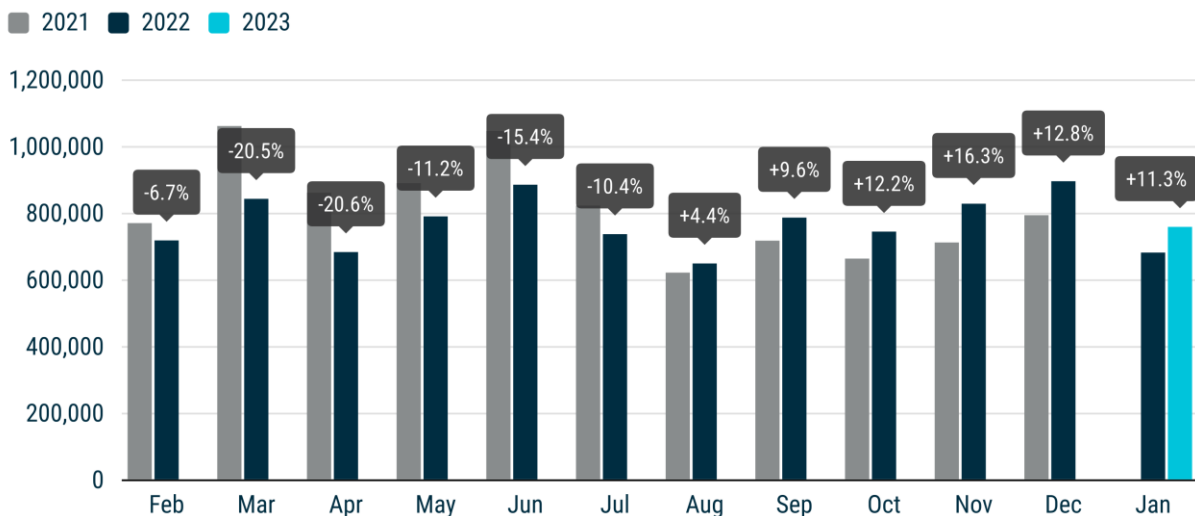


NEW PASSENGER CAR REGISTRATIONS, EUROPEAN UNION

PRESS EMBARGO

8.00am CET (7.00am GMT), 21 February 2023

Passenger car registrations: +11.3% in January 2023, battery electric 9.5% market share



In January 2023, the European Union passenger car market grew by 11.3% to 760,041 units, starting the new year on a positive note. However, this was largely due to an unusually modest base of comparison in 2022, when the lowest January volume on record was reached.

At a country level, the region's positive performance was reflected in three of the four key markets. The strongest gains were seen in Spain (+51.4%) and Italy (+19.0%), followed by France, with a more modest but still solid growth (+8.8%). The exception to this trend was Germany, which recorded a 2.6% decline last month.

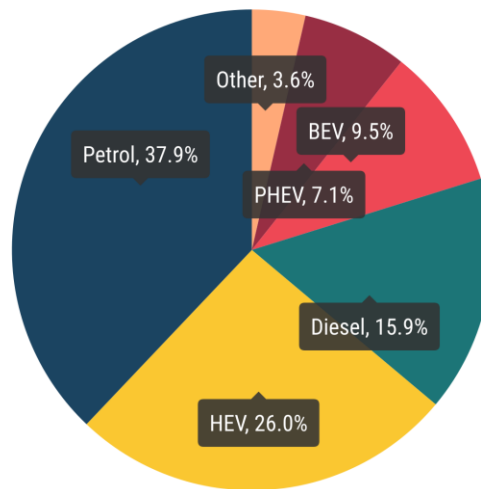
FUEL TYPES OF NEW CARS

During the first month of 2023, battery electric and hybrid passenger car registrations in the EU continued to grow, accounting for 9.5% and 26.0% of the market respectively. Nonetheless, petrol remained the most popular fuel type for newly-registered cars in the EU, with a market share of 37.9%.

Data source: the European Automobile Manufacturers' Association (ACEA), based on aggregated data provided by national automobile associations, ACEA members and S&P Global Mobility.

