



THE ELECTRIC VEHICLE WORLD SALES DATABASE

Global xEV Sales Tracker

December and
Full Year 2019

This is a sample version of our ~ 90 page
Global xEV Sales Tracker.

The price is **7 500€ / year** and includes 12
updates.

Data Center subscribers have 20 % lower price

Contact viktor@ev-volumes.com for info

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2.2 million EVs were sold in 2019, growing by only 11% compared to last year and still representing less than 3% of PV sales. USA were down, China stable and Europe significantly up.

Countries

- [China](#) – 1.2 million EVs (5.2% penetration) - up 6% - 80% BEV – BJEV EU-Series = most sold EV
- [Europe](#) – 565k EVs (3.1% penetration) - up 45% - 64% BEV – Tesla Model 3 = most sold EV
- [U.S.A.](#) – 320k EVs (1.9% penetration) - down 12% - 73% BEV – Tesla Model 3 = most sold EV
- [Germany](#) – 106k EVs (2.9% penetration) - up 60% - 64% BEV – Renault Zoé= most sold EV
- [Norway](#) – 79k EVs (56% penetration) - up 9% - 76% BEV – Tesla Model 3 = most sold EV
- [UK](#) – 75k EVs (3.2% penetration) – up 24% - 51% BEV – Tesla Model 3 = most sold EV
- [France](#) – 62k EVs (2.8% penetration) - up 35% - 70% BEV – Renault Zoé = most sold EV
- [Japan](#) – 44k EVs (1% penetration) - down 18% - 53% BEV – Nissan Leaf = most sold EV

OEMs

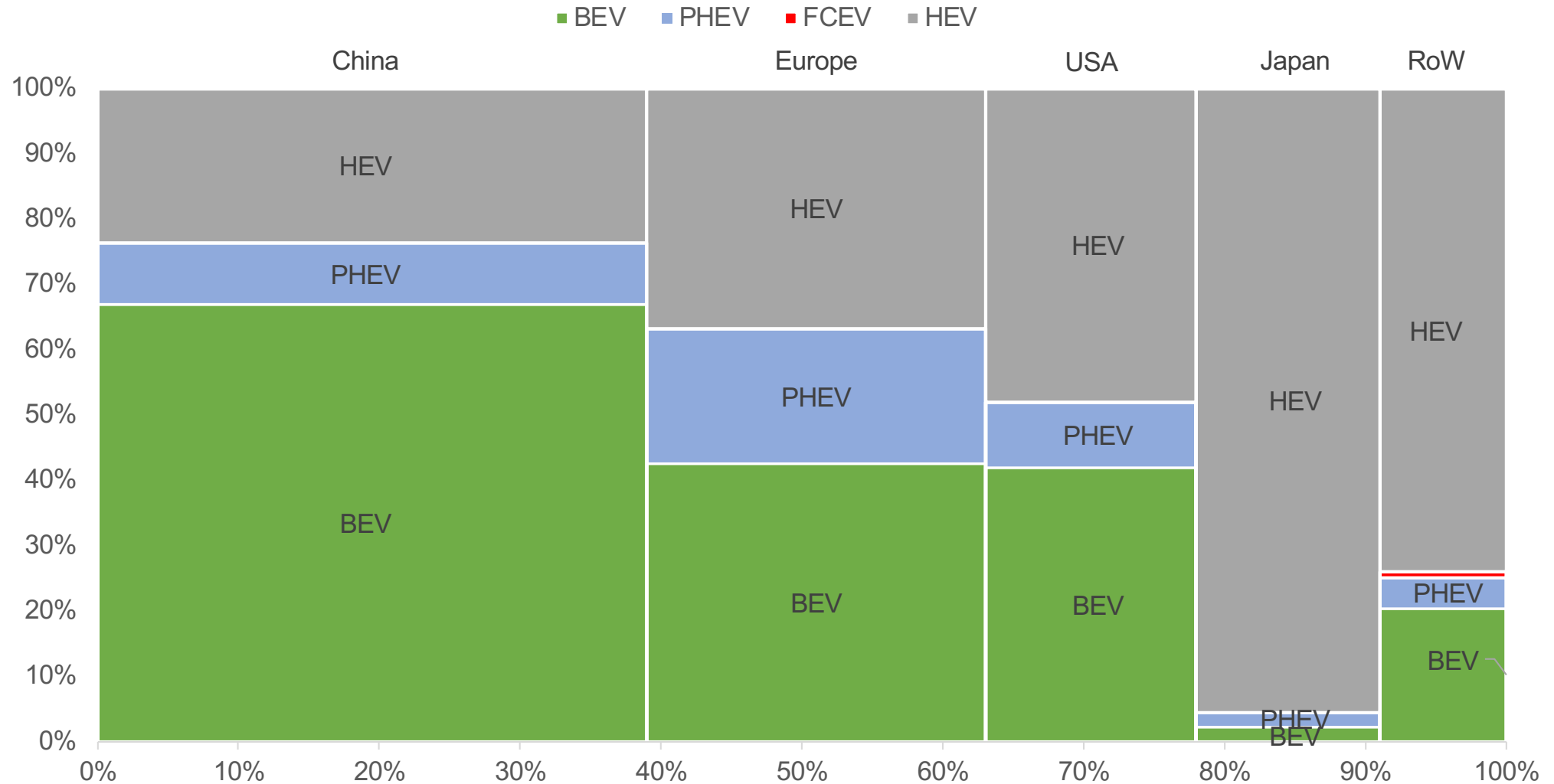
- [Tesla won the OEM crown once again in front of BYD and BAIC](#) with more than 360k EVs sold
- [VW Group is finally serious about EVs](#) and will overtake BMW Group in 2020 to become the 1st European OEM

Models

- [Tesla Model 3 won the EV crown once again](#) with more than 300k units sold
- More than 50k Tesla Model 3 were sold in December while [there wasn't any European EV in Top 10](#)

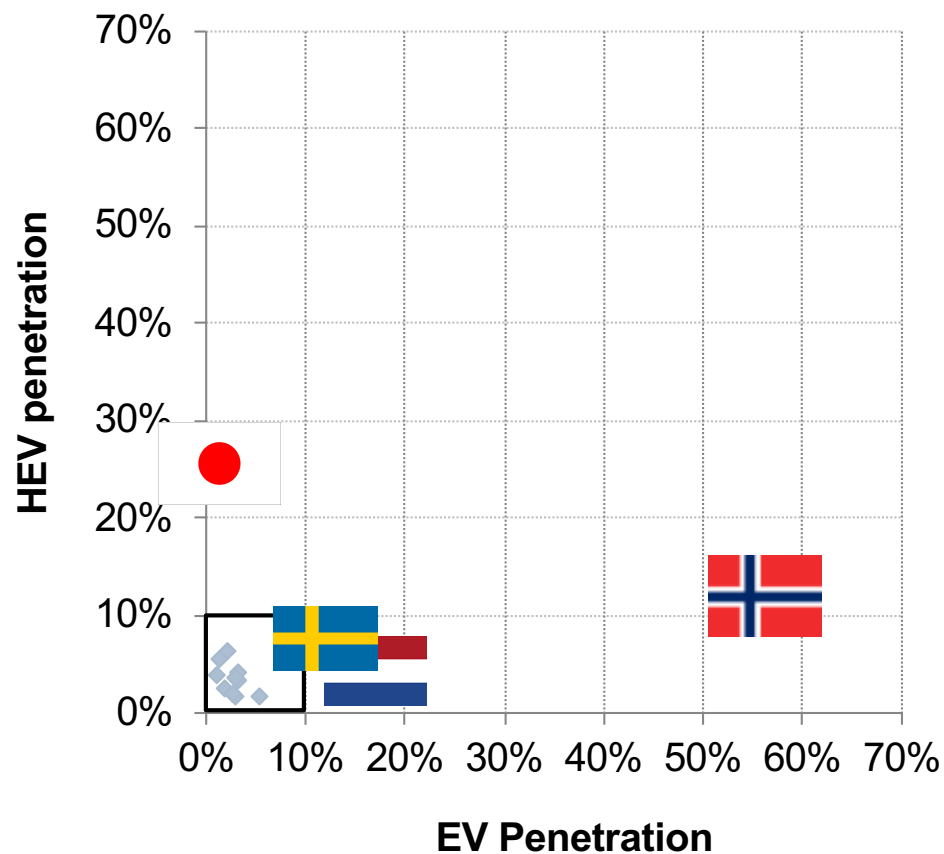
China represented 58% of global BEV market in December while Europe kept its lead on PHEVs with 46% market share and South Korea on FCEVs with 55% market share (300 units).

x-EV Sales Composition by Region
- December 2019 -

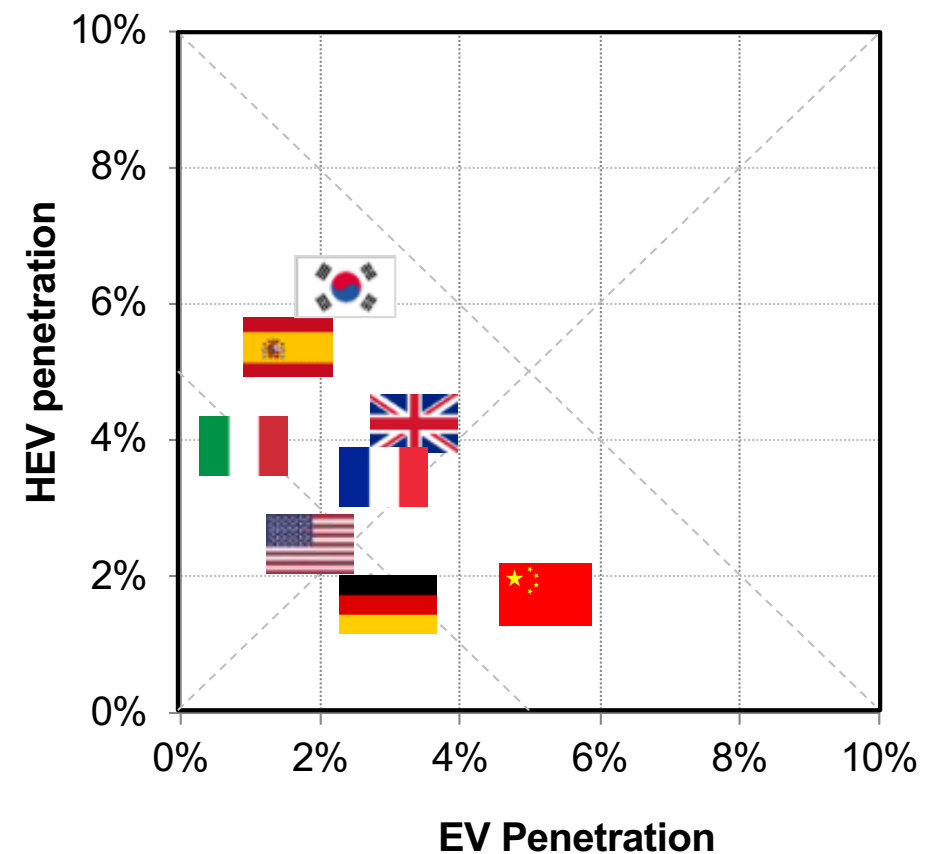


3 countries are now over 10% EV penetration – Norway, Netherlands and Sweden – while China was over 5% for the 1st time and the UK took the lead of the EU5 countries.

EV & HEV penetration
- % of Passenger Vehicle Sales, 2019 -



EV & HEV penetration
- % of Passenger Vehicle Sales, 2019 -

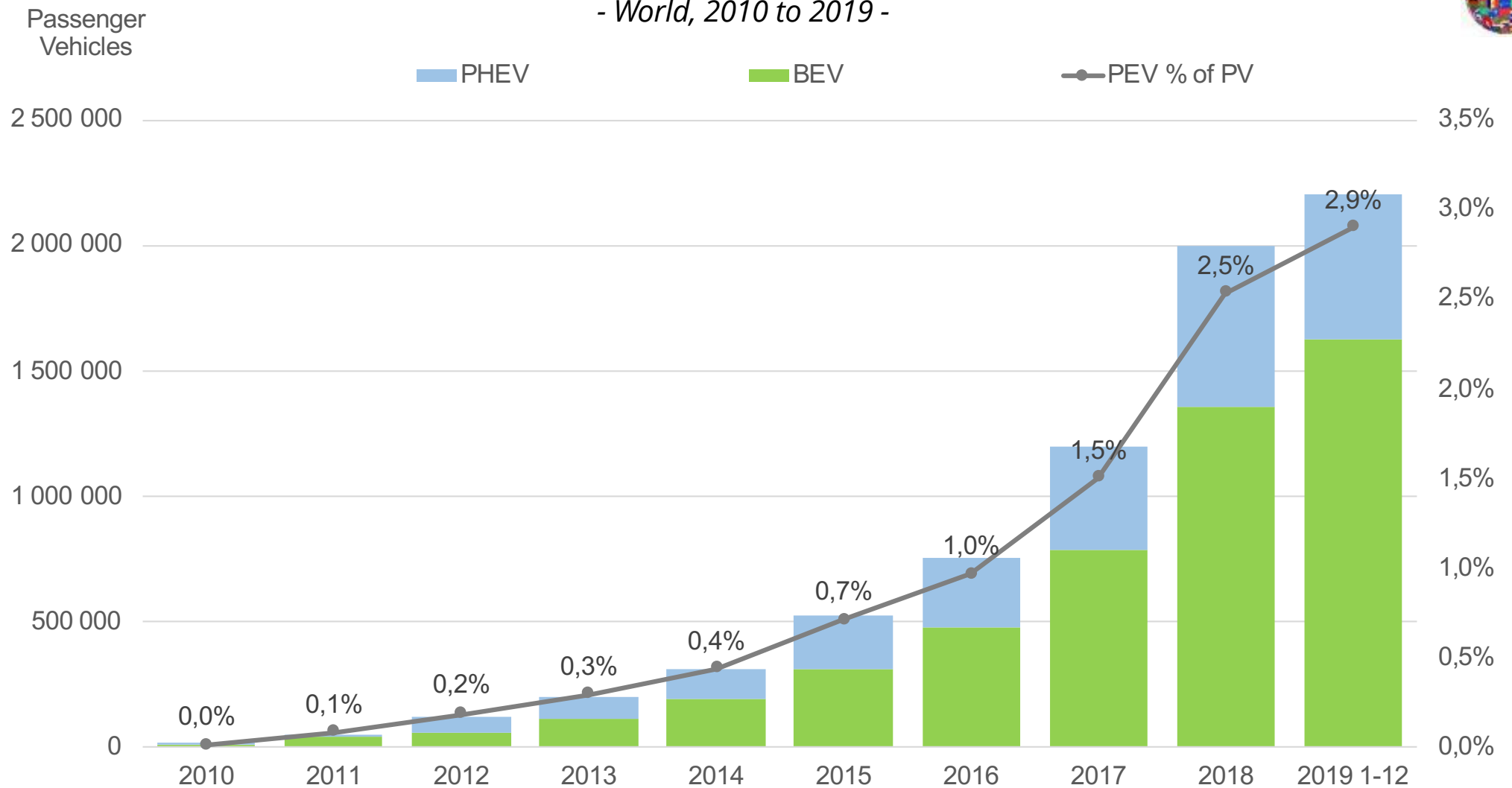


Global Sales Tracking



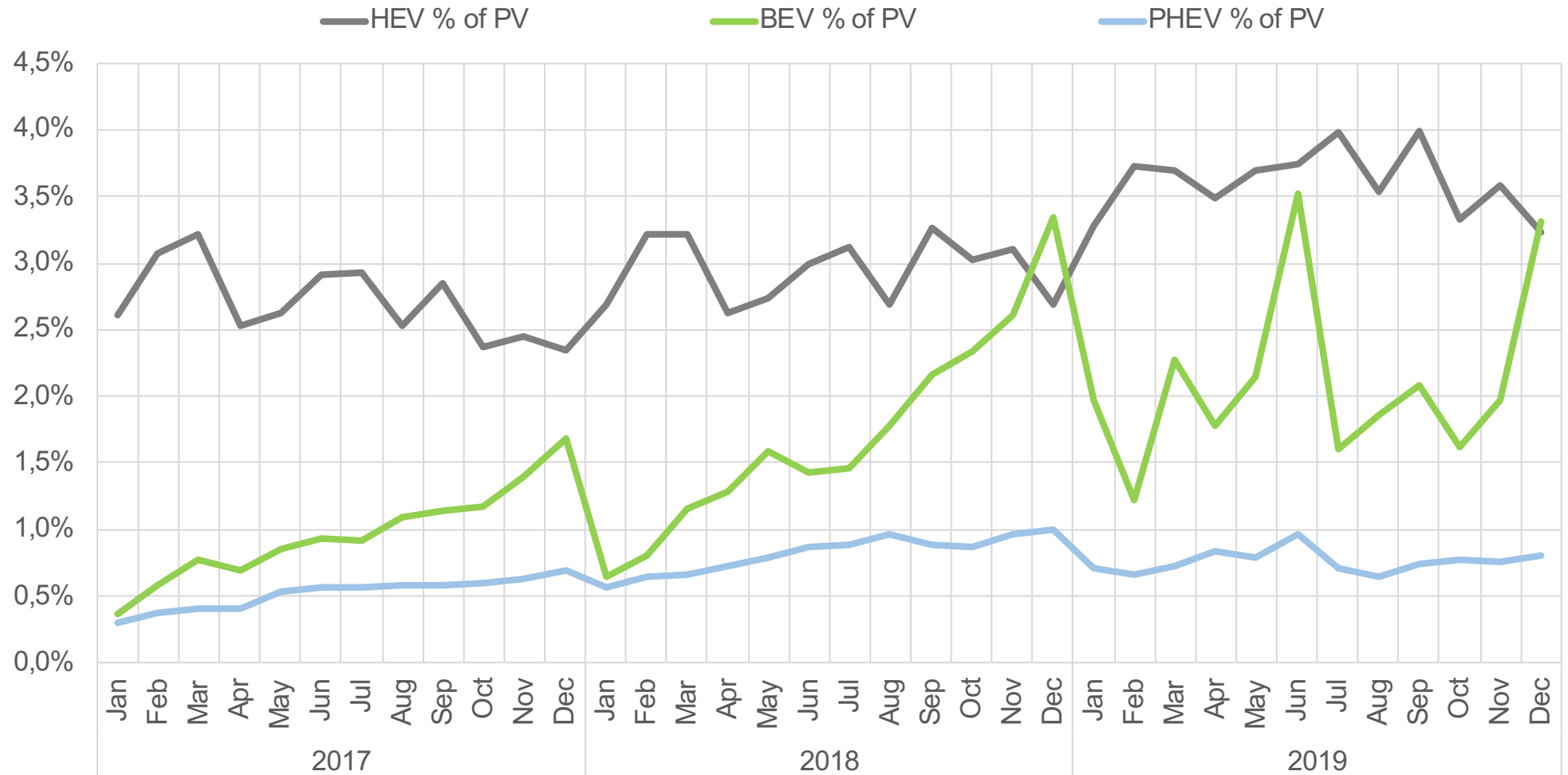
2.2 million EVs were sold in 2019, growing by only 11% compared to last year and representing 2.9% of PV sales after 2.5% in FY 2018.

Electric Passenger Vehicles Sales - World, 2010 to 2019 -



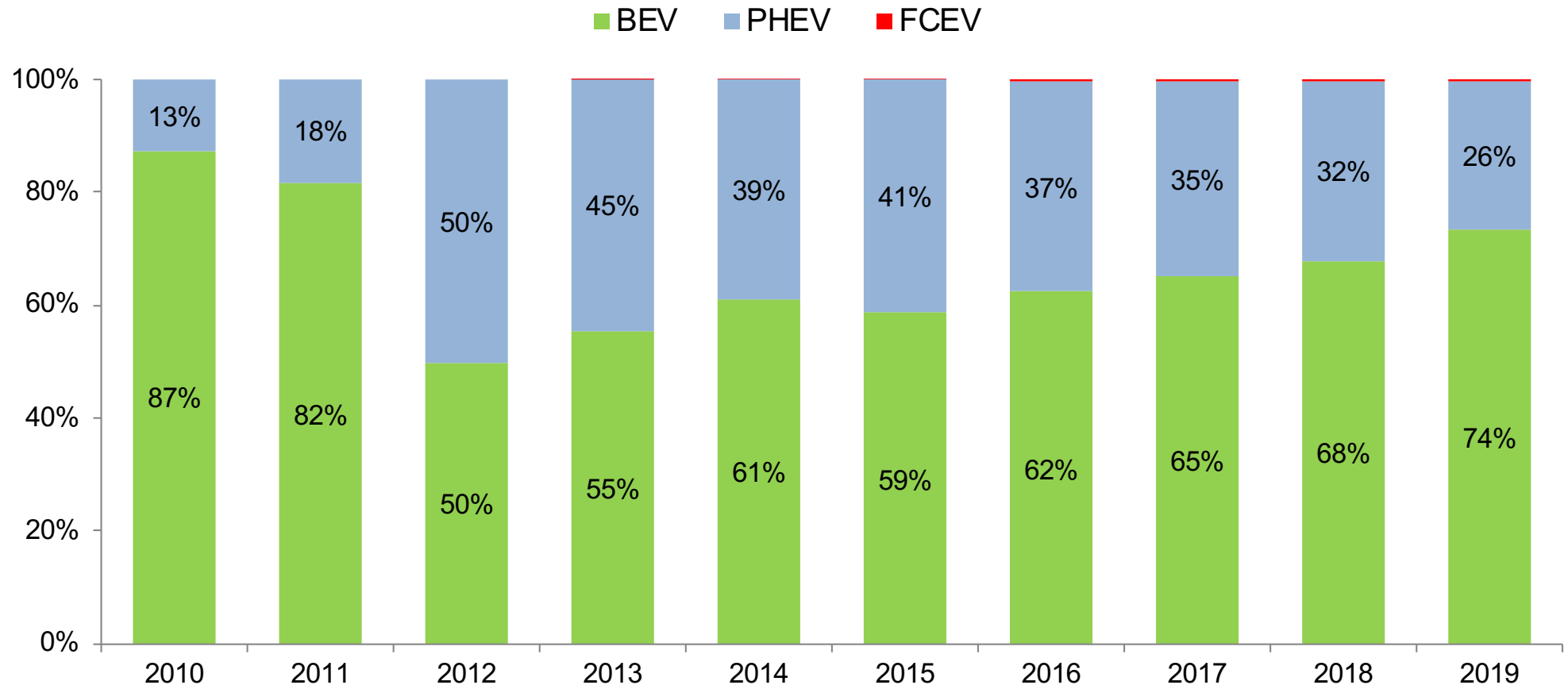
280k EVs were sold in December down by 4% compared to 2018. BEV penetration was however higher than the last couple of month thanks to Tesla, China and the Netherlands.

Monthly x-EV Penetration
- World, January 2017 to December 2019-



BEVs continue to increase their lead in 2019 to reach almost 3 EVs out of 4 sold but it might have reach its peak as many PHEV models were launched in the last couple of months.

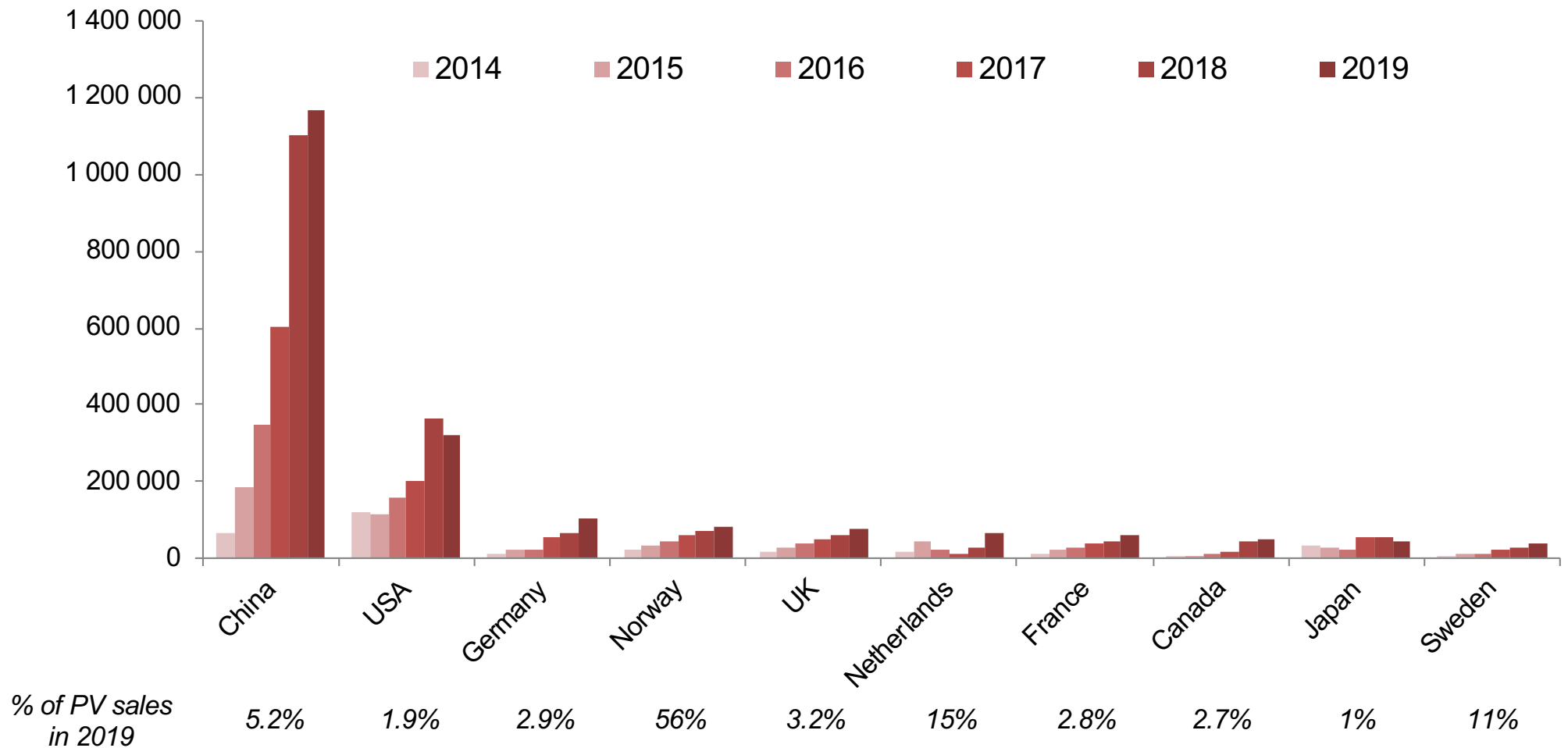
Electric Vehicles Sales by Type
- World, 2010 to 2019 -



China was back over 5% in December while Netherlands reached an all time record high of 54%.

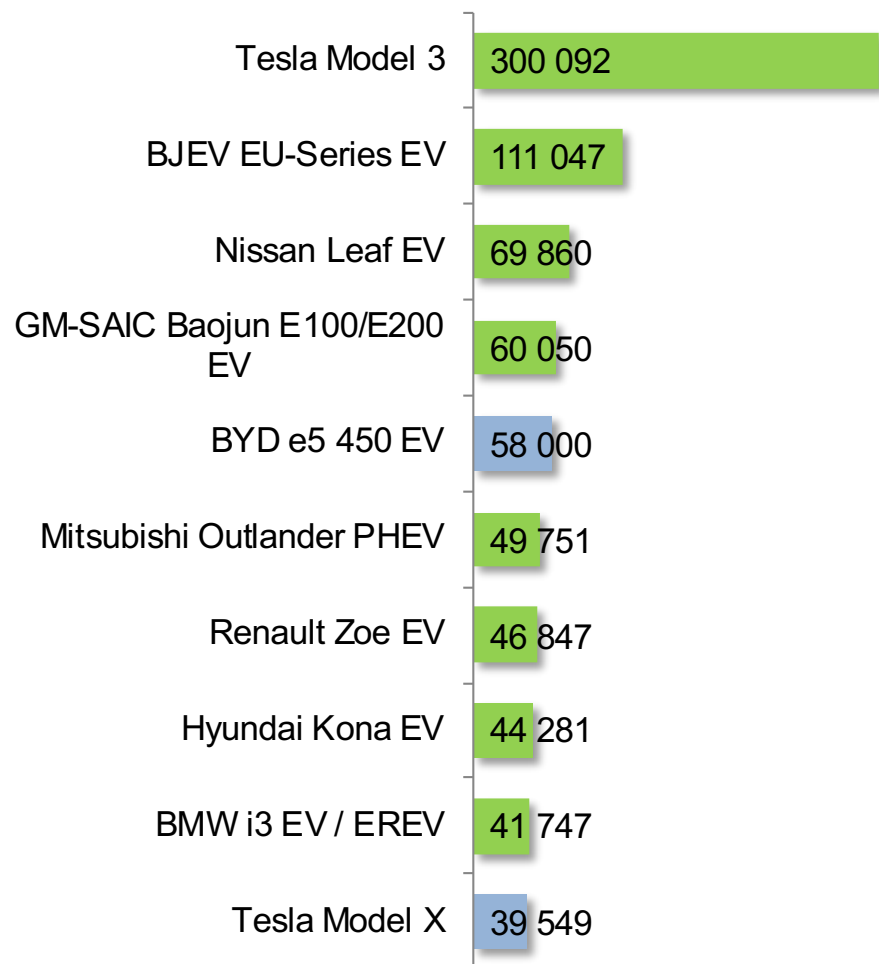
Global EV penetration of 4.1% is however slightly down compared to December 2018 (4.4%).

Electric Vehicles Sales by Country - Top 10 countries, 2014 to 2019 -

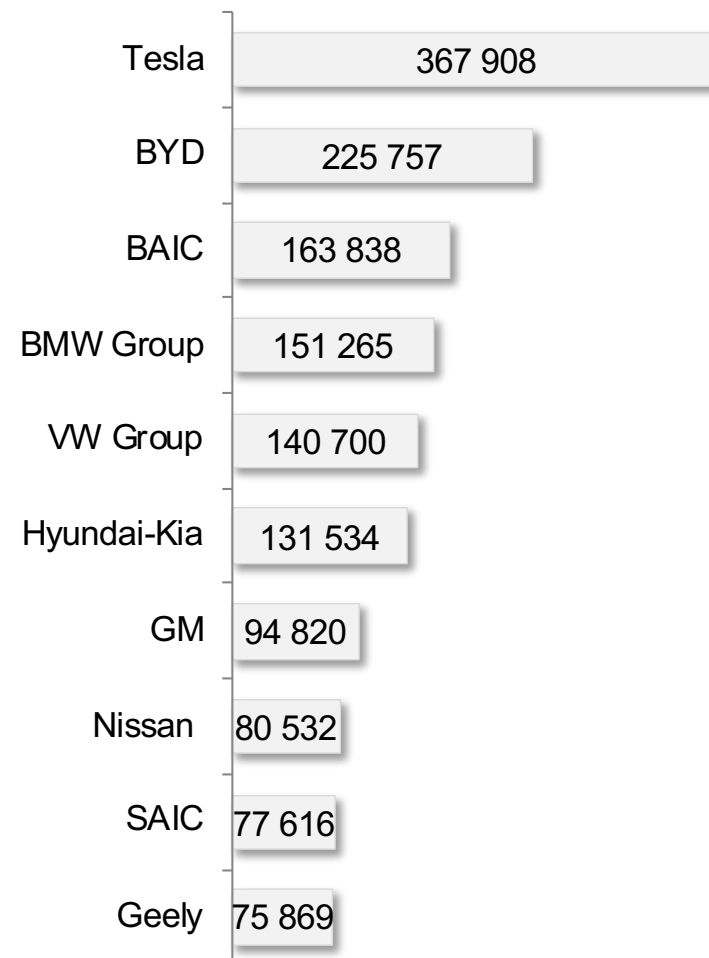


Tesla Model 3 won the EV crown once again with more than 300k units sold while Tesla also won the OEM crown in front of BYD and BAIC with more than 350k EVs sold.

Top 10 Electric Vehicles sold
- World, 2019 -

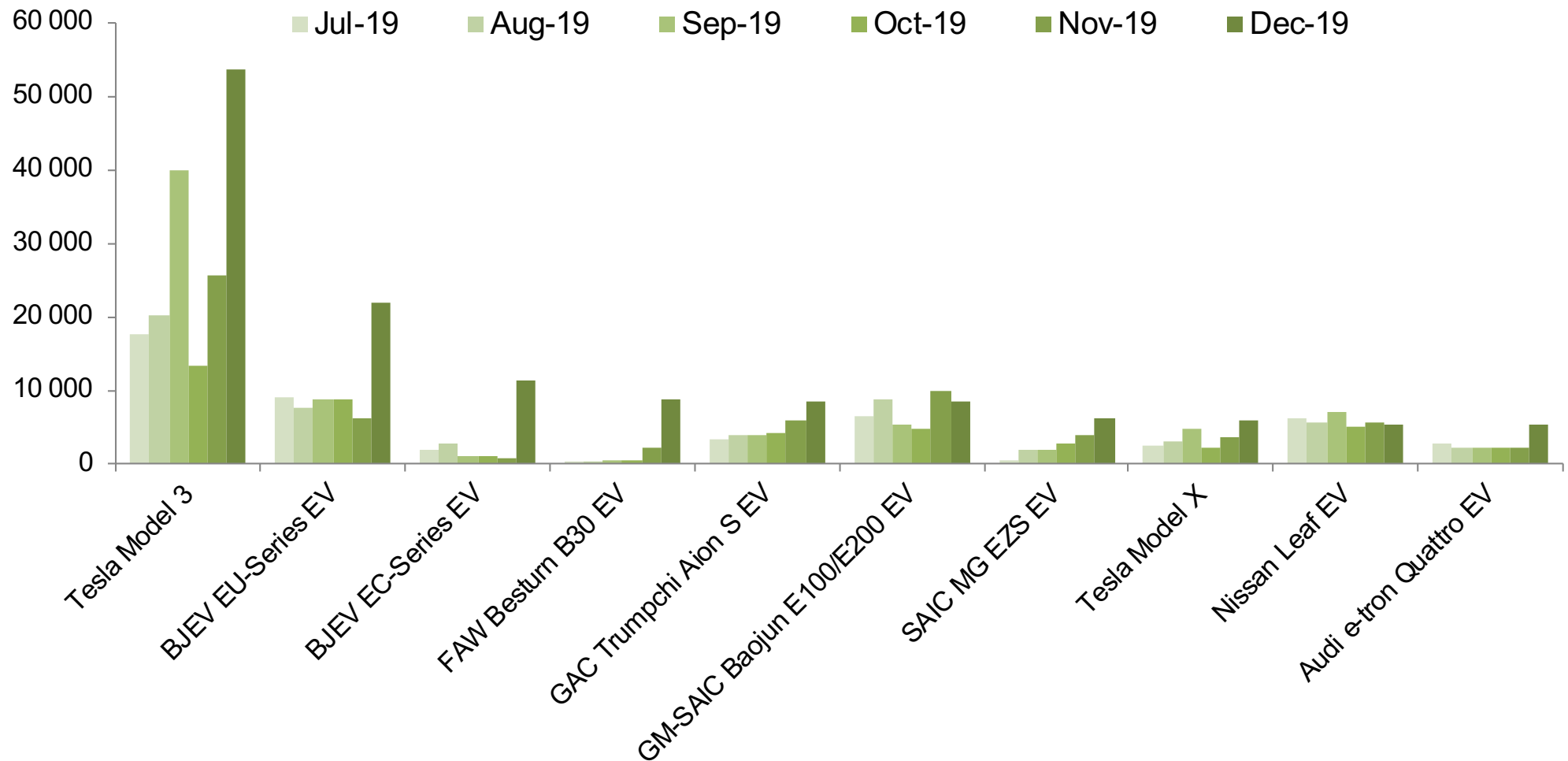


Top 10 Electric Vehicles Brand
- World, 2019 -



More than 50k Tesla Model 3 were sold in December while BAIC had 2 EVs on the podium.
There wasn't any single European EV in Top 10 in December.

