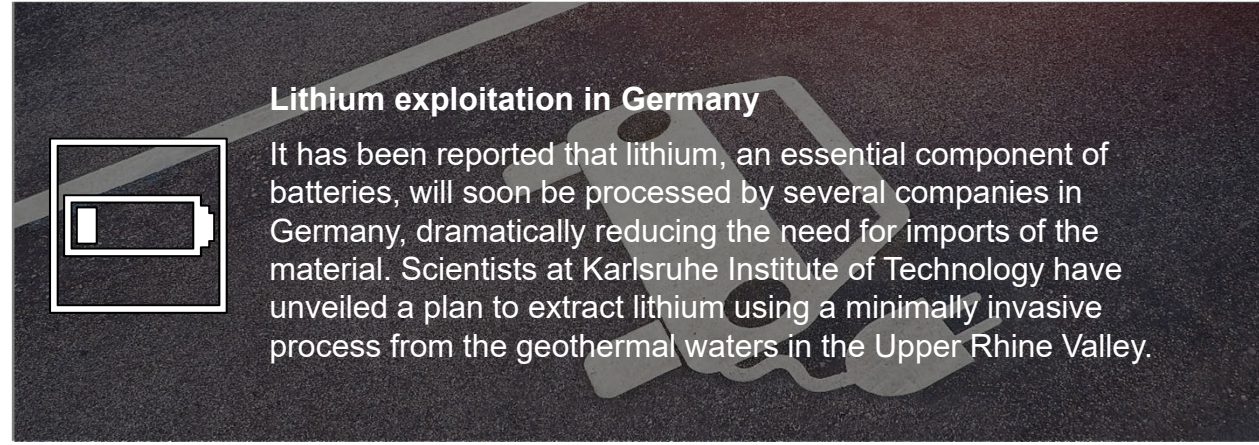
be used for driving a million miles, the additional charging cycles could be repurposed for grid storage or backup power systems.

Swappable batteries in China

Among many support programs for electric vehicles, the Chinese government has offered incentives to promote swappable battery systems. New energy vehicles priced over 300,000 yuan are not eligible for

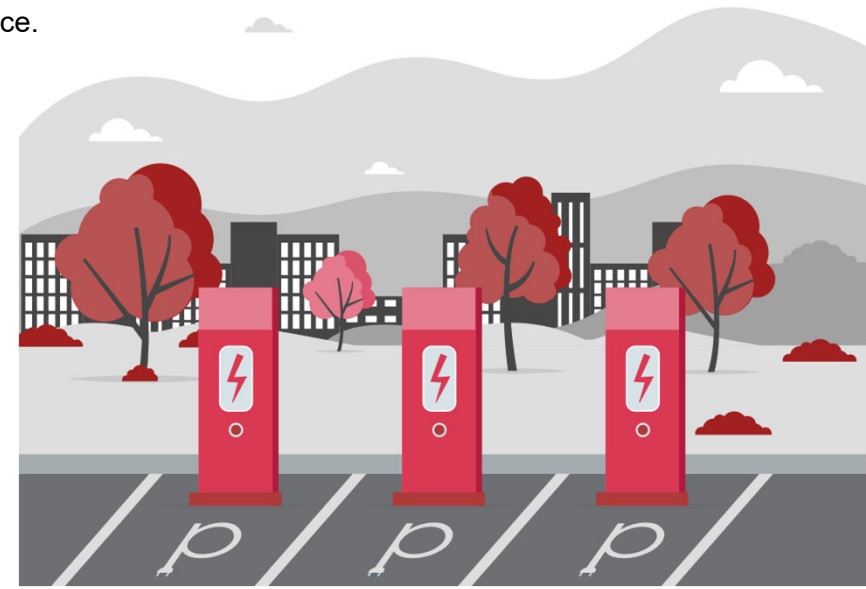
incentives in the latest subsidy plan which have taken effect on July 23, but cars with exchangeable batteries are exempt from this limitation.

Swapping batteries is seen as quick and convenient, enabling car owners to benefit continually from upgrades in battery technology. The government is also pushing for industry-wide standardization to allow for true Battery-as-a-Service.



Lithium exploitation in Germany

It has been reported that lithium, an essential component of batteries, will soon be processed by several companies in Germany, dramatically reducing the need for imports of the material. Scientists at Karlsruhe Institute of Technology have unveiled a plan to extract lithium using a minimally invasive process from the geothermal waters in the Upper Rhine Valley.





Incentives vs. limited production

Europe at the forefront of incentive strategy

Governments in Europe continue to compete with each other in offering generous incentives to stimulate demand for electric vehicles. In France, for example, buyers of BEVs could now receive up to €12,000, lowering the cost of purchase by up to 40% in some cases. Meanwhile, consumers in the Netherlands will be entitled to a subsidy of €4,000 for BEVs. Germany introduced a raft of measures to stimulate the market, including increased subsidies for BEVs and PHEVs and reduced company car tax for electric vehicles. Given limited production capacity for existing EVs, measurable market effects are likely to be small, despite the fact that consumer interest in online configuration portals has increased threefold. At the same time, €2.5 billion has been allotted to research and production of EV batteries and to a long-term plan to extend the charging infrastructure to one million charging points by 2030.



On average, 68% of consumers in France, Germany, Italy and Spain intend to buy an EV in the next five years.¹



In Germany, there is currently one public charging station per seven electric vehicles.²



PR Congo accounts for at least 60% of worldwide cobalt production, a key ingredient for EV batteries.³

China maintains its commitment

China's State Grid Corporation, a state-owned utility, announced that it would invest 2.7 billion yuan to establish 78,000 charging posts in 24 regions and municipalities. Moreover, the Chinese government has extended its stimulus package for NEVs until the end of 2022. They will continue to be exempt from the 10% vehicle purchase tax and remain eligible for various purchase subsidies.