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■ Battery Electric (BEV)
 ■ Plug-in hybrid (PHEV)
 ■ Hybrid Electric (HEV)
 ■ Other
 ■ Petrol
 ■ Diesel



Electric cars

January registrations of new battery electric vehicles (BEVs) increased by 22.9%, reaching 71,984 cars registered across the EU and a market share of 9.5% (against 8.6% in January 2022). Most of the region's markets contributed significantly to this growth, with double- and triple-digit percentage gains. However, there were a few exceptions in some of the EU's biggest volume markets for this powertrain: Germany (-13.2%), Sweden (-18.5%) and Italy (-8.7%).

Hybrid electric vehicles (HEVs) also had a strong start of the year. Their volumes grew by 22.1% to 197,982 units, sustained by double-digit gains in the region's four biggest markets: Spain (+59.3%), Italy (+24.7%), Germany (+19.0%), and France (+12.5%). This resulted in a market share of 26.0%, a 2.3 percentage-point improvement compared to January 2022.

On the other hand, EU plug-in hybrid vehicle (PHEV) sales declined by 9.9% to 53,649 units in January, as registrations more than halved in Germany (-53.2%), which until last year was the largest market by volume for such cars. As a result, the market share for PHEVs contracted from 8.7% in January 2022 to 7.1% this year.

Petrol and diesel cars

Registrations of new petrol cars in the EU recorded a 12.3% uplift in **January**, contributing to the expansion of their market share to 37.9% (against 37.6% in 2022). All the region's major markets contributed to this growth: Spain (+59.4%), Italy (+15.5%), France (+11.9%) and Germany (+3.5%).

By contrast, the EU's diesel car market continued to struggle – with a decline of 1.6% last month – despite a notable increase in Italian (+21.4%) and Spanish (+19.0%) registrations. This resulted in a drop of 2.0 percentage points in market share, from 17.9% to 15.9%.