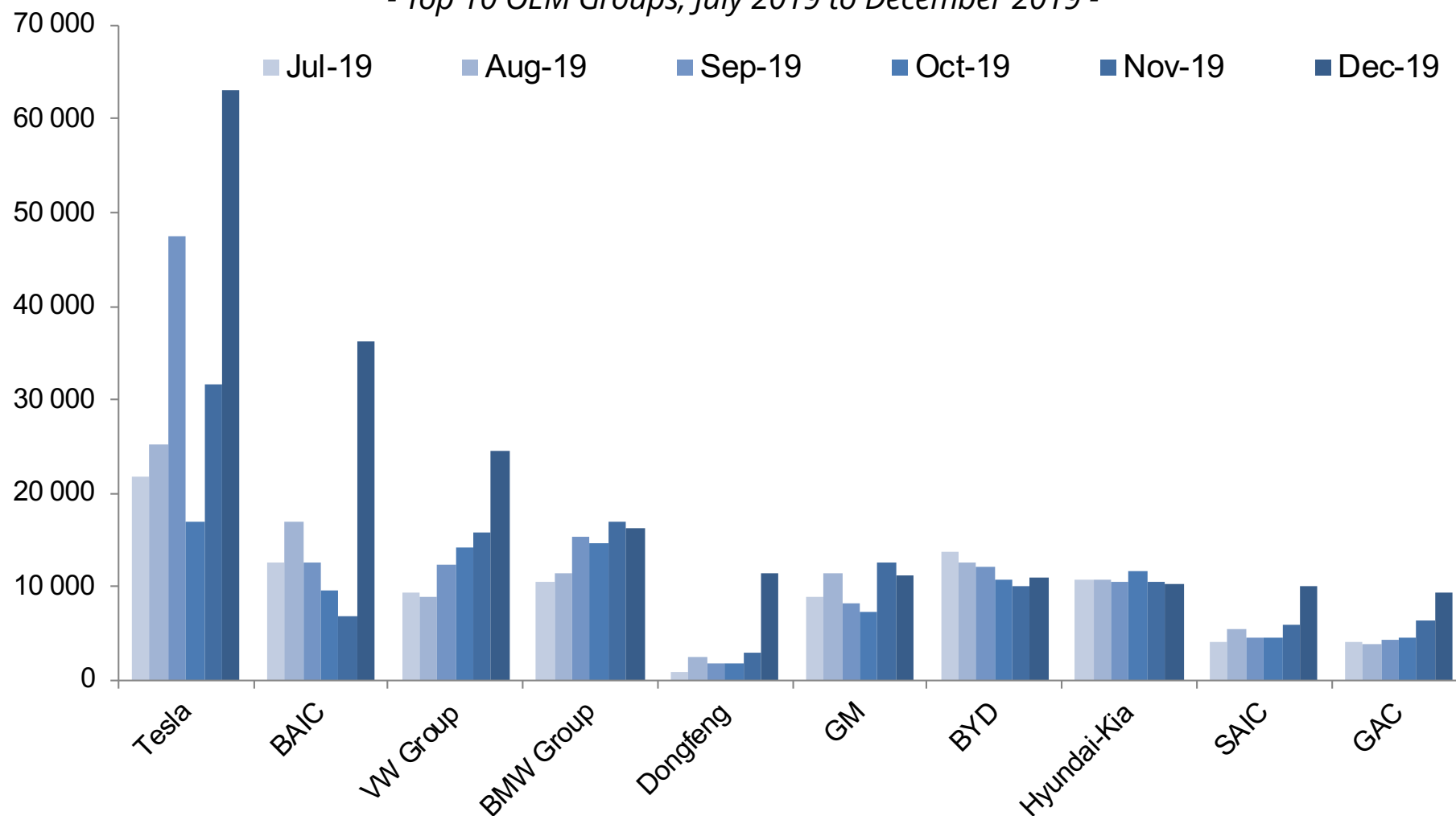
Electric Vehicles Sales by Model
- Top 10 Models, July 2019 to December 2019 -



Tesla sold more than 60k EVs in December for its all time record month while BAIC and VW Group also performed well in December, thanks to China and the Netherlands.

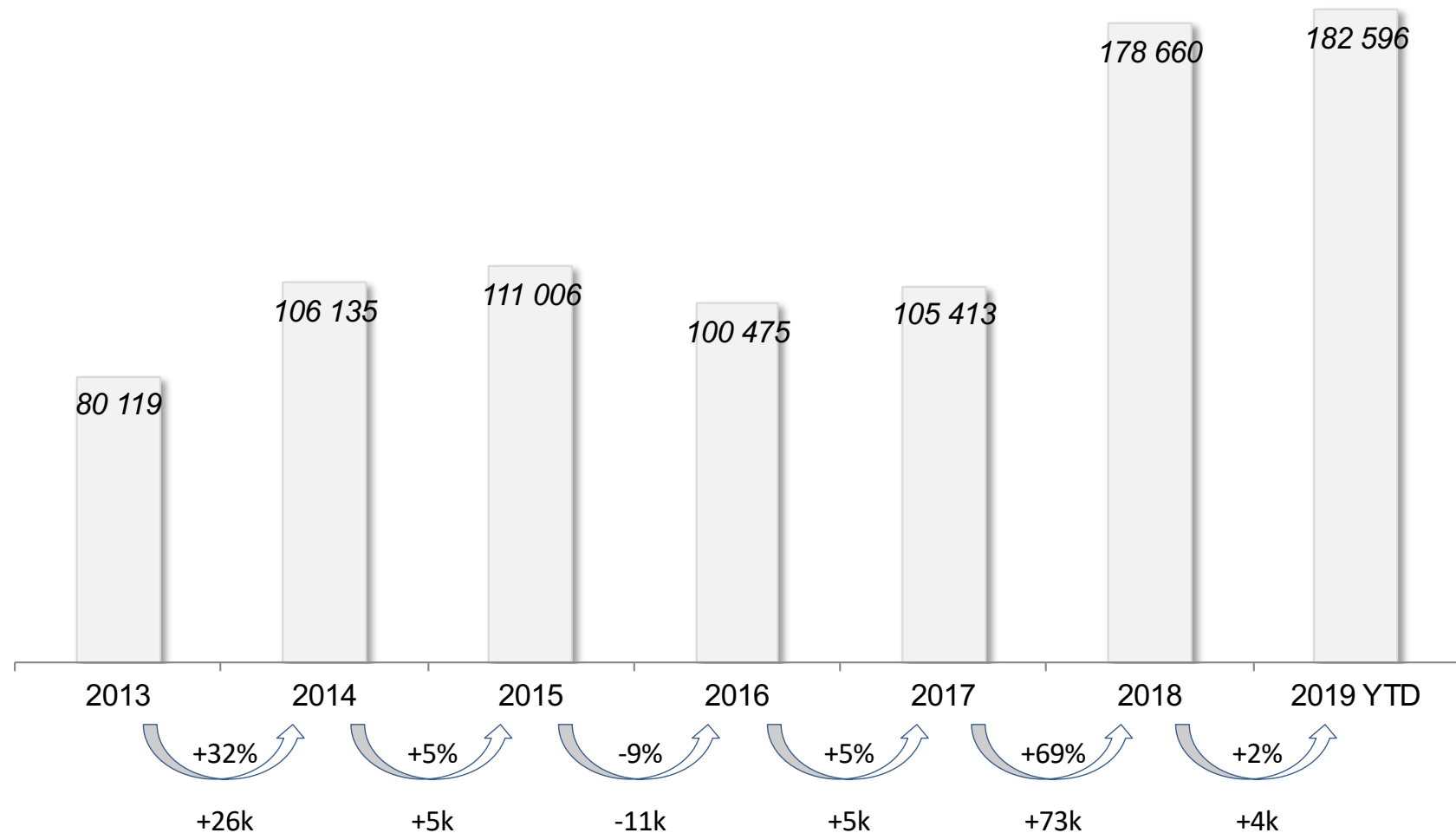


Electric Vehicles Sales by OEM Group
- Top 10 OEM Groups, July 2019 to December 2019 -



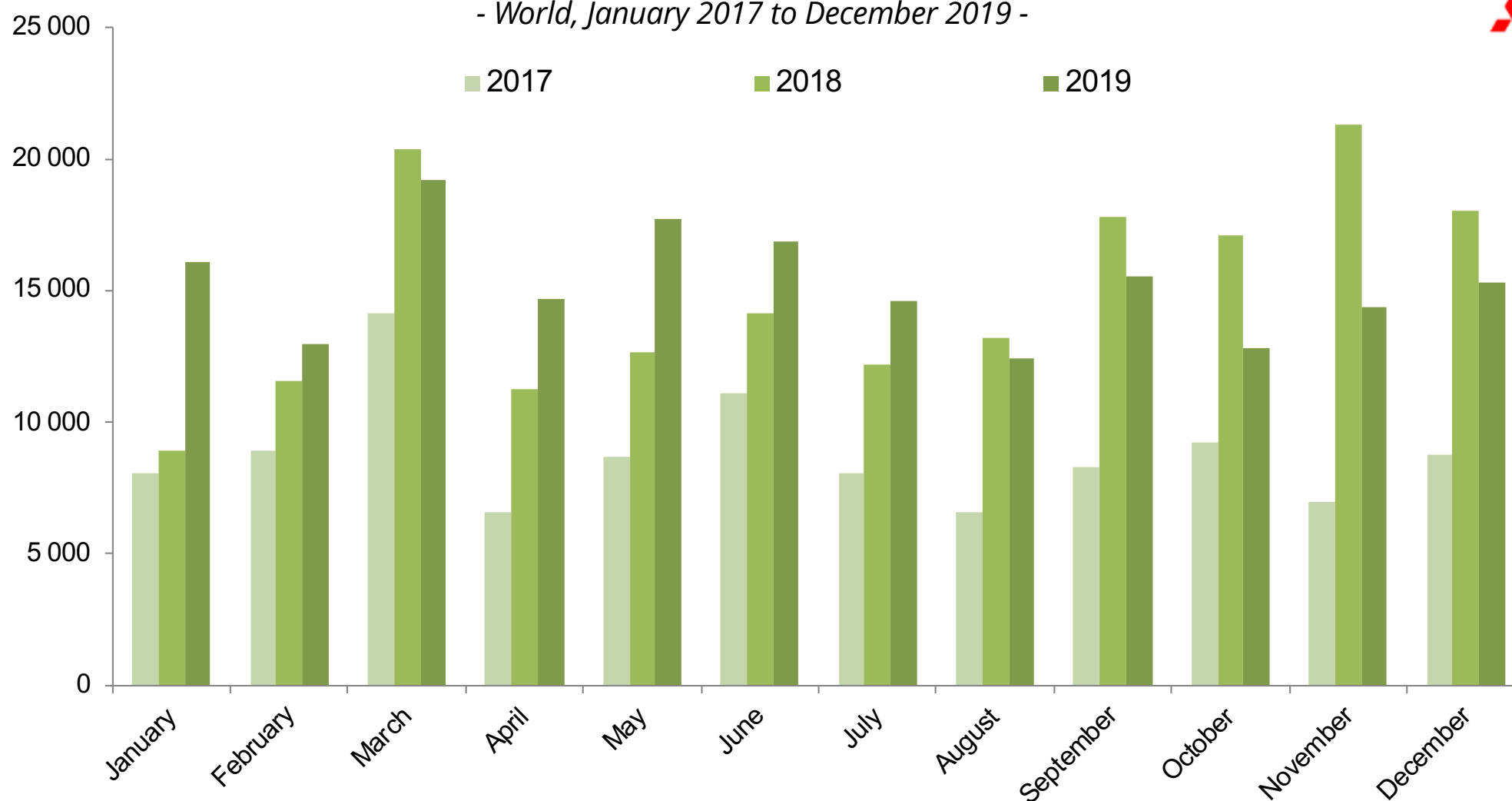
EV sales stagnated in 2019 with 2% growth only.
Where will sales growth come from in 2020 as competition increases?

Renault-Nissan-Mitsubishi Electric Vehicles Sales
- World, 2013 to 2019 -



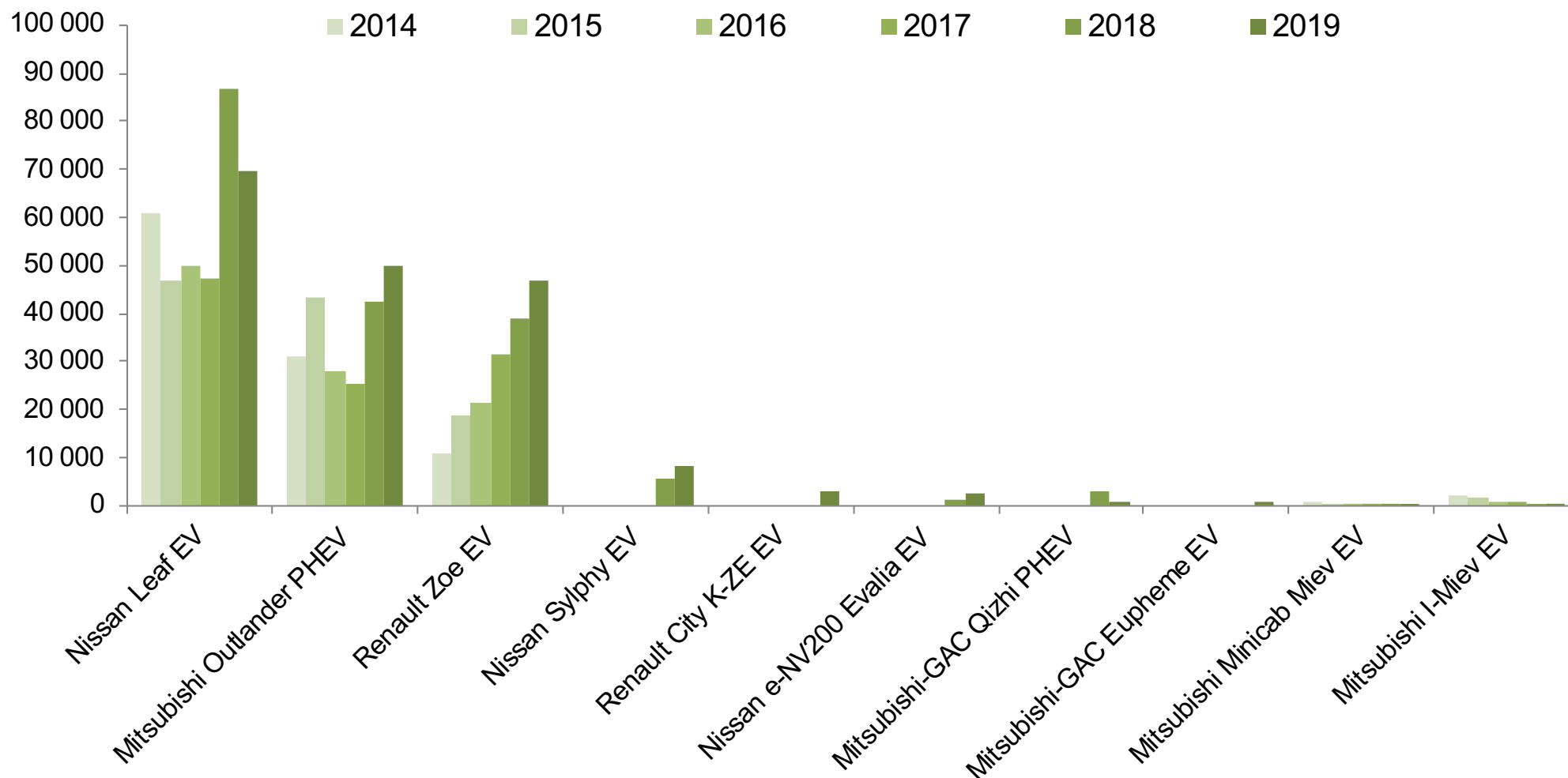
EV sales were once again down in December by 15% with 15k EVs sold.

Renault-Nissan-Mitsubishi Electric Vehicles Sales
- World, January 2017 to December 2019 -



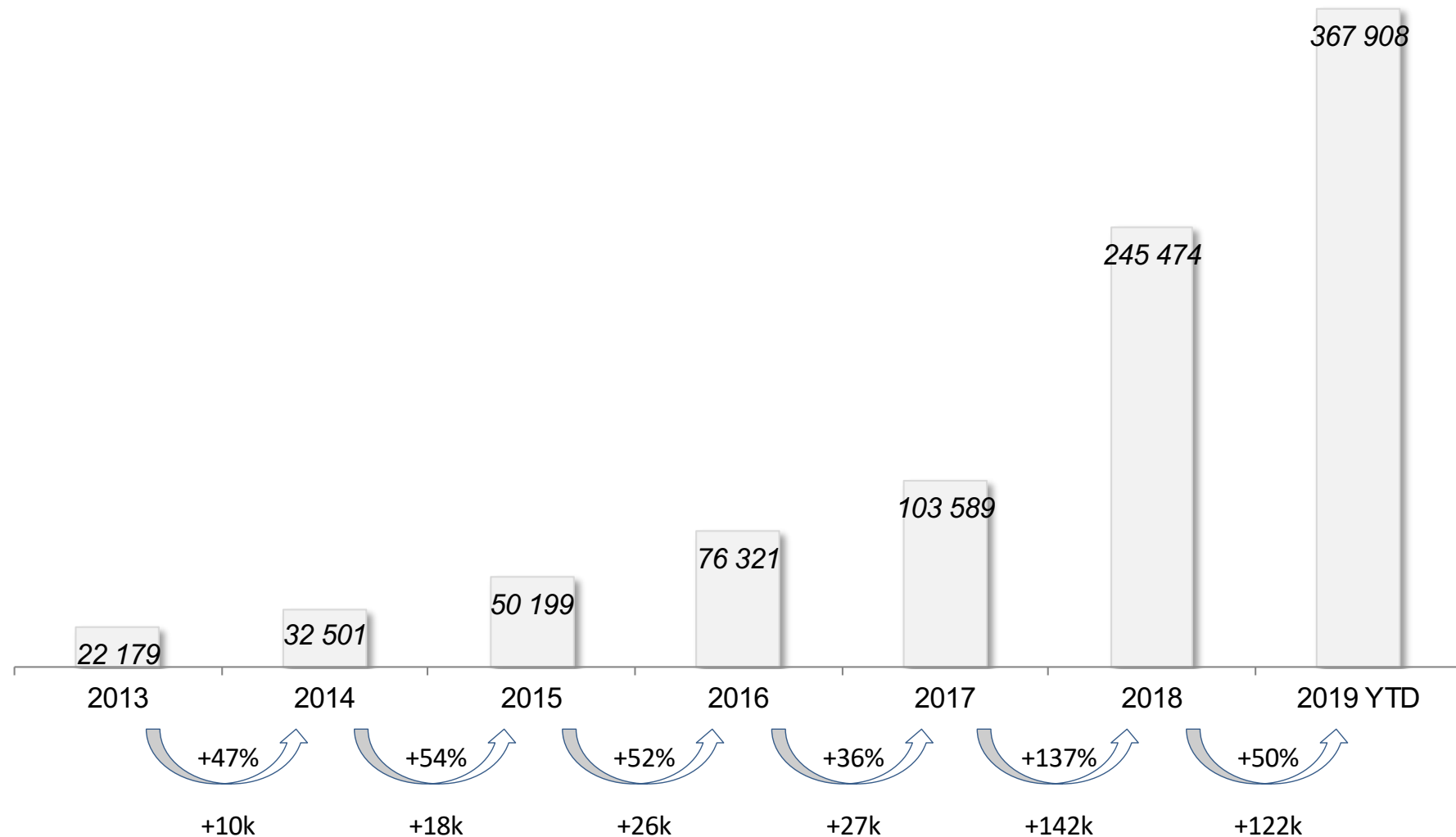
The Nissan Leaf suffered from Model 3 competition in 2019 with less than 70k units sold while the Renault Zoé continued to grow slowly but surely to reach almost 50k units sold.

Renault-Nissan-Mitsubishi Alliance Electric Vehicles Sales by Model
- Top 10 Models, 2014 to 2019 -

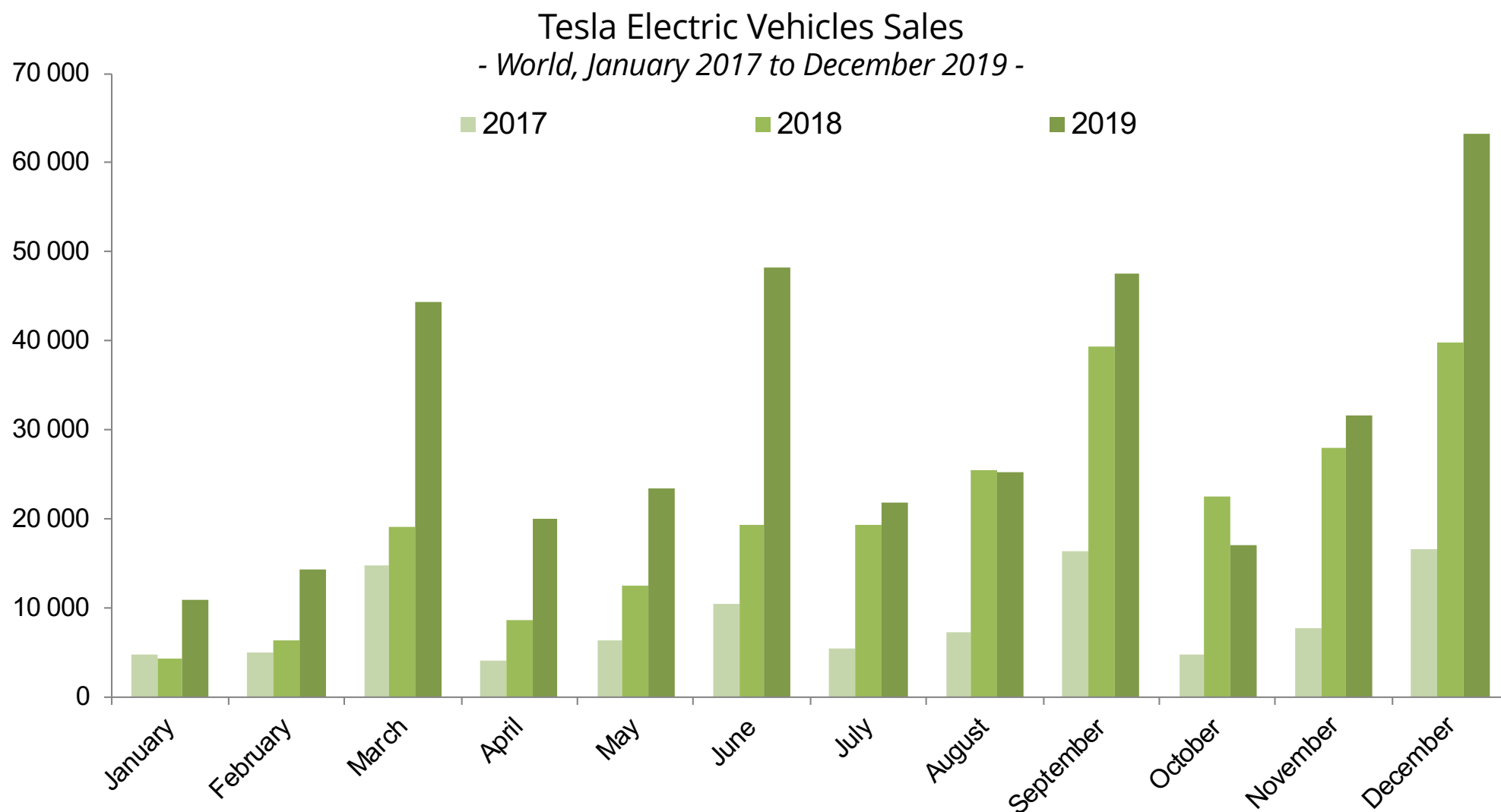


Tesla sales continued to grow at a very fast pace with almost 370k EVs sold in 2019 and an additional 120k EVs sold compared to last year representing 50% growth.

Tesla Electric Vehicles Sales - World, 2013 to 2019 -

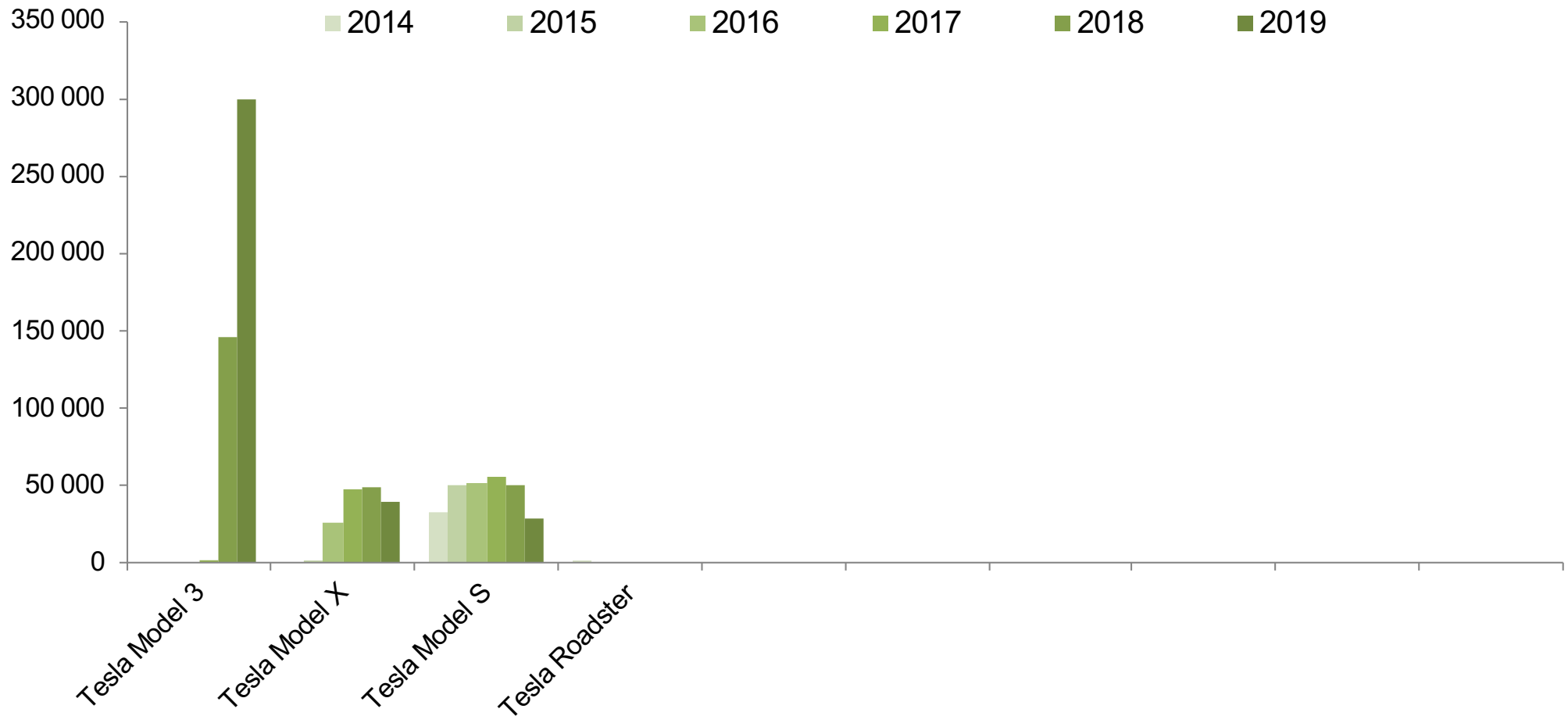


December was a new record high for Tesla
with as many as 63k EVs sold growing 58% compared to last year.



Tesla Model S suffered the most from Model 3 sales cannibalisation in 2019 which now represent more than 80% of Tesla Sales. Model X might have passed its sales peak as well.

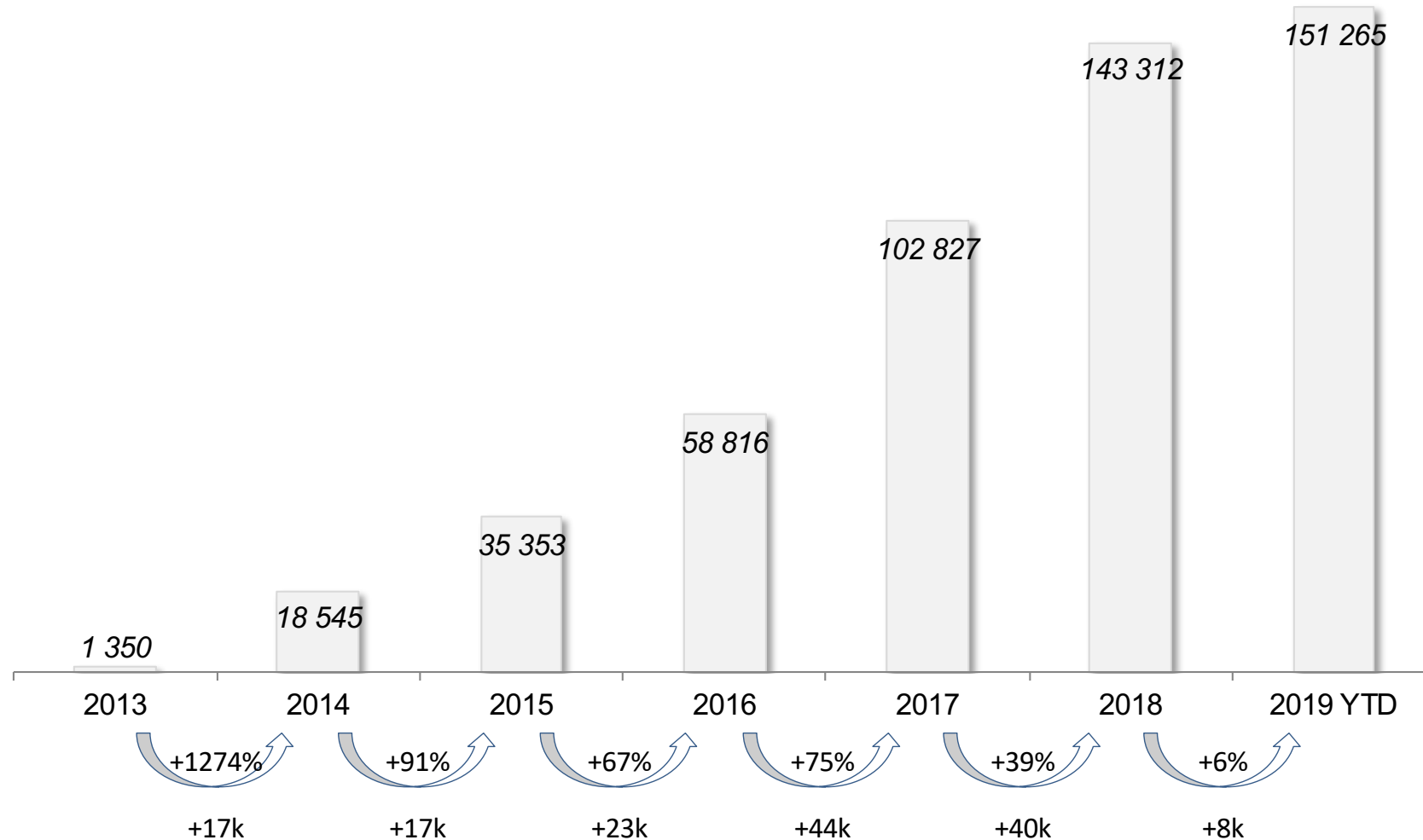
Tesla Electric Vehicles Sales by Model
- 2014 to 2019 -



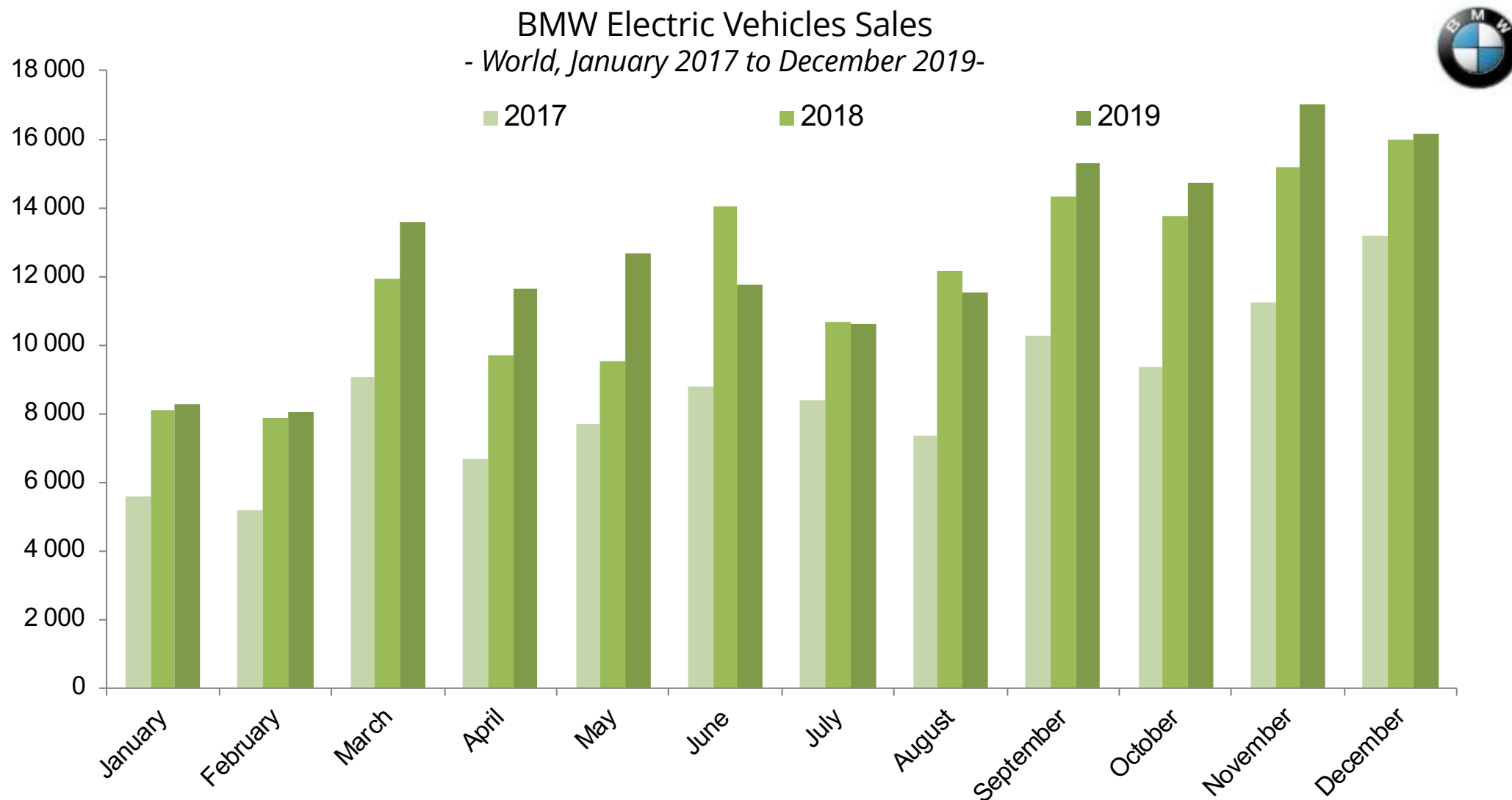
BMW group sold slightly more than 150k EVs in 2019 growing by only 6% compared to 2018.

BMW Group is the 1st European OEM in 2019 closely followed by VW Group.