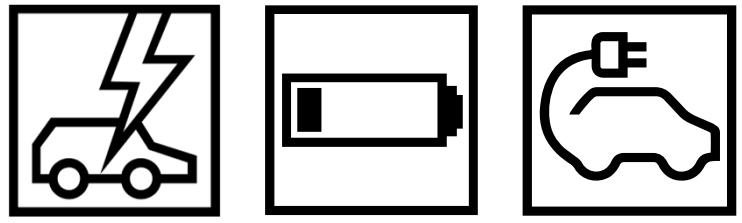


Sources:
¹ Strategy& eReadiness survey, February 2020
² NOW GmbH / KBA and BNetzA, June 2020
³ Investing News, June 16, 2020



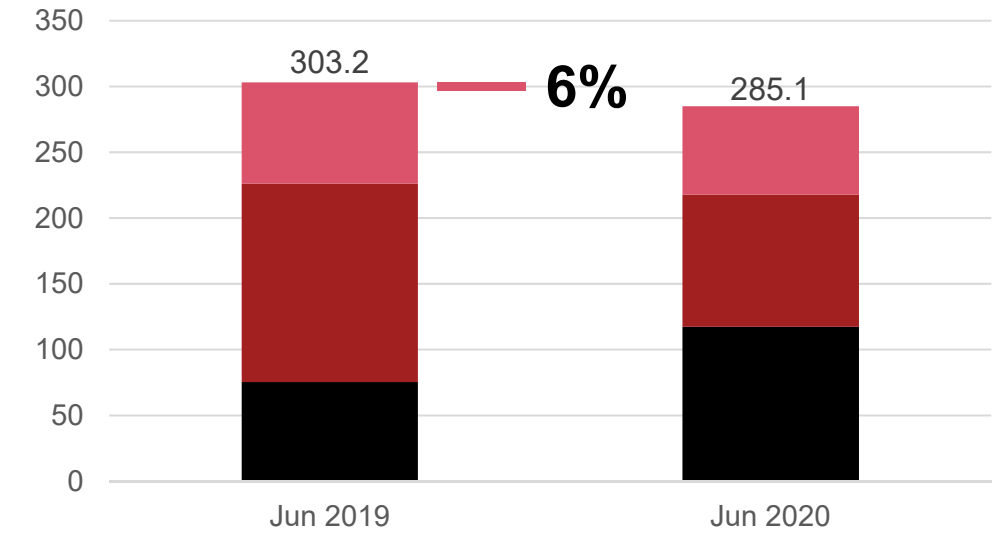
EV sales recover in June

Key Markets

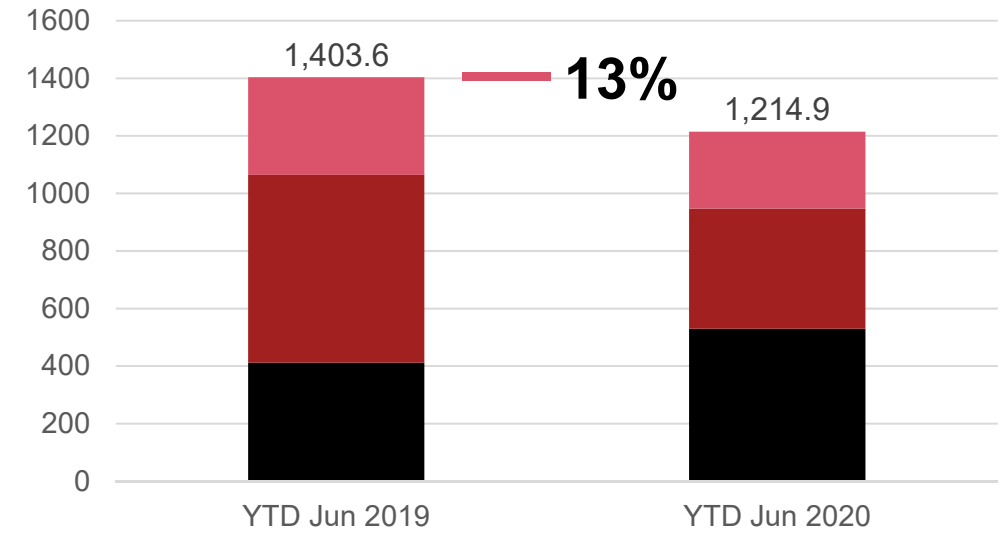


Electric Vehicles (EVs*)

Jun 19 vs. Jun 20 (in '000 units)



YTD Jun 19 vs. YTD Jun 20 (in '000 units)