NEW PASSENGER CAR REGISTRATIONS, BY MARKET AND FUEL TYPE

MONTHLY

	BATTERY ELECTRIC			PLUG-IN HYBRID			HYBRID ELECTRIC			OTHERS ¹			PETROL			DIESEL			TOTAL	
	January 2023	% change 23/22	% share 2023	January 2023	% change 23/22	% share 2023	January 2023	% change 23/22	% share 2023	January 2023	% change 23/22	% share 2023	January 2023	% change 23/22	% share 2023	January 2023	% change 23/22	% share 2023	January 2023	% change 23/22
Austria	2,745	+36.4	14.6	1,218	+10.3	6.5	3,743	+41.1	19.9	1	-75.0	0.0	7,220	+17.7	38.3	3,923	+5.7	20.8	18,850	+20.7
Belgium	5,696	+105.9	14.3	7,247	+48.4	18.2	3,291	+33.1	8.3	281	-33.9	0.7	18,231	+9.5	45.8	5,101	-24.5	12.8	39,847	+17.4
Bulgaria	51	+50.0	2.3	16	+128.6	0.7	53	-14.5	2.4	3	-62.5	0.1	1,696	+7.9	76.2	408	+17.9	18.3	2,227	+9.8
Croatia	192	+76.1	5.7	80	+9.6	2.4	720	+19.0	21.4	138	-2.8	4.1	1,634	+17.0	48.6	596	-3.6	17.7	3,360	+14.1
Cyprus	82	+446.7	6.4	29	+222.2	2.3	491	+119.2	38.5	0	-100.0	0.0	620	-18.7	48.6	53	-46.5	4.2	1,275	+14.8
Czech Republic	429	+129.4	2.5	488	+80.1	2.8	2,783	+31.0	16.2	297	-35.6	1.7	9,320	+9.6	54.4	3,820	-19.0	22.3	17,137	+5.4
Denmark	2,202	+32.0	21.2	795	-34.4	7.6	2,422	+16.3	23.3	0	-100.0	0.0	4,551	+18.5	43.7	433	-27.8	4.2	10,403	+10.6
Estonia	58	+31.8	3.3	32	-17.9	1.8	739	+10.1	41.7	6	-83.3	0.3	735	+16.1	41.5	203	-32.6	11.4	1,773	+2.8
Finland	1,862	+87.7	26.0	1,295	-21.6	18.0	2,470	-9.8	34.4	53	-27.4	0.7	1,183	-39.2	16.5	312	-35.0	4.3	7,175	-9.0
France	14,629	+43.2	13.1	10,301	+29.8	9.2	26,030	+12.5	23.3	5,087	+27.0	4.5	43,340	+11.9	38.7	12,552	-33.4	11.2	111,939	+8.8
Germany	18,136	-13.2	10.1	8,853	-53.2	4.9	41,919	+19.0	23.4	1,187	-34.3	0.7	69,922	+3.5	39.0	39,230	-1.2	21.9	179,247	-2.6
Greece	273	+196.7	2.6	447	+64.9	4.2	2,516	+76.7	23.9	240	-41.2	2.3	4,968	+96.4	47.2	2,088	+162.0	19.8	10,532	+90.7
Hungary	369	+14.2	4.4	367	-1.3	4.4	3,598	+9.6	43.3	99	+191.2	1.2	3,006	-6.2	36.2	875	+0.1	10.5	8,314	+2.8
Ireland	3,675	+36.3	13.5	1,956	-10.0	7.2	6,197	-11.1	22.7	0	-100.0	0.0	9,254	+22.5	33.9	6,236	+11.0	22.8	27,318	+9.2
Italy	3,332	-8.7	2.6	6,049	+11.1	4.7	47,178	+24.7	36.7	13,507	+18.0	10.5	34,166	+15.5	26.6	24,205	+21.4	18.8	128,437	+19.0