BMW Electric Vehicles Sales
- World, 2013 to 2019 -

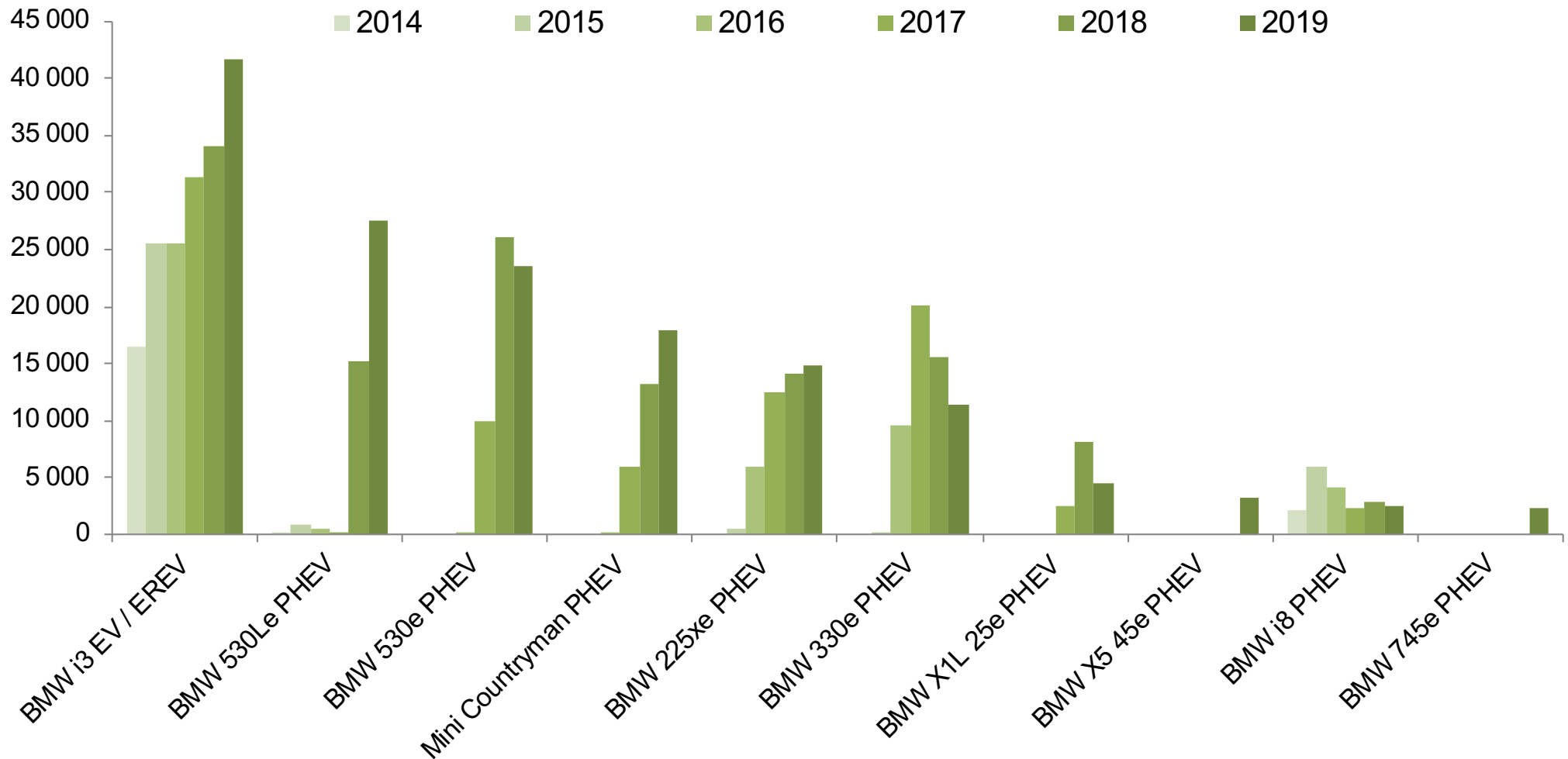


EV sales were flat in December at 16k units as BMW did not benefit from the Netherlands EV sales surge like Tesla and VW group.



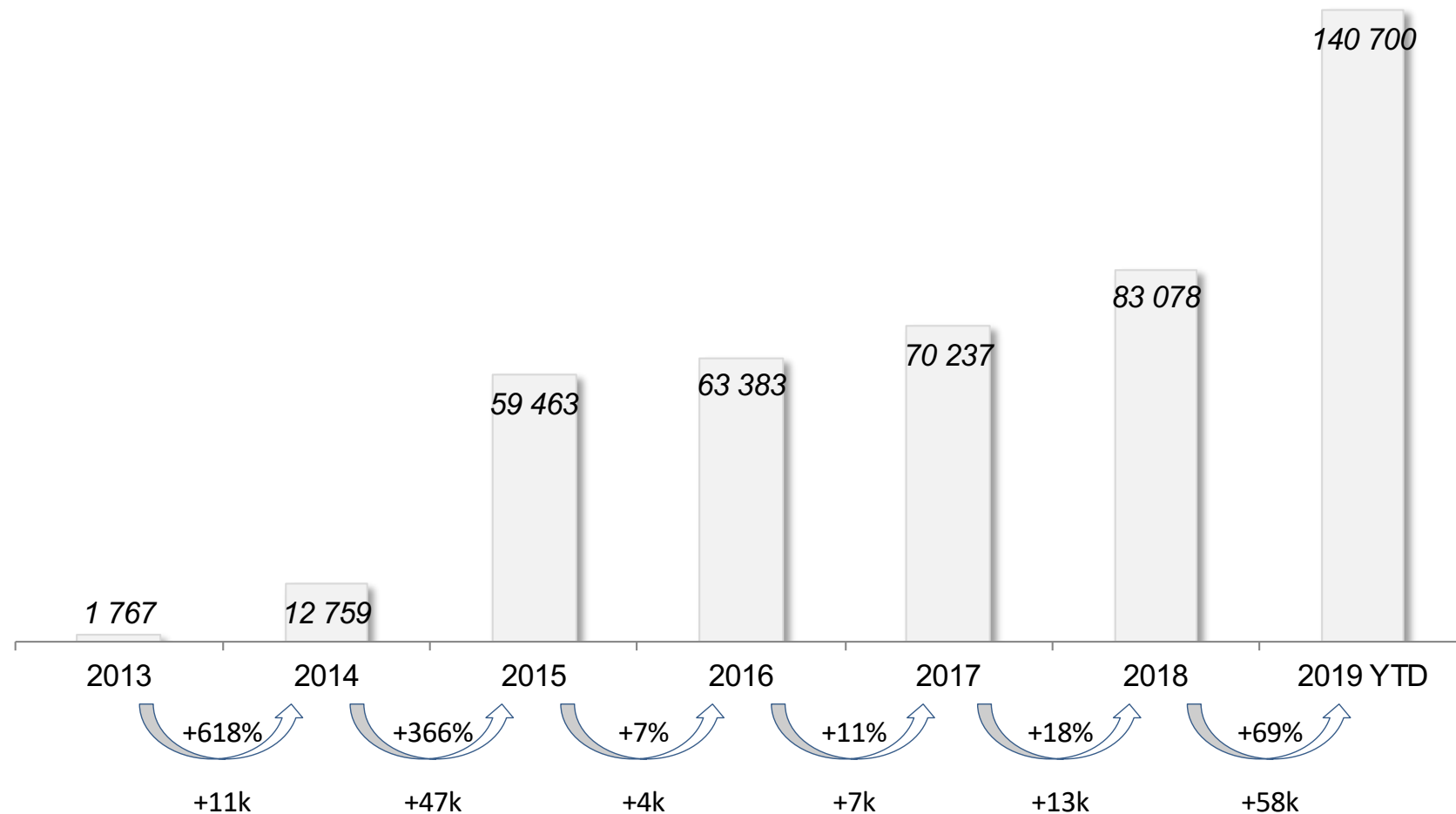
BMW i3 followed the same sales path at the Renault Zoé over the last 6 years to reach more than 40k units in 2019. The BMW 530e was however the most sold EV with more than 50k units.

BMW Electric Vehicles Sales by Model
- Top 10 Models, 2014 to 2019 -



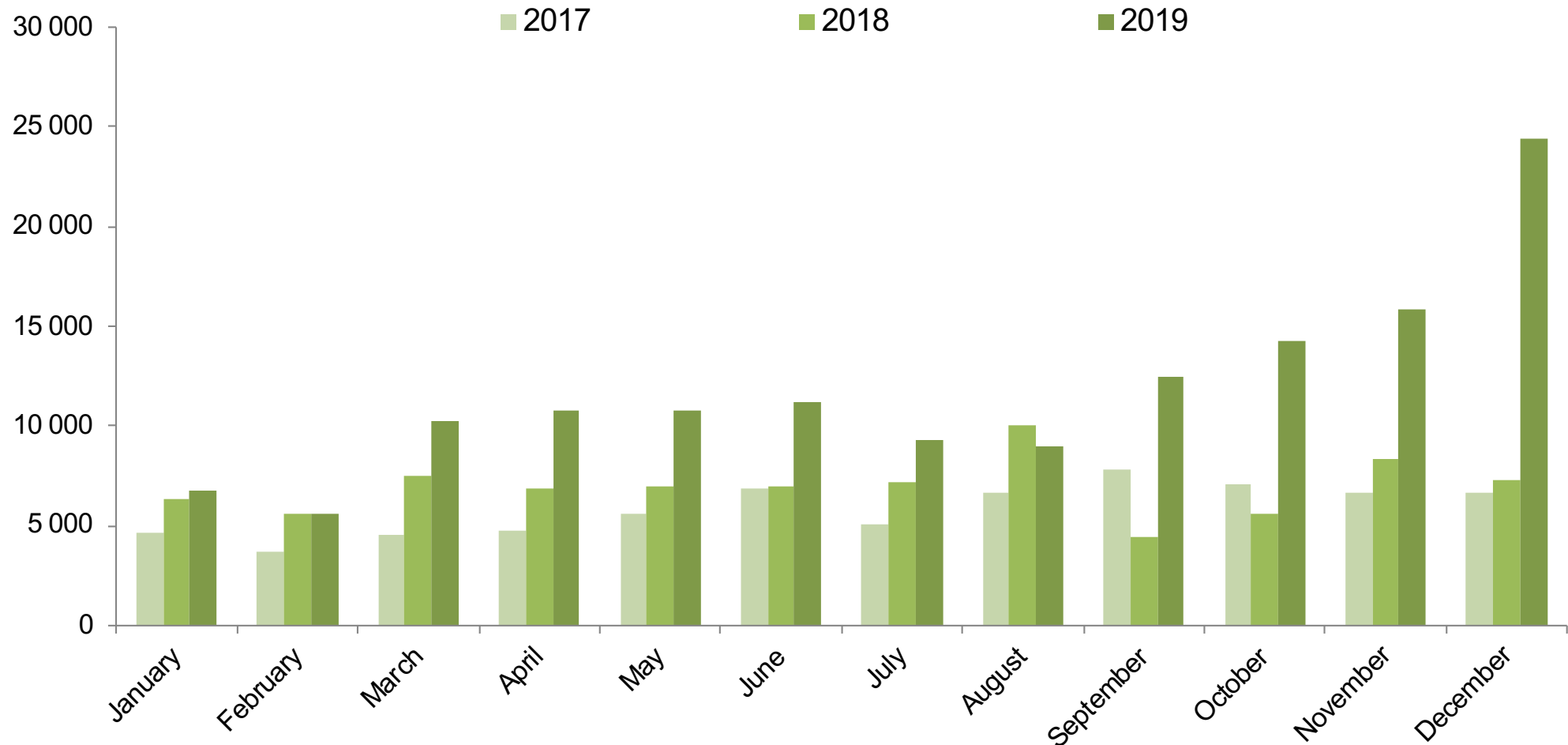
VW is finally serious about EVs with the 2nd highest growth after Tesla with an additional 58k EV sold for 140k sold in total 2019. In 2020, VW Group is likely to be on the global podium.

VW Electric Vehicles Sales - World, 2013 to 2019 -



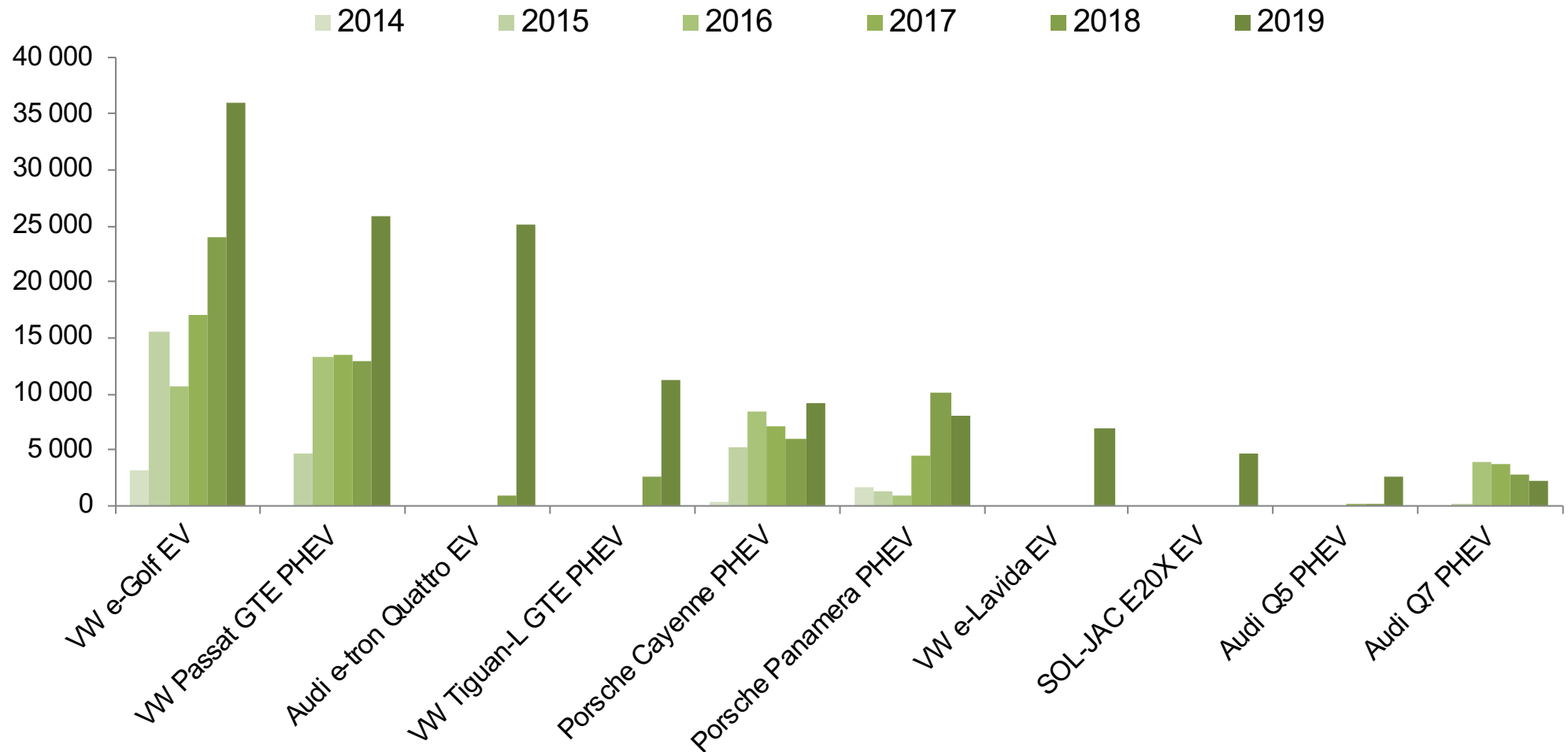
VW sold almost 25k EVs in December, a new record high with EV sales more than tripling.
VW will overtake BMW Group in 2020 to become the 1st European OEM.

VW Electric Vehicles Sales
- World, January 2017 to December 2019-



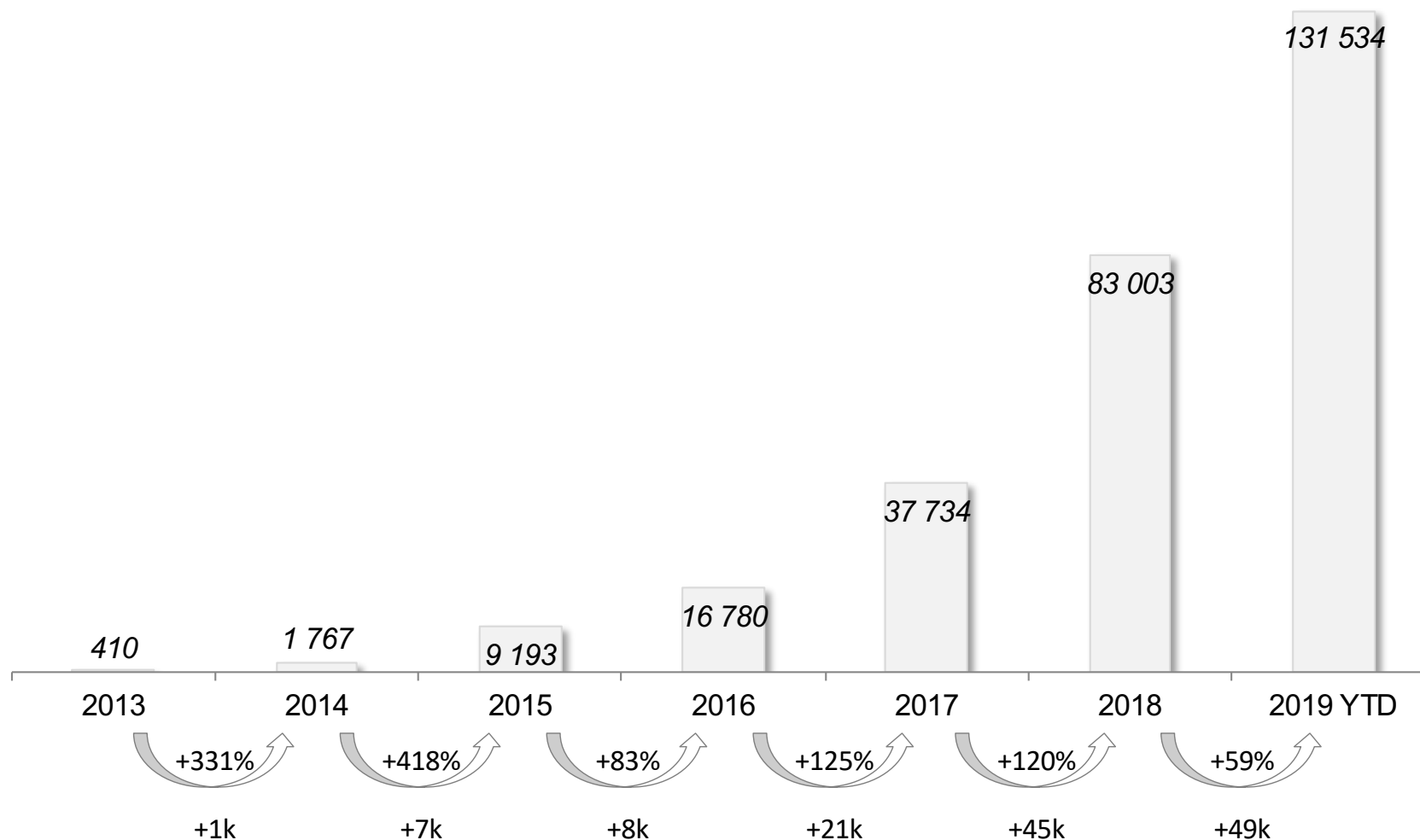
The e-Golf enjoyed its last year as the VW flagship before the ID3 arrives in 2020. VW is the European OEM with the strongest presence in China with the Passat, Tiguan, e-Lavida and SOL.

VW Group Electric Vehicles Sales by Model
- Top 10 models, 2014 to 2019 -

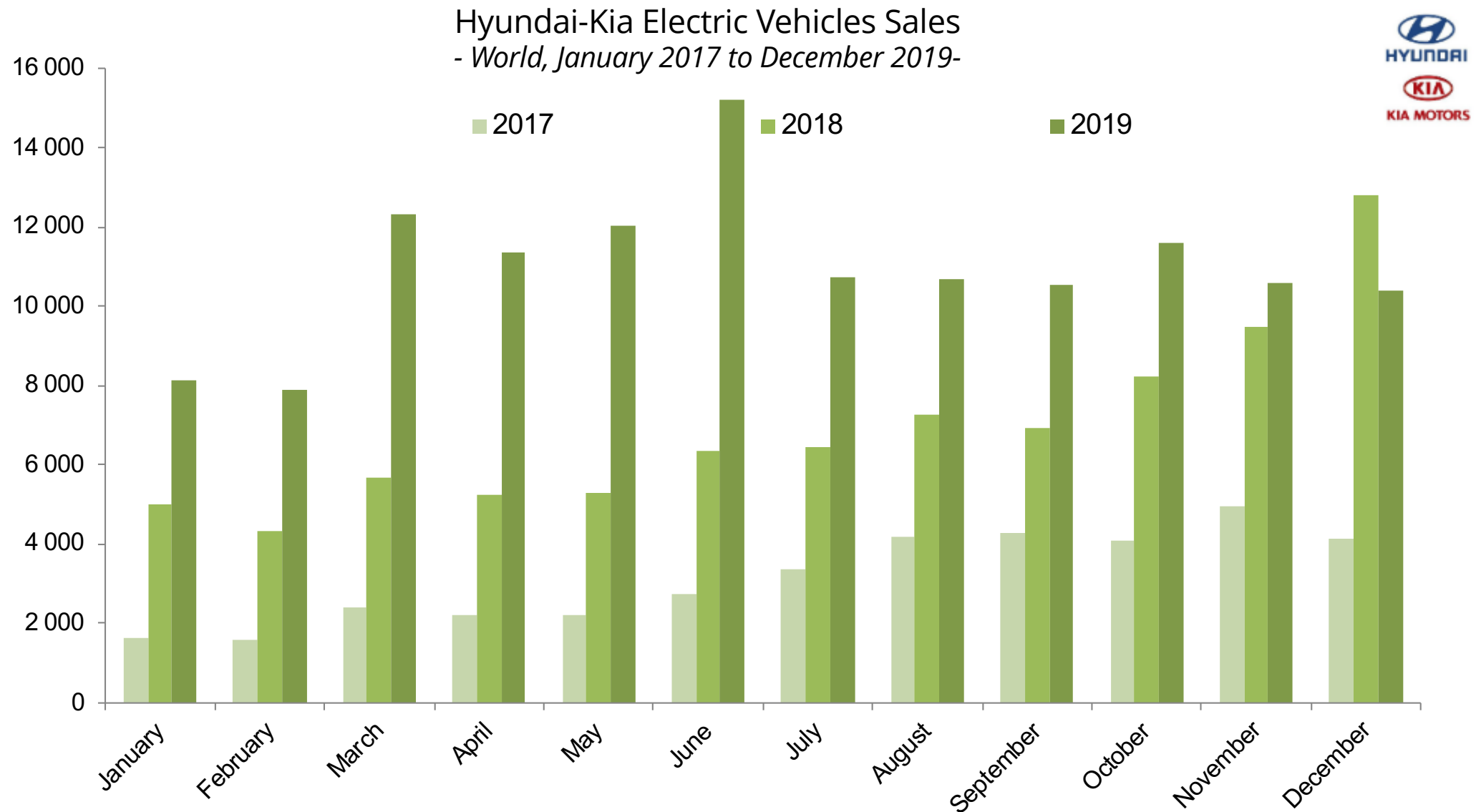


Hyundai-Kia continued to grow at a fast pace in 2019 but twice as slow as last year and slightly lower than VW with 49k additional EV sold in 2019 compared to last year.

Hyundai-Kia Electric Vehicles Sales - World, 2013 to 2019 -

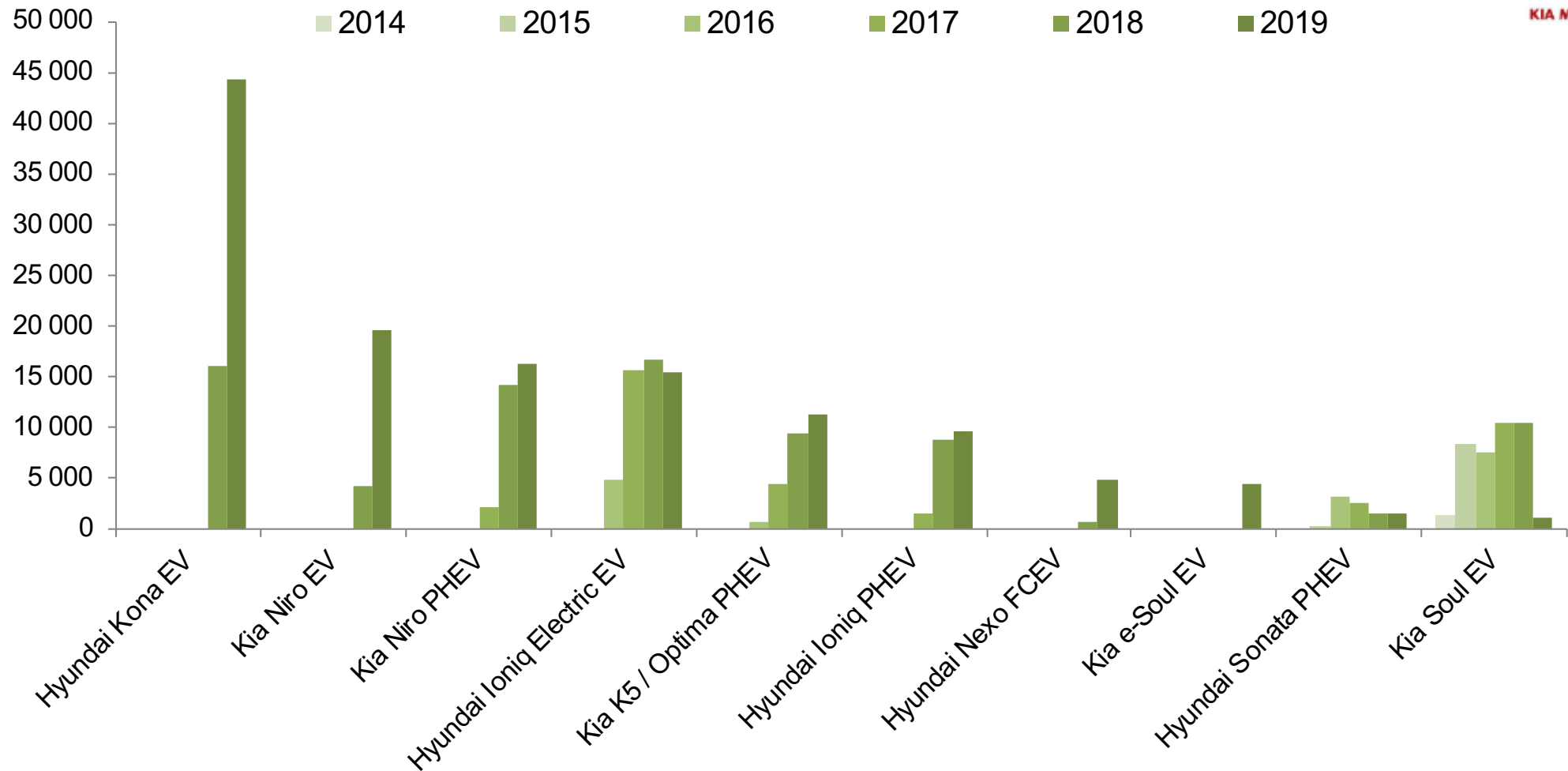


Hyundai-Kia sold once again around 10k EVs in December with sales 19% down : it has pushed on the break pedal and wait for early 2020 to sell its European EV for its CAFE performance.

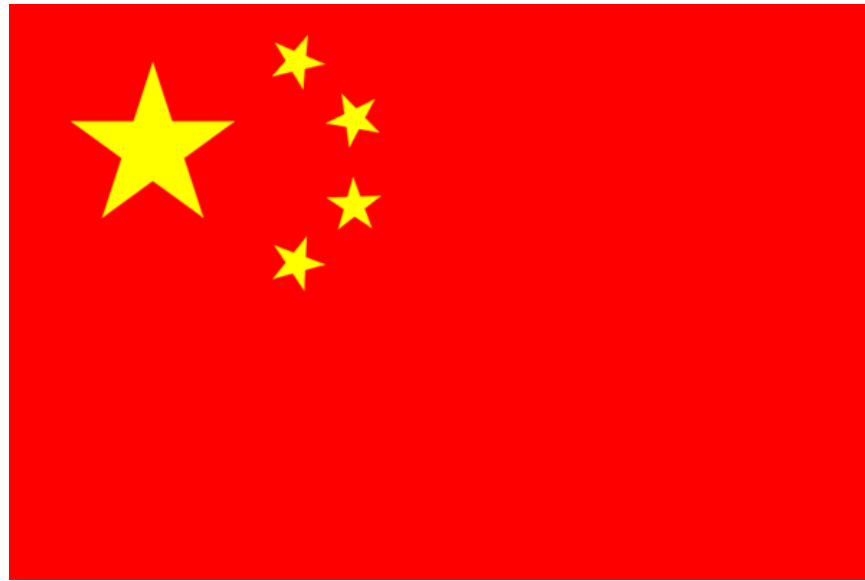


In only 2 years, the Hyundai Kona managed to match or surpass the European OEM flagships : Renault Zoé, BMW i3 and VW e-Golf. Kia Nio ranks 2nd with more than 35k units sold in 2019.

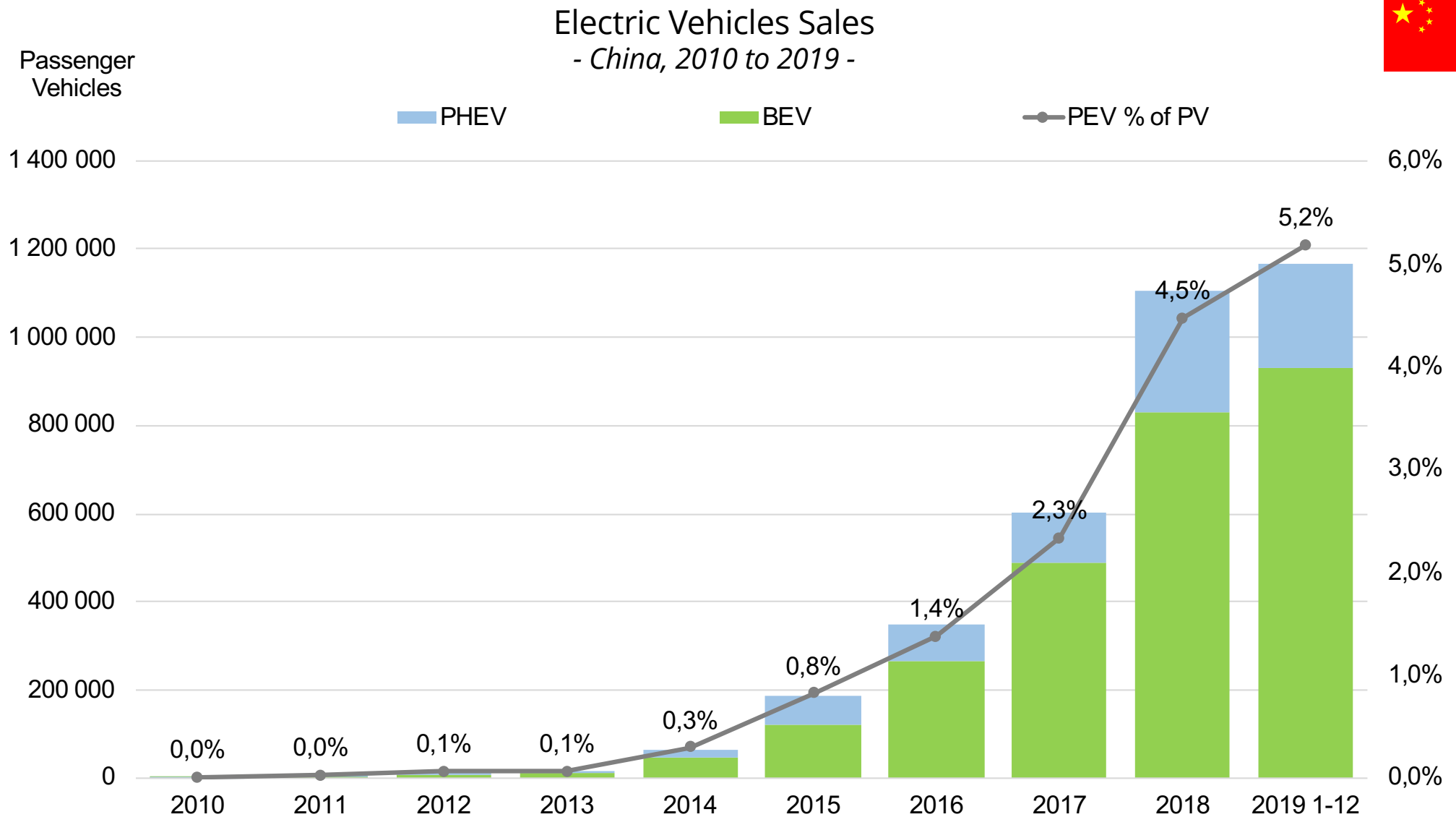
Hyundai-Kia Electric Vehicles Sales by Model
- Top 10 models, 2014 to 2019 -



China Sales Tracking

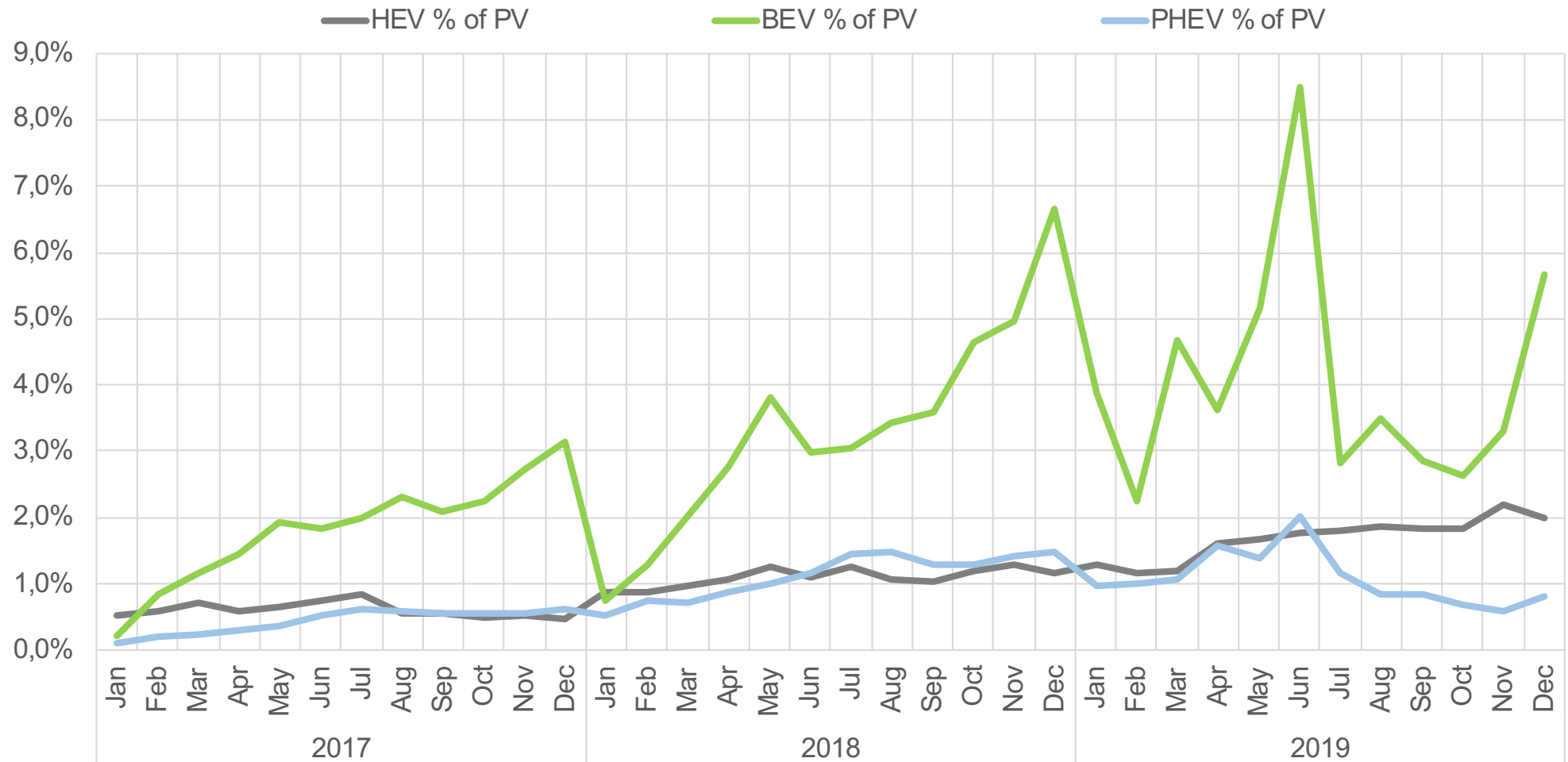


China EV Sales were almost stable in 2019 with only 6% growth vs. 83% last year. Penetration increased more as PV sales were down in 2019 and was over 5% for the 1st time.