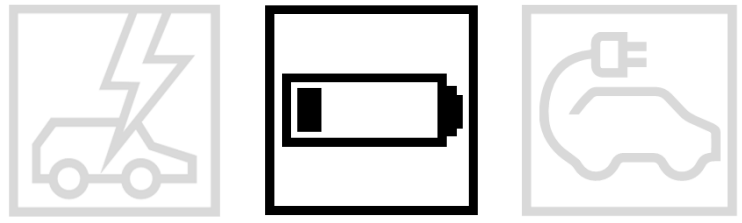




3. E-mobility sales data

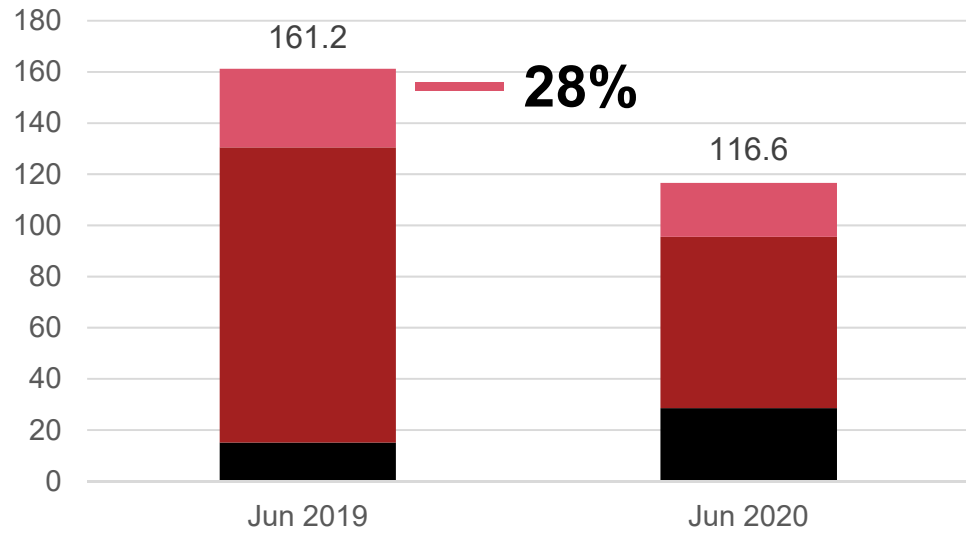
BEV sales take a break

Key Markets

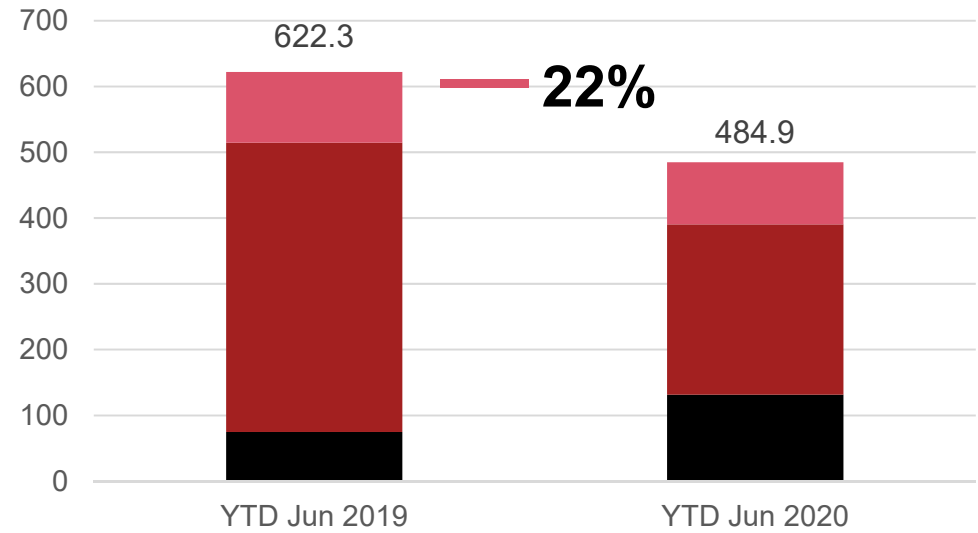


Battery Electric Vehicles

Jun 19 vs. Jun 20 (in '000 units)



YTD Jun 19 vs. YTD Jun 20 (in '000 units)

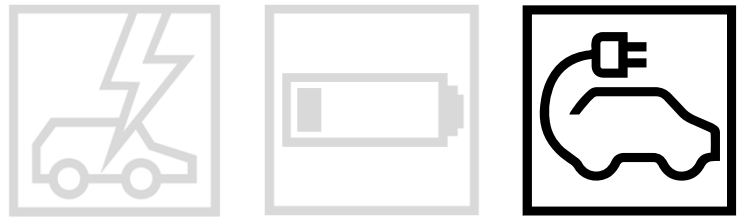




3. E-mobility sales data

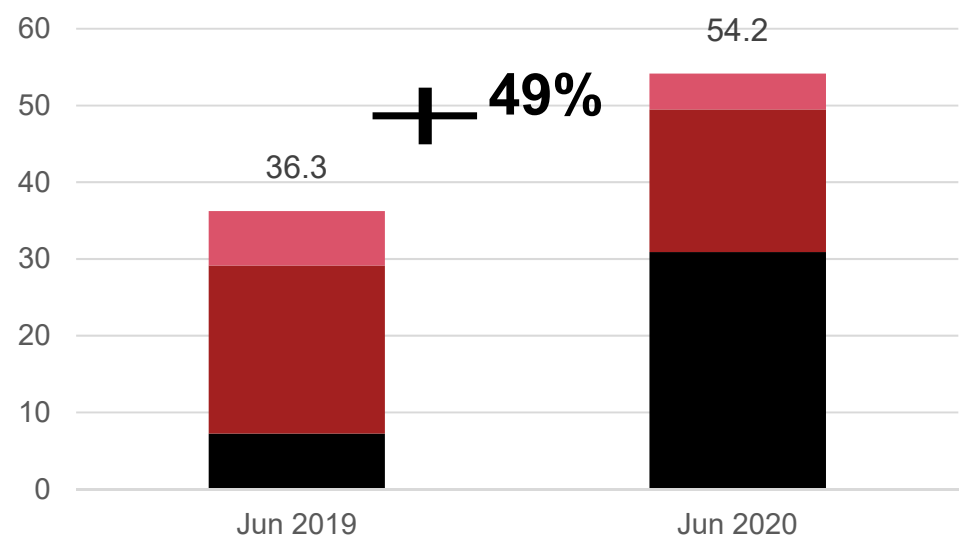
PHEV sales kick in

Key Markets

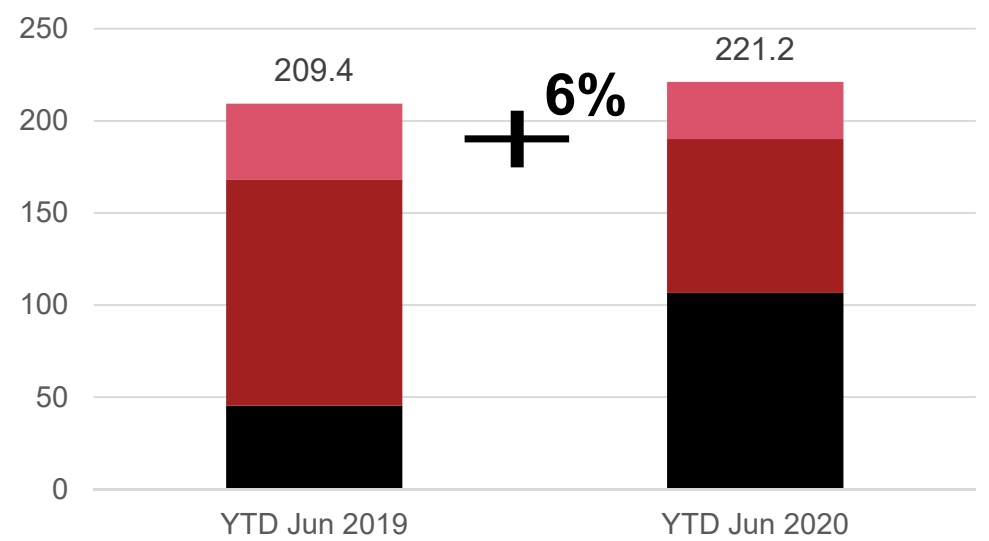


Plug-in Hybrids

Jun 19 vs. Jun 20 (in '000 units)