Latvia	183	+251.9	13.3	21	+61.5	1.5	401	+15.9	29.2	40	+33.3	2.9	491	-7.9	35.7	239	+6.2	17.4	1,375	+14.7
Lithuania	167	+92.0	8.2	0		0.0	927	-6.5	45.5	0		0.0	707	-14.6	34.7	235	-29.9	11.5	2,036	-9.1
Luxembourg	674	+68.1	18.1	328	+6.5	8.8	684	+20.0	18.4	0	-100.0	0.0	1,247	+5.1	33.5	793	-4.8	21.3	3,726	+12.9
Malta	56	-15.2	13.3	93	-6.1	22.1	90	+18.4	21.4	1	-50.0	0.2	141	-15.1	33.5	40	+207.7	9.5	421	-0.2
Netherlands	5,082	+64.9	15.5	4,024	-0.4	12.3	7,779	-8.9	23.7	160	-50.9	0.5	15,457	+7.8	47.1	343	-35.0	1.0	32,845	+6.5
Poland	1,077	+110.4	3.1	689	-6.1	2.0	13,444	+46.3	38.4	945	-19.3	2.7	15,648	+6.1	44.6	3,243	+24.0	9.3	35,046	+21.0
Portugal	2,258	+134.7	15.4	1,575	+23.5	10.8	2,437	+41.5	16.6	730	+254.4	5.0	5,220	+39.7	35.7	2,419	+23.0	16.5	14,639	+48.4
Romania	1,073	+87.9	8.7	0		0.0	3,354	+36.7	27.3	2,187	+54.0	17.8	4,361	+15.6	35.6	1,291	+15.5	10.5	12,266	+31.4
Slovakia	105	+41.9	1.6	142	+35.2	2.1	1,751	+35.7	26.2	138	-21.1	2.1	3,448	+13.8	51.6	1,096	+3.0	16.4	6,680	+16.4
Slovenia	316	+125.7	7.1	88	+72.5	2.0	434	-27.7	9.8	63	-14.9	1.4	2,743	+2.1	62.0	781	+1.7	17.6	4,425	+2.4
Spain	3,060	+72.3	4.8	4,115	+28.2	6.4	20,901	+59.3	32.6	1,798	+83.5	2.8	25,863	+59.4	40.3	8,410	+19.0	13.1	64,147	+51.4
Sweden	4,202	-18.5	28.8	3,401	-36.6	23.3	1,630	-3.3	11.2	609	+173.1	4.2	3,153	-35.7	21.6	1,606	-37.4	11.0	14,601	-26.6
EUROPEAN UNION	71,984	+22.9	9.5	53,649	-9.9	7.1	197,982	+22.1	26.0	27,570	+17.5	3.6	288,325	+12.3	37.9	120,531	-1.6	15.9	760,041	+11.3
Iceland	196	-40.4	26.8	112	-61.4	15.3	150	+28.2	20.5	1		0.1	122	+82.1	16.7	151	+86.4	20.6	732	-17.2
Norway	1,237	-81.4	66.5	182	-66.2	9.8	263	-29.1	14.1	0	-100.0	0.0	36	-79.4	1.9	142	-33.0	7.6	1,860	-76.6
Switzerland	2,840	+33.6	17.3	1,387	-9.4	8.4	4,667	+19.3	28.4	10	-54.5	0.1	5,905	-6.0	35.9	1,628	-19.7	9.9	16,437	+3.4
EFTA	4,273	-53.1	22.5	1,681	-28.8	8.8	5,080	+15.5	26.7	11	-52.2	0.1	6,063	-7.0	31.9	1,921	-17.2	10.1	19,029	-23.1
United Kingdom	17,294	+19.8	13.1	9,109	+0.7	6.9	41,338	+21.1	31.3	0		0.0	58,973	+14.6	44.7	5,280	-12.1	4.0	131,994	+14.7
EU + EFTA + UK	93,551	+13.9	10.3	64,439	-9.2	7.1	244,400	+21.8	26.8	27,581	+17.4	3.0	353,361	+12.3	38.8	127,732	-2.4	14.0	911,064	+10.7

