

strategy&

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# E-Mobility Sales Review Q4 2020



Foresight to drive the industry  
October 2020





## 0. Executive summary

# Favorable conditions unleash EV potential

Europe has confirmed its position as the leading market in the global electric vehicle (EV) market, boasting both the highest growth and the highest market share in the third quarter 2020. As customer interest and demand for electric and hybrid vehicles is spurred by numerous local and national incentive programs, manufacturers are struggling to increase production and advance product launches. Technical issues and supply limitations are creating operational challenges for automotive companies.

Despite the overall market decline earlier in 2020, sales of battery electric vehicles (BEVs) in the European top 5 markets have more than doubled for the year to date compared to the same period last year (+120%). While conventional powertrains have felt the full brunt of the market downturn, customers have flocked to electric vehicles due to increasingly attractive products and higher battery capacity, efficient sales processes, and more affordable prices.

More plug-in hybrid vehicles (PHEVs) have become available from premium brands in Q3, further boosting overall EV sales in Europe. As these products become rolled out globally, the segment is expected to expand in other regions as well.



**While there is increasing demand for better products, automotive manufacturers face numerous and complex challenges from the rapid growth of EV markets.**





## 1. News and highlights I

# Regulation stimulates demand ...

### California sets date of transition

California, USA's most populous state, has decreed that it will halt sales of purely gasoline-powered passenger cars and trucks by 2035. The state government believes that this move will cut greenhouse emissions by more than a third. California thus becomes the first US state to launch such a move, sparking expectations that others will follow its lead.<sup>1</sup>

In a similar move, the UK government plans to bring forward the ban on fossil fuel vehicles from 2040 to 2030 to accelerate the expansion of the electric car market. Other countries have announced similar plans in order to meet the 2050 decarbonisation targets.<sup>2</sup>

The European Commission has proposed that by 2030 the average CO<sub>2</sub> emissions from new cars should be 50% below 2021 levels. This would represent an increase from the current target of a 37.5% reduction over the same period.<sup>3</sup>

From 2021, China will adapt its subsidy policy so that it no longer primarily promotes BEVs, but will now focus on a broader range of environmentally friendly drive systems, potentially including plug-in hybrids and also hydrogen-powered fuel-cell vehicles.<sup>4</sup>

### Germany: Tax reforms

From 2021, motor vehicle tax will rise in Germany for new cars with high fuel consumption. This is to encourage citizens to buy more fuel-efficient cars. Already registered cars are not affected. In future, the motor vehicle tax will be more strongly oriented towards how much CO<sub>2</sub> a vehicle emits.

Starting 2021, a charge of €25 will be added to each 374.5 liters of diesel, which will contribute to 1 ton of carbon dioxide emissions.<sup>5</sup> This means a price increase of about 7 cents per liter in 2021 and 15 cents in 2025.

#### Sources

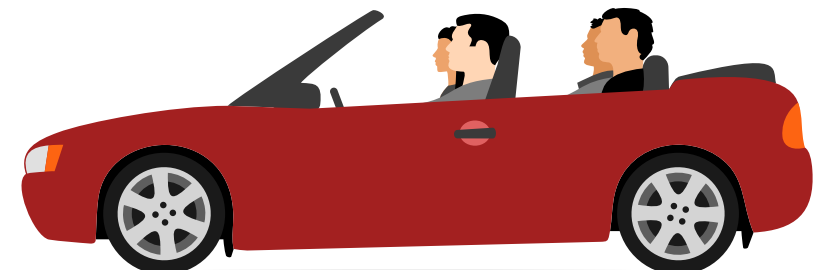
<sup>1</sup> CNBC, 23 September 2020

<sup>2</sup> The Guardian, 21 September 2020

<sup>3</sup> Reuters, 11 September 2020

<sup>4</sup> Automobilwoche, 20 July 2020

<sup>5</sup> Clean Energy Wire, 15 June 2020





## 1. News and highlights II

# ... and technology boosts markets

### Battery developments

Chinese battery manufacturer CATL is developing new technology that will allow battery cells to be integrated with an EV chassis, so that more cells can be loaded onto the car to increase driving range to more than 800km.<sup>1</sup>

Meanwhile, Blackstone has made major progress in its 3D-printing technology to print lithium ion solid-state batteries<sup>2</sup>, which promise significantly lower costs, more production flexibility and a 20% increase in energy density.

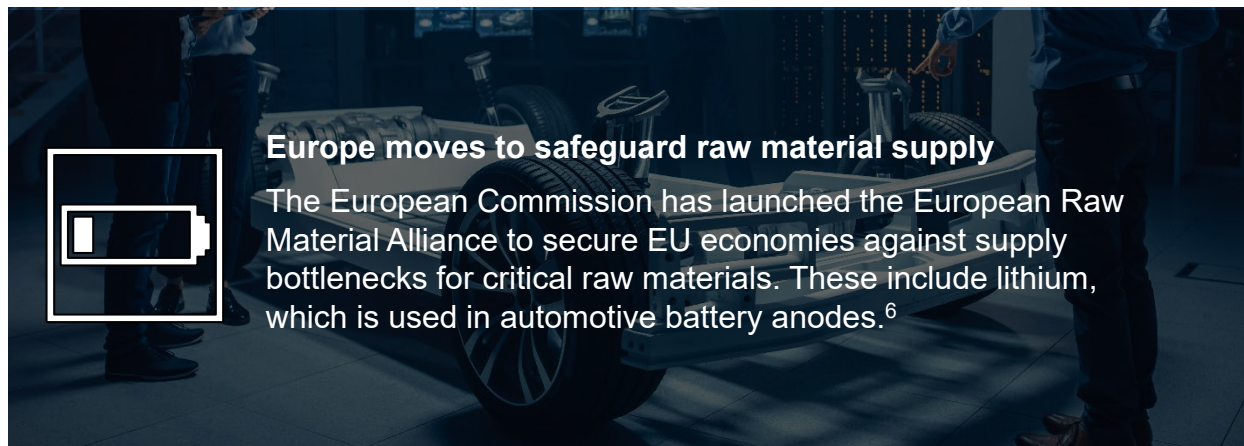
Toyota and University of Kyoto are developing a new fluoride ion battery, which should offer around seven times the energy per unit weight as conventional lithium-ion batteries and could enable EVs to drive 1,000 kilometres on one charge.<sup>3</sup>

### Nio announces BaaS model

Chinese EV manufacturer Nio has launched a battery-as-a-service model, offering users to purchase electric vehicles and subscribe to the usage of battery packs separately.<sup>4</sup>

### Tesla sets new industry benchmarks

At its annual Battery Day, Tesla announced moves towards eliminating cobalt in its batteries, a new Plaid powertrain for the Model S that could reach speeds of 200 mph, and a new cathode plant to streamline its battery production. The company also plans to manufacture its own “tabless” batteries to improve range and power in the new 4680 format, and set new goals for the reducing battery costs beyond previous industry ambitions.<sup>5</sup>



### Europe moves to safeguard raw material supply

The European Commission has launched the European Raw Material Alliance to secure EU economies against supply bottlenecks for critical raw materials. These include lithium, which is used in automotive battery anodes.<sup>6</sup>





## 2. Analyst insights

# Fortune (finally) favors the brave

As sales rates continue to accelerate, companies which made an early and decisive entry into EV technology and innovative product concepts from charging plugs to battery systems and entire EVs, are now reaping their rewards for the first time.

Vehicles which emerge from dedicated e-mobility R&D organizations have proven more compelling to customers. Nevertheless, a great deal more work is required after launch to integrate them into product marketing, sales and service processes.