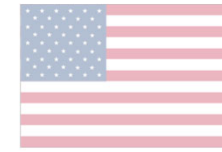
YTD Jun 19 vs. YTD Jun 20 (in '000 units)





4. EU Top 5+5

EU Top 5+5



EU Top 5: France, Germany, Italy, Spain, and the UK

Although registrations of electric vehicles were hit hard by the effects of COVID-19 in April, and to a lesser extent in May, they rebounded in June. Sales declined by only 1% compared to the equivalent quarter in 2019, with 211,000 new electrified vehicles being registered in the top 5 markets. Such relative stability and the growth in market share of electric vehicles can be attributed to increasing customer interest, and a general improvement in the quality and availability of the vehicles themselves.

Whereas sales of hybrid vehicles fell by 29% in comparison to the same quarter last year, registrations of PHEVs soared. This was particularly noticeable in Germany (+257%). The UK showed a significant increase in BEV registrations (+113%).

Further European markets (+5)

Looking at five smaller European EV markets (Austria, Netherlands, Norway, Switzerland and Sweden), the overall percentage decrease in the ten European markets from the same quarter last year is similarly negligible (1%). Norway's overall market share for electrified vehicles continues to outstrip the rest of the region, at 79%.



	2020 Q2*	Comparison to 2019 Q2*
BEV	52,000	+35%
PHEV	50,000	+121%
Hybrid	109,000	-29%
Total	211,000	-1%





4. United States

United States



USA

As a result of the COVID-19 crisis, registrations of electric vehicles declined by a third (-33%) in comparison to the equivalent quarter in 2019. Significant falls in sales were evident for BEVs, PHEVs and hybrids. The only bright spot was a 6% increase in hybrid registrations in June 2020 in comparison with the same month last year, up to 42,000 units.

The scale of the overall decrease is largely due to crisis-related delays in the launch or delivery of much anticipated new models, including Ford's Mustang Mach-E and Tesla's Model Y. However, long-term structural issues continue to have an effect. Government incentives and regulations vary markedly across different states, and do not demonstrate the same strategic resolve to boost the EV market that is evident in other global regions.



	2020 Q2	Comparison to 2019 Q2
BEV	48,000	-29%
PHEV	12,000	-42%
Hybrid	79,000	-33%
Total	138,000	-33%





4. China and Rest of Asia

China and Rest of Asia

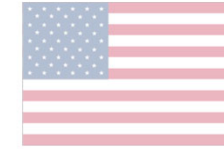
China

Although the Chinese EV market fell by 22% in Q2 in comparison to the equivalent period last year, registrations were more than twice as high as in the first quarter of this year. The relative recovery is partly due to the reopening after the economic lockdown which occurred earlier than in other regions.

Registrations of BEVs declined most sharply, down 29% to 182,000 units, while sales of hybrids increased 9%. It is hoped that the extension of sales subsidies and tax breaks for NEVs (BEVs and PHEVs) for two years* will revive the electric car market and further extend its global market share. The Chinese government has also introduced comprehensive safety regulations for electric cars in order to provide additional reassurance for consumers.

Rest of Asia

Having also emerged from lockdown earlier than many regions, South Korea recorded an increase in electric car registrations from the same quarter last year, up by 21% to 51,000 units. However, this increase builds on a much lower base, with South Korea still held back by poor supply and low-level state subsidies.