¹ Includes fuel cell electric vehicles (FCEVs), natural gas vehicles (NGVs), LPG, E85/ethanol and other fuels

NEW PASSENGER CAR REGISTRATIONS, BY MANUFACTURER EUROPEAN UNION

	JANUARY					JANUARY-JANUARY				
	% share ¹		Units		% change	% share ¹		Units		% change
	2023	2022	2023	2022	23/22	2023	2022	2023	2022	23/22
Volkswagen Group	26.0	26.1	197,490	178,554	+10.6	26.0	26.1	197,490	178,554	+10.6
Volkswagen	11.3	11.0	85,554	75,189	+13.8	11.3	11.0	85,554	75,189	+13.8
Skoda	5.8	5.7	43,919	38,868	+13.0	5.8	5.7	43,919	38,868	+13.0
Audi	5.0	4.8	37,713	32,685	+15.4	5.0	4.8	37,713	32,685	+15.4
Seat	2.3	3.0	17,343	20,385	-14.9	2.3	3.0	17,343	20,385	-14.9
Cupra	0.8	0.7	6,341	4,979	+27.4	0.8	0.7	6,341	4,979	+27.4
Porche	0.8	0.9	6,296	6,066	+3.8	0.8	0.9	6,296	6,066	+3.8
Others ²	0.0	0.1	324	382	-15.2	0.0	0.1	324	382	-15.2
Stellantis	18.6	20.5	141,160	139,958	+0.9	18.6	20.5	141,160	139,958	+0.9
Peugeot	5.6	6.9	42,538	47,162	-9.8	5.6	6.9	42,538	47,162	-9.8
Fiat ³	3.9	3.8	29,858	25,881	+15.4	3.9	3.8	29,858	25,881	+15.4
Citroen	3.2	3.6	24,561	24,664	-0.4	3.2	3.6	24,561	24,664	-0.4
Opel/Vauxhall	3.1	3.7	23,531	25,602	-8.1	3.1	3.7	23,531	25,602	-8.1
Jeep	1.2	1.3	9,469	8,757	+8.1	1.2	1.3	9,469	8,757	+8.1
DS	0.5	0.4	3,657	2,831	+29.2	0.5	0.4	3,657	2,831	+29.2
Lancia/Chrysler	0.5	0.5	3,586	3,271	+9.6	0.5	0.5	3,586	3,271	+9.6
Alfa Romeo	0.4	0.2	3,269	1,511	+116.3	0.4	0.2	3,269	1,511	+116.3
Others ⁴	0.1	0.0	691	279	+147.7	0.1	0.0	691	279	+147.7
Renault Group	11.7	10.4	88,636	71,150	+24.6	11.7	10.4	88,636	71,150	+24.6
Dacia	6.0	4.7	45,511	31,911	+42.6	6.0	4.7	45,511	31,911	+42.6
Renault	5.7	5.7	42,979	39,086	+10.0	5.7	5.7	42,979	39,086	+10.0
Alpine	0.0	0.0	146	153	-4.6	0.0	0.0	146	153	-4.6
Hyundai Group	9.0	9.7	68,344	66,306	+3.1	9.0	9.7	68,344	66,306	+3.1
Kia	4.7	5.2	35,961	35,749	+0.6	4.7	5.2	35,961	35,749	+0.6
Hyundai	4.3	4.5	32,383	30,557	+6.0	4.3	4.5	32,383	30,557	+6.0
Toyota Group	8.2	8.1	62,069	55,131	+12.6	8.2	8.1	62,069	55,131	+12.6
Toyota	7.8	7.7	59,568	52,842	+12.7	7.8	7.7	59,568	52,842	+12.7
Lexus	0.3	0.3	2,501	2,289	+9.3	0.3	0.3	2,501	2,289	+9.3
BMW Group	5.7	7.1	43,306	48,180	-10.1	5.7	7.1	43,306	48,180	-10.1
BMW	4.7	5.4	35,953	36,802	-2.3	4.7	5.4	35,953	36,802	-2.3
Mini	1.0	1.7	7,352	11,378	-35.4	1.0	1.7	7,352	11,378	-35.4
Mercedes-Benz	4.7	5.7	35,977	38,873	-7.4	4.7	5.7	35,977	38,873	-7.45
Mercedes	4.6	5.4	34,632	37,166	-6.8	4.6	5.4	34,632	37,166	-6.8
Smart	0.2	0.2	1,345	1,707	-21.2	0.2	0.2	1,345	1,707	-21.2
Ford	3.7	4.4	27,959	30,207	-7.4	3.7	4.4	27,959	30,207	-7.4
Volvo Cars	2.1	2.2	15,631	15,282	+2.3	2.1	2.2	15,631	15,282	+2.3
Nissan	1.8	1.6	13,537	11,166	+21.2	1.8	1.6	13,537	11,166	+21.2
Mazda	1.6	1.2	11,963	8,080	+48.1	1.6	1.2	11,963	8,080	+48.1
Suzuki	1.4	1.3	10,832	9,064	+19.5	1.4	1.3	10,832	9,064	+19.5
Jaguar Land Rover Group	0.6	0.5	4,923	3,643	+35.1	0.6	0.5	4,923	3,643	+35.1
Land Rover	0.6	0.4	4,278	2,934	+45.8	0.6	0.4	4,278	2,934	+45.8
Jaguar	0.1	0.1	645	709	-9.0	0.1	0.1	645	709	-9.0
Tesla	1.2	0.1	8,749	731	+1,096.8	1.2	0.1	8,749	731	+1,096.8
Mitsubishi	0.3	0.5	2,402	3,550	-32.3	0.3	0.5	2,402	3,550	-32.3
Honda	0.3	0.4	2,397	2,726	-12.1	0.3	0.4	2,397	2,726	-12.1