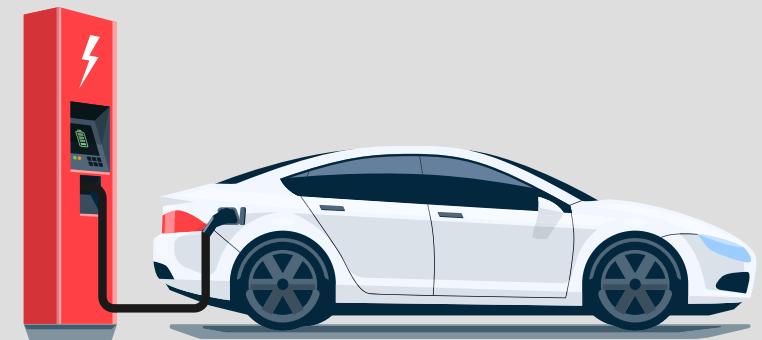
Although BEVs rely on stand-alone technology, they need to remain fully aligned with core brand values to ensure market success. They could even serve to shape brands, such as the recently launched ID.3 from Volkswagen, which seems to have become a successful extension of the VW Golf, the most popular car on German roads. The Polestar 2 is another flagship model, which even outsold the sector leader Tesla Model 3 in Sweden. Customers who simply wish to take advantage of incentives and lower operating costs have the option of switching to more conventional PHEVs.

Selected EV core technologies are only available from new technology providers, and require innovative collaboration models, such as long-term partnerships or joint ventures in battery technology and other areas. Additional investments for boosting production capacity and advancing product launches place a strain on financial resources, but are crucial for developing the EV market and increasing acceptance.

Manufacturers now need to focus their efforts on market expansion and set out their route to financial success. One step in this direction would be to question how the range of products and services can meet and exceed user expectations.

# 121%

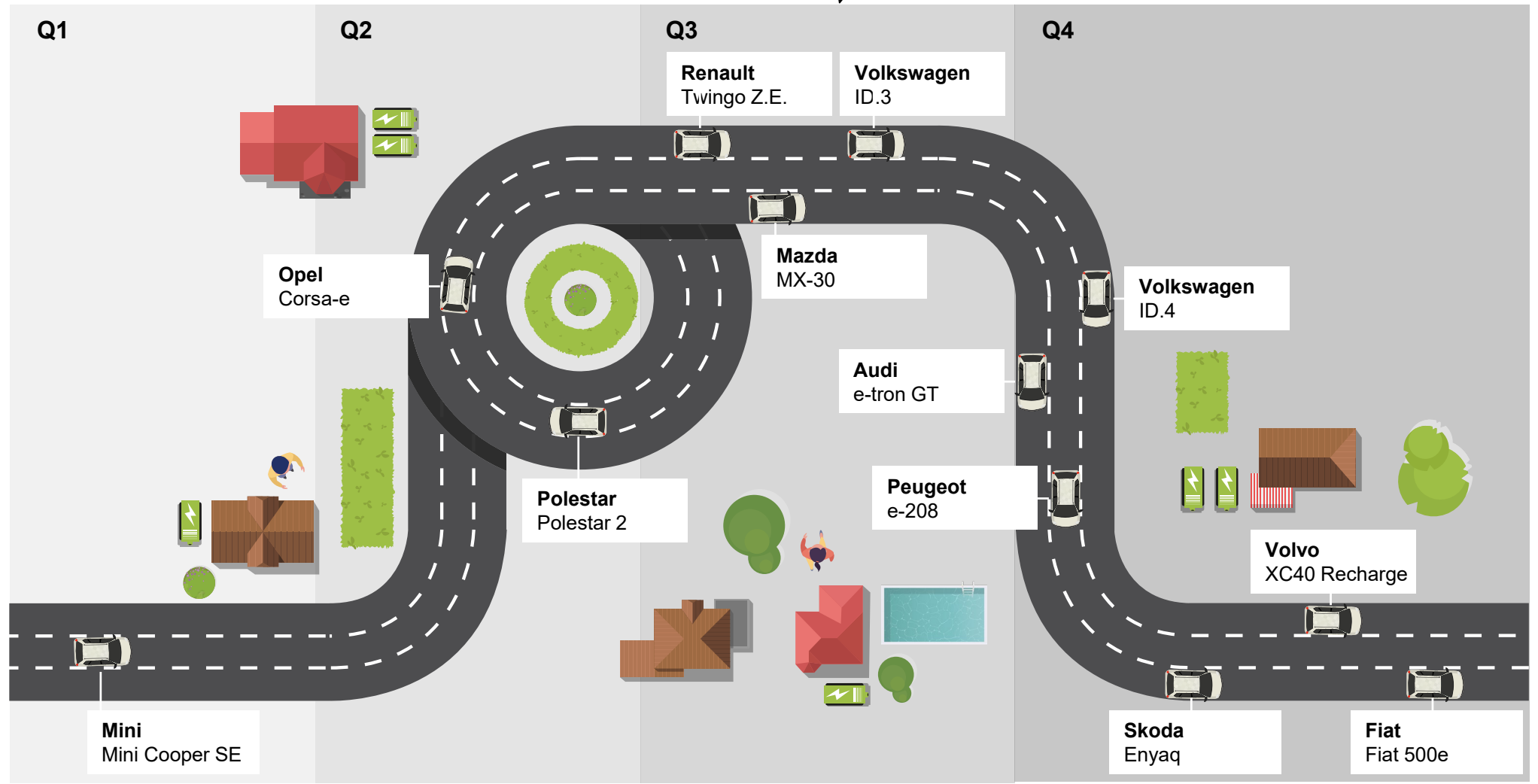
Increase in BEV sales in Western Europe 5+5 markets: Q3 2020 vs. Q3 2019





# New models driving market growth

⚡ New BEV models on European Markets in 2020 (domestic)