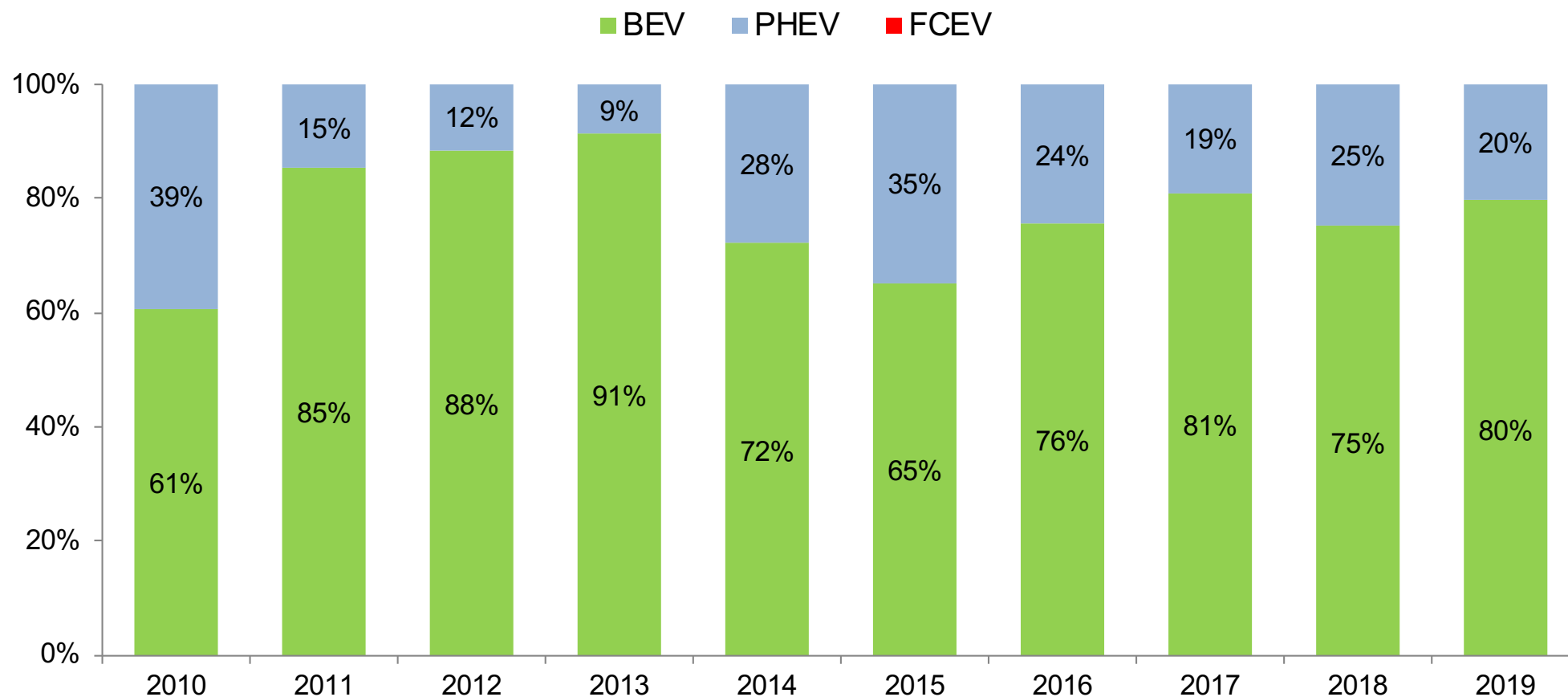
EV sales were once again down in December but by “only” 21% – the 6th consecutive month after the incentive reduction end of June - and it is expected to last with the Coronavirus.

Monthly x-EV Penetration
- China, January 2017 to December 2019-



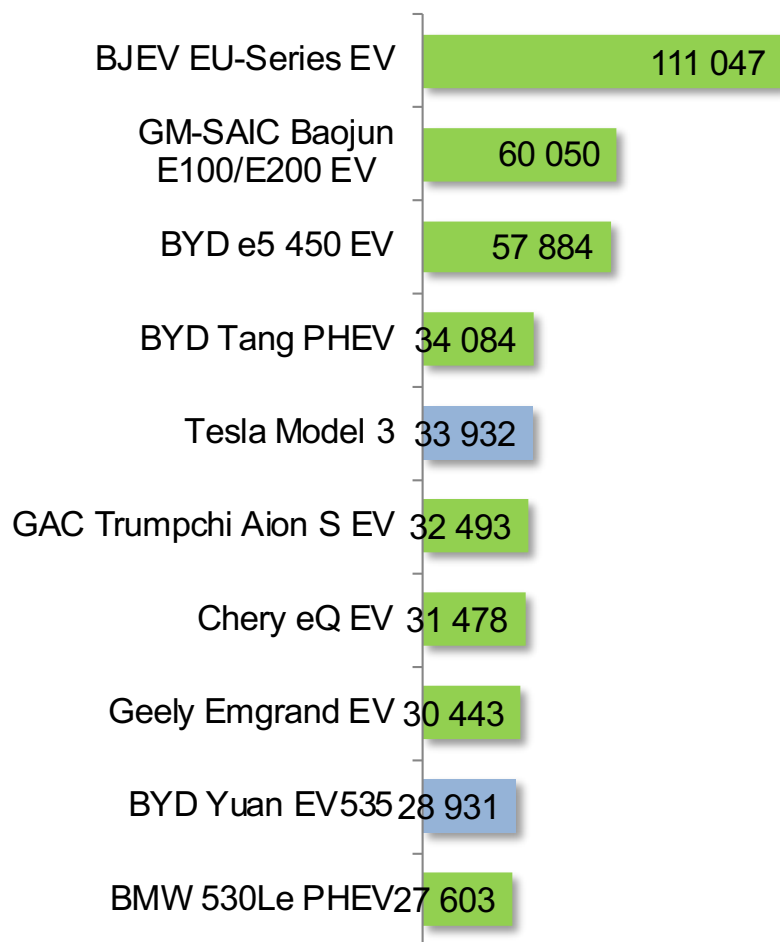
BEV share was back at 80% in 2019 as BEVs suffered less than PHEVs from the incentive reduction in June : +13% in 2019 for BEVs vs. -13% for PHEVs.

Electric Vehicles Sales by Type - China, 2010 to 2019 -

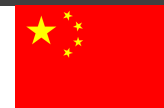
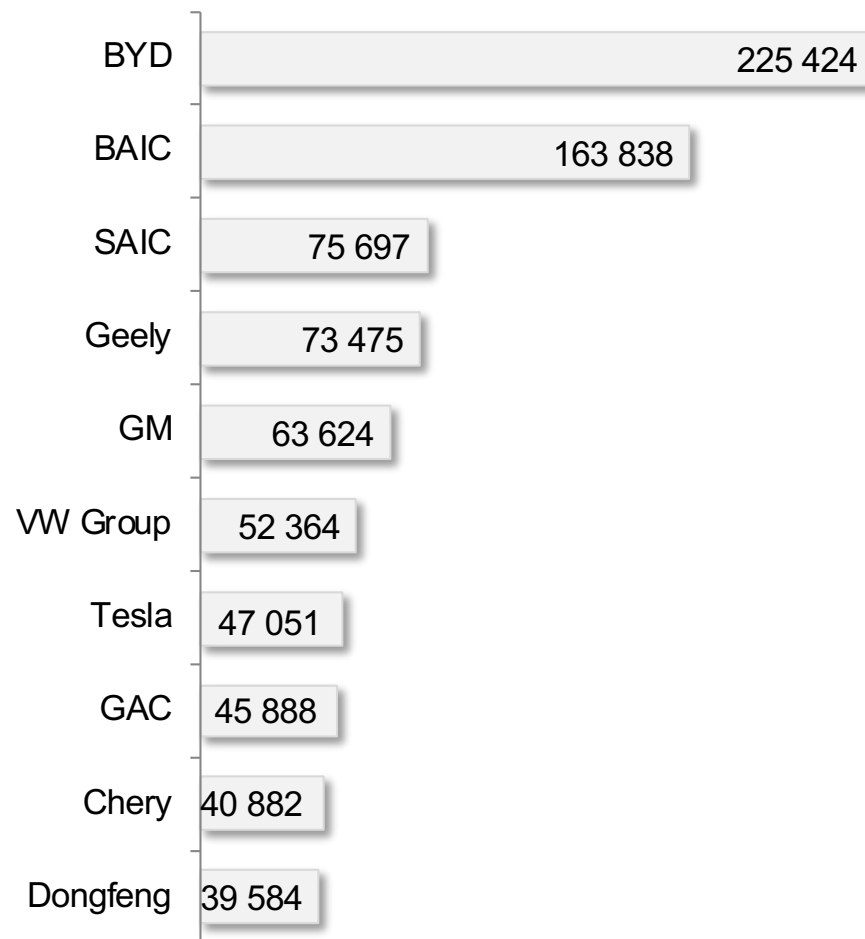


BJEV EU-Series won the EV crown once again with more than 110k units sold in 2019 while BYD won the OEM crown. The gap between BYD and BAIC should decrease in 2020.

Top 10 Electric Vehicles sold
- China, 2019 -



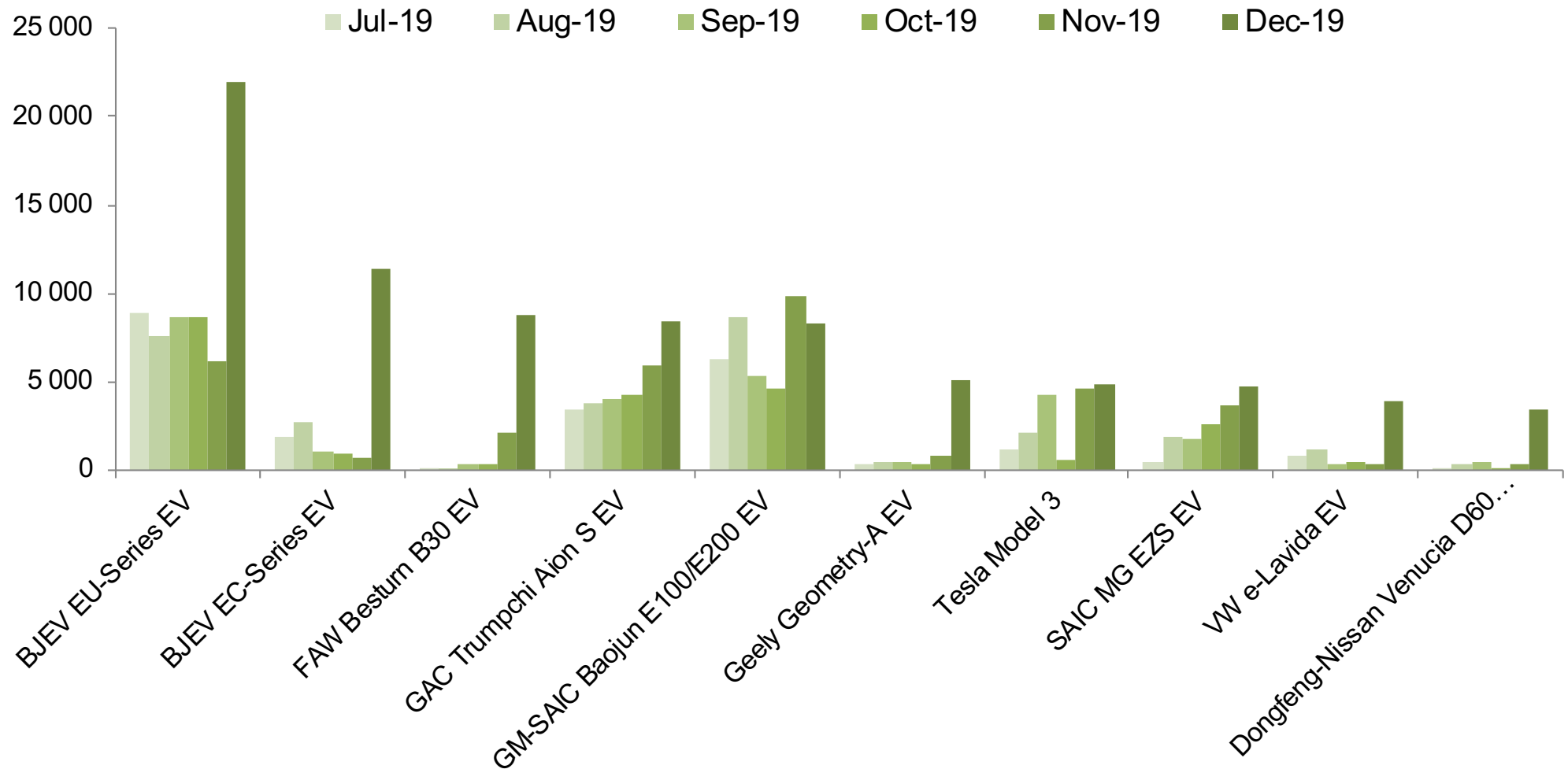
Top 10 Electric Vehicles Brands
- China, 2019 -



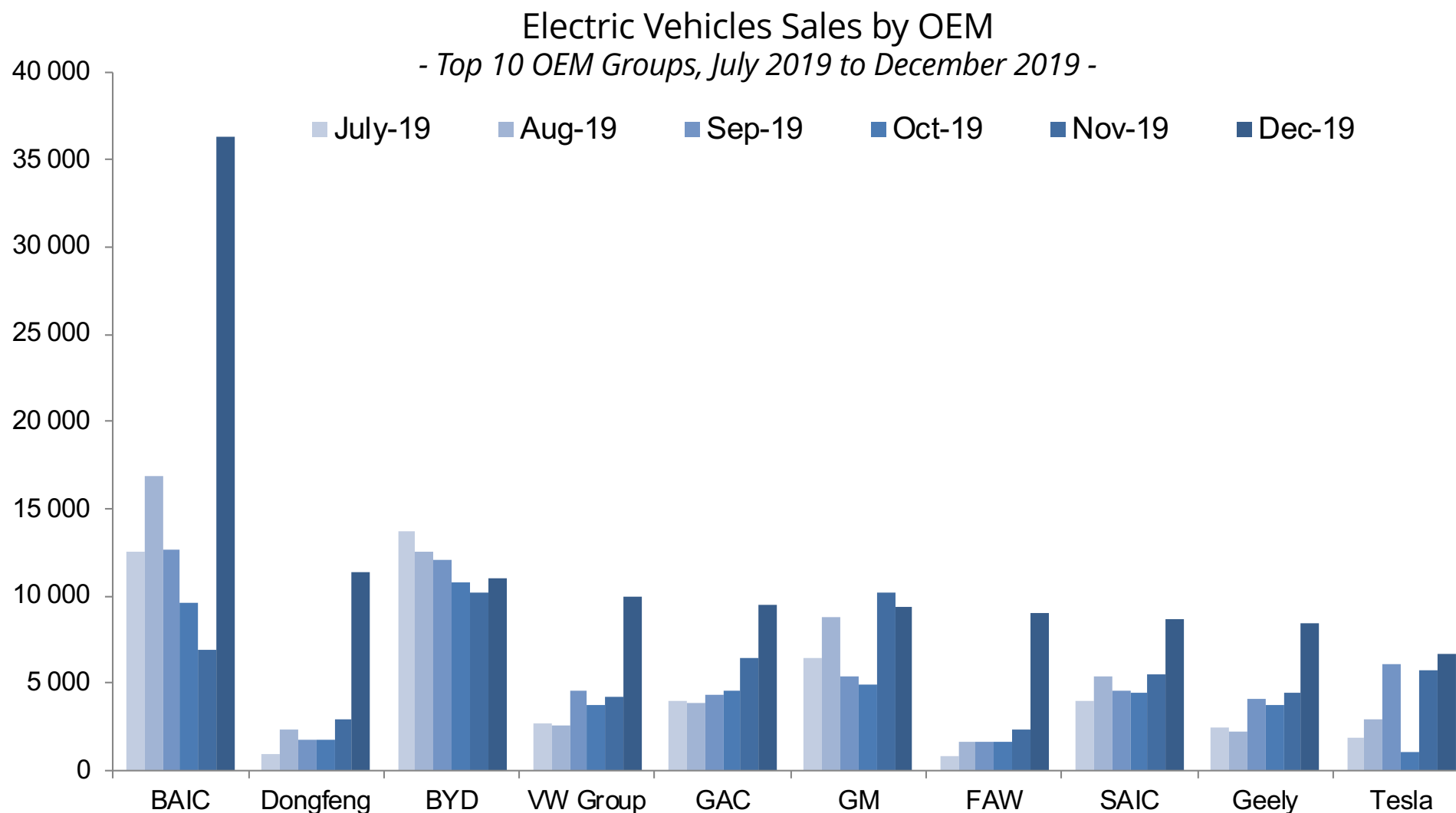
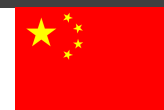
More than 22k of the 2019 EV crown – the BJEV EU-Series – were sold in December while its little brother the EC-Series also performed well. No model from BYD in Top 10 in December.



Electric Vehicles Sales by Model
- Top 10 Models, July 2019 to December 2019 -



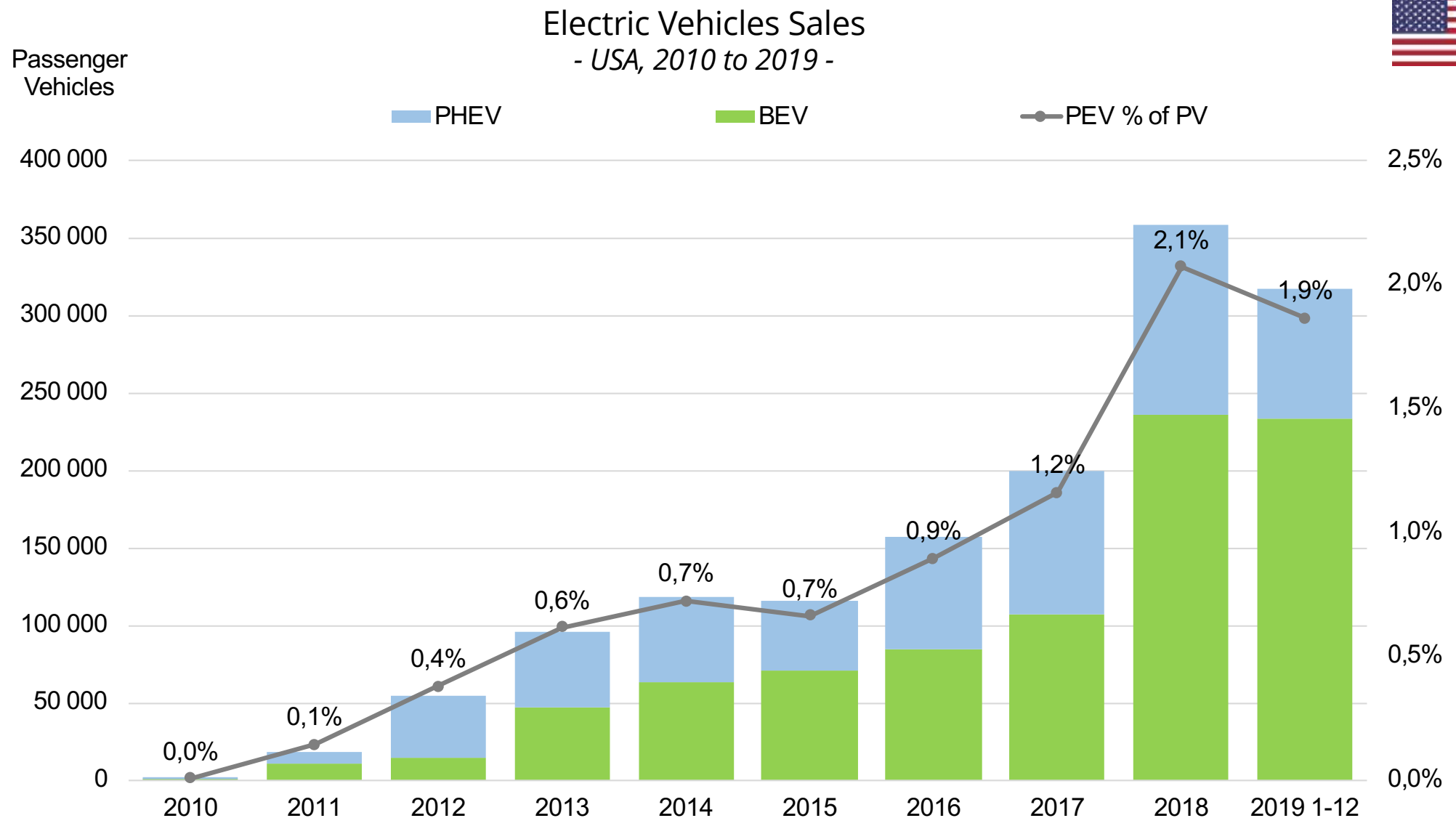
BAIC sold more 35k units in December – a new all time record – followed by Dongfeng who managed to finish in front of the 2019 OEM crown BYD.



USA Sales Tracking



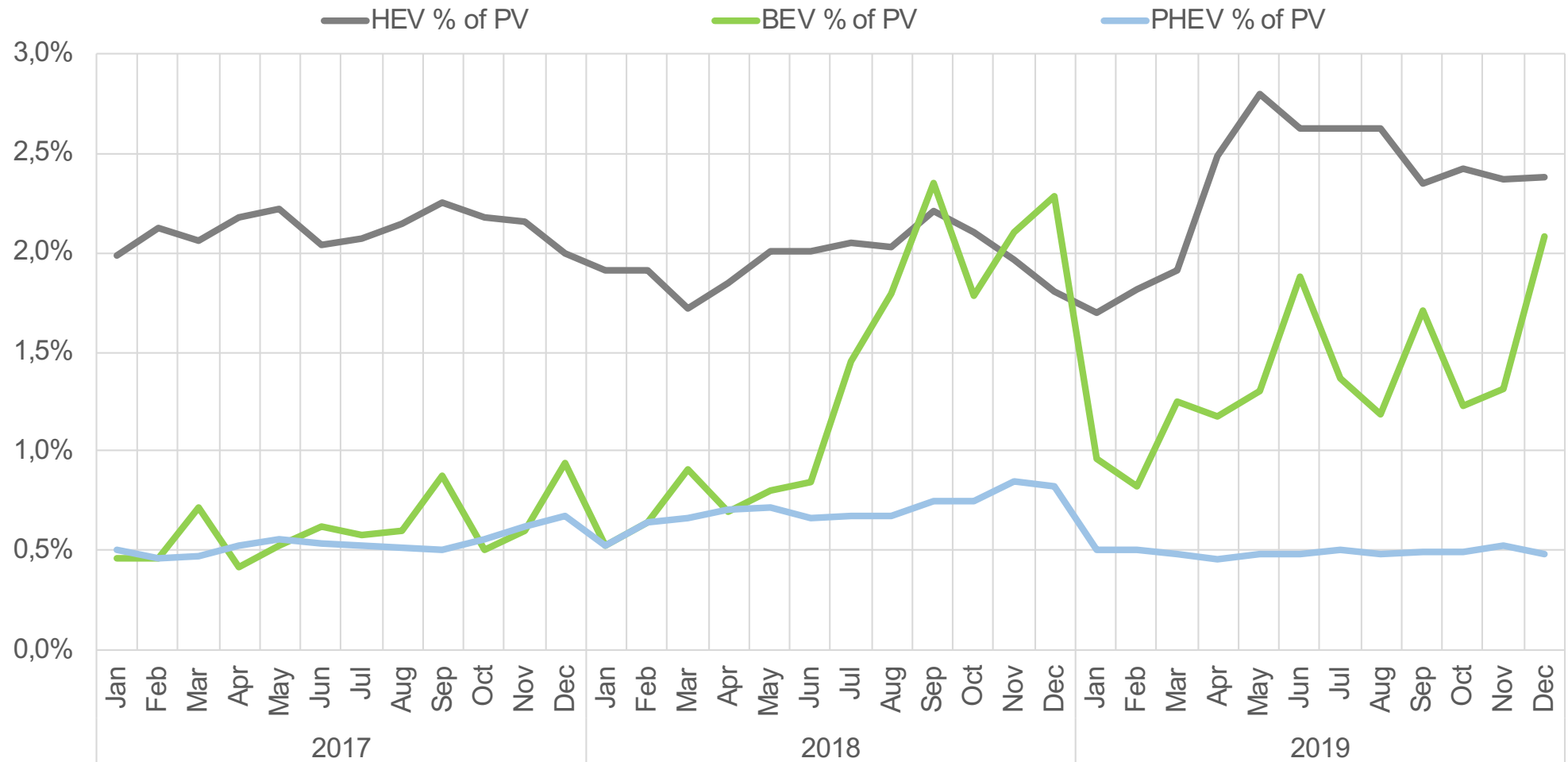
As the USA EV market is very Model 3 dependant, its limited sales growth in 2019 explains the 12% market decline with 320k units sold representing less than 2% of PV sales.



EV sales were down by 23% in December for the 6th consecutive month.
Tesla Model 3 sales were also down by 11% for the 6th consecutive month.

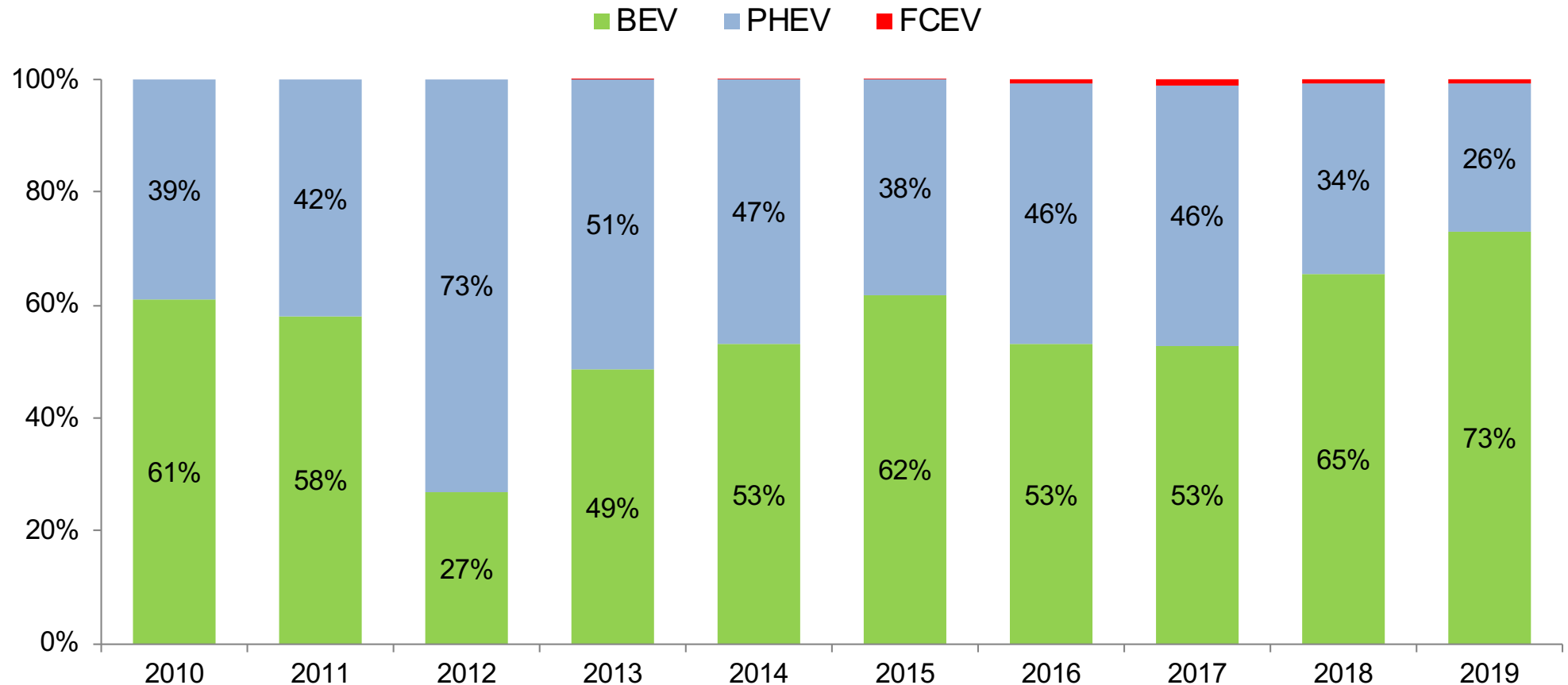


Monthly x-EV Penetration
- USA, January 2017 to December 2019-



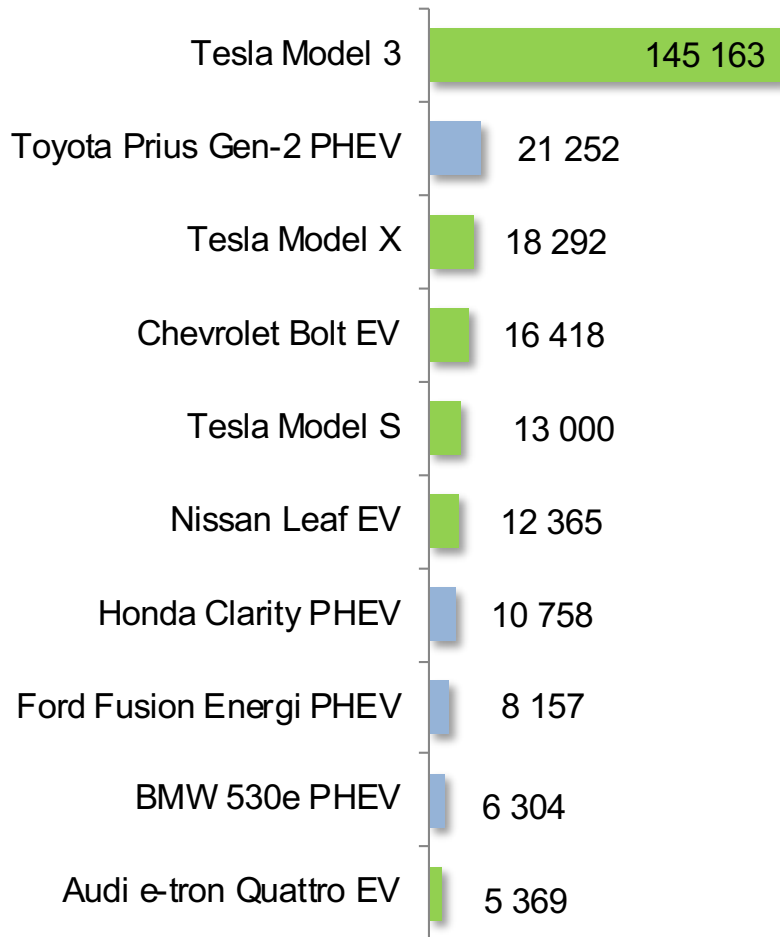
BEV share reached a new record high in the USA thanks to the 1st full year of the Tesla Model 3
with as high as 73% in 2019.

Electric Vehicles Sales by Type
- USA, 2010 to 2019 -



Tesla Model 3 won the 2019 EV crown in the US with almost 150k units sold representing 45% market share and outselling its closest challenger by a factor of 7.

Top 10 Electric Vehicles sold
- USA, 2019 -



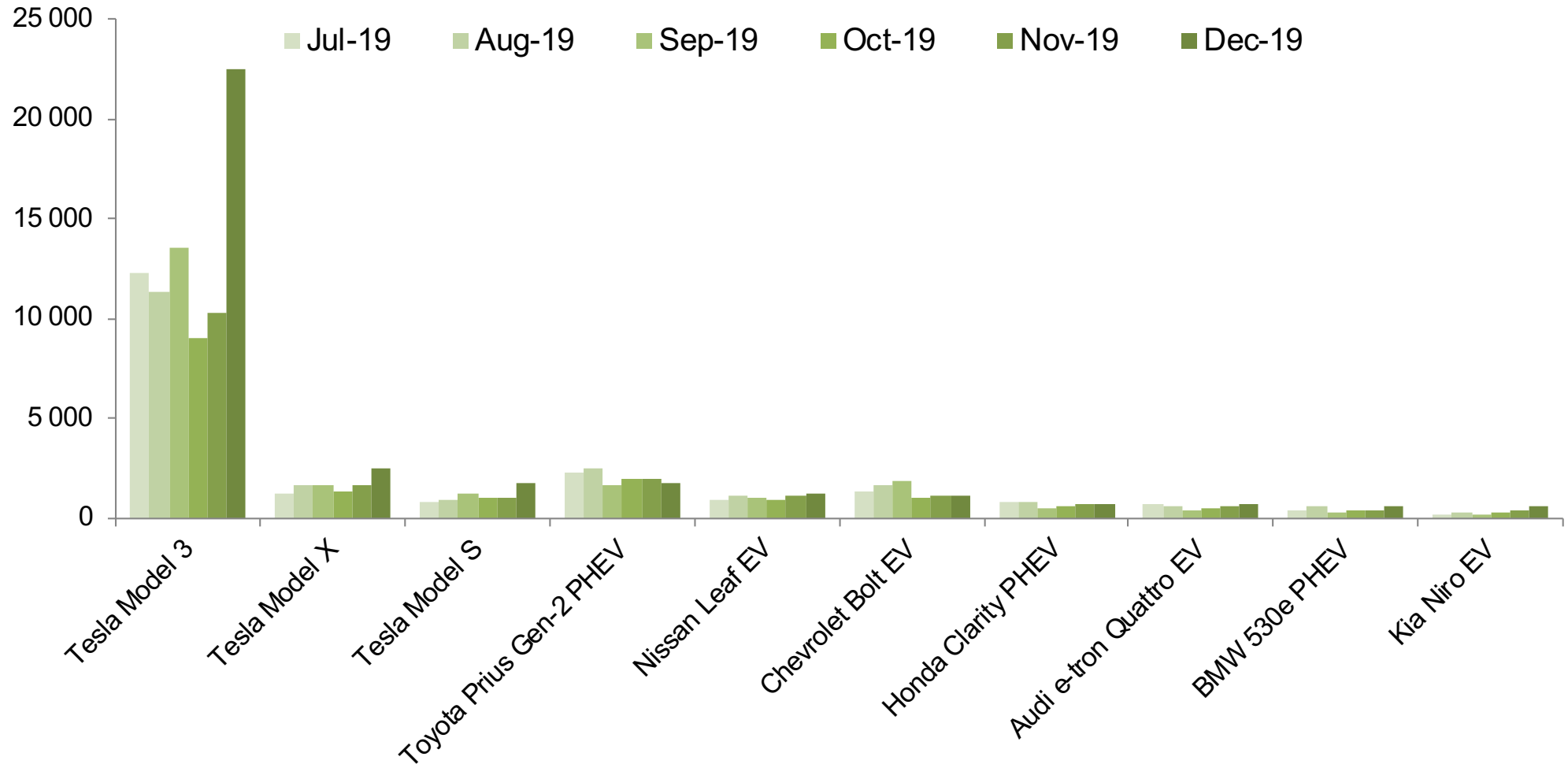
Top 10 Electric Vehicles Brands
- USA, 2019 -



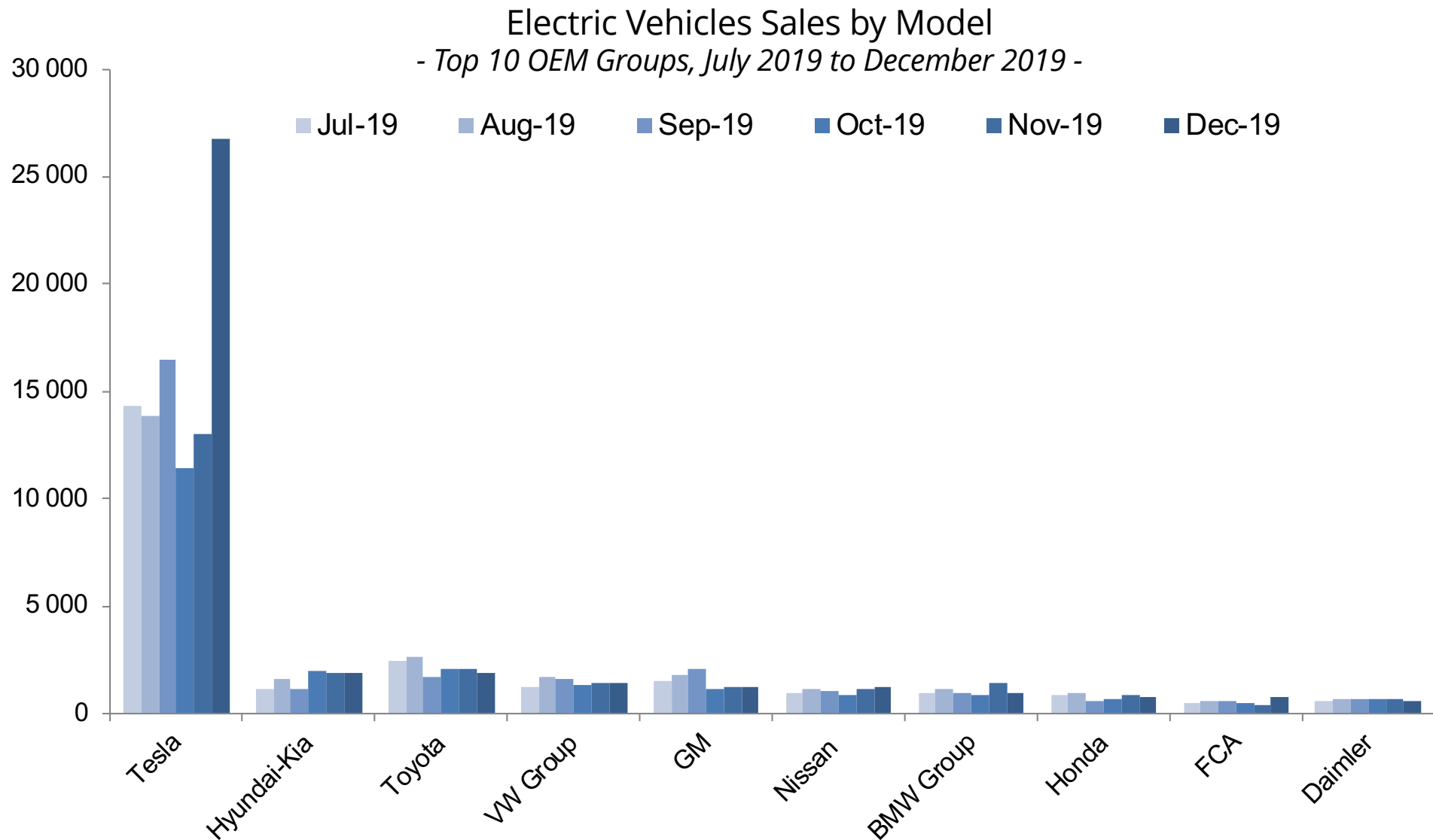
Tesla Model 3 sales were back above 20k units and should stay at higher levels from now on
as the new plant in China should help in increasing Model 3 availability in the USA.