	2020 Q2	Comparison to 2019 Q2
BEV	182,000	-29%
PHEV	57,000	-17%
Hybrid	45,000	+9%
Total	283,000	-22%



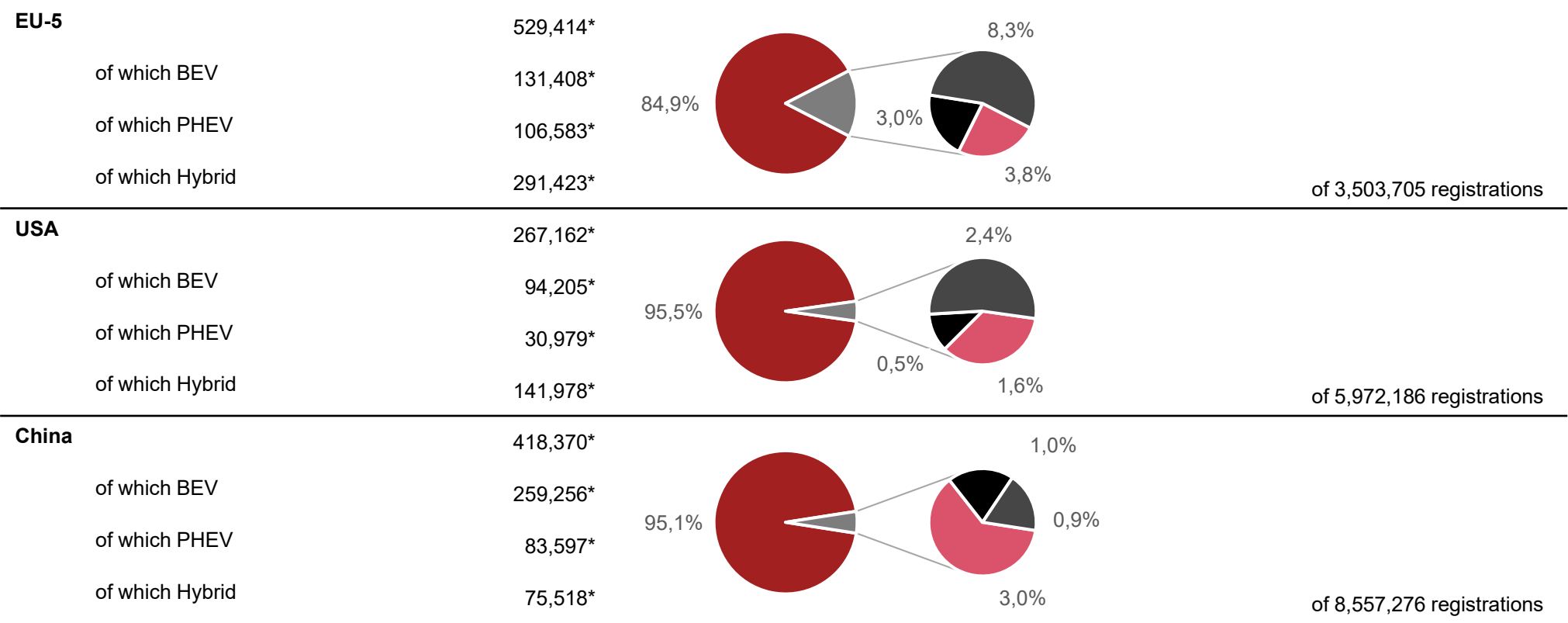
*taking effect on July 23, 2020



5. Rankings

Rankings for EV registrations

EV registrations YTD Jun 2020

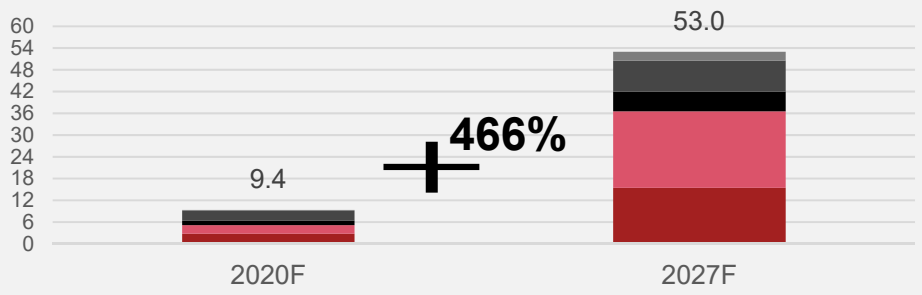




6. Electrified vehicle assembly forecast

Electrified vehicle assembly forecast by region

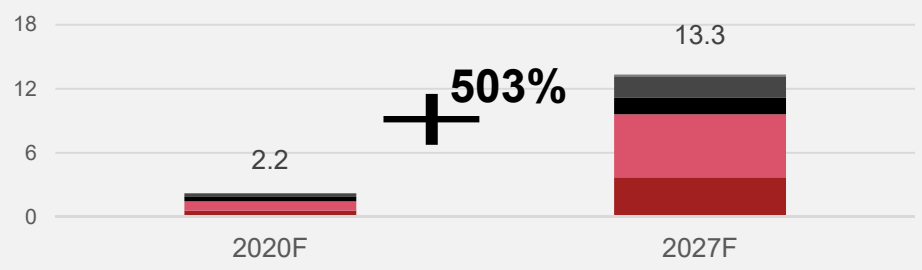
1 EV Assembly by Region
2020F vs. 2027F (in million units)



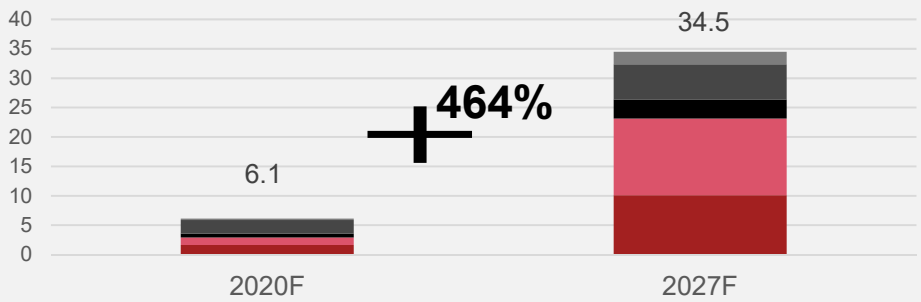
2 Plug-in Hybrid Vehicle Assembly
2020F vs. 2027F (in million units)