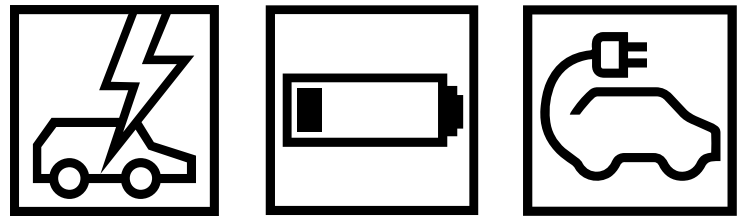




3. E-mobility sales data

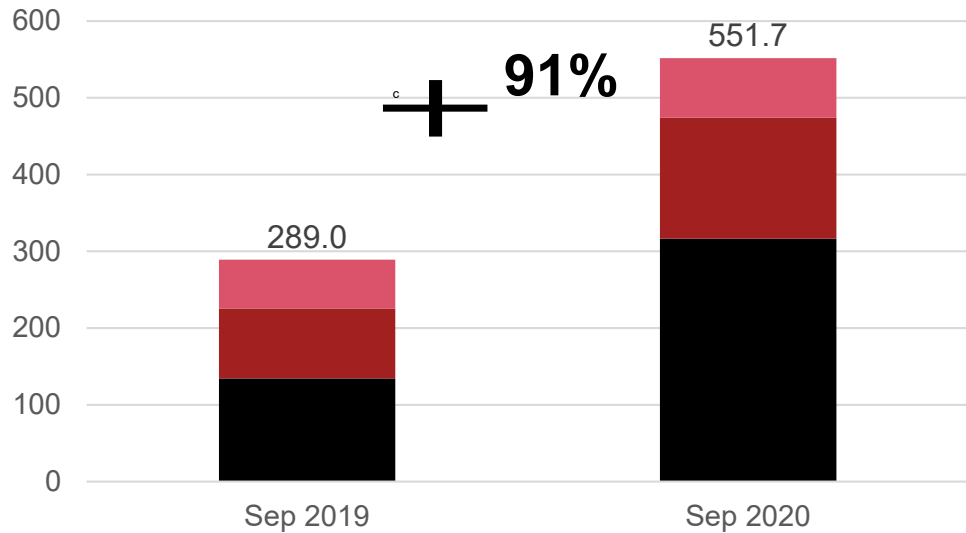
# High growth in spite of crisis

## Key Markets

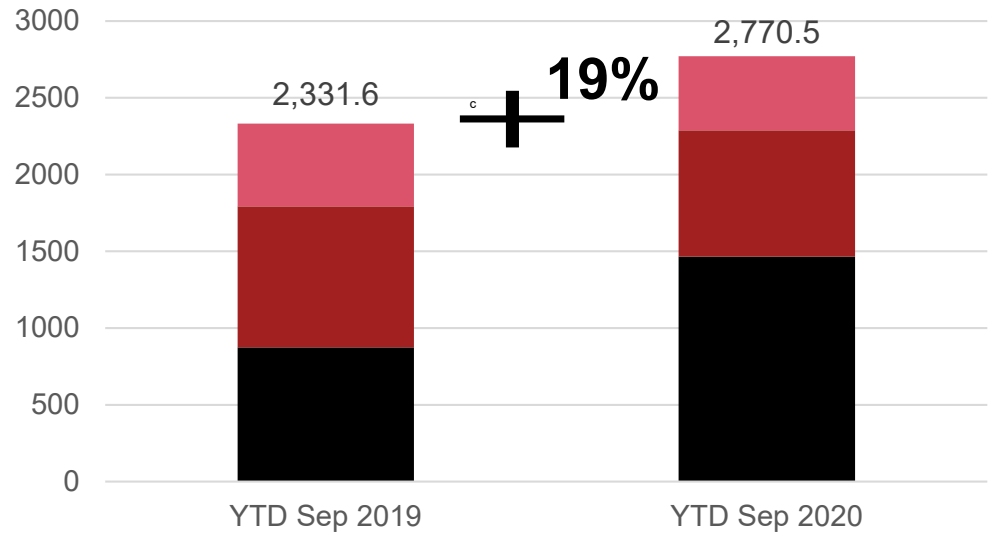


## Electric Vehicles (EVs\*)

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



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

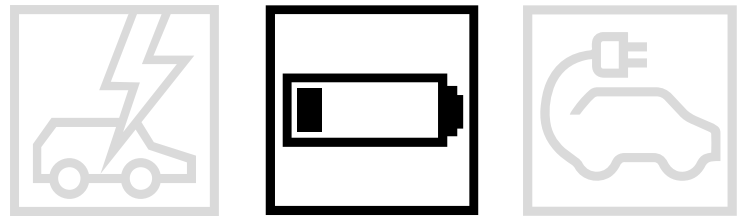




3. E-mobility sales data

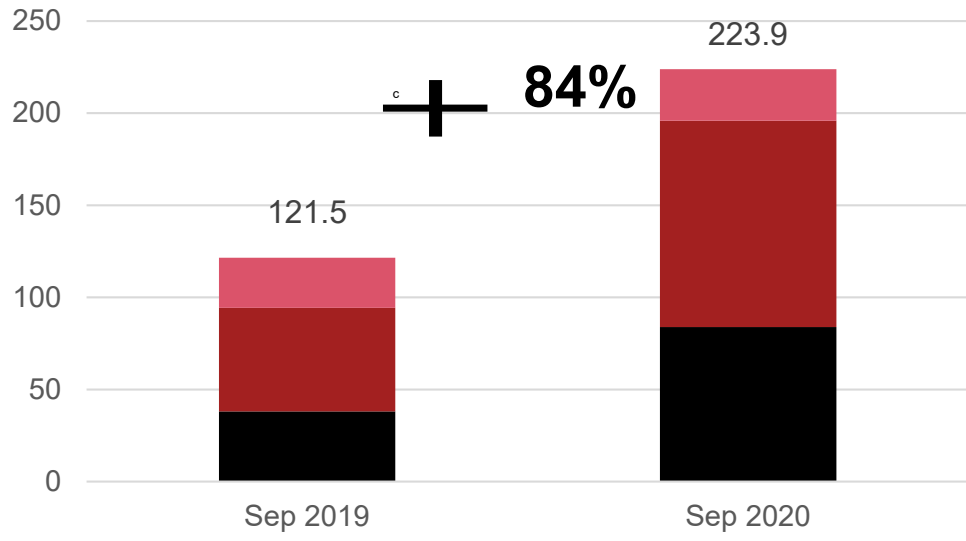
# 1 Million BEV sold in 2020

## Key Markets

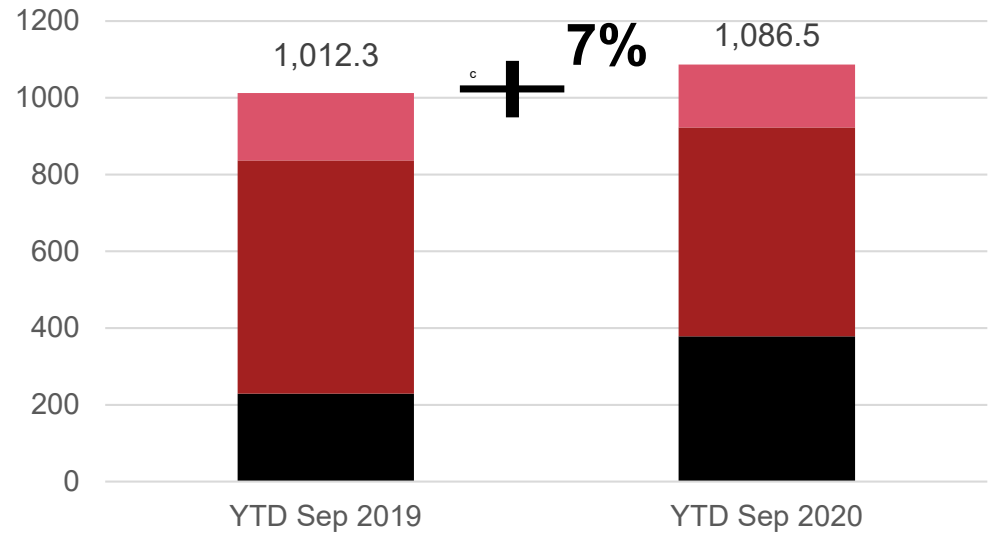


## Battery Electric Vehicles

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



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

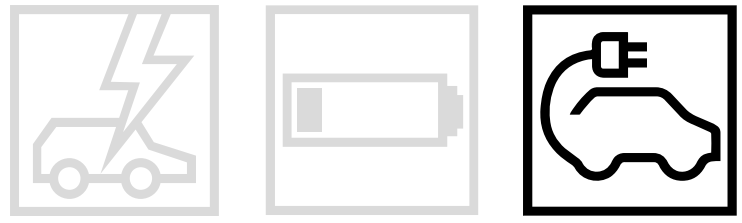






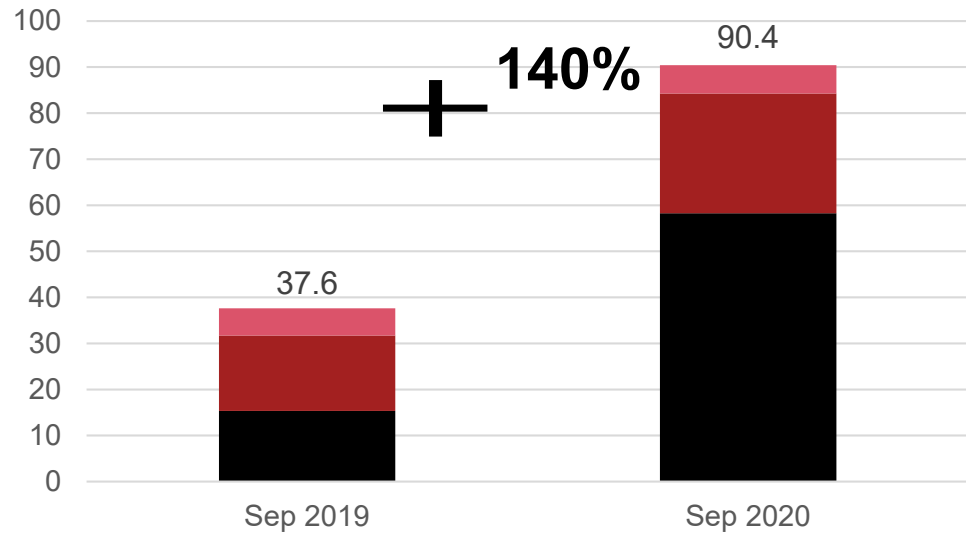
# What Plug-ins can do

## Key Markets

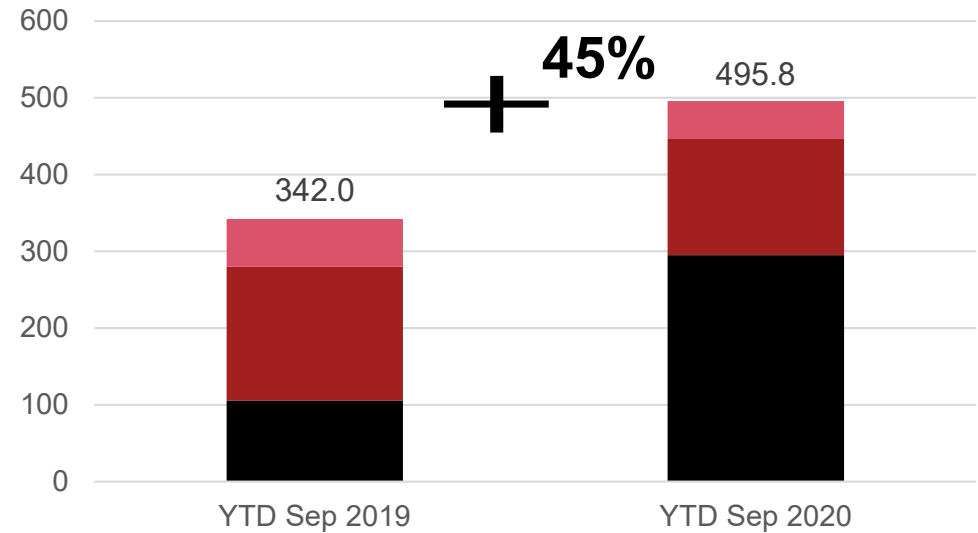


## Plug-in Hybrids

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



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





#### 4. EU Top 5

# Western Europe 5+5

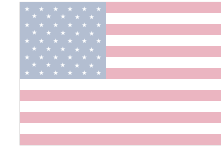
## EU Top 5: France, Germany, Italy, Spain, and UK




Sales have been growing rapidly in the EU top 5 markets since the temporary blip during the COVID-19 lockdown earlier in the year. There were 579,000 new EV registrations in Q3 alone, an increase of 146% compared to the equivalent quarter in 2019. This growth can be attributed to continually growing customer interest, the launch of new models by popular domestic brands and greatly expanded availability after the supply disruptions of the lockdown period. OEMs and suppliers are increasingly struggling to keep pace with demand.

Sales of PHEVs were up more than 400% in France and Germany compared to the same period last year, while BEV sales at least doubled in all five countries. The total EV market share for the EU top 5 for the year to date stands at 19%.

## Other European markets (+5)

When including five smaller European EV markets (Austria, Netherlands, Norway, Switzerland and Sweden), the overall growth in EV sales compared to Q3 sales last year is 128%. Norway's overall EV market share continues to outstrip the remainder of the region, at 82%.