Electric Vehicles Sales by Model
- Top 10 Models, July 2019 to December 2019 -



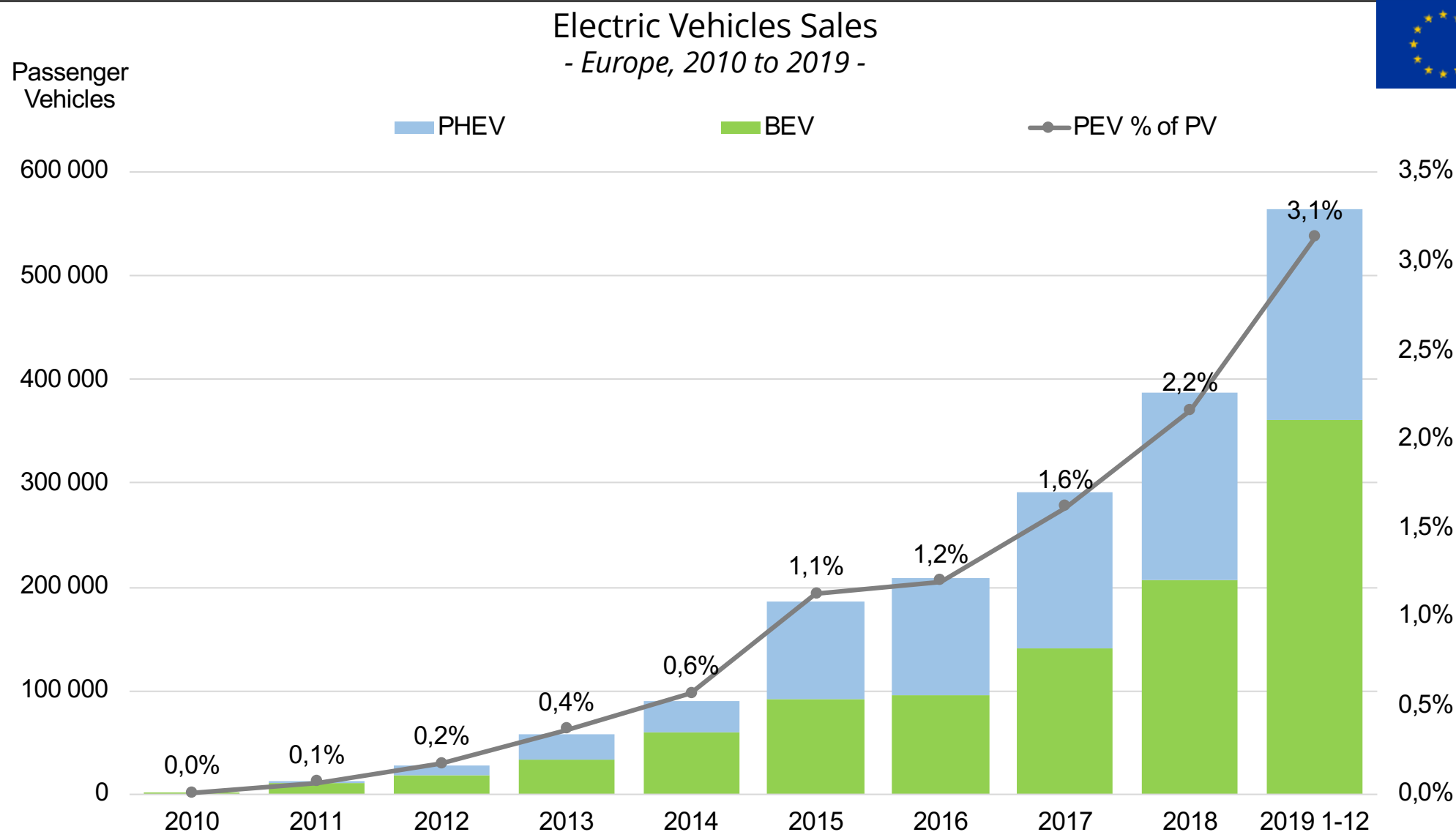
With its 3 EVs on the podium, Tesla had as high as 68% market share and sold 14 times as many EVs as any other OEM in the USA.



Europe Sales Tracking

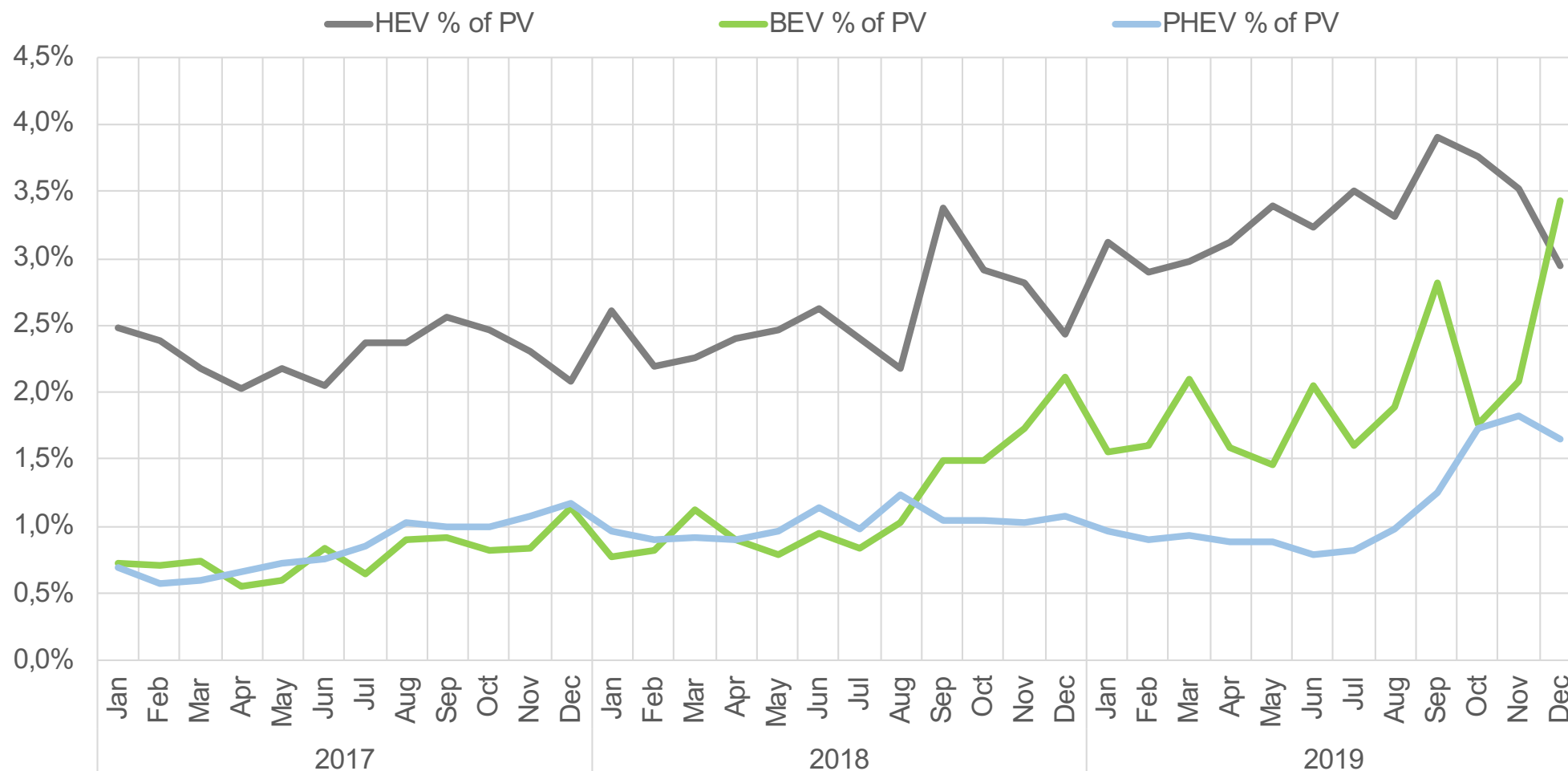


Europe was the fastest growing region last year with 45% growth and more than 560k EVs sold. EV penetration reached 3.1% and Europe could finish close to China in 2020.



77k EVs were sold in Europe in December growing by 88% thanks an exceptionally high month in the Netherlands before an incentive reduction. More BEVs were sold than HEVs.

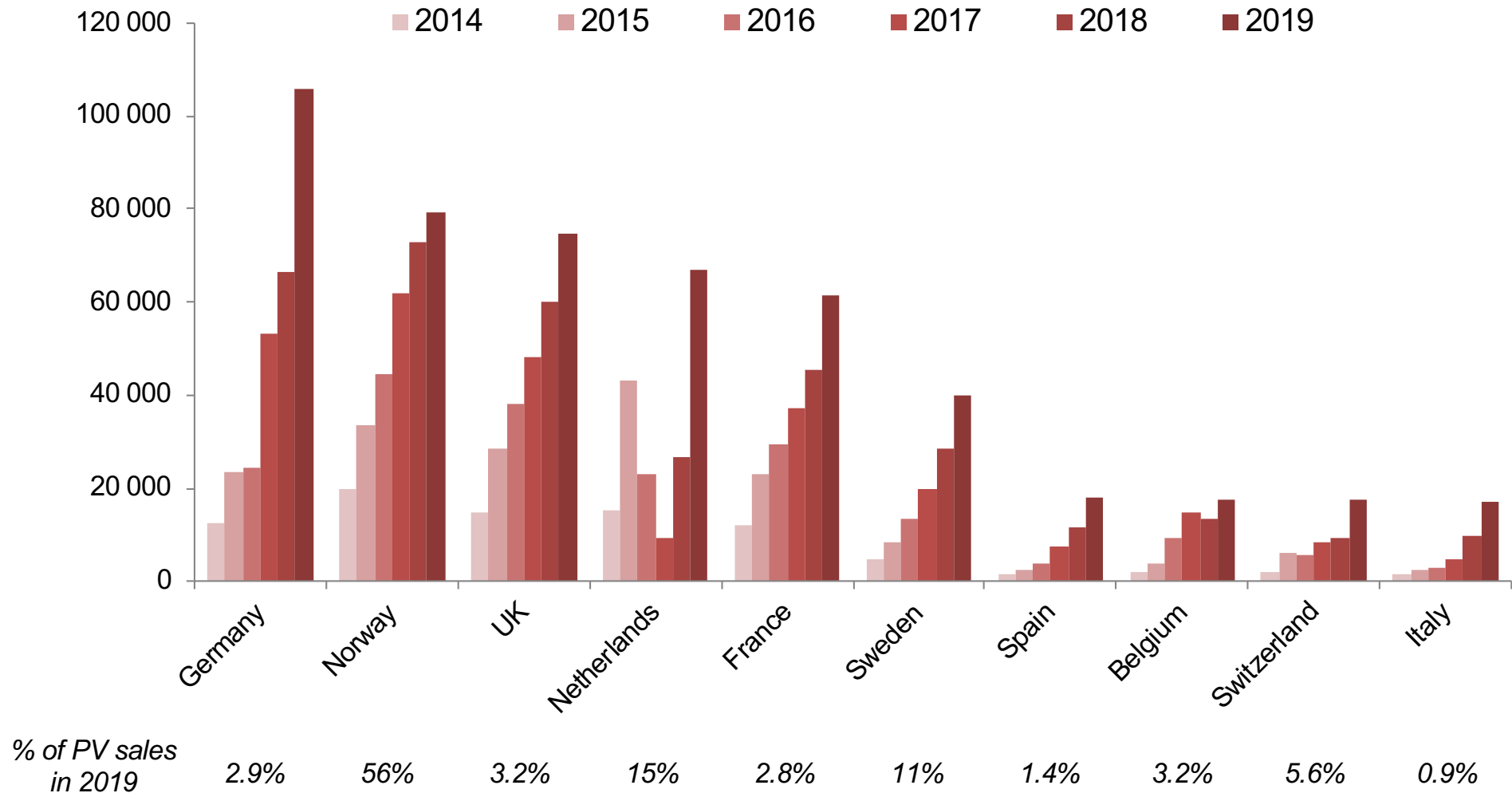
Monthly x-EV Penetration
- Europe, January 2017 to December 2019-



The Netherlands took the lead in Europe both in term of sales with as high as 23k units but also in term of EV penetration with 54% of PV sales. Germany is 2nd followed by the UK and France.

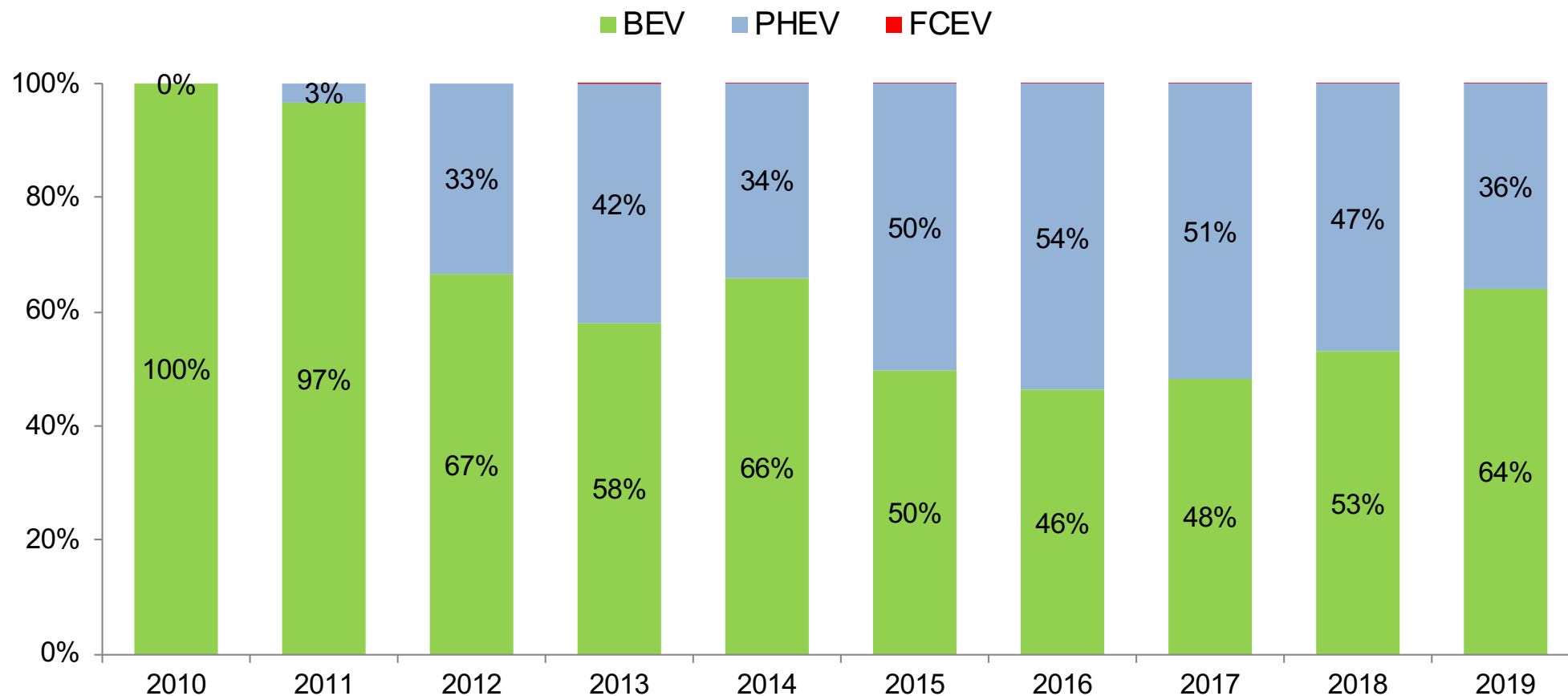


Electric Vehicles Sales by Country
- Top 10 countries, 2014 to 2019 -



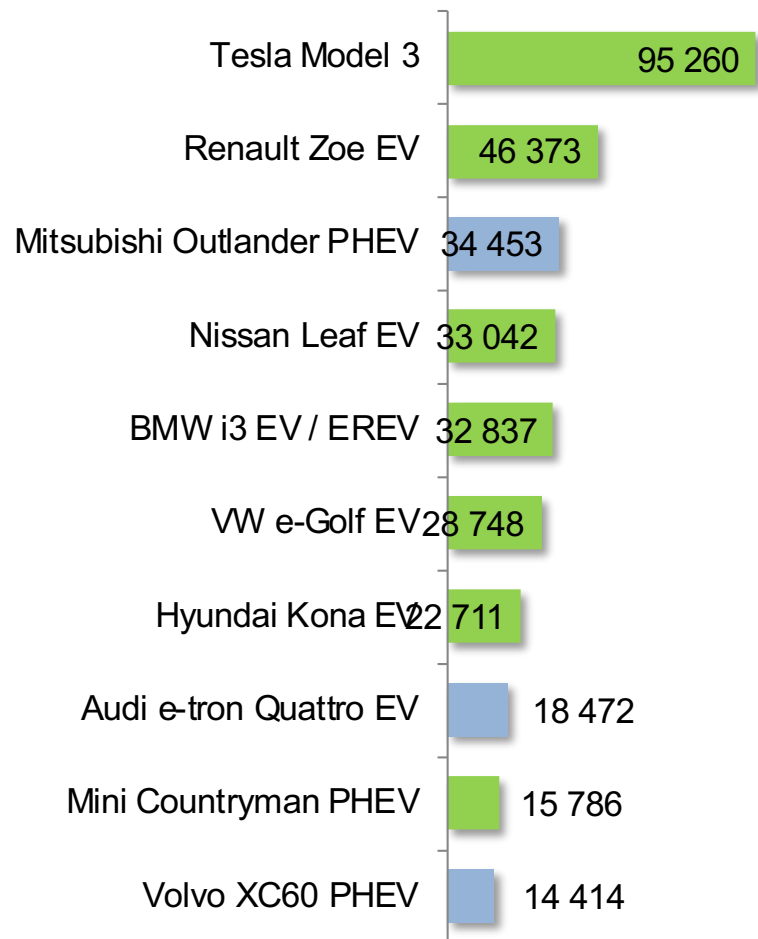
BEVs were back at higher levels in 2019 thanks to the Model 3 hurricane but some rebalancing is expected in 2020 in what should be the 1st PHEV market in the world.

Electric Vehicles Sales by Type
- Europe, 2010 to 2019 -

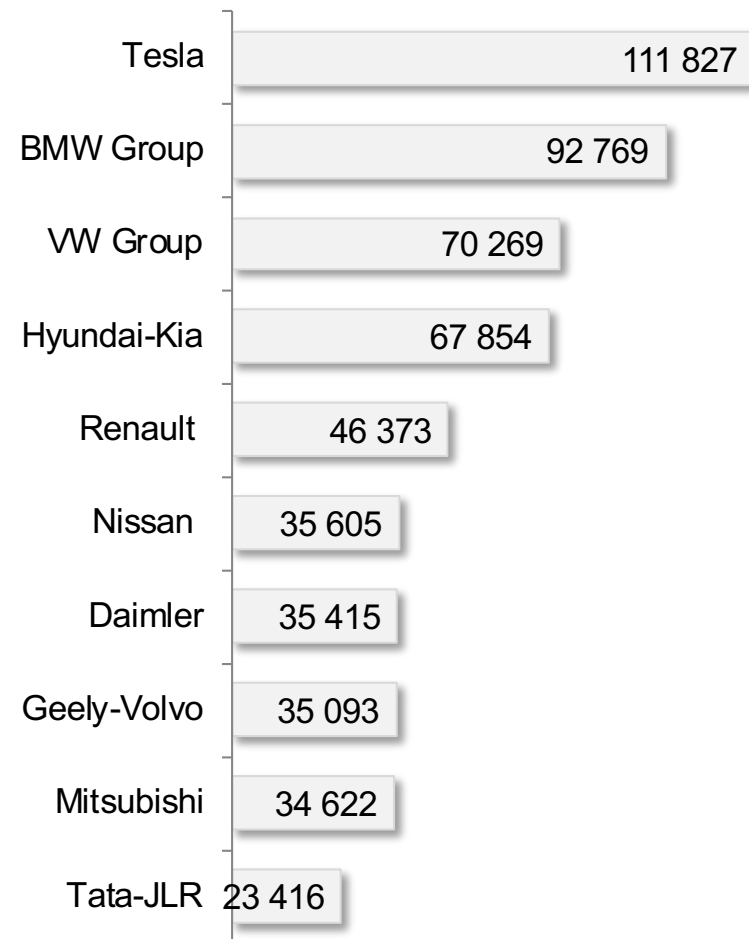


Tesla Model 3 won the EV crown with almost 100k units sold in front of the local champion while Tesla will also win the OEM crown in front of BMW Group and VW Group.

Top 10 Electric Vehicles sold
- Europe, 2019 -



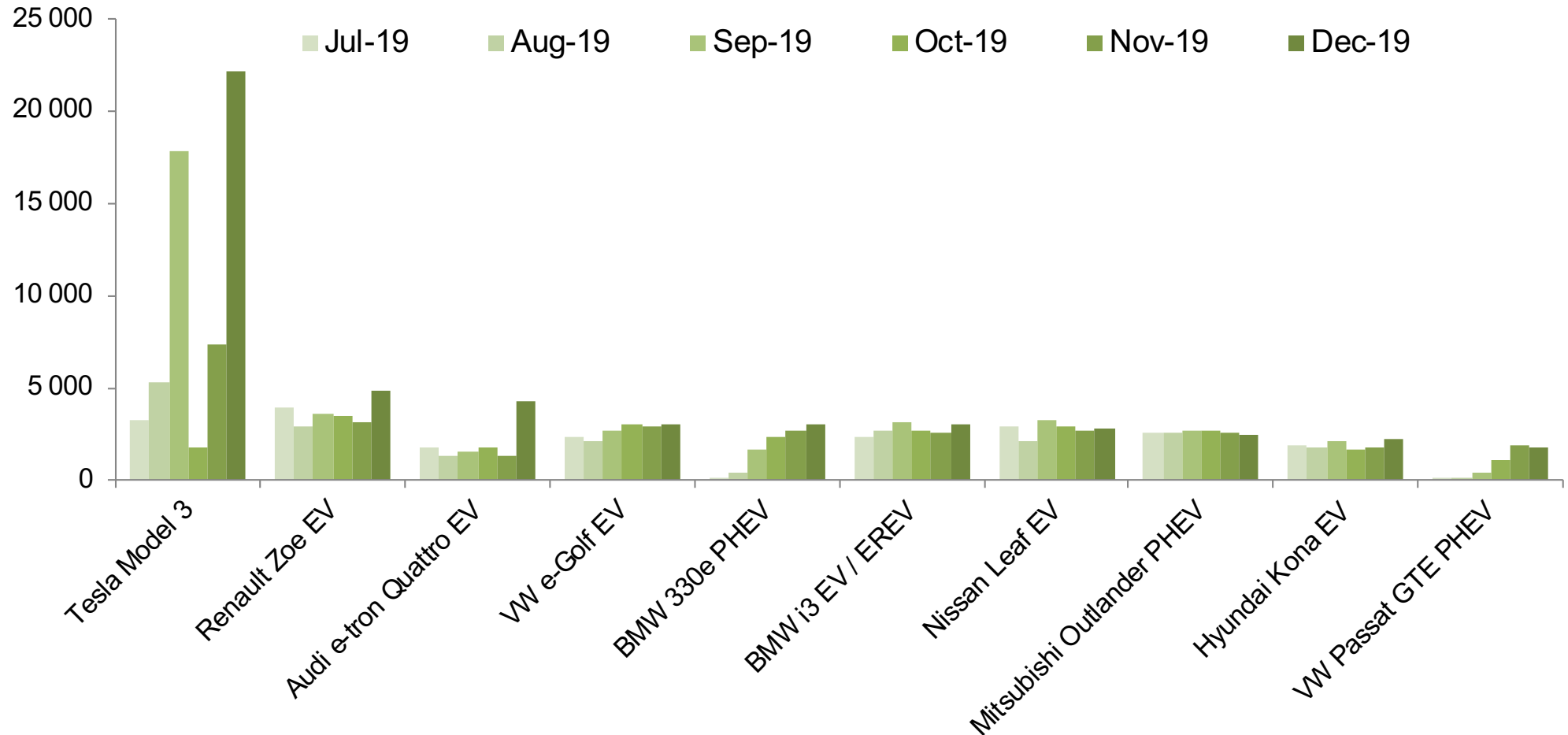
Top 10 Electric Vehicles Brands
- Europe, 2019 -



22k Tesla Model 3 were sold in December while the Audi-E-tron Quattro made it to the podium for the 1st time – it is not expected to last however as it was a one-off in the Netherlands.



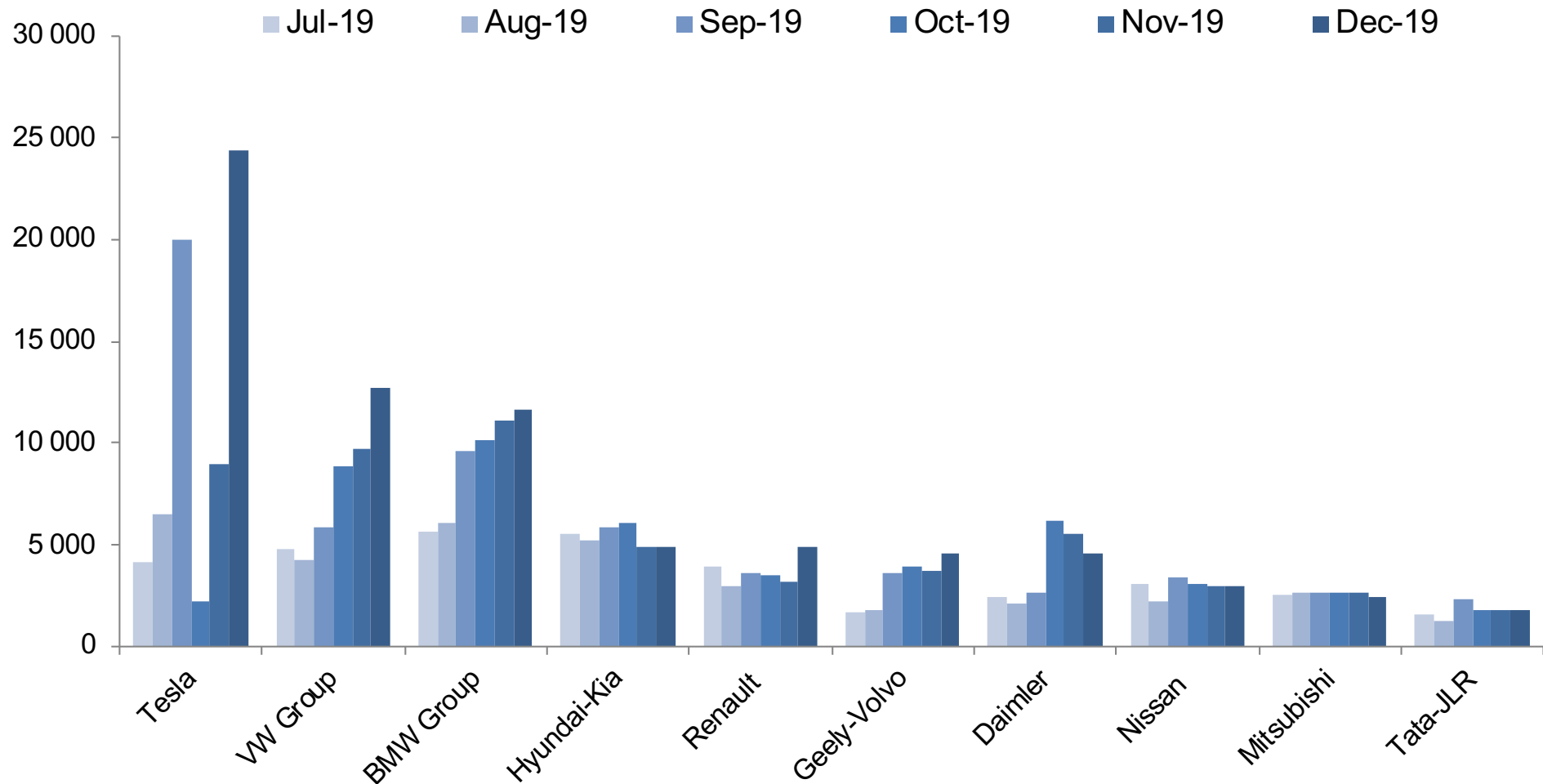
Electric Vehicles Sales by Model
- Top 10 Models, July 2019 to December 2019 -



Tesla sold almost 25k units in December while VW Group managed to overtake BMW group for the 1st time over the last few months. Tesla might have a challenger in Europe next year.



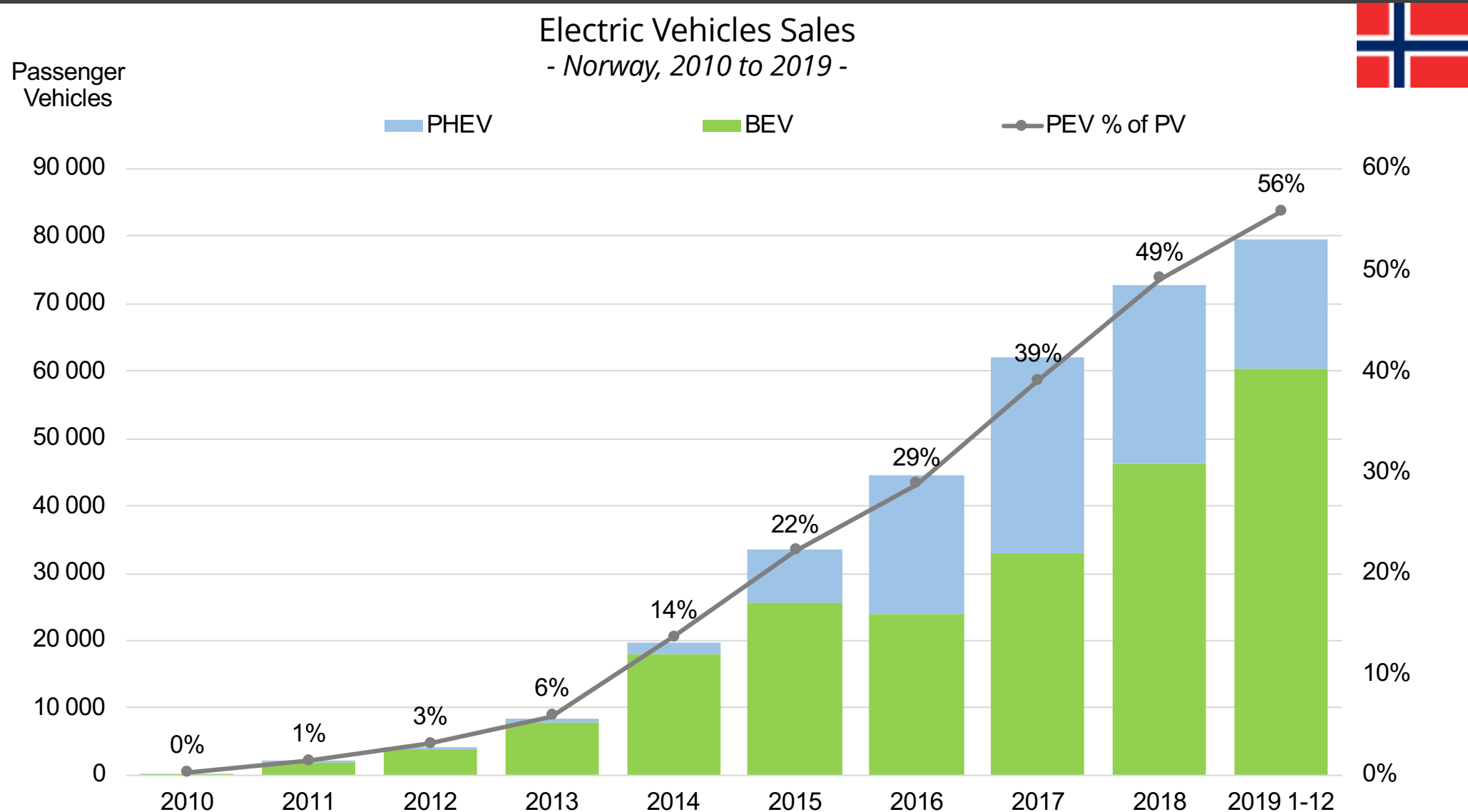
Electric Vehicles Sales by Model
- Top 10 OEM Groups, July 2019 to December 2019 -



Norway Sales Tracking



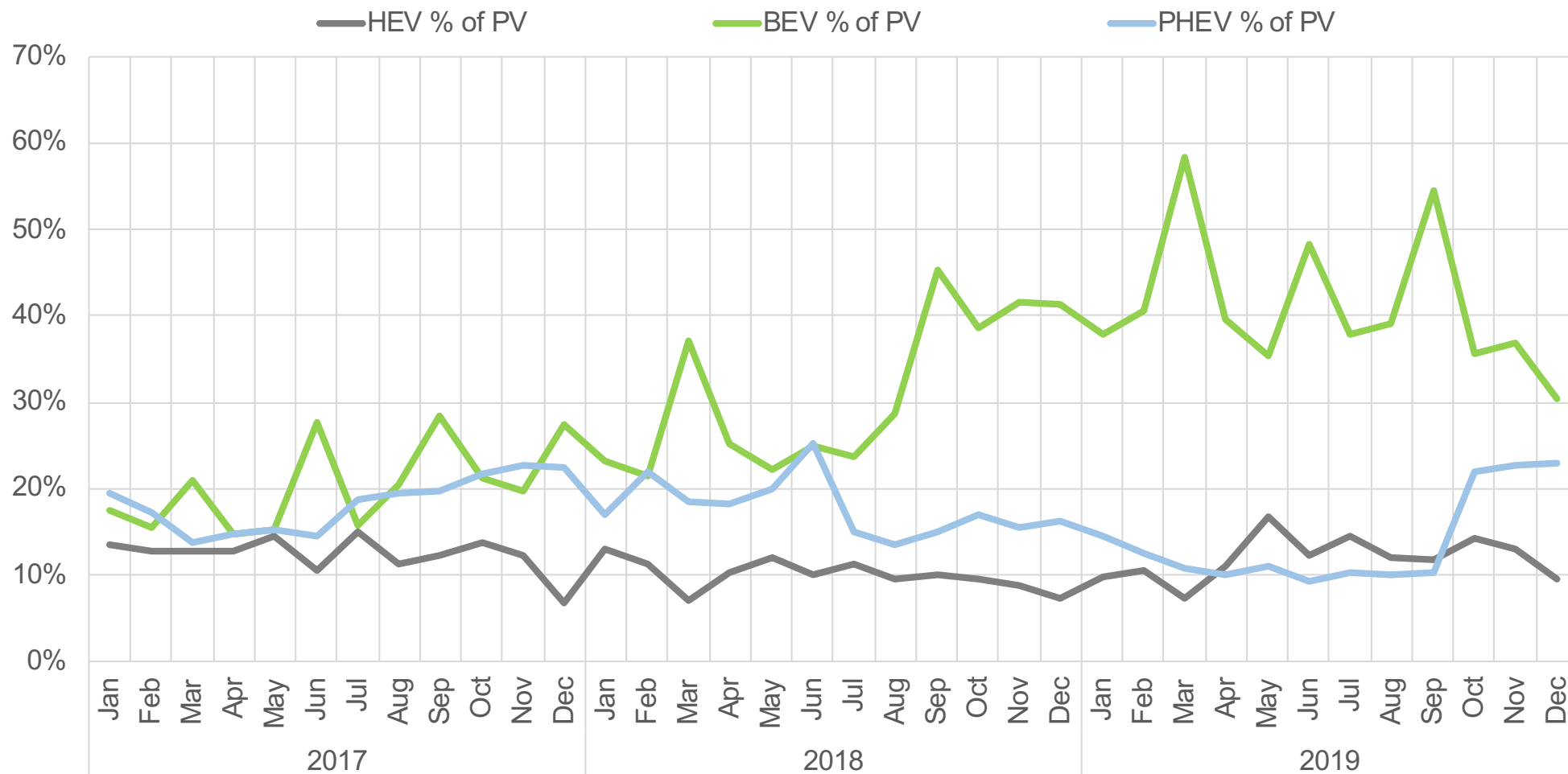
2019 is the first year when more than 1 new cars sold out of 2 is electric.
80k EVs were sold in 2019 representing 56% of PV sales but growing by only 9% vs. 2018.