¹ ACEA estimation based on total by market

² Bentley and Lamborghini

³ Includes Abarth

⁴ Dodge, Maserati and RAM

NEW PASSENGER CAR REGISTRATIONS, BY MANUFACTURER EUROPEAN UNION + EFTA + UK

	JANUARY					JANUARY-JANUARY				
	% share ¹		Units		% change	% share ¹		Units		% change
	2023	2022	2023	2022	23/22	2023	2022	2023	2022	23/22
Volkswagen Group	26.1	25.8	238,000	212,657	+11.9	26.1	25.8	238,000	212,657	+11.9
Volkswagen	11.0	10.5	100,213	86,223	+16.2	11.0	10.5	100,213	86,223	+16.2
Skoda	5.6	5.4	51,241	44,204	+15.9	5.6	5.4	51,241	44,204	+15.9
Audi	5.3	5.3	48,241	43,652	+10.5	5.3	5.3	48,241	43,652	+10.5
Seat	2.3	2.9	20,968	24,063	-12.9	2.3	2.9	20,968	24,063	-12.9
Porche	0.9	1.0	8,597	8,001	+7.4	0.9	1.0	8,597	8,001	+7.4
Cupra	0.9	0.7	8,249	5,941	+38.8	0.9	0.7	8,249	5,941	+38.8
Others ²	0.1	0.1	491	573	-14.3	0.1	0.1	491	573	-14.3
Stellantis	17.2	19.1	156,553	156,807	-0.2	17.2	19.1	156,553	156,807	-0.2
Peugeot	5.1	6.3	46,789	52,171	-10.3	5.1	6.3	46,789	52,171	-10.3
Fiat ³	3.5	3.4	31,828	27,614	+15.3	3.5	3.4	31,828	27,614	+15.3
Opel/Vauxhall	3.2	4.0	29,048	32,695	-11.2	3.2	4.0	29,048	32,695	-11.2
Citroen	3.0	3.2	27,152	26,665	+1.8	3.0	3.2	27,152	26,665	+1.8
Jeep	1.1	1.1	9,927	9,147	+8.5	1.1	1.1	9,927	9,147	+8.5
DS	0.4	0.4	3,954	3,227	+22.5	0.4	0.4	3,954	3,227	+22.5
Lancia/Chrysler	0.4	0.4	3,586	3,271	+9.6	0.4	0.4	3,586	3,271	+9.6
Alfa Romeo	0.4	0.2	3,430	1,652	+107.6	0.4	0.2	3,430	1,652	+107.6
Others ⁴	0.1	0.0	839	365	+129.9	0.1	0.0	839	365	+129.9
Renault Group	10.4	9.3	94,889	76,524	+24.0	10.4	9.3	94,889	76,524	+24.0
Dacia	5.3	4.1	47,998	34,115	+40.7	5.3	4.1	47,998	34,115	+40.7
Renault	5.1	5.1	46,714	42,221	+10.6	5.1	5.1	46,714	42,221	+10.6
Alpine	0.0	0.0	177	188	-5.9	0.0	0.0	177	188	-5.9
Hyundai Group	9.4	10.3	85,444	84,846	+0.7	9.4	10.3	85,444	84,846	+0.7
Kia	5.1	5.7	46,094	47,174	-2.3	5.1	5.7	46,094	47,174	-2.3
Hyundai	4.3	4.6	39,350	37,672	+4.5	4.3	4.6	39,350	37,672	+4.5
Toyota Group	8.0	8.0	73,299	65,796	+11.4	8.0	8.0	73,299	65,796	+11.4
Toyota	7.7	7.6	69,978	62,485	+12.0	7.7	7.6	69,978	62,485	+12.0
Lexus	0.4	0.4	3,321	3,311	+0.3	0.4	0.4	3,321	3,311	+0.3
BMW Group	6.1	7.6	55,448	62,173	-10.8	6.1	7.6	55,448	62,173	-10.8
BMW	5.0	5.7	45,147	47,003	-3.9	5.0	5.7	45,147	47,003	-3.9
Mini	1.1	1.8	10,300	15,170	-32.1	1.1	1.8	10,300	15,170	-32.1
Ford	4.1	4.7	37,609	38,380	-2.0	4.1	4.7	37,609	38,380	-2.0
Mercedes-Benz	3.9	4.7	35,977	38,873	-7.4	3.9	4.7	35,977	38,873	-7.45
Mercedes	3.8	4.5	34,632	37,166	-6.8	3.8	4.5	34,632	37,166	-6.8
Smart	0.1	0.2	1,345	1,707	-21.2	0.1	0.2	1,345	1,707	-21.2
Volvo Cars	2.3	2.4	20,736	19,685	+5.3	2.3	2.4	20,736	19,685	+5.3
Nissan	2.1	1.9	19,343	15,950	+21.3	2.1	1.9	19,343	15,950	+21.3
Mazda	1.6	1.3	14,950	10,520	+42.1	1.6	1.3	14,950	10,520	+42.1
Suzuki	1.4	1.3	12,581	10,432	+20.6	1.4	1.3	12,581	10,432	+20.6
Jaguar Land Rover Group	1.1	0.9	9,729	7,629	+27.5	1.1	0.9	9,729	7,629	+27.5
Land Rover	0.9	0.8	8,008	6,194	+29.3	0.9	0.8	8,008	6,194	+29.3
Jaguar	0.2	0.2	1,721	1,435	+19.9	0.2	0.2	1,721	1,435	+19.9
Tesla	1.2	0.1	9,469	844	+1,021.9	1.2	0.1	9,469	844	+1,021.9
Honda	0.5	0.7	4,690	5,467	-14.2	0.5	0.7	4,690	5,467	-14.2
Mitsubishi	0.3	0.5	2,496	3,747	-33.4	0.3	0.5	2,496	3,747	-33.4

¹ ACEA estimation based on total by market

² Bentley and Lamborghini

³ Includes Abarth

⁴ Dodge, Maserati and RAM