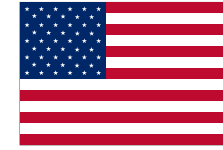


	WE 5+5	2020 Q3	Comparison to 2019 Q3
 BEV		179,000	+121%
 PHEV		146,000	+316%
 Hybrid		386,000	+97%
<b>Total</b>		<b>711,000</b>	<b>+128%</b>



## 4. United States

# United States



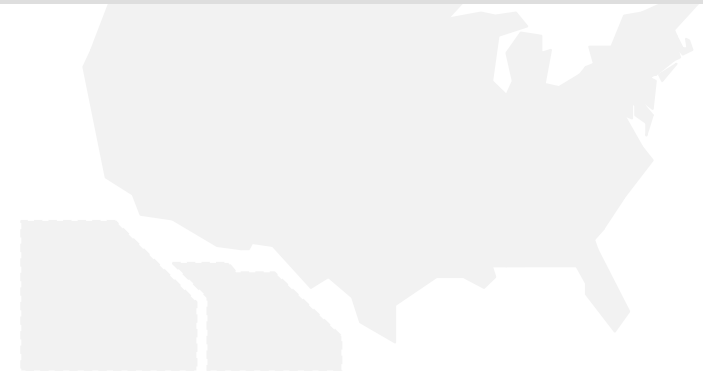
### USA

EV registrations in USA have not enjoyed the same growth witnessed in other regions. Although hybrid sales grew by 17% compared to Q3 last year, BEVs only grew by 2% and PHEV sales even fell by 16%. Total EV sales amounted to 216,000, an increase of 8%, while overall market share for the year to date stands at 5%.

Consumer surveys consistently demonstrate considerable interest in EVs within the US market. However, a pause of new product entries has dampened market growth. The resulting lack of market penetration in turn discourages domestic manufacturers from making the necessary investments to up their game in the EV field.



USA	2020 Q3	Comparison to 2019 Q3
BEV	70,000	+2%
PHEV	18,000	-16%
Hybrid	128,000	+17%
<b>Total</b>	<b>216,000</b>	<b>+8%</b>





#### 4. China and Rest of Asia

# China and rest of Asia

## China

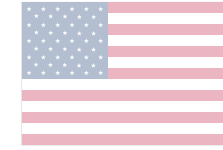
Overall EV sales grew by 49% in Q3 over the same quarter last year, with the market powered by an extension of tax breaks announced in June 2020. Sales of BEVs amounted to 279,000, an increase of 66%, while PHEV sales reached 66,000, an increase of 29%. Overall EV market share for the year to date stands at 6%.

## Japan

Overall, Japan is struggling with an economic downturn and there has been limited focus on BEVs. This is reflected in the sales data. Overall EV sales fell by 19% in Q3 from the same quarter last year. Sales of BEVs amounted to 3,300 a decrease of 46%, while PHEV sales reached 3,000, a fall of 48%. However, the total EV market share stands at 25%, as hybrids are hugely popular.

## Other Asian countries

South Korea recorded a marked increase of EV registrations over the same quarter last year, up by 56% to 48,000 units. The South Korean government has announced a multi-billion dollar investment in subsidies and charging stations with the aim of increasing the number of electric cars tenfold by 2025.