EV sales were down for the 3rd month in a row in Norway with 6k EVs sold.
OEM might be waiting for January 2020 to benefit from the bonus for the CAFÉ.

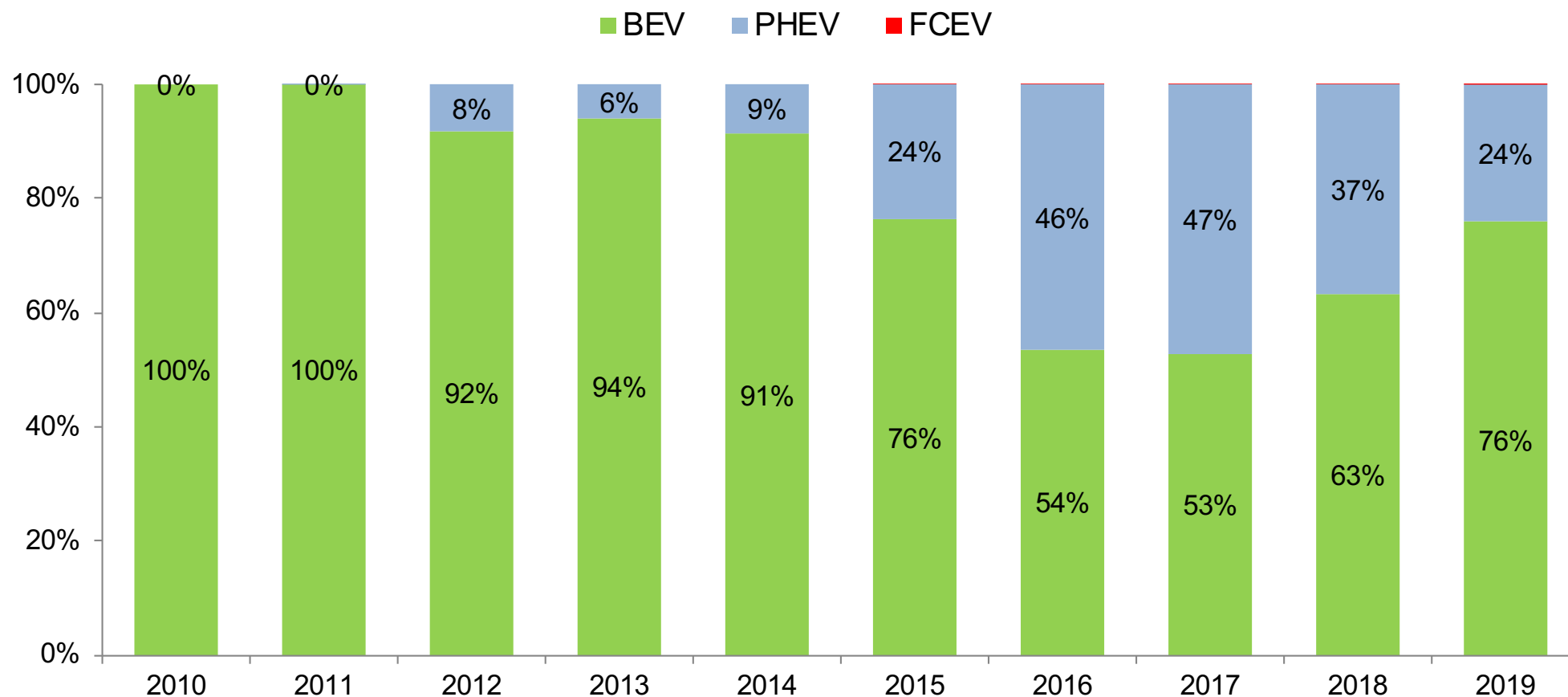


Monthly x-EV Penetration
- Norway, January 2017 to December 2019-



BEV share was back at 2015 levels thanks to Tesla Model 3 but some rebalancing towards PHEV is expected in 2020 following the trend of the last couple of months.

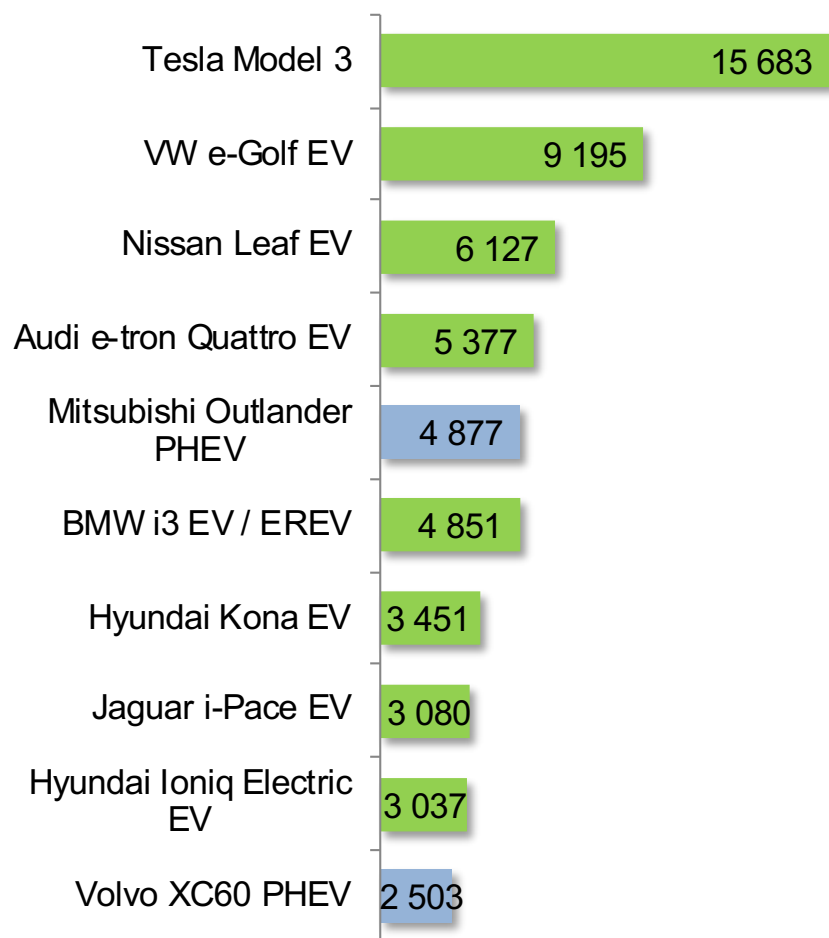
Electric Vehicles Sales by Type
- Norway, 2010 to 2019 -



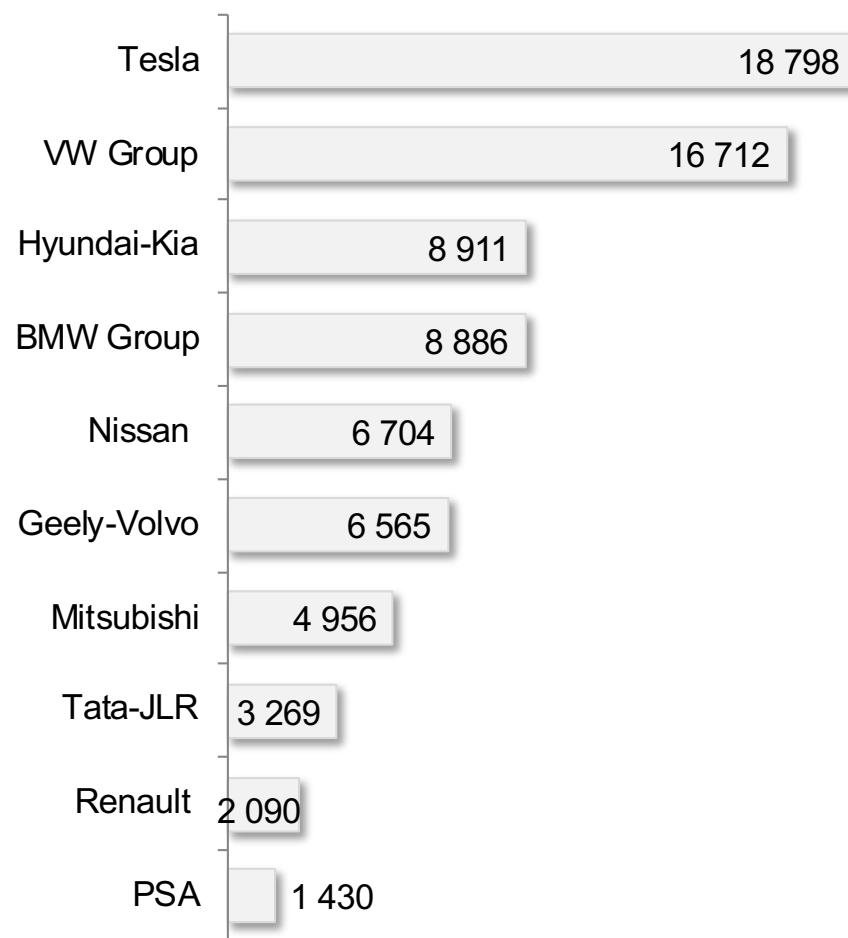
The Tesla Model 3 (and Tesla) won the EV crown in 2019 in front of the VW e-Golf (and VW Group which will finish in 2nd position thanks to its VW e-Golf and Audi e-tron Quattro)



Top 10 Electric Vehicles sold
- Norway, 2019 -



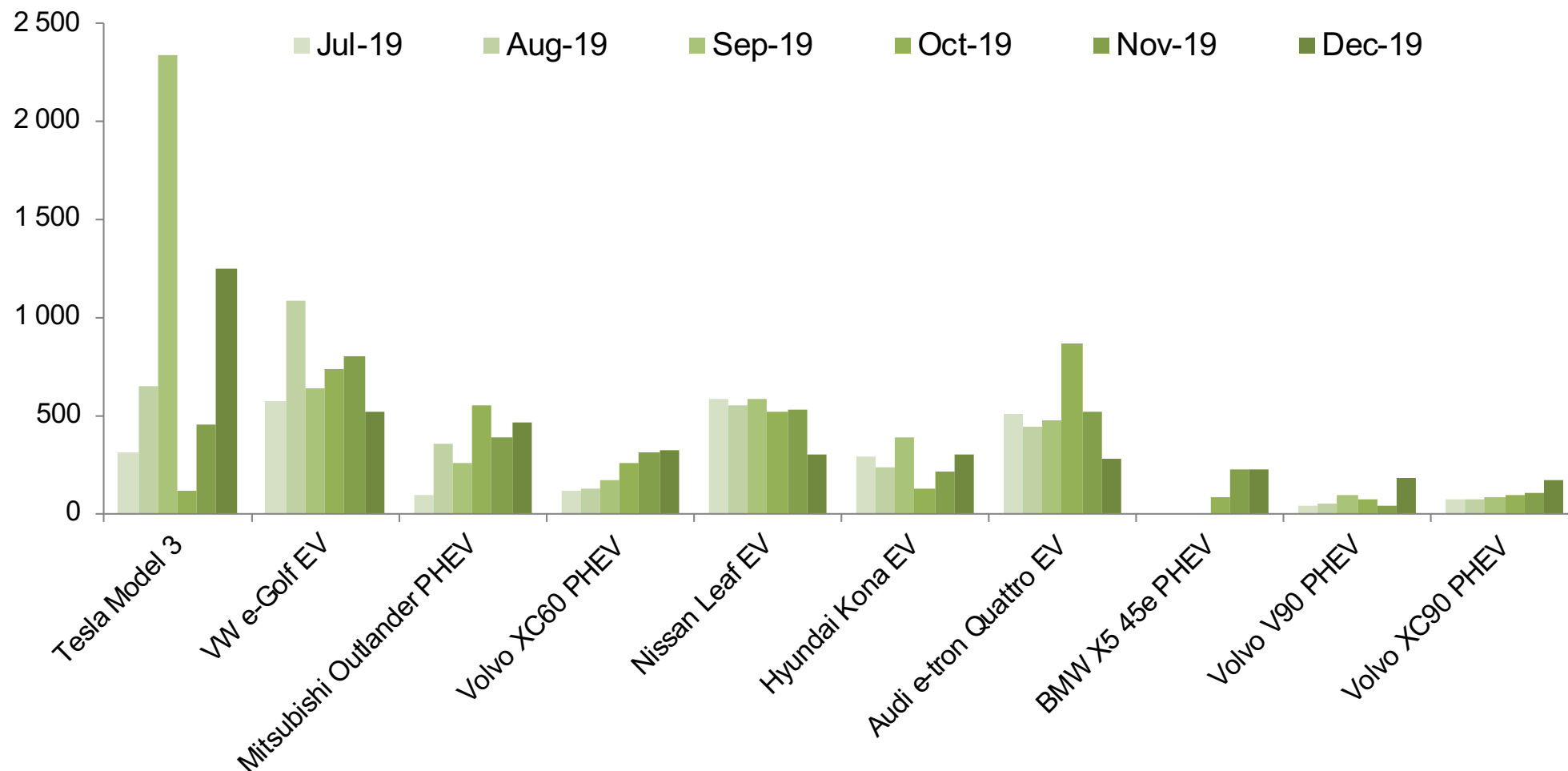
Top 10 Electric Vehicles Brands
- Norway, 2019 -



As expected, Tesla Model 3 was back in the lead in December in front of the VW e-Golf and Mitsubishi Outlander.



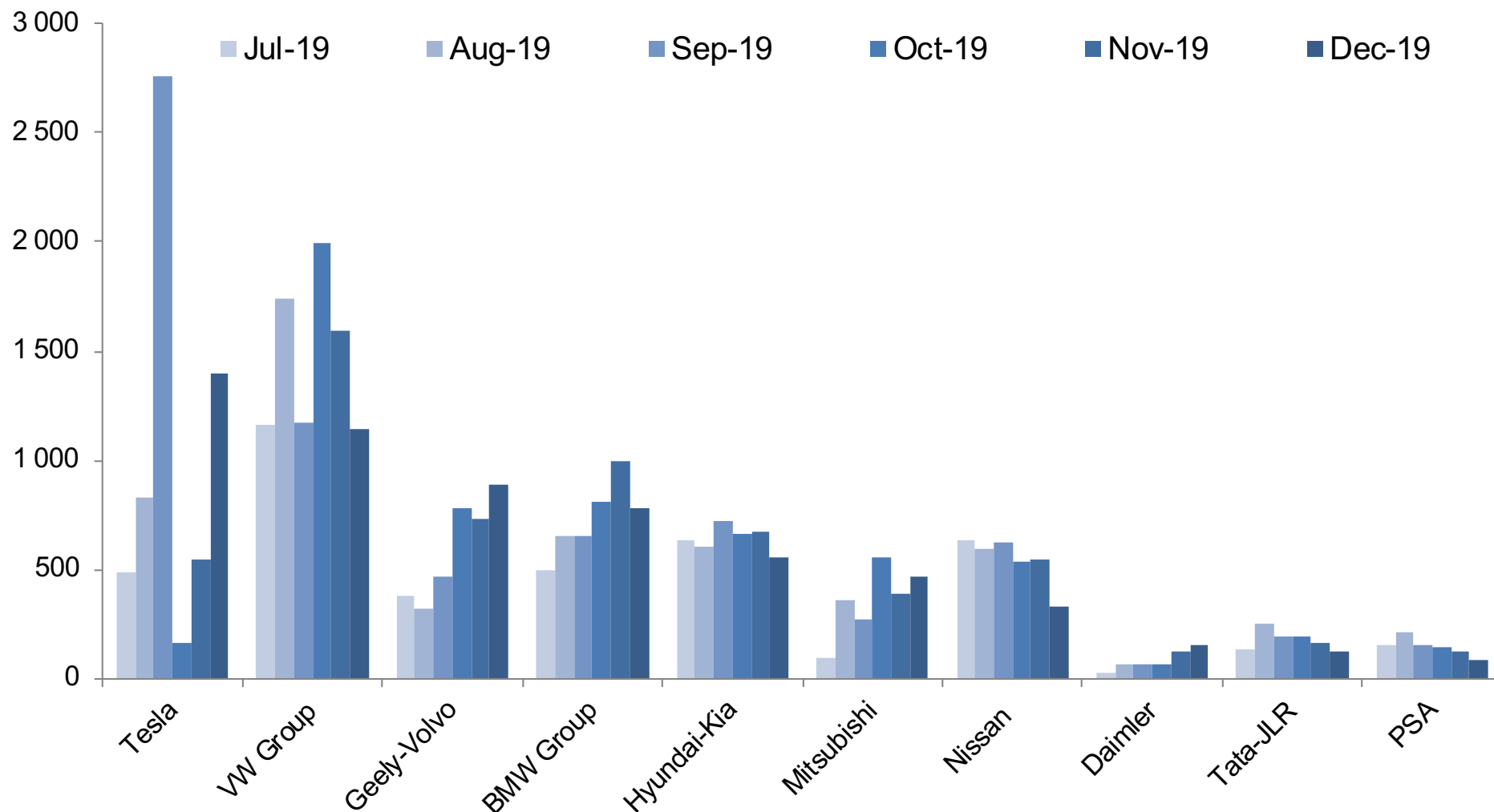
Electric Vehicles Sales by Model
- Top 10 Models, July 2019 to December 2019 -



VW Group lost its lead in December to Tesla as any end-of-quarter but should be back in the lead in January.



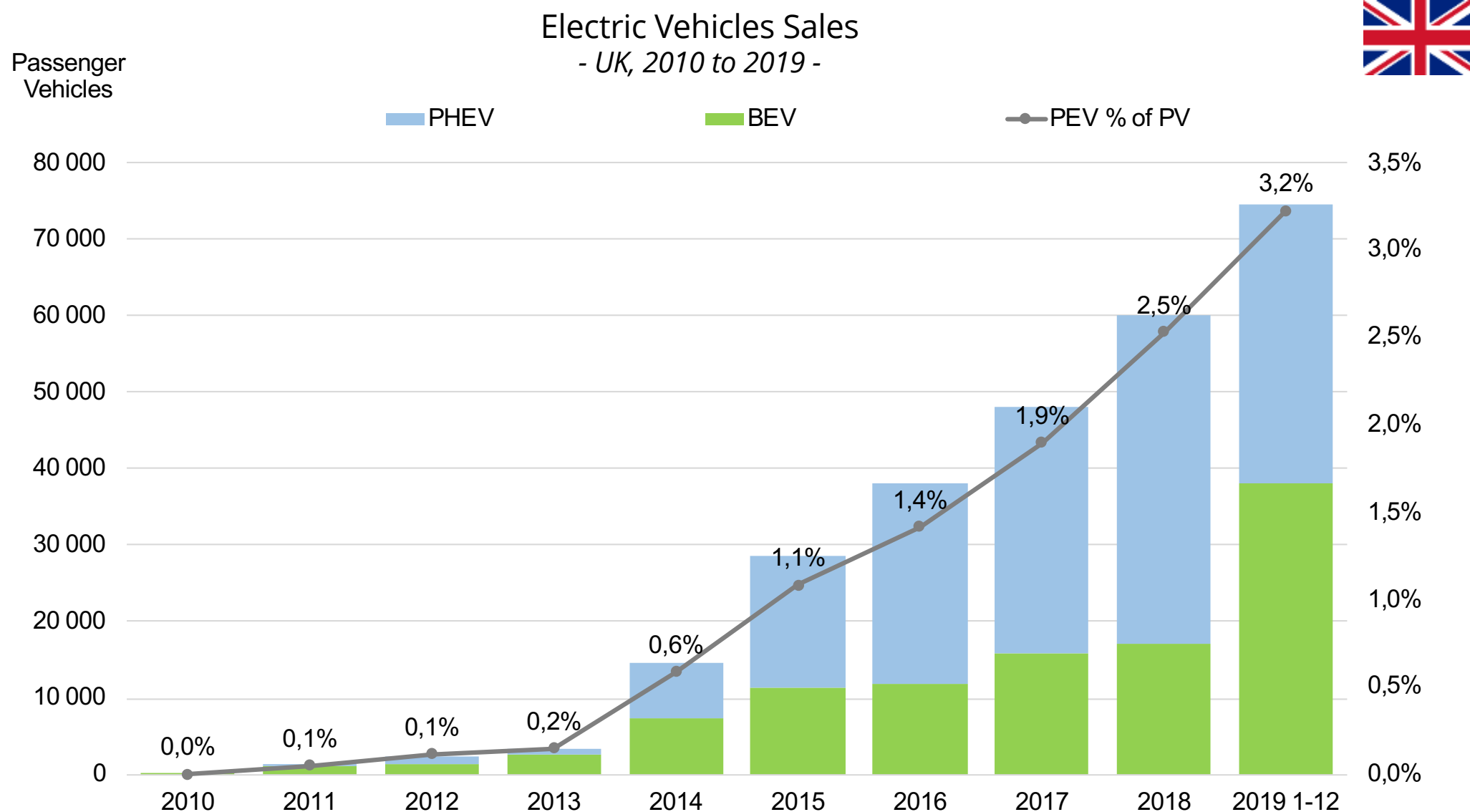
Electric Vehicles Sales by Model
- Top 10 OEM Groups, July 2019 to December 2019 -



U.K. Sales Tracking

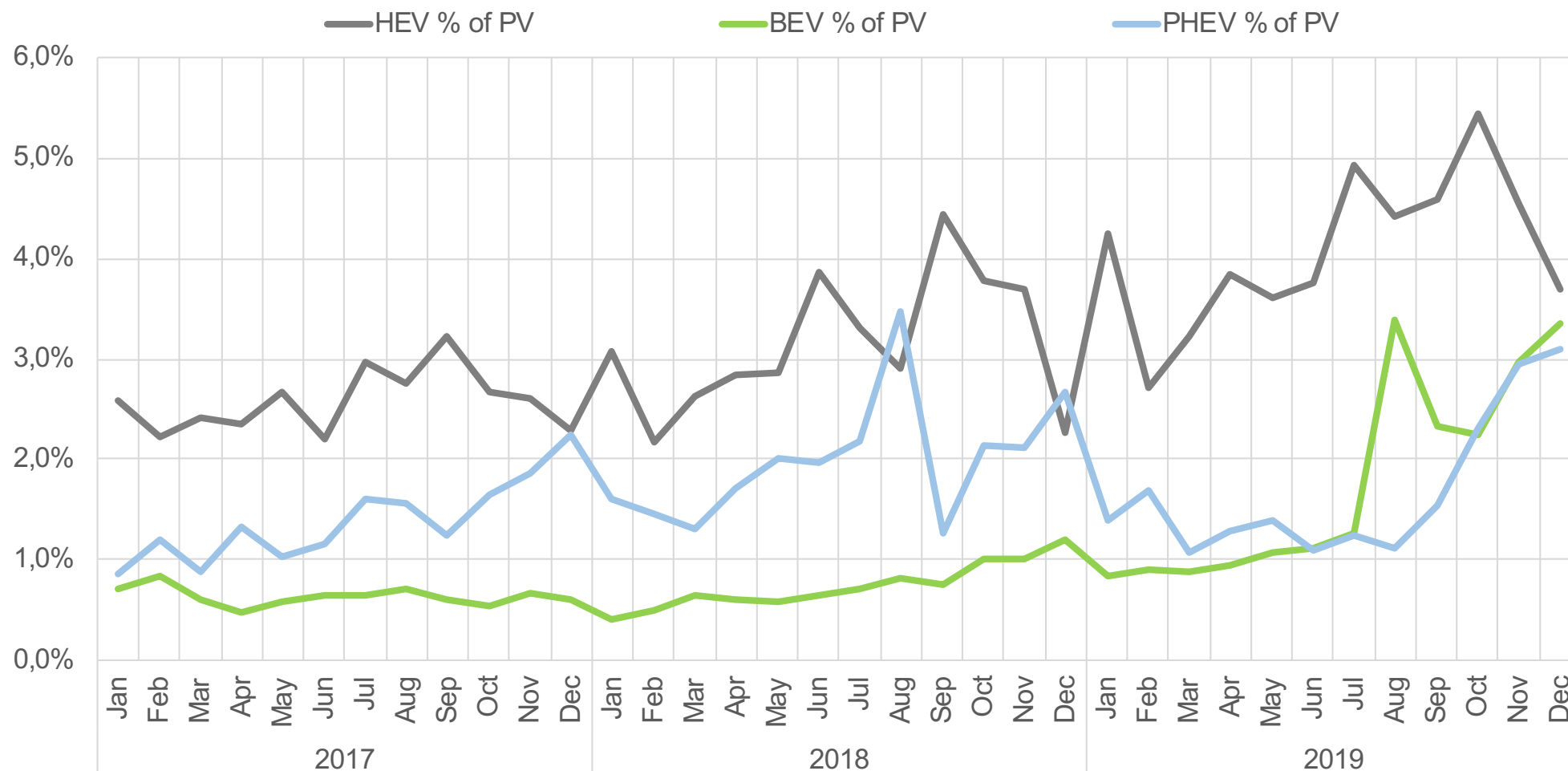


75k EVs were sold in the UK in 2019 up 24% compared to 2018 and representing 3.2% of PV sales after 2.5% last year.



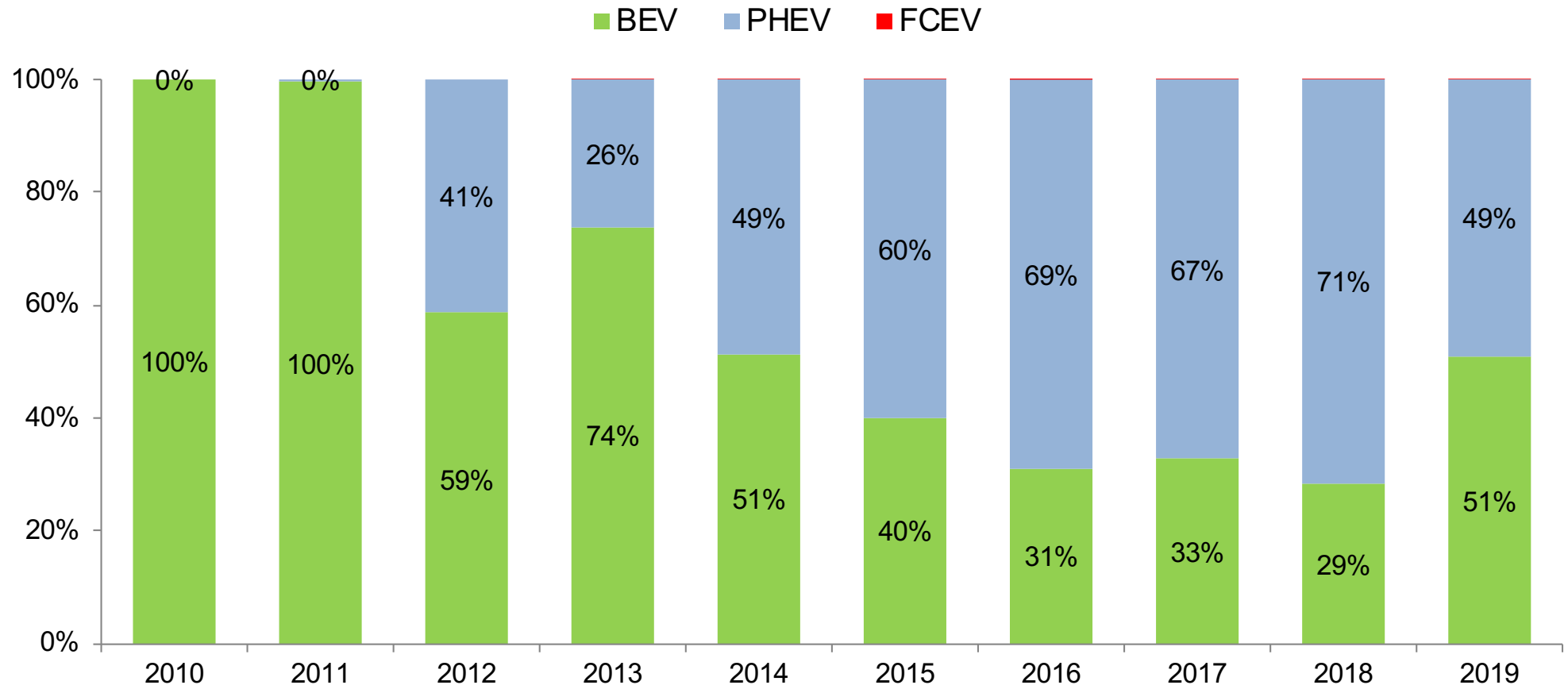
Both BEVs and PHEVs were over 3% PV penetration pushing EVs at a new record high penetration of 6.4% of PVs. UK is the only EU5 countries over 5% EV penetration.

Monthly x-EV Penetration
- UK, January 2017 to December 2019-



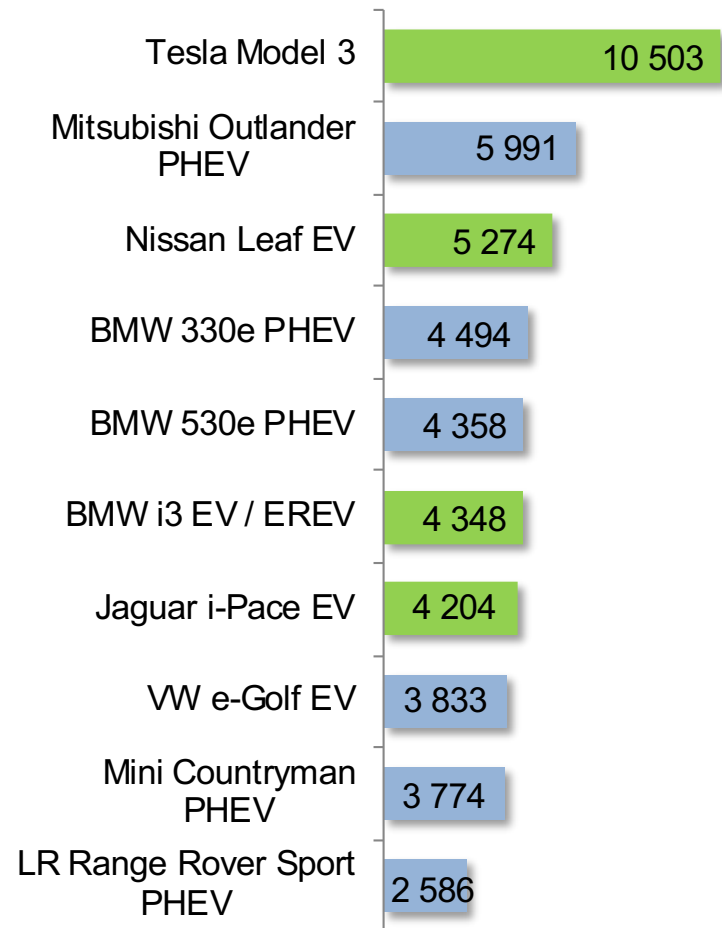
Even with the purchase grant reduction in 2018, PHEV have not given up yet as they continue to benefit from significant BIK reduction for company cars. It should however end in 2020.

Electric Vehicles Sales by Type
- UK, 2010 to 2019 -

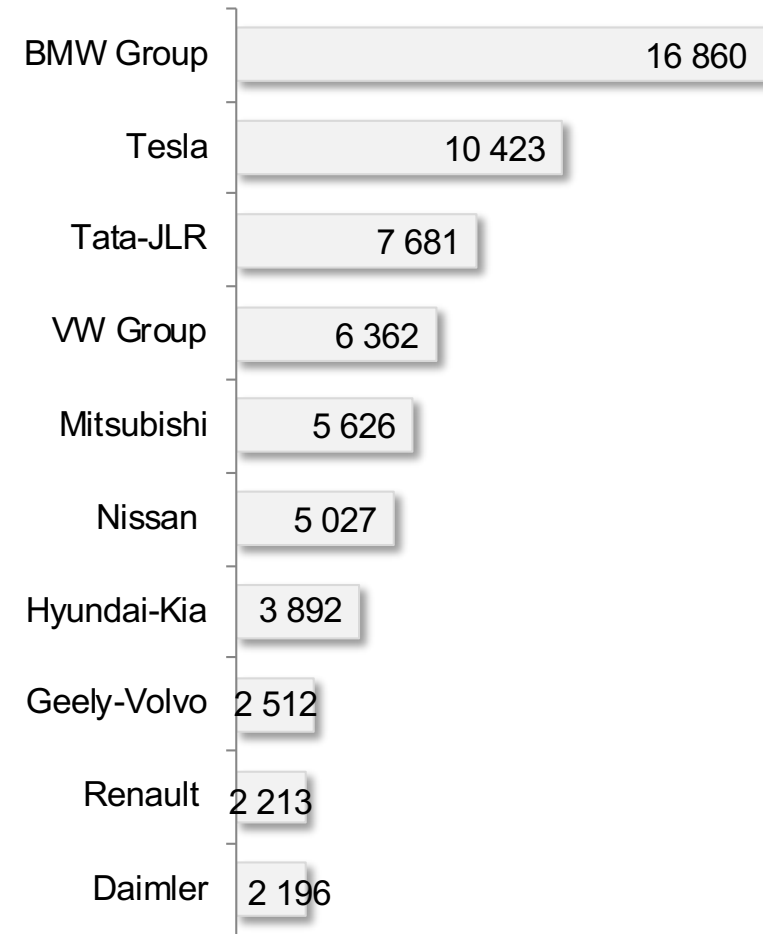


Mitsubishi Outlander lost its EV crown to the Tesla Model 3 while BMW won the OEM crown in front of Tesla and JLR.