3 BEV Vehicle Assembly
2020F vs. 2027F (in million units)



4 Full and Mild Hybrid Vehicle Assembly
2020F vs. 2027F (in million units)

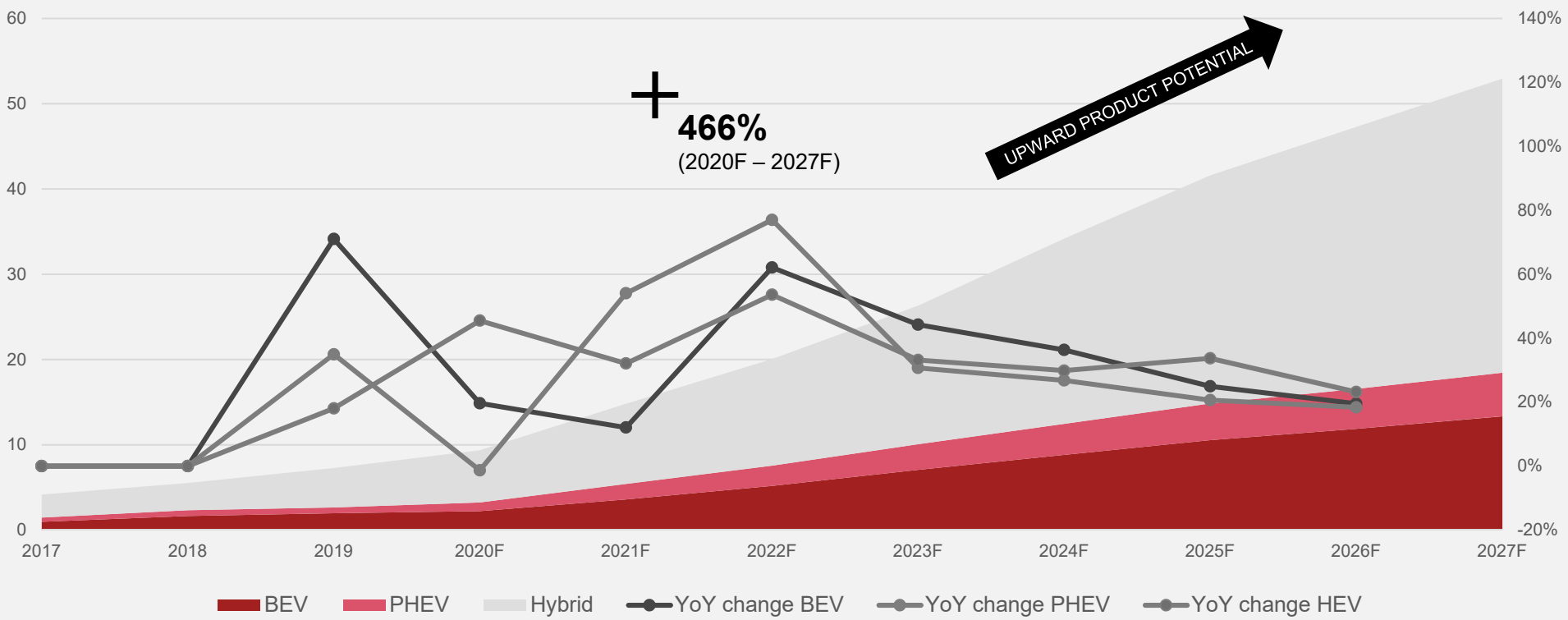




6. Electrified vehicle assembly forecast

Electrified vehicle assembly forecast

5 EV assembly by powertrain type
2020F vs. 2027F (in million units, percent)





Authors



Felix Kuhnert
Partner, Global Automotive
Leader, PwC Germany
Phone: +49 711 25034-3309
felix.kuhnert@pwc.com



Christoph Stürmer
Global Lead Analyst PwC
Autofacts®, PwC Germany
Phone: +49 69 9585-6269
christoph.stuermer@pwc.com



Jörn Neuhausen
Director,
Strategy& Germany
Phone: +49 211 3890-345
joern.neuhausen
@strategyand.de.pwc.com



Annabelle Kliesing
Senior PR Lead,
Strategy& Germany
Phone: +49 89 54525-613
annabelle.kliesing
@strategyand.de.pwc.com

Thank you

E-mobility sales data

France, Germany, Italy, Spain, UK

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

France	YTD 2020	Market Share	YTD 2019	YOY YTD 20-19	20 Q2	QOY 20 Q2	Jun 20	MOY Jun 20	May 20	MOY May 20	Apr 20	MOY Apr 20
BEV	41.430	5,8%	21.007	97,2%	15.545	48,7%	8.429	87,4%	3.282	20,0%	3.834	19,0%
PHEV	17.058	2,4%	7.903	115,8%	7.451	87,7%	3.095	129,6%	2.796	113,4%	1.560	19,0%
Hybrid	37.059	5,2%	49.959	-25,8%	15.602	-42,2%	9.151	-8,3%	6.055	-32,0%	397	-95,1%
Total	95.547	13,3%	78.869	21,1%	38.598	-6,8%	20.675	30,6%	12.132	-6,3%	5.791	-54,1%
Germany												
BEV	43.232	3,6%	30.018	44,0%	17.878	22,8%	8.119	46,7%	5.367	20,6%	4.392	-4,0%
PHEV	58.453	4,8%	16.179	261,3%	32.046	256,9%	19.775	605,0%	6.692	108,7%	5.579	88,0%
Hybrid	100.259	8,3%	86.191	16,3%	37.396	-18,0%	10.479	-33,8%	16.016	0,0%	10.901	-20,9%
Total	201.944	16,7%	132.388	52,5%	87.320	26,3%	38.373	58,8%	28.075	18,6%	20.872	-2,1%
Italy												
BEV	9.938	1,7%	5.037	97,3%	4.539	17,8%	2.224	52,7%	1.814	51,8%	501	-58,3%
PHEV	5.801	1,0%	2.497	132,3%	2.850	101,6%	1.644	316,2%	1.180	145,3%	26	-95,2%
Hybrid	62.279	10,7%	55.444	12,3%	27.562	-2,1%	16.004	76,8%	11.312	11,5%	246	-97,3%
Total	78.018	13,4%	62.978	23,9%	34.951	4,6%	19.872	82,2%	14.306	21,1%	773	-92,8%
Spain												
BEV	5.851	1,7%	6.698	-12,6%	1.445	-62,3%	908	-22,7%	438	-62,7%	99	-93,3%
PHEV	5.761	1,7%	3.633	58,6%	2.272	19,2%	1.462	232,3%	749	12,0%	61	-92,3%
Hybrid	52.528	15,5%	50.713	3,6%	17.050	-39,3%	11.967	25,1%	4.744	-55,2%	339	-95,7%
Total	64.140	18,9%	61.044	5,1%	20.767	-38,6%	14.337	28,3%	5.931	-52,3%	499	-95,1%
UK												
BEV	30.957	4,7%	11.950	159,1%	12.701	112,8%	8.903	261,8%	2.424	21,8%	1.374	-9,4%
PHEV	19.510	3,0%	15.134	28,9%	5.846	-10,8%	4.926	117,2%	825	-65,1%	95	-95,1%
Hybrid	39.298	6,0%	49.438	-20,5%	10.938	-52,8%	10.239	19,3%	651	-91,6%	48	-99,3%
Total	89.765	13,7%	76.522	17,3%	29.485	-17,4%	24.068	80,8%	3.900	-67,9%	1.517	-85,2%