China	2020 Q3	Comparison to 2019 Q3
BEV	279,000	+66%
PHEV	66,000	+29%
Hybrid	50,000	+7%
<b>Total</b>	<b>395,000</b>	<b>+49%</b>

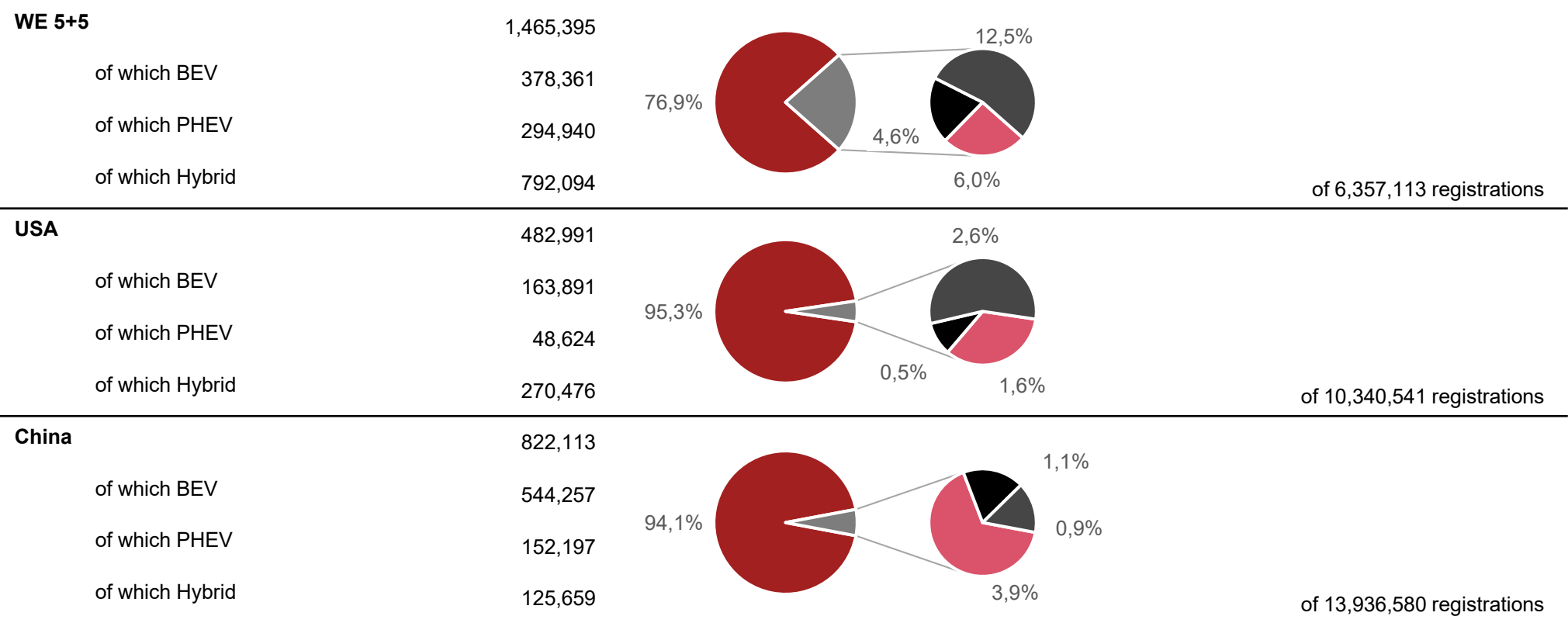




5. Rankings

# Shares of EV registrations

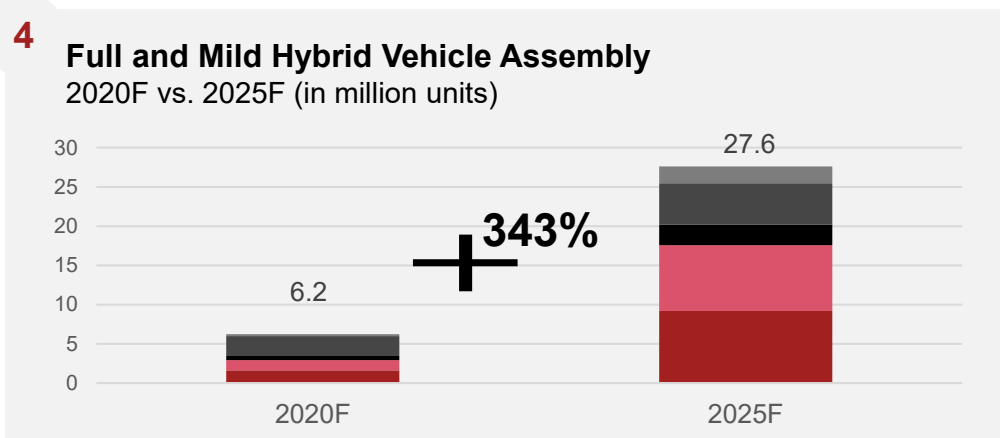
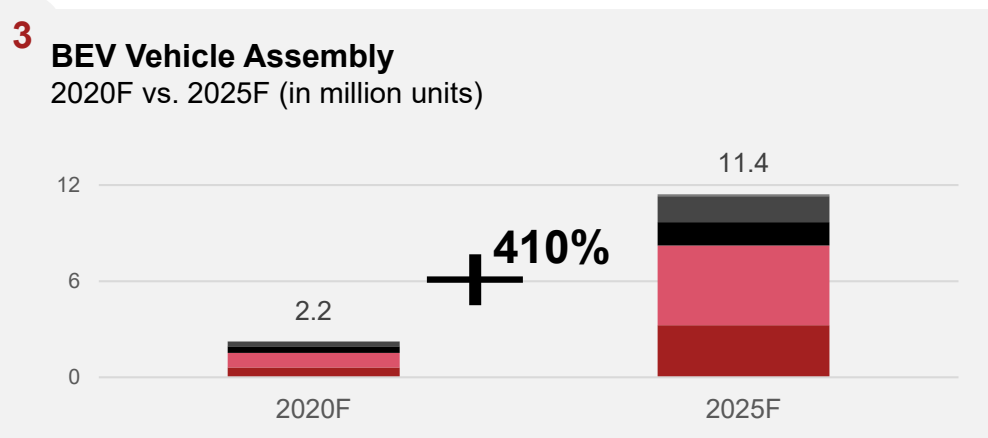
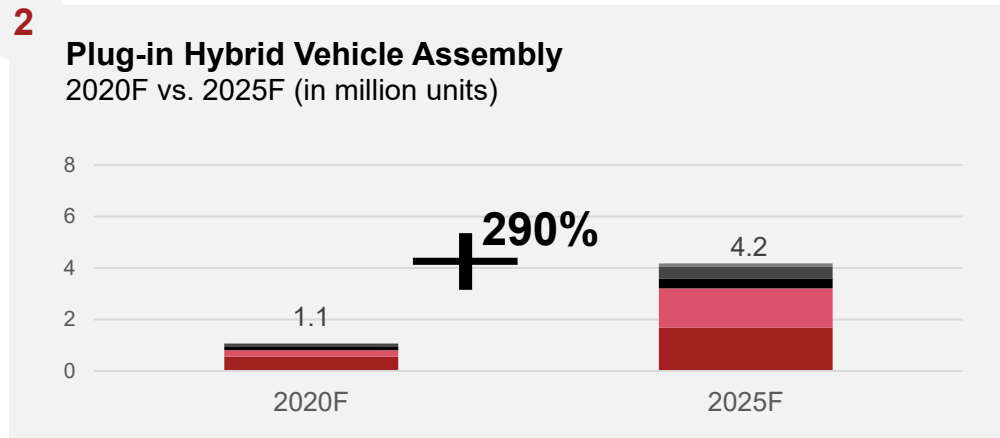
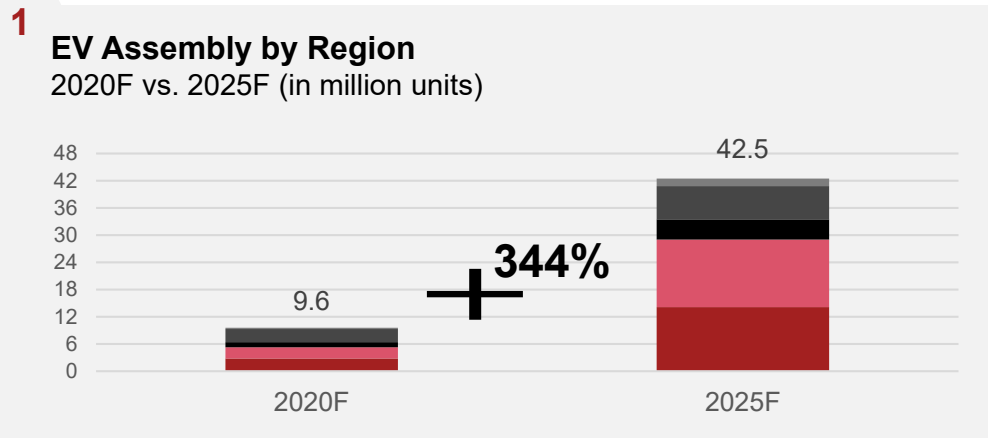
## EV registrations YTD Sep 2020