Top 10 Electric Vehicles sold
- UK, 2019 -



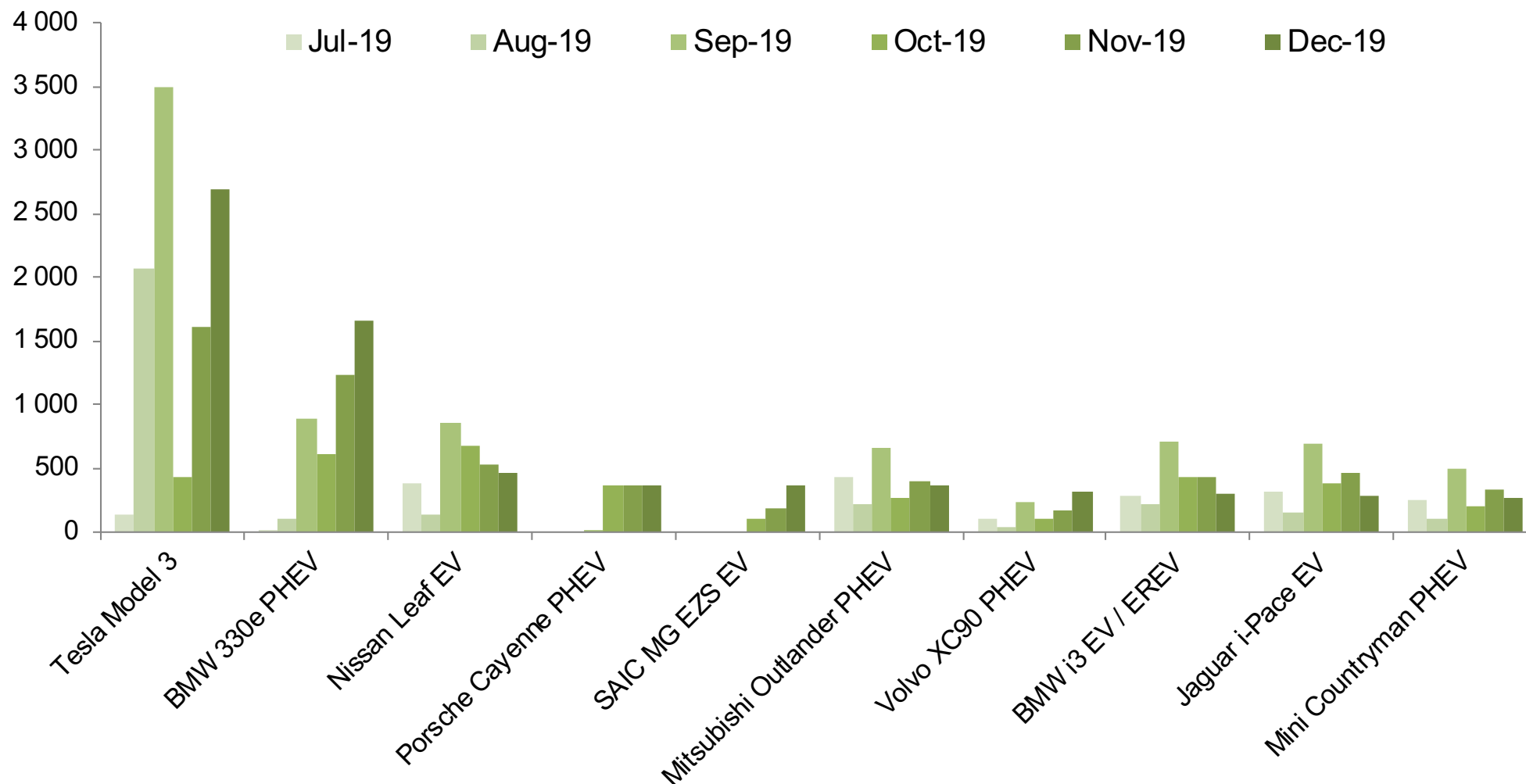
Top 10 Electric Vehicles Brands
- UK, 2019 -



Tesla Model 3 increased its lead in December in front of the BMW 330e and Nissan Leaf which looks in terminal decline in its home country.



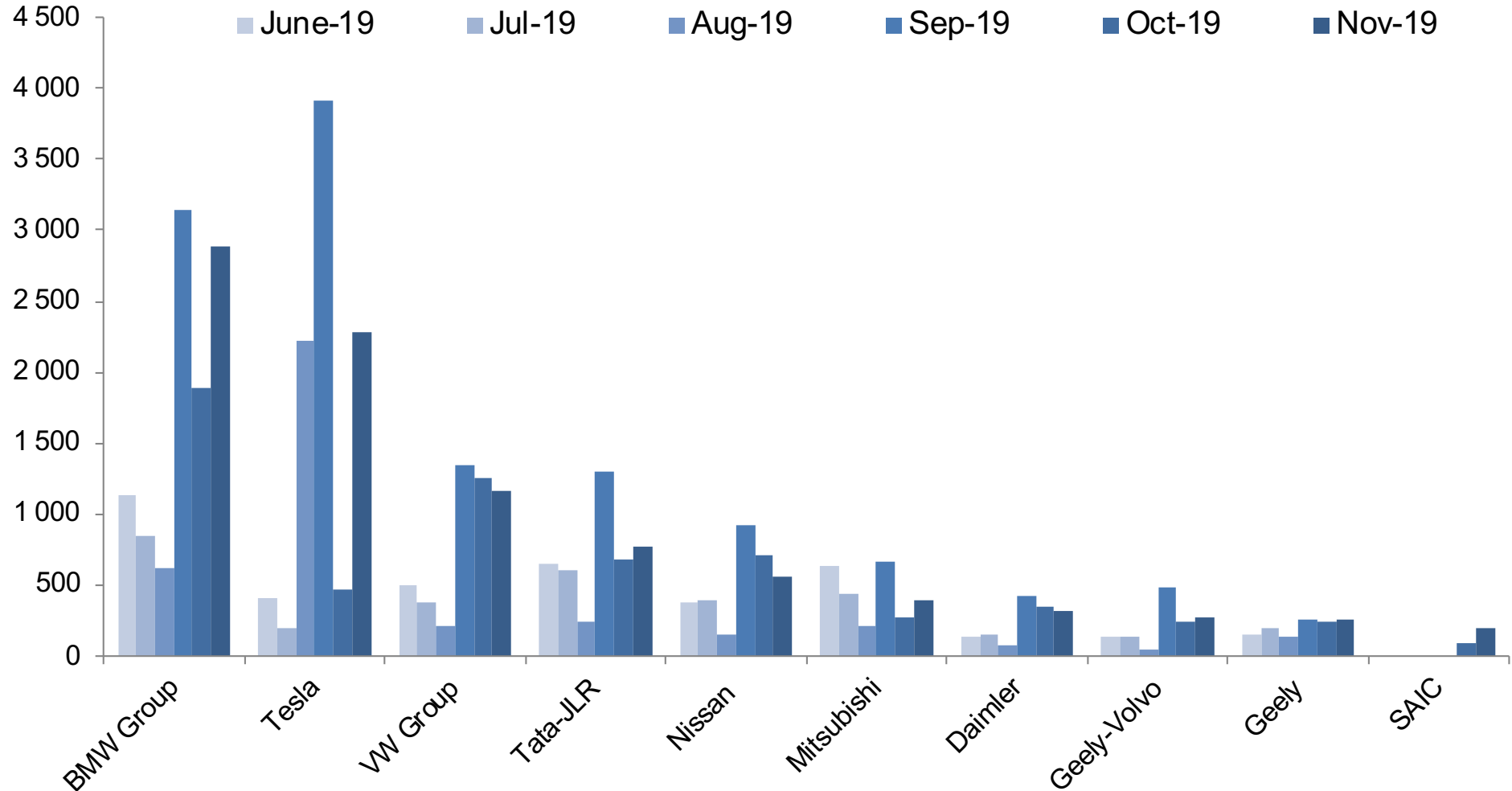
Electric Vehicles Sales by Model
- Top 10 Models, July 2019 to December 2019 -



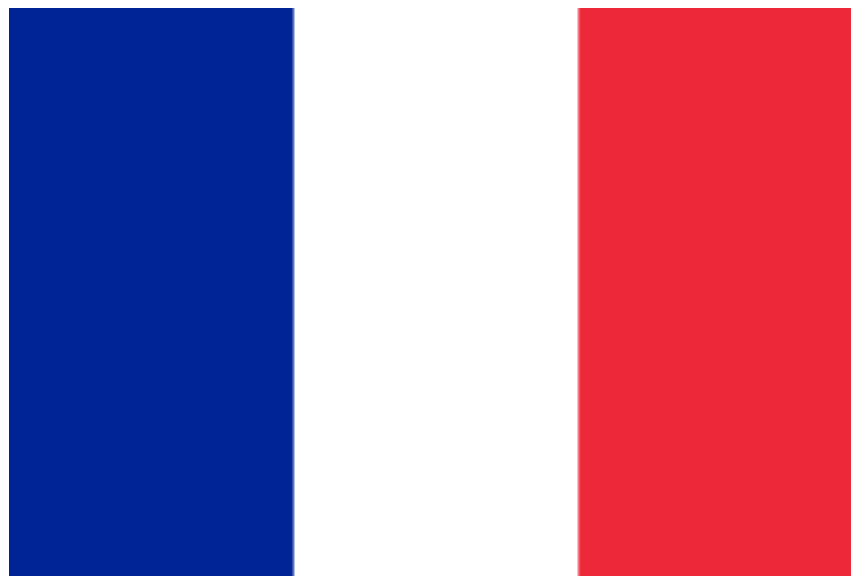
BMW kept its lead in December in front of Tesla and VW.
2 Chinese OEMs made it to Top 10 : Geely and its EV taxi and SAIC with the MG brand revival.



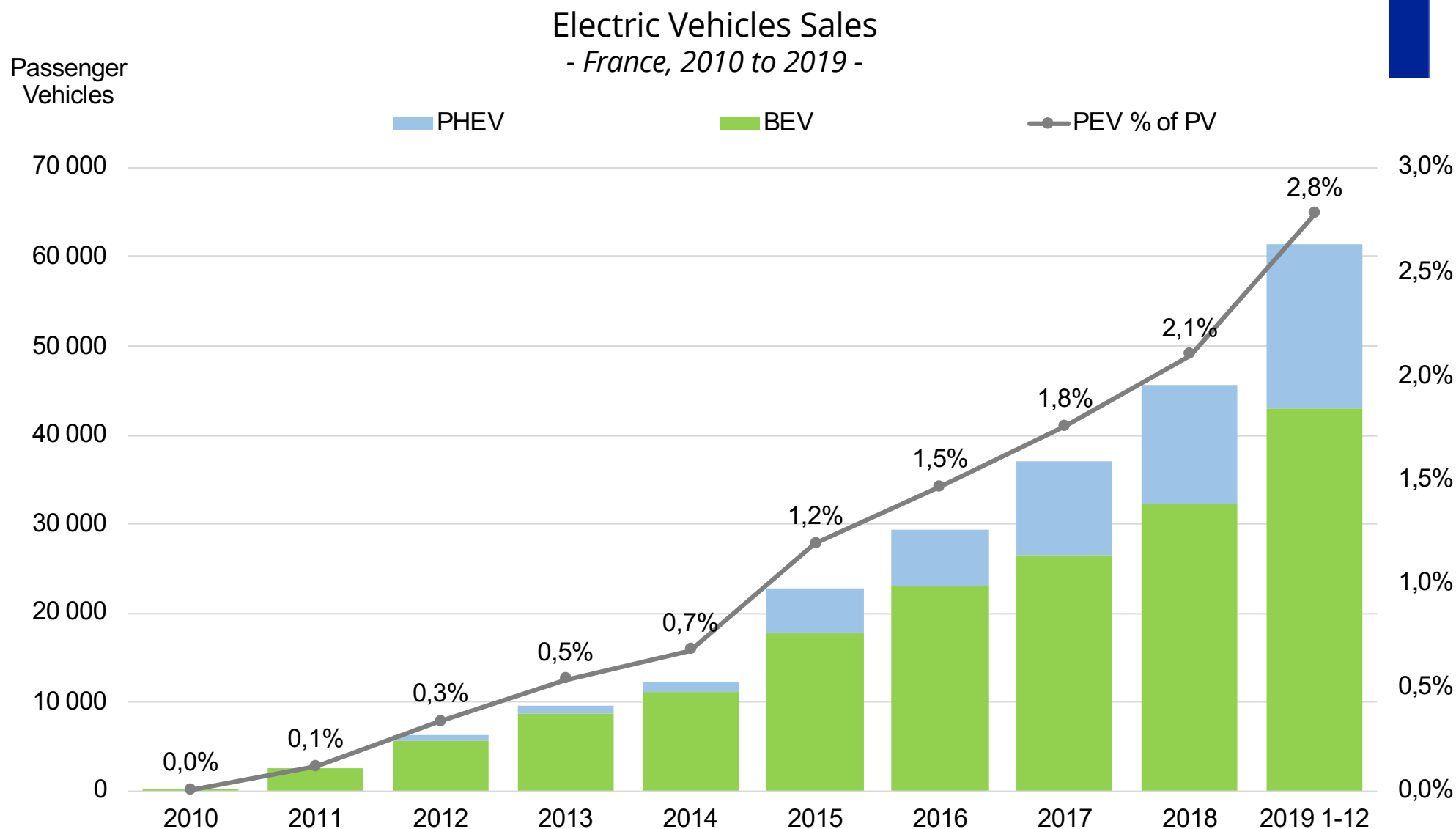
Electric Vehicles Sales by Model
- Top 10 OEM Groups, July 2019 to December 2019 -



France Sales Tracking

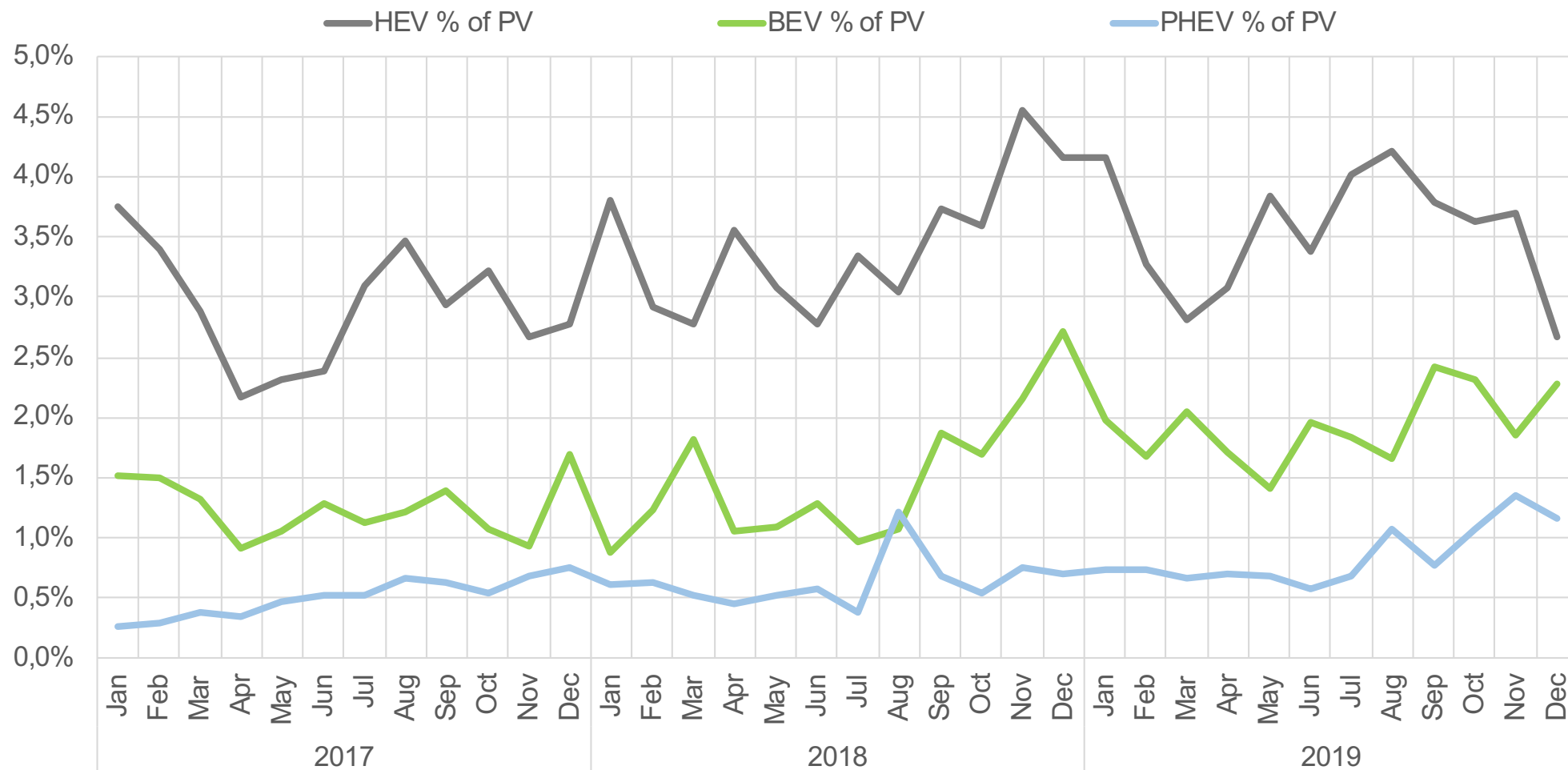


62k EVs were sold in 2019 up 35% compared to last year and representing 2.8% of PV sales after 2.1% in FY 2018.



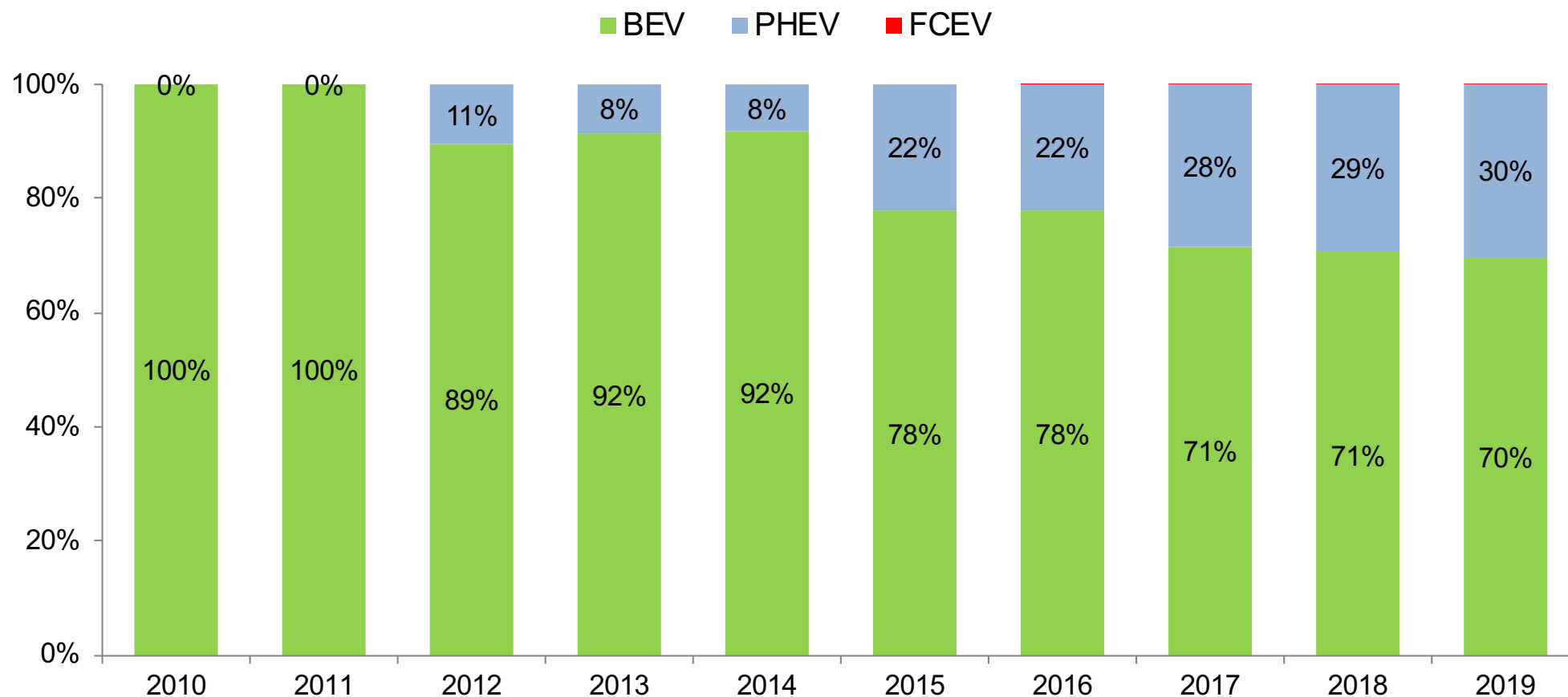
More than 7k EVs were sold in December growing 29% growth compared to 2018.
BEV penetration was up to 2.3% of PV sales while PHEVs were down at 1.2% of PV sales.

Monthly x-EV Penetration
- France, January 2017 to December 2019-



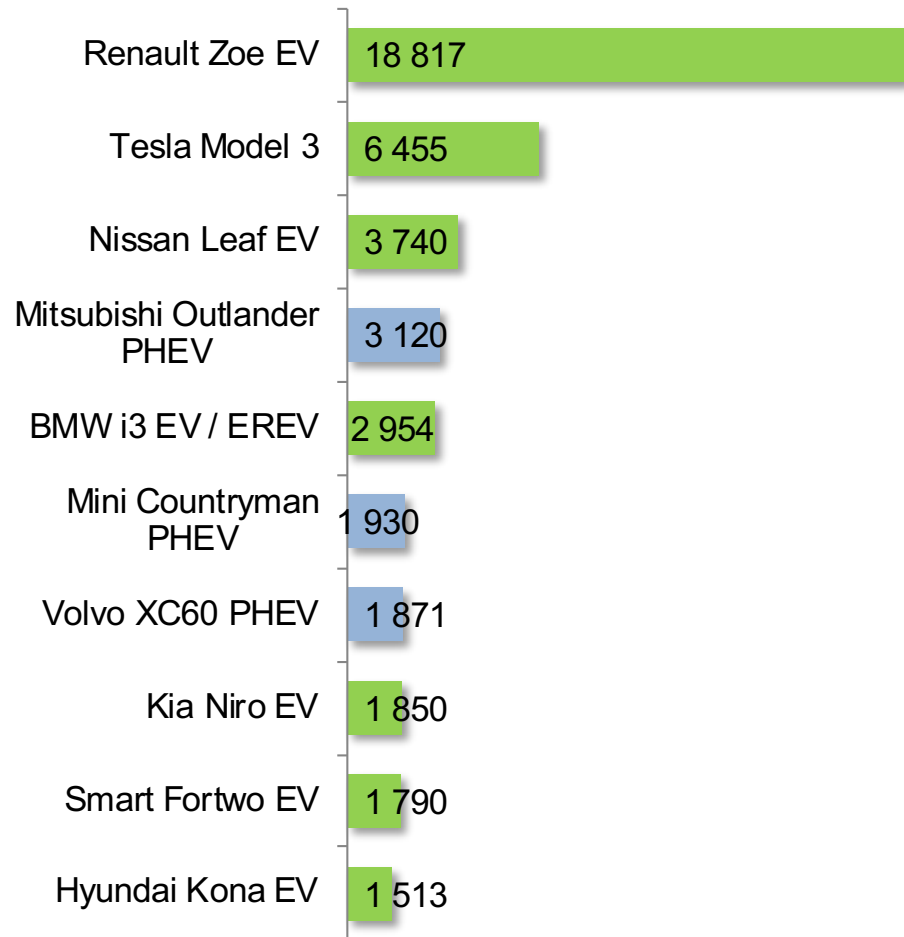
BEV share was still at 70% in France in 2019. It is however slowly but surely declining year after year so we should be in the 60's in 2020.

Electric Vehicles Sales by Type - France, 2010 to 2019 -

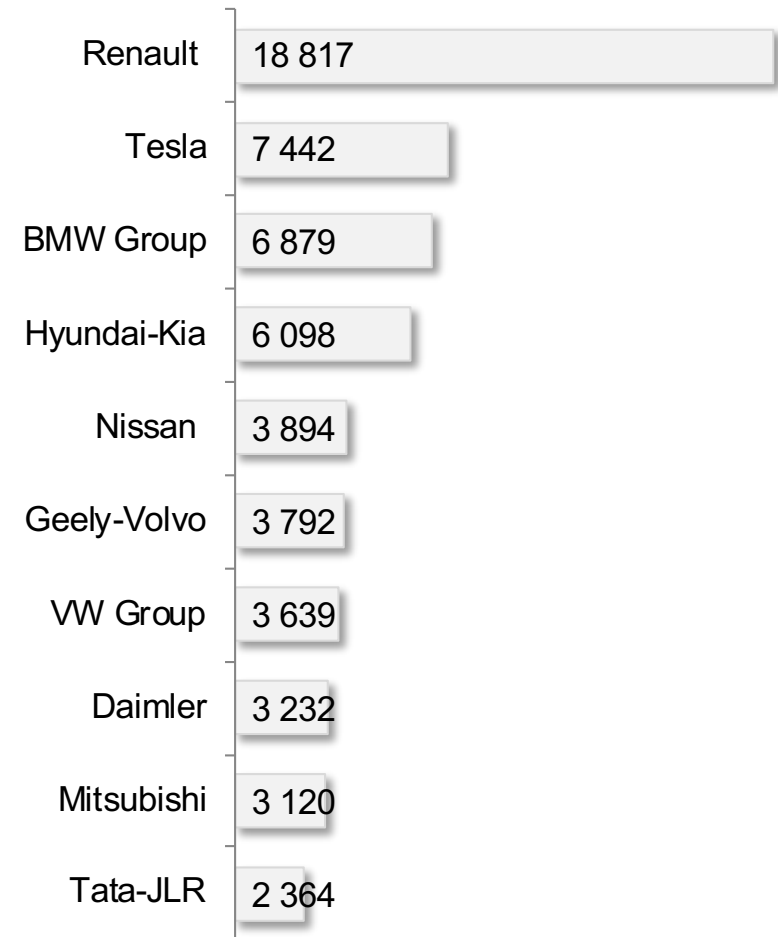


Renault Zoé only represented 30% of EVs sold for the 1st time in 2019.
Next year, it will finally have a real challenger with the Peugeot 208.

Top 10 Electric Vehicles sold
- France, 2019 -

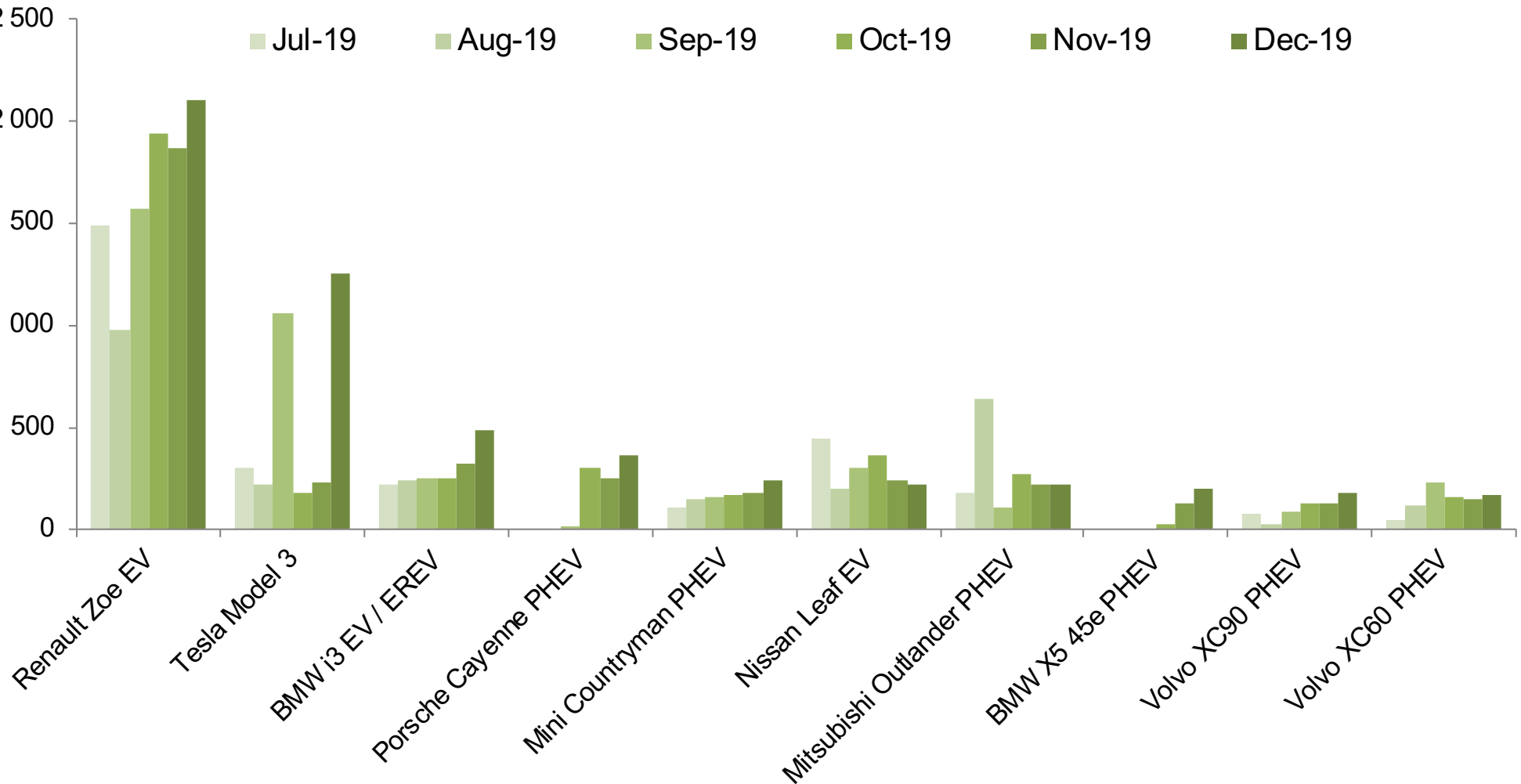


Top 10 Electric Vehicles Brands
- France, 2019 -

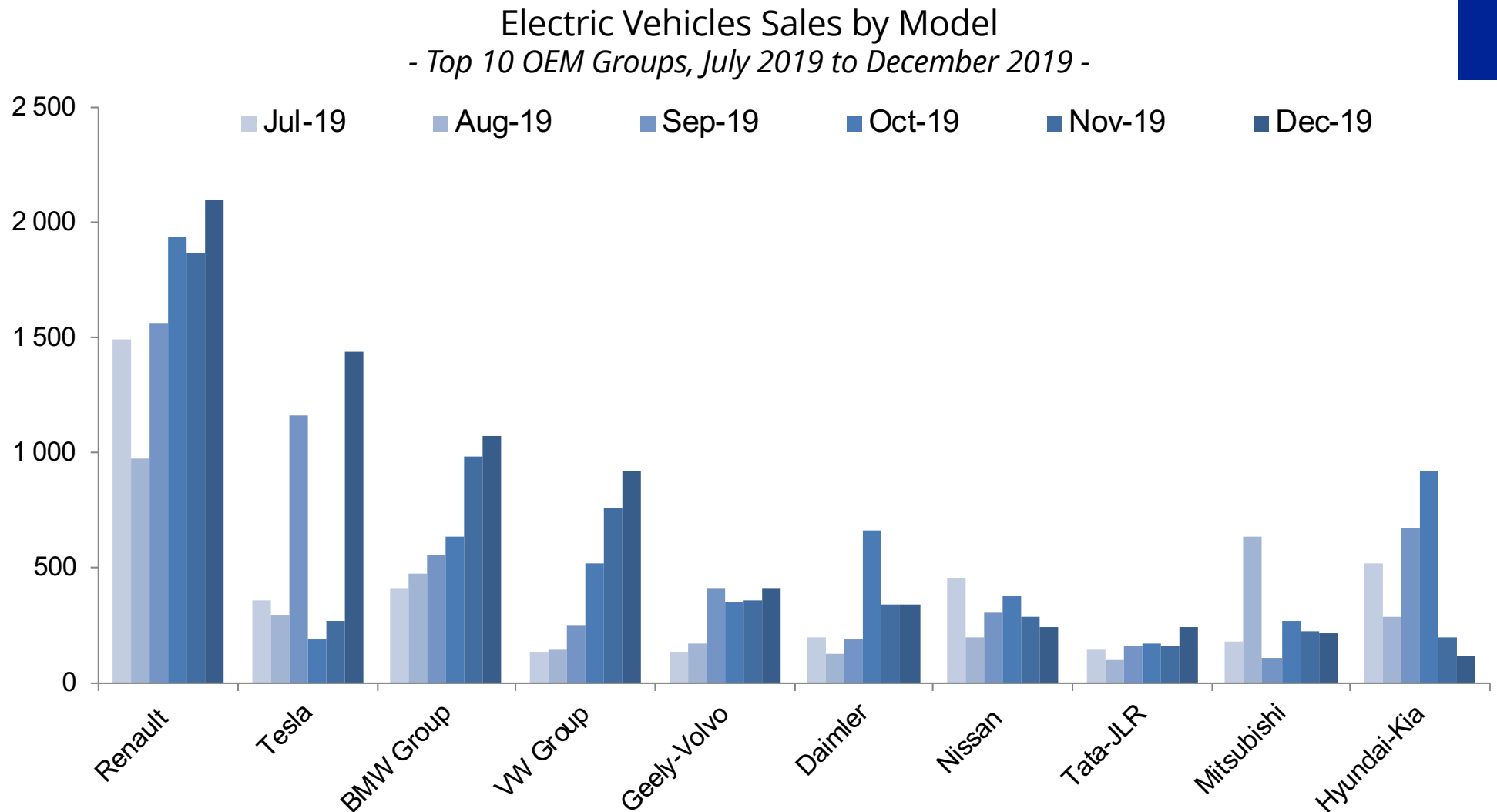


Renault Zoé kept its lead in December with limited volumes growth : it is waiting for January to deliver its new version. 6 PHEVs made it to Top 10 in December with Porsche Cayenne n°4.