E-mobility sales data

EU Top 5, Netherlands, Norway, Sweden, Switzerland

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

EU 5	YTD 2020	Market Share	YTD 2019	YOY YTD 20-19	20 Q2	QOY 20 Q2	Jun 20	MOY Jun 20	May 20	MOY May 20	Apr 20	MOY Apr 20
BEV	131.408	3,8%	74.710	75,9%	52.108	34,8%	28.583	89,0%	13.325	15,4%	10.200	-15,0%
PHEV	106.583	3,0%	45.346	135,0%	50.465	121,1%	30.902	325,9%	12.242	52,5%	7.321	-2,8%
Hybrid	291.423	8,3%	291.745	-0,1%	108.548	-28,6%	57.840	9,1%	38.778	-27,4%	11.931	-73,8%
Total	529.414	15,1%	411.801	28,6%	211.121	-1,1%	117.325	55,6%	64.344	-11,9%	29.452	-54,8%
Netherlands												
BEV	14.479	9,1%	17.251	-16,1%	5.803	-32,7%	2.837	-31,0%	1.404	-40,2%	1.562	-28,0%
PHEV	5.605	3,5%	2.843	97,2%	2.334	107,5%	1.118	161,8%	640	74,9%	576	73,5%
Hybrid	18.415	11,6%	14.309	28,7%	6.855	-13,8%	2.732	-4,3%	2.073	-27,1%	2.050	-8,8%
Total	38.499	24,2%	34.403	11,9%	14.992	-15,3%	6.687	-9,5%	4.117	-25,9%	4.188	-11,8%
Norway												
BEV	28.503	48,1%	35.182	-19,0%	12.156	-26,5%	5.041	-32,1%	3.444	-26,0%	3.671	-17,7%
PHEV	12.069	20,4%	8.776	37,5%	5.848	45,3%	2.546	76,8%	1.805	24,9%	1.497	31,2%
Hybrid	5.940	10,0%	9.258	-35,8%	2.568	-54,1%	1.065	-45,7%	916	-61,0%	587	-54,4%
Total	46.512	78,5%	53.216	-12,6%	20.572	-21,4%	8.652	-20,1%	6.165	-27,0%	5.755	-16,5%
Sweden												
BEV	9.310	7,1%	8.436	10,4%	3.596	-16,8%	1.706	0,8%	841	-33,0%	1.049	-23,8%
PHEV	23.413	17,8%	10.883	115,1%	10.520	105,7%	4.696	168,6%	2.591	56,6%	3.233	89,0%
Hybrid	15.677	11,9%	11.963	31,0%	7.801	4,1%	2.767	5,0%	2.305	-13,4%	2.729	24,3%
Total	48.400	36,8%	31.282	54,7%	21.917	29,5%	9.169	51,0%	5.737	3,0%	7.011	32,7%
Switzerland												
BEV	5.688	5,5%	5.943	-4,3%	2.567	-12,1%	1.347	20,2%	688	1,6%	532	-52,6%
PHEV	4.410	4,3%	1.523	189,6%	2.127	185,9%	1.074	434,3%	629	149,6%	424	45,7%
Hybrid	11.803	11,4%	8.714	35,4%	5.751	9,4%	2.962	61,7%	1.751	-6,2%	1.038	-33,4%
Total	21.901	21,2%	16.180	35,4%	10.445	17,1%	5.383	70,7%	3.068	9,8%	1.994	-32,9%

E-mobility sales data

Austria, EU 5+5, China, South Korea, USA

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

Austria	YTD 2020	Market Share	YTD 2019	YOY YTD 20-19	20 Q2	QOY 20 Q2	Jun 20	MOY Jun 20	May 20	MOY May 20	Apr 20	MOY Apr 20
BEV	4,805	4.3%	4,904	-2.0%	2,377	0.6%	1,085	15.5%	735	5.2%	557	-23.1%
PHEV	2,575	2.3%	898	186.7%	1,386	234.0%	674	580.8%	498	255.7%	214	21.6%
Hybrid	9,524	8.4%	5,996	58.8%	5,112	36.9%	2,340	90.2%	1,861	53.8%	911	-29.5%
Total	16,904	15.0%	11,798	43.3%	8,875	36.3%	4,099	80.7%	3,094	51.0%	1,682	-23.3%
EU 5+5												
BEV	194,193	5.2%	146,426	32.6%	78,607	7.0%	40,599	33.5%	20,437	-3.5%	17,571	-19.6%
PHEV	154,655	4.2%	70,269	120.1%	72,680	112.2%	41,010	267.1%	18,405	54.8%	13,265	18.6%
Hybrid	352,782	9.5%	341,985	3.2%	136,635	-24.9%	69,706	9.7%	47,684	-25.9%	19,246	-64.5%
Total	701,630	18.9%	558,680	25.6%	287,922	-0.6%	151,315	44.0%	86,525	-11.2%	50,082	-42.6%
China												
BEV	259,256	3.0%	440,013	-41.1%	182,000	-28.5%	67,000	-41.9%	64,000	-14.5%	51,000	-20.5%
PHEV	83,597	1.0%	122,870	-32.0%	56,600	-17.0%	18,600	-15.0%	18,000	-13.4%	20,000	-21.6%
Hybrid	75,518	0.9%	89,637	-15.8%	44,891	8.7%	14,935	11.0%	13,837	14.5%	16,118	2.3%
Total	418,370	4.9%	652,520	-35.9%	283,491	-22.1%	100,535	-33.3%	95,837	-11.0%	87,118	-17.3%
South Korea												
BEV	17,724	1.9%	20,195	-12.2%	9,940	-28.4%	4,750	-5.5%	2,572	-43.4%	2,618	-39.2%
PHEV	2,962	0.3%	1,464	102.3%	1,908	47.9%	814	53.9%	509	-21.6%	585	422.3%
Hybrid	61,552	6.7%	50,495	21.9%	39,607	45.4%	12,847	29.8%	13,889	60.5%	12,871	48.1%
Total	82,238	8.9%	72,154	14.0%	51,455	21.3%	18,411	19.1%	16,970	22.6%	16,074	22.6%
USA												
BEV	94,205	1.6%	107,532	-12.4%	47,861	-28.9%	21,035	-31.5%	14,285	-32.8%	12,541	-18.2%
PHEV	30,979	0.5%	41,172	-24.8%	11,692	-42.0%	4,668	-34.5%	4,339	-39.0%	2,685	-54.7%
Hybrid	141,978	2.4%	190,554	-25.5%	78,655	-33.1%	41,551	5.9%	24,279	-46.2%	12,825	-61.5%
Total	267,162	4.5%	339,258	-21.3%	138,208	-32.6%	67,254	-12.7%	42,903	-41.6%	28,051	-48.6%