6. Electrified vehicle assembly forecast

# Electrified vehicle assembly forecast by region

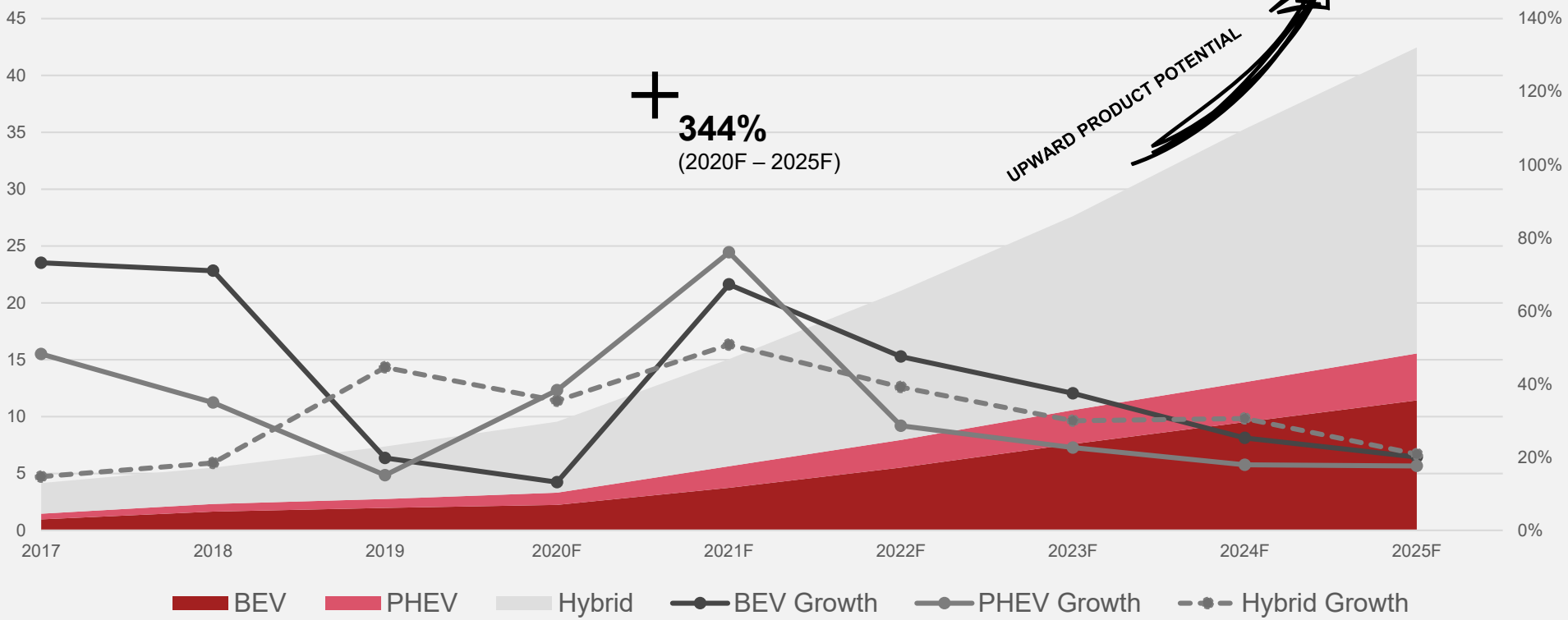




6. Electrified vehicle assembly forecast

# Electrified vehicle assembly forecast

5 EV assembly by powertrain type 2017 – 2025F (in million units, percent)



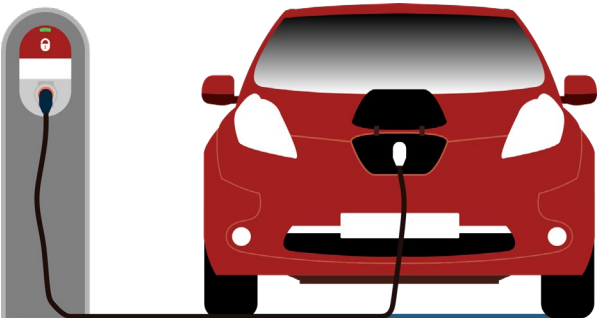


## 6. Electrified vehicle model launches

# Overview: BEV model launches

**2020-2021**  
**not exhaustive**

Source: [www.electrive.net/2020/01/02/unser-blick-voraus-diese-elektroautos-kommen-2020](http://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	Quarter
Audi	C+ CUV e-tron	2021	Q2
Audi	e-tron GT	2020	Q4
Audi	e-tron Sportback	2020	Q1
Audi	Q4 e-tron	2021	Q2
Audi	Q4 e-tron Sportback	2021	Q3
BMW	Mini Cooper SE	2020	Q1
BMW	iX3	2021	n/a
BMW	iNext	2021	Q1
BMW	i4	2021	n/a
Citroën	ë-C4	2020	n/a
Dacia	Spring	2021	n/a
DS	DS 3 Crossback E-Tense	2020	n/a
Fiat	Fiat 500e	2020	Q4
Ford	Mustang Mach-E	2020	Q4
Honda	Honda E	2020	Q1
Hyundai	Ioniq Electric	2020	n/a





6. Electrified vehicle model launches

# Overview: BEV model launches

**2020-2021  
not exhaustive**

Source: [www.electrive.net/2020/01/02/unser-blick-voraus-diese-elektroautos-kommen-2020](http://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	Quarter
Lexus	UX 300e	2020	Q4
Mazda	MX-30	2020	Q3
Mercedes	EQB	2021	Q1
Mercedes	EQA	2021	Q1
Mercedes	EQS	2021	Q3
Nissan	Ariya	2021	n/a
Opel	Corsa-e	2020	Q2
Opel	Mokka-e	2021	n/a
Opel	Zafira-e Life	2021	n/a
Opel	Astra-e	2021	n/a
Peugeot	e-208	2020	Q4
Peugeot	e-2008	2020	n/a
Peugeot	e-Partner	2021	n/a
Peugeot	e-Rifter	2021	n/a
Polestar	Polestar 2	2020	Q2
Renault	Zoe 2	2020	n/a