8. Appendix

E-mobility sales data

Analyzed Markets	YTD 2020	Market Share	YTD 2019	YOY YTD 20-19	20 Q2	QOY 20 Q2	Jun 20	MOY Jun 20	May 20	MOY May 20	Apr 20	MOY Apr 20
BEV	565,379	2.9%	714,166	-20.8%	318,408	-22.1%	133,384	-26.5%	101,294	-16.9%	83,730	-20.7%
PHEV	272,192	1.4%	235,775	15.4%	142,880	15.4%	65,092	59.9%	41,253	2.0%	36,535	-14.5%
Hybrid	631,829	3.3%	672,671	-6.1%	299,787	-18.6%	139,039	10.2%	99,689	-23.4%	61,060	-45.4%
Total	1,469,400	7.7%	1,622,612	-9.4%	761,076	-15.5%	337,515	-3.1%	242,236	-17.2%	181,325	-30.3%

Analyzed Markets

Legend

- MOY = Month-on-Year
- QOY = Quarter-on-Year
- YOY = Year-on-Year
- YTD = Year-to-Date

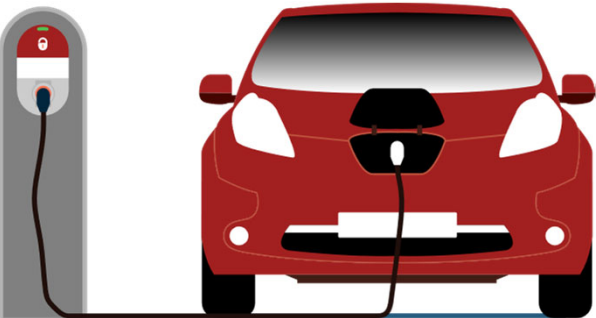
Source: Autofacts Analysis, Autoactu, ANFAC, ANFIA, BOVAG, Fourin, KBA, SMMT, Marklines



Overview: Upcoming BEV models

(not exhaustive)

Source: www.electrive.net/2020/01/02/unser-blick-voraus-diese-elektroautos-kommen-2020, Automobilwoche Datencenter (Modellvorschau), JPMorgan, IHS (information Quarter, when available)



OEM	Model	Launch
Audi	e-tron Sportback	2020
Honda	Honda E	2020
Opel	Corsa-e	2020
Peugeot	e-208	2020
Renault	Twingo-E	2020
Renault	Zoe 2	2020
Toyota	Mirai 2	2020
DS	DS 3 Crossback E-Tense	2020
Hyundai	Ioniq Electric	2020
Polestar	Polestar 2	2020
BMW	Mini Cooper SE	2020
Citroën	ë-C4	2020
Mazda	MX-30	2020
Volkswagen	ID.3	2020
Audi	e-tron GT	2020
Ford	Mustang Mach-E	2020



Overview: Upcoming BEV models

(not exhaustive)

Source: www.electrive.net/2020/01/02/unser-blick-voraus-diese-elektroautos-kommen-2020, Automobilwoche Datencenter (Modellvorschau), JPMorgan, IHS (information Quarter, when available)



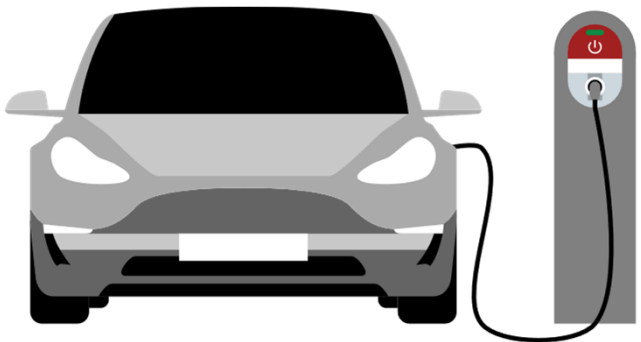
OEM	Model	Launch
Skoda	Enyaq	2020
Volkswagen	ID.4	2020
Fiat	Fiat 500e	2020
Peugeot	E-2008	2020
Audi	C+ CUV e-tron	2021
Audi	Q4 e-tron	2021
Audi	Q4 e-tron Sportback	2021
BMW	i4	2021
BMW	iNext (i5)	2021
BMW	iX3	2021
Mercedes	EQB	2021
Mercedes	EQS	2021
Nissan	Ariya	2021
Opel	Astra-e	2021
Opel	Mokka-e	2021
Opel	Zafira-e Life	2021



Overview: Upcoming BEV models

(not exhaustive)

Source: www.electrive.net/2020/01/02/unser-blick-voraus-diese-elektroautos-kommen-2020, Automobilwoche Datencenter (Modellvorschau), JPMorgan, IHS (information Quarter, when available)



OEM	Model	Launch
Peugeot	e-Partner	2021
Peugeot	E-Rifter	2021
Renault	Kangoo-E	2021
Tesla	Model Y	2021
Volkswagen	ID.4X	2021
Volkswagen	ID.5	2021
Volkswagen	ID.6	2021
Volvo	XC40 Recharge	2021
Audi	E6 e-tron	2022
Audi	Q6 e-tron	2022
BMW	I7	2022
BMW	iX1	2022
Honda	City-SUV (E-Auto)	2022
Peugeot	e-208 Performance	2022



Overview: Upcoming BEV models

(not exhaustive)

Source: www.electrive.net/2020/01/02/unser-blick-voraus-diese-elektroautos-kommen-2020, Automobilwoche Datencenter (Modellvorschau), JPMorgan, IHS (information Quarter, when available)

OEM	Model	Launch
Tesla	Roadster 2	2023
Audi	B-CUV e-tron	2025
Audi	Q8 e-tron	2026
Audi	Q8 e-tron Sportback	2027
Audi	Q9 e-tron	2027