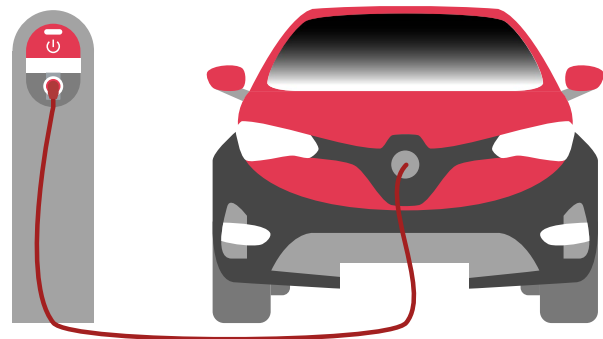
## 6. Electrified vehicle model launches

# Overview: BEV model launches

**2020-2021  
not exhaustive**

Source: [www.electrive.net/2020/01/02/unser-blick-voraus-diese-elektroautos-kommen-2020](http://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	Quarter
Renault	Twingo Z.E.	2020	Q3
Renault	Kangoo-E	2021	n/a
Seat	Cupra el-Born	2021	n/a
Skoda	Enyaq	2020	Q4
Tesla	Model Y	2020	Q1
Toyota	Mirai 2	2020	n/a
Volkswagen	ID.3	2020	Q3
Volkswagen	ID.4	2020	Q4
Volkswagen	ID.5	2021	Q1
Volkswagen	ID.6	2021	Q2
Volkswagen	ID.4X	2021	n/a
Volvo	XC40 Recharge	2020	Q4



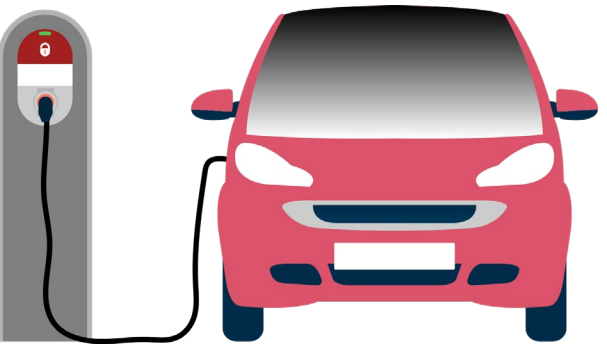


6. Electrified vehicle model launches

# Overview: Upcoming BEV models

from 2022 onward  
not exhaustive

Source: [www.electrive.net/2020/01/02/unser-blick-voraus-diese-elektroautos-kommen-2020](http://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	“Landjet”	2024
Audi	B-CUV e-tron	2025
Audi	E6 e-tron	2022
Audi	Q6 e-tron	2022
Audi	Q8 e-tron	2026
Audi	Q8 e-tron Sportback	2027
Audi	Q9 e-tron	2027
BMW	i7	2022
BMW	iX1	2022
Honda	City-SUV (E-Auto)	2022
Polestar	Polestar 3	2022
Polestar	Precept	2023
Porsche	Macan EV	2022
Smart	SUV	2022
Tesla	Roadster 2	2023
Volkswagen	ID Vizzion	2022



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# E-Mobility sales data

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

### 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

		YTD 2020	Market Share	YTD 2019	YoY YTD	20 Q3	QoY 20 Q3	Sep 20	MoY Sep 20	Aug 20	MoY Aug 20	Jul 20	MoY Jul 20
	BEV	98,360	4.8%	47,903	105.3%	54,053	220.9%	21,188	260.3%	16,076	221.5%	16,789	181.6%
	PHEV	105,882	5.2%	26,487	299.8%	56,341	465.6%	20,127	463.5%	17,095	447.9%	19,119	484.7%
	Hybrid	206,041	10.1%	136,865	50.5%	96,371	91.2%	33,909	120.6%	29,093	73.9%	33,369	82.4%
<b>Germany</b>	Total EV	410,283	20.1%	211,255	94.2%	206,765	167.8%	75,224	203.0%	62,264	150.5%	69,277	151.7%
	BEV	66,611	5.4%	25,072	165.7%	35,654	171.7%	21,903	184.3%	5,589	77.6%	8,162	259.4%
	PHEV	42,279	3.4%	22,984	83.9%	22,769	190.1%	12,400	139.4%	2,922	222.2%	7,447	322.2%
	Hybrid	204,227	16.4%	93,328	118.8%	114,295	171.3%	70,210	150.4%	15,043	199.9%	29,042	220.2%
<b>UK</b>	Total EV	313,117	25.2%	141,384	121.5%	172,718	173.7%	104,513	155.4%	23,554	159.7%	44,651	240.7%
	BEV	70,504	6.0%	30,380	132.1%	25,568	172.8%	10,011	138.2%	5,590	167.1%	9,967	223.8%
	PHEV	40,493	3.5%	11,865	241.3%	20,133	408.2%	7,867	482.3%	5,266	269.0%	7,000	491.2%
	Hybrid	60,849	5.2%	75,419	-19.3%	24,995	-1.8%	8,523	-3.0%	6,655	-8.0%	9,817	4.0%
<b>France</b>	Total EV	171,846	14.7%	117,664	46.0%	70,696	82.2%	26,401	84.1%	17,511	62.8%	26,784	95.5%
	BEV	17,497	1.8%	7,775	125.0%	7,559	176.1%	4,086	224.3%	1,879	255.2%	1,594	68.0%
	PHEV	12,436	1.3%	3,975	212.9%	6,635	348.9%	2,909	268.7%	1,628	433.8%	2,098	446.4%
	Hybrid	125,083	13.0%	78,124	60.1%	62,804	176.9%	32,038	213.1%	13,387	226.9%	17,379	108.1%
<b>Italy</b>	Total EV	155,016	16.1%	89,874	72.5%	76,998	186.3%	39,033	217.8%	16,894	242.7%	21,071	117.6%
	BEV	11,155	1.9%	9,189	21.4%	5,332	114.1%	2,351	149.8%	1,359	112.7%	1,622	78.0%
	PHEV	11,282	1.9%	5,130	119.9%	5,706	281.2%	1,974	265.6%	1,336	199.6%	2,396	368.9%
	Hybrid	88,273	14.8%	76,296	15.7%	41,216	61.1%	12,318	45.3%	10,369	48.1%	18,529	83.3%
<b>Spain</b>	Total EV	110,710	18.6%	90,615	22.2%	52,254	76.7%	16,643	67.1%	13,064	61.6%	22,547	95.6%
	BEV	264,127	4.4%	120,319	119.5%	128,166	187.6%	59,539	197.9%	30,493	167.3%	38,134	189.5%
	PHEV	212,372	3.5%	70,441	201.5%	111,584	350.9%	45,277	296.1%	28,247	355.2%	38,060	435.1%
	Hybrid	684,473	11.4%	460,032	48.8%	339,681	104.3%	156,998	121.4%	74,547	86.0%	108,136	95.7%
<b>WE-5</b>	Total EV	1,160,972	19.3%	650,792	78.4%	579,431	146.0%	261,814	155.9%	133,287	131.0%	184,330	144.0%

# E-Mobility sales data

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

## 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

		YTD 2020	Market Share	YTD 2019	YoY YTD	20 Q3	QoY 20 Q3	Sep 20	MoY Sep 20	Aug 20	MoY Aug 20	Jul 20	MoY Jul 20
	BEV	16,415	7.8%	12,254	34.0%	7,105	86.1%	3,678	108.5%	2,120	118.3%	1,307	20.7%
	PHEV	40,361	19.1%	15,732	156.6%	16,948	249.5%	6,233	232.6%	5,301	217.8%	5,414	314.2%
	Hybrid	28,250	13.3%	20,678	36.6%	12,573	44.3%	5,291	77.9%	4,291	37.8%	2,991	13.8%
<b>Sweden</b>	Total EV	85,026	40.2%	48,664	74.7%	36,626	110.7%	15,202	129.9%	11,712	103.6%	9,712	93.5%
	BEV	48,175	50.5%	49,465	-2.6%	19,672	37.7%	9,560	57.1%	5,704	21.0%	4,408	26.5%
	PHEV	19,357	20.3%	12,064	60.5%	7,288	121.7%	3,129	174.7%	1,881	56.0%	2,278	141.6%
	Hybrid	11,109	11.7%	13,558	-18.1%	5,169	20.2%	1,130	-19.5%	950	-38.9%	3,089	130.2%
<b>Norway</b>	Total EV	78,641	82.5%	75,087	4.7%	32,129	46.9%	13,819	60.2%	8,535	14.2%	9,775	69.4%
	BEV	29,533	11.9%	30,757	-4.0%	14,588	13.2%	6,260	-19.1%	4,388	48.8%	3,940	79.3%
	PHEV	10,392	4.2%	3,830	171.3%	4,773	383.6%	1,665	289.0%	1,349	355.7%	1,759	568.8%
	Hybrid	31,768	12.8%	21,662	46.7%	13,355	81.6%	5,092	95.2%	3,864	61.7%	4,399	86.8%
<b>Netherlands</b>	Total EV	71,693	28.8%	56,249	27.5%	32,716	54.1%	13,017	20.8%	9,601	70.4%	10,098	109.7%
	BEV	11,169	6.8%	8,831	26.5%	5,481	89.8%	2,869	87.5%	1,608	162.3%	1,004	34.8%
	PHEV	8,029	4.9%	2,373	238.3%	3,619	325.8%	1,462	344.4%	938	294.1%	1,219	330.7%
	Hybrid	19,757	12.1%	14,156	39.6%	7,954	46.2%	3,131	64.8%	2,131	29.0%	2,692	42.4%
<b>Switzerland</b>	Total EV	38,955	23.8%	25,360	53.6%	17,054	85.8%	7,462	98.5%	4,677	86.9%	4,915	68.4%
	BEV	8,942	5.0%	7,383	21.1%	4,137	66.9%	1,946	100.8%	1,127	41.1%	1,064	49.6%
	PHEV	4,429	2.5%	1,264	250.4%	1,854	406.6%	485	199.4%	635	516.5%	734	626.7%
	Hybrid	16,737	9.3%	9,808	70.6%	7,213	89.2%	2,608	115.4%	2,112	52.3%	2,493	105.4%
<b>Austria</b>	Total EV	30,108	16.7%	18,455	63.1%	13,204	98.3%	5,039	115.2%	3,874	69.2%	4,291	111.8%
	BEV	378,361	6.0%	229,009	65.2%	179,149	121.4%	83,852	120.2%	45,440	111.8%	49,857	133.1%
	PHEV	294,940	4.6%	105,704	179.0%	146,066	316.3%	58,251	279.2%	38,351	294.7%	49,464	394.1%
	Hybrid	792,094	12.5%	539,894	46.7%	385,945	97.0%	174,250	115.1%	87,895	75.2%	123,800	91.4%
<b>WE 5+5</b>	Total EV	1,465,395	23.1%	874,607	67.5%	711,160	128.0%	316,353	135.3%	171,686	111.1%	223,121	132.2%

# E-Mobility sales data

## China, Japan, USA South Korea Analyzed Markets

### Legend

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

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

		YTD 2020	Market Share	YTD 2019	YoY YTD	20 Q3	QoY 20 Q3	Sep 20	MoY Sep 20	Aug 20	MoY Aug 20	Jul 20	MoY Jul 20
	BEV	544,257	3.9%	607,650	-10.4%	279,000	66.4%	112,000	99.3%	88,000	39.0%	79,000	64.2%
	PHEV	152,197	1.1%	174,199	-12.6%	66,300	29.2%	26,000	59.1%	21,000	27.8%	19,300	4.0%
	Hybrid	125,659	0.9%	136,543	-8.0%	50,143	6.9%	19,991	7.6%	14,837	4.4%	15,315	8.5%
<b>China</b>	<b>Total EV</b>	<b>822,113</b>	<b>5.9%</b>	<b>918,392</b>	<b>-10.5%</b>	<b>395,443</b>	<b>48.7%</b>	<b>157,991</b>	<b>73.4%</b>	<b>123,837</b>	<b>31.8%</b>	<b>113,615</b>	<b>40.6%</b>
	BEV	10,270	0.4%	17,191	-40.3%	3,373	-45.8%	1,887	-27.2%	719	-58.1%	767	-59.9%
	PHEV	9,266	0.3%	14,171	-34.6%	3,077	-47.8%	1,387	-50.6%	744	-46.6%	946	-44.0%
	Hybrid	681,500	24.3%	894,915	-23.8%	236,579	-17.5%	96,234	-11.8%	62,525	-20.1%	77,820	-21.6%
<b>Japan</b>	<b>Total EV</b>	<b>701,036</b>	<b>25.0%</b>	<b>926,277</b>	<b>-24.3%</b>	<b>243,029</b>	<b>-18.7%</b>	<b>99,508</b>	<b>-13.1%</b>	<b>63,988</b>	<b>-21.3%</b>	<b>79,533</b>	<b>-22.7%</b>
	BEV	163,891	1.6%	175,636	-6.7%	69,686	2.3%	28,034	3.0%	19,164	-9.8%	22,488	14.4%
	PHEV	48,624	0.5%	62,141	-21.8%	17,646	-15.8%	6,170	4.1%	6,105	-15.6%	5,371	-31.2%
	Hybrid	270,476	2.6%	300,848	-10.1%	128,498	16.5%	43,130	42.2%	41,934	-3.5%	43,434	19.0%
<b>USA</b>	<b>Total EV</b>	<b>482,991</b>	<b>4.7%</b>	<b>538,625</b>	<b>-10.3%</b>	<b>215,830</b>	<b>8.3%</b>	<b>77,334</b>	<b>21.9%</b>	<b>67,203</b>	<b>-6.6%</b>	<b>71,293</b>	<b>11.4%</b>
	BEV	30,354	2.3%	27,522	10.3%	10,533	22.4%	2,908	23.0%	4,524	76.6%	3,101	-15.7%
	PHEV	4,410	0.3%	2,224	98.3%	1,511	98.8%	277	114.7%	585	117.5%	649	79.3%
	Hybrid	100,559	7.5%	71,199	41.2%	35,820	68.4%	11,389	59.0%	10,821	88.7%	13,610	62.4%
<b>South Korea</b>	<b>Total EV</b>	<b>135,323</b>	<b>10.0%</b>	<b>100,945</b>	<b>34.1%</b>	<b>47,864</b>	<b>56.2%</b>	<b>14,574</b>	<b>50.9%</b>	<b>15,930</b>	<b>86.0%</b>	<b>17,360</b>	<b>39.8%</b>
	BEV	1,127,133	3.2%	1,057,008	6.6%	541,741	63.4%	228,681	80.8%	157,847	43.1%	155,213	63.8%
	PHEV	509,437	1.5%	358,439	42.1%	234,600	105.7%	92,085	127.0%	66,785	90.6%	75,730	97.0%
	Hybrid	1,970,288	5.7%	1,943,399	1.4%	836,985	26.6%	344,994	40.1%	218,012	13.7%	273,979	22.9%
<b>Analyzed Markets</b>	<b>Total EV</b>	<b>3,606,858</b>	<b>10.4%</b>	<b>3,358,846</b>	<b>7.4%</b>	<b>1,613,326</b>	<b>45.8%</b>	<b>665,760</b>	<b>61.1%</b>	<b>442,644</b>	<b>31.3%</b>	<b>504,922</b>	<b>41.8%</b>