Electric Vehicles Sales by Model
- Top 10 Models, December 2018 to December 2019-



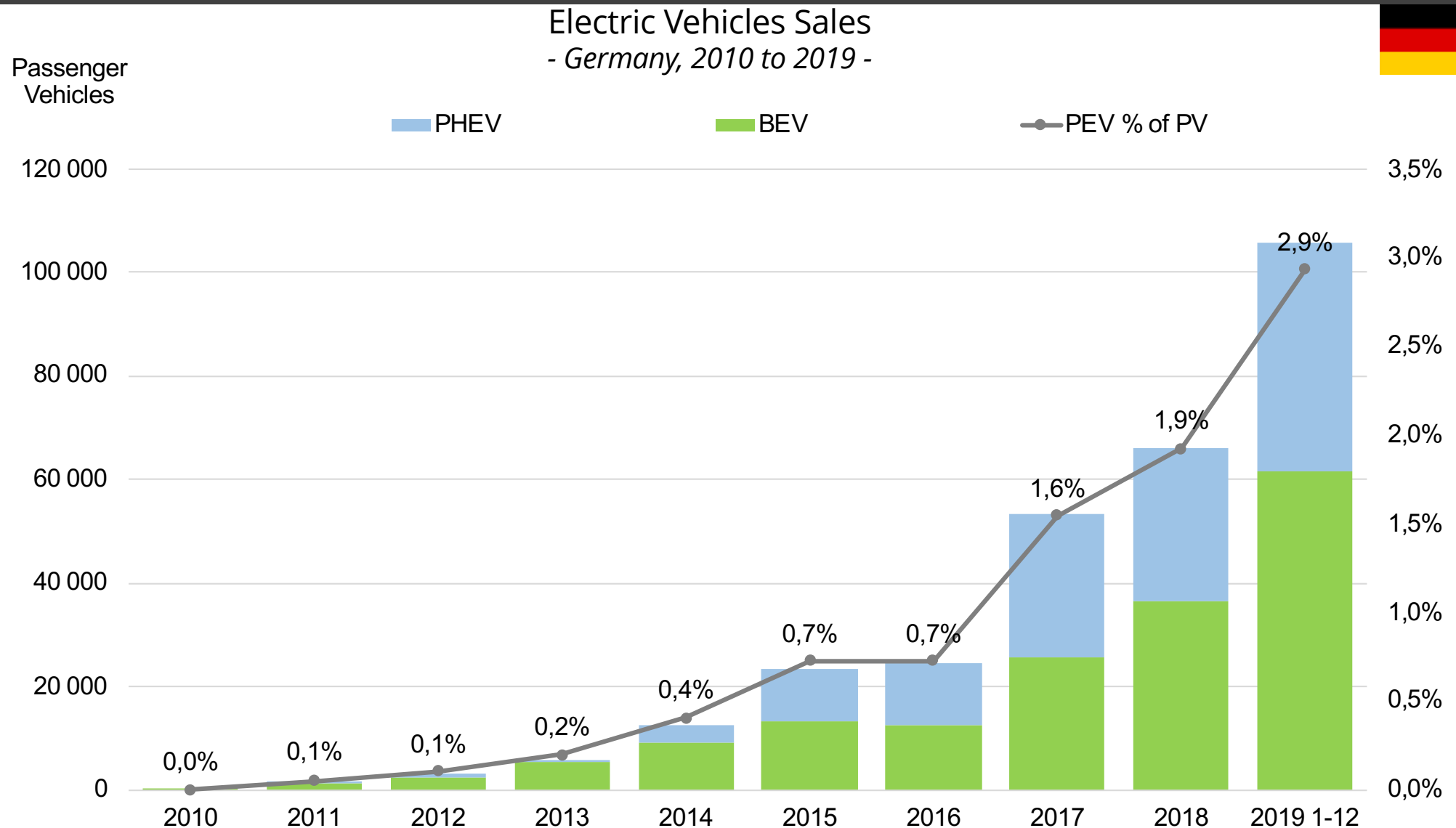
Renault continues to lead the French market followed by Tesla, BMW Group and VW Group. Hyundai-Kia has definitely cut its deliveries until January 2020.



Germany Sales Tracking

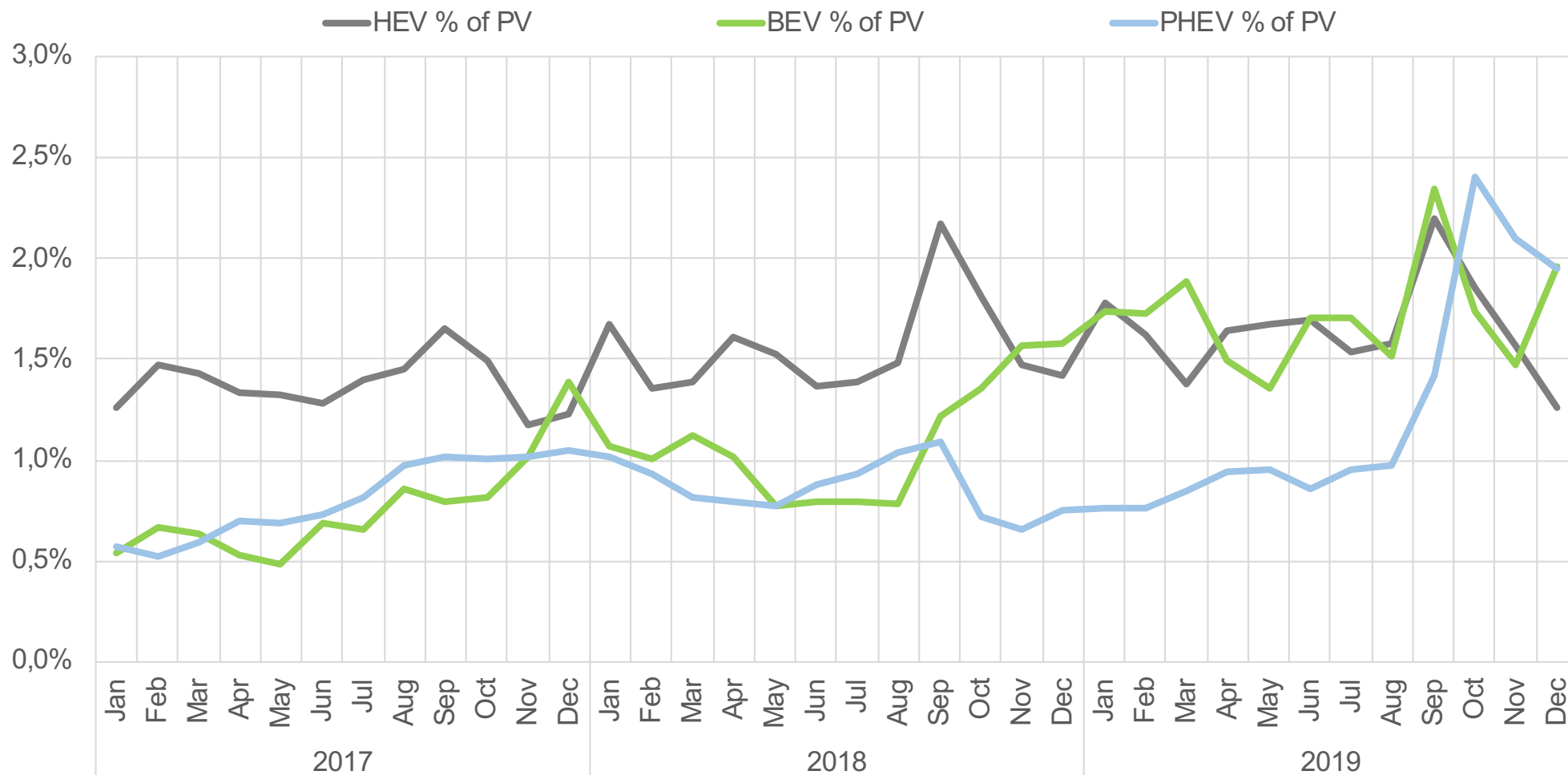


106k EVs were sold in 2019 in Germany in the fastest growing EU5 country with 60% growth vs. 24% in 2019. EVs now represent 2.9% of PV sales YTD.



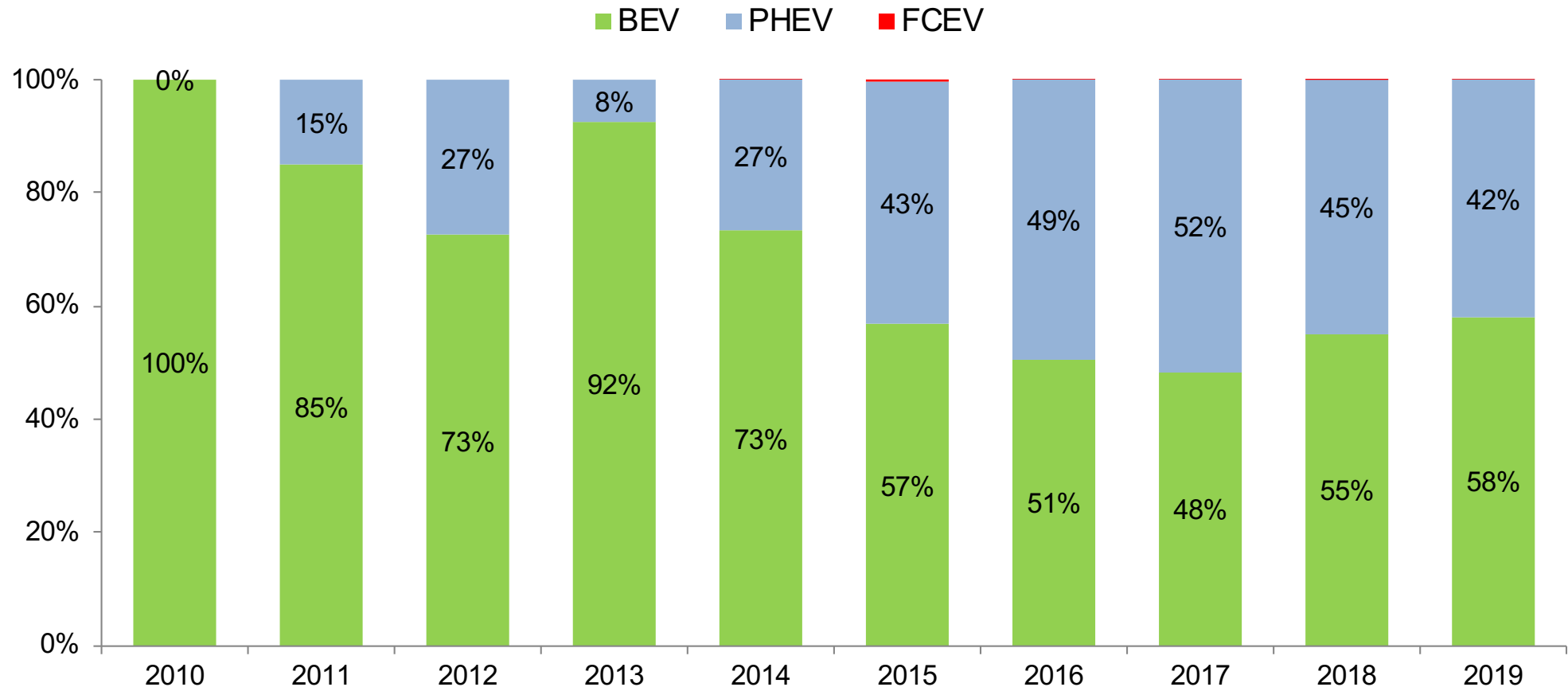
BEV and PHEV were both at 2% penetration in December as BEVs benefited from the “end of quarter” Tesla push. PHEVs are expected to dominate the EV market in 2020 in Germany.

Monthly x-EV Penetration
- Germany, January 2017 to December 2019-



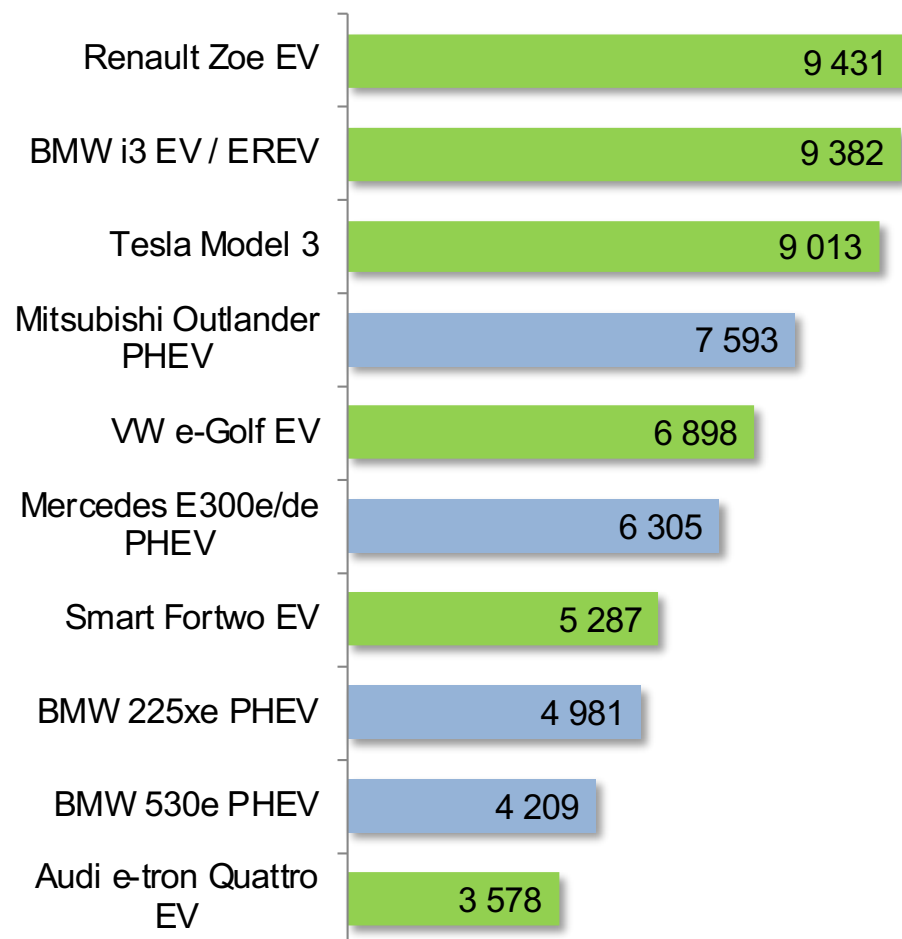
Tesla Model 3 impact was also felt in Germany in 2019 but PHEVs are expected to be back in the lead in 2020 with a strong push from German OEMs.

Electric Vehicles Sales by Type
- Germany, 2010 to 2019 -

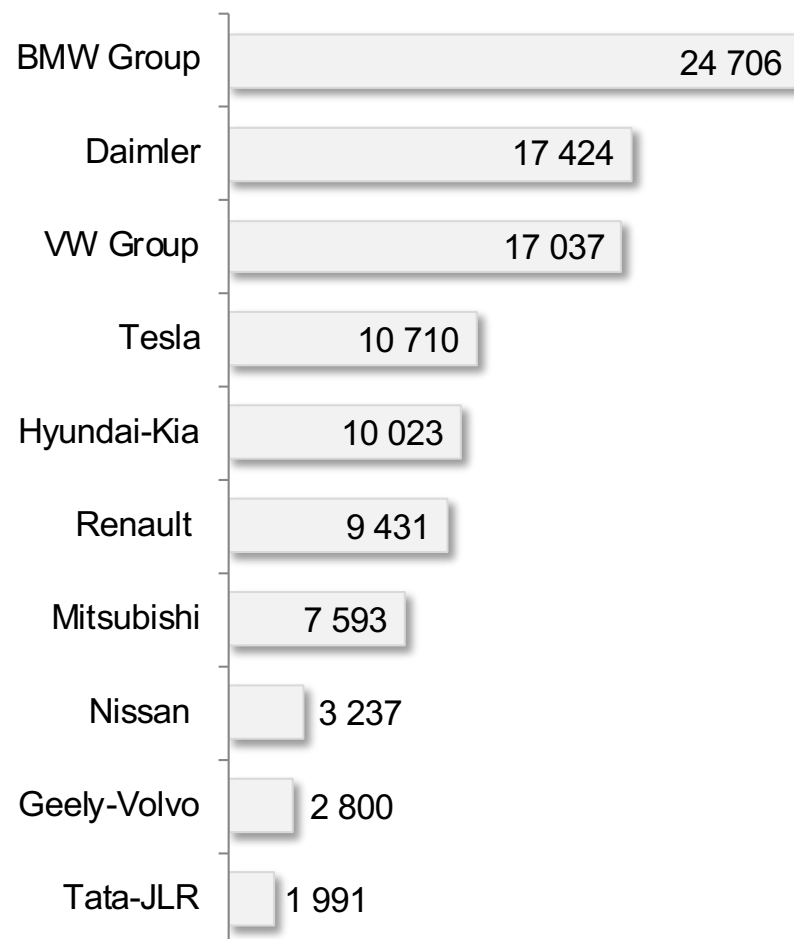


The Renault Zoé managed to keep its 2018 EV crown in front of the BMW i3 and Tesla Model 3. OEM wise, BMW won the EV crown in front of Daimler and VW.

Top 10 Electric Vehicles sold
- Germany, 2019 -

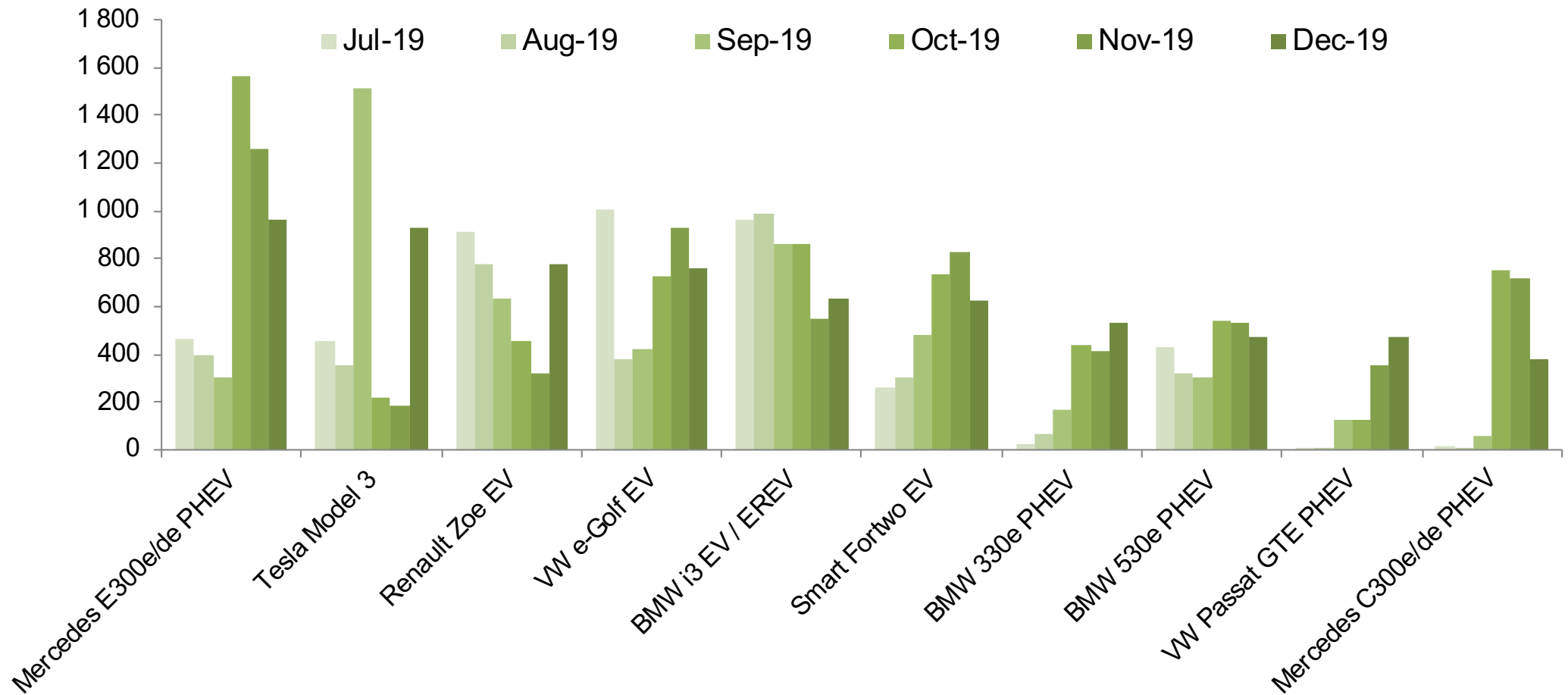


Top 10 Electric Vehicles Brands
- Germany, 2019 -



BEVs were up in Germany in December thanks to the Model 3 but also the 1st deliveries of the new Renault Zoé which allowed it to keep its 2018 EV crown over the BMW i3.

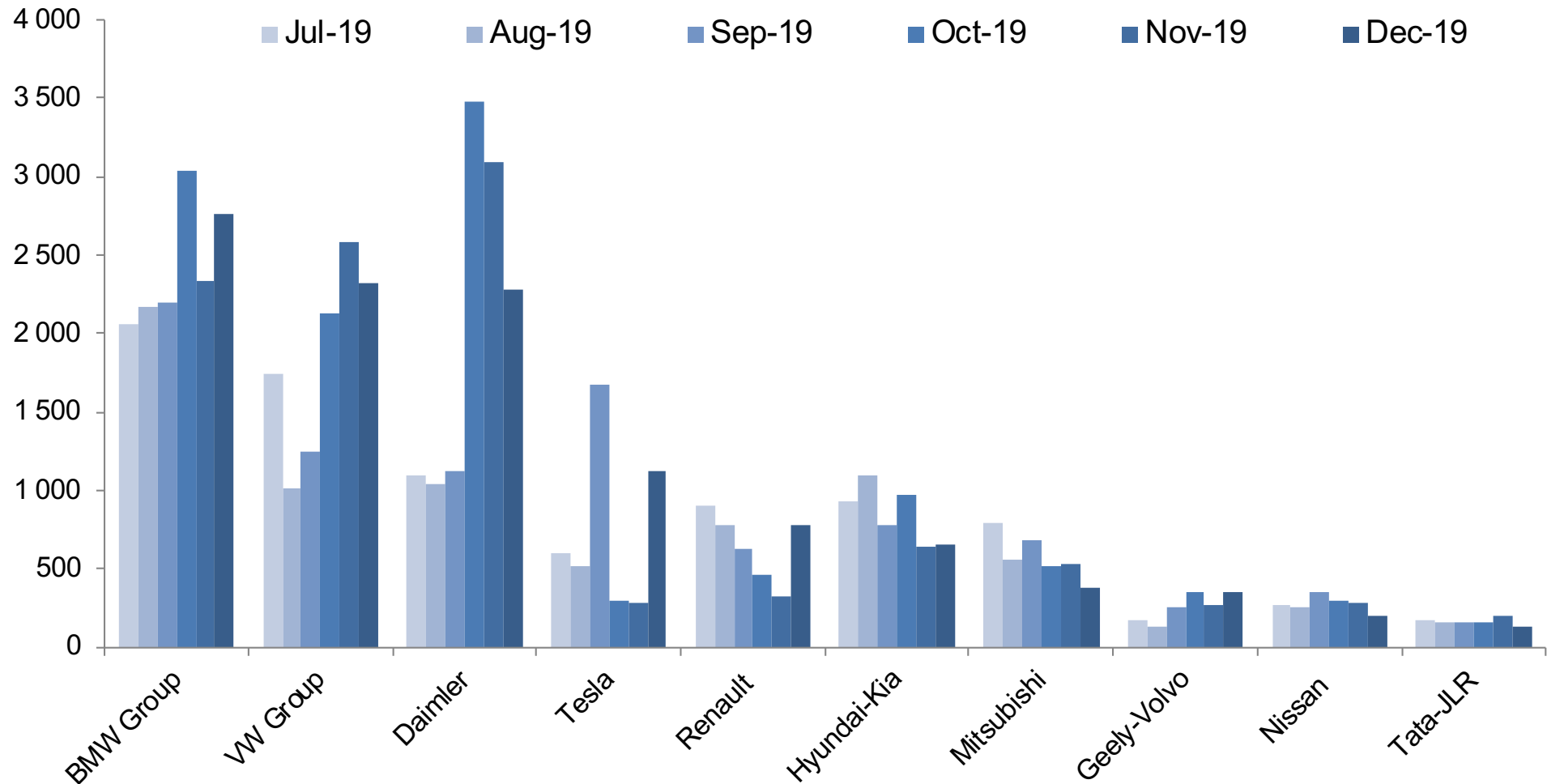
Electric Vehicles Sales by Model
- Top 10 Models, July 2019 to December 2019 -



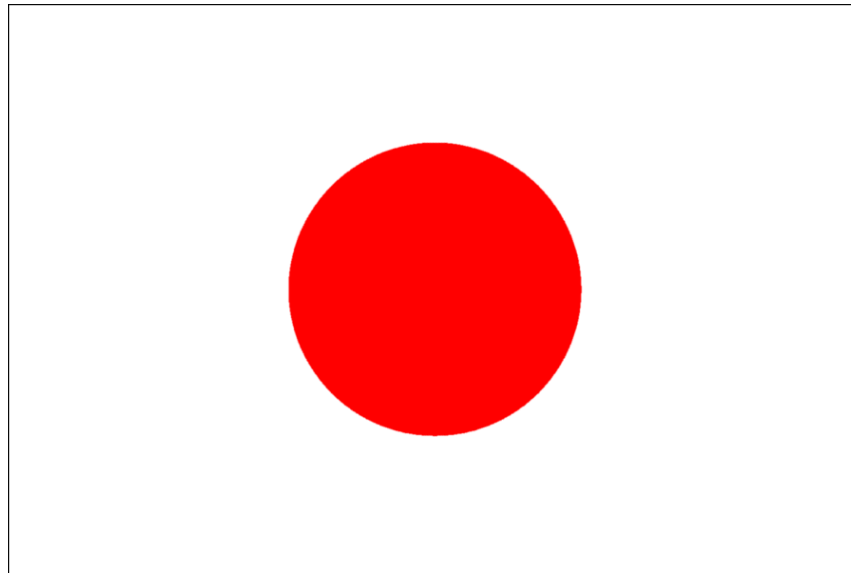
BMW was back in the lead in December in front of VW Group and Daimler.
The Top 3 is not expected to change any more in the months to come.



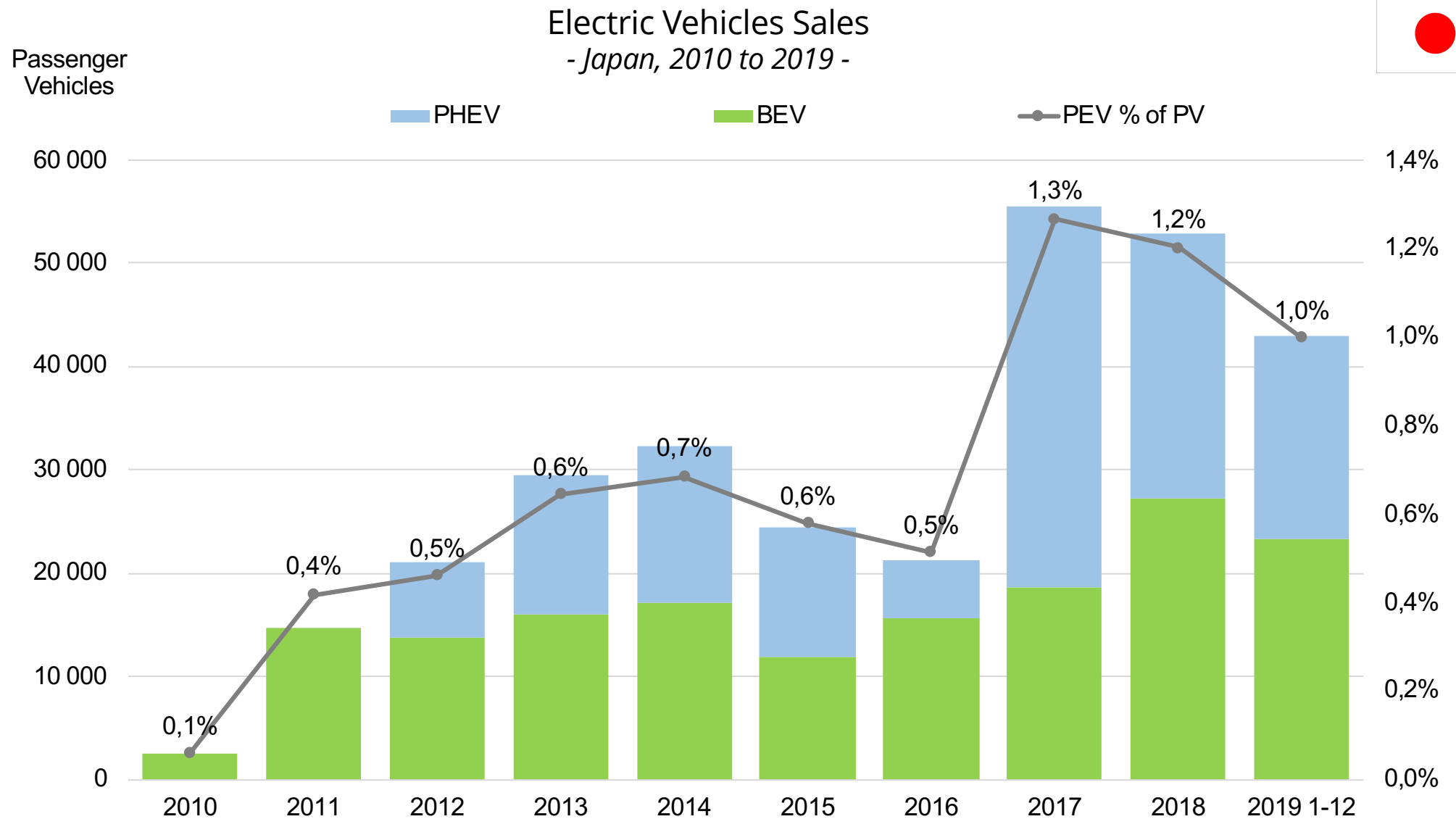
Electric Vehicles Sales by Model
- Top 10 OEM Groups, July 2019 to December 2019 -



Japan Sales Tracking



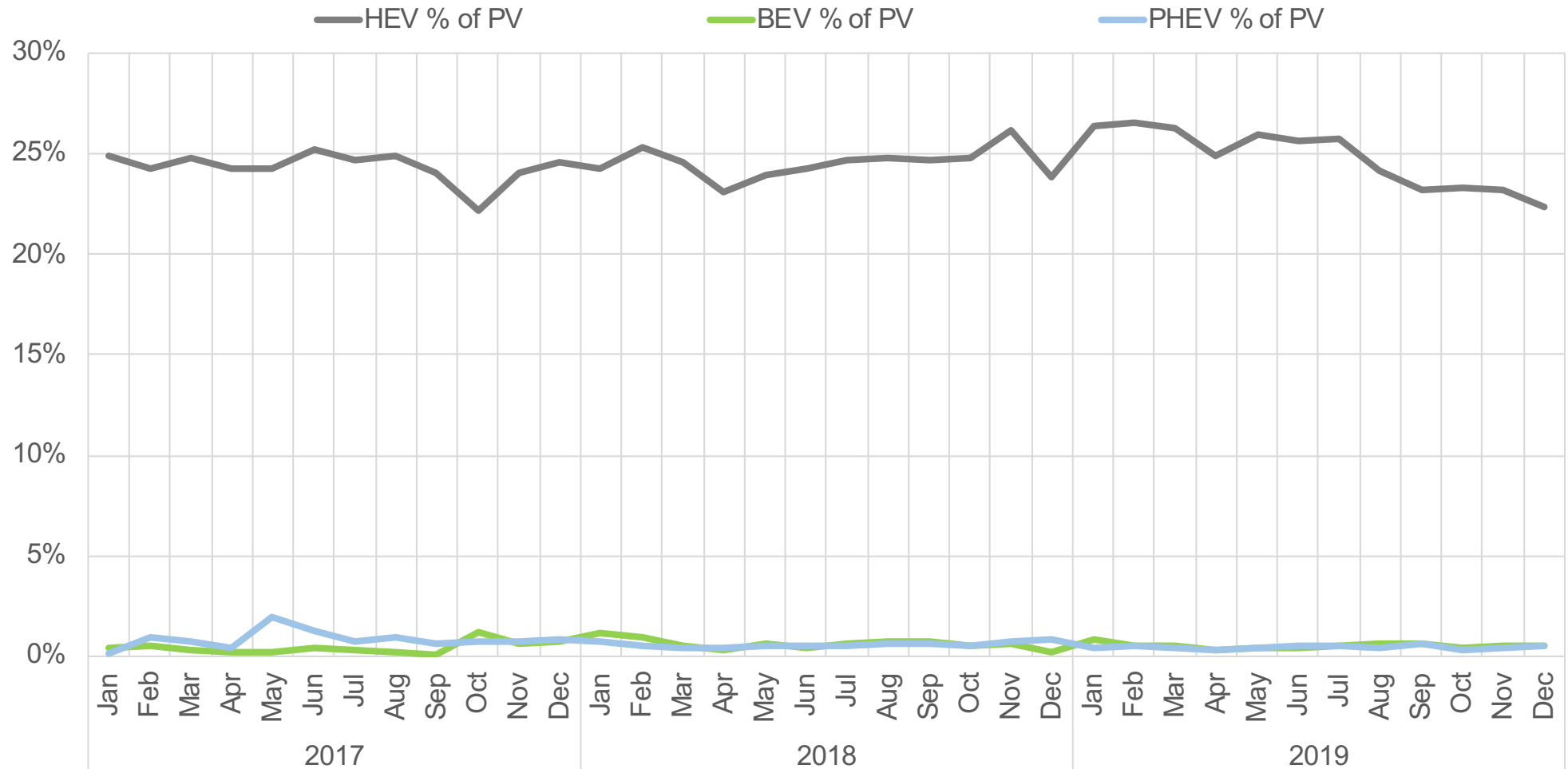
44k EVs were sold in Japan in 2019, down 18% compared to 2018 and representing only 1% of PV sales : Japan only has eyes for HEVs.



EV sales were down by 6% in December with 3k EV sold representing less than 1.1% of PV sales.

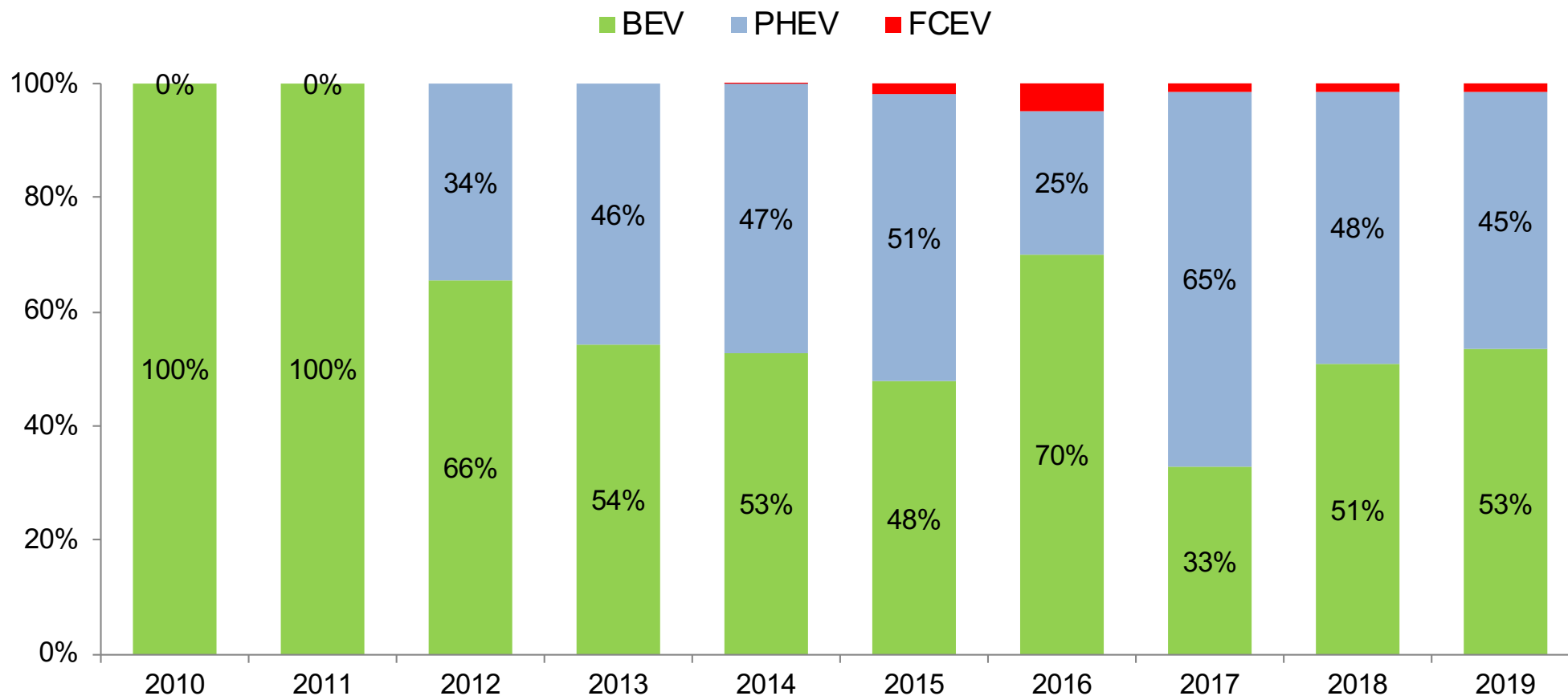
Interestingly HEV penetration seems to decrease over the last couple of months.

Monthly x-EV Penetration
- Japan, January 2017 to December 2019 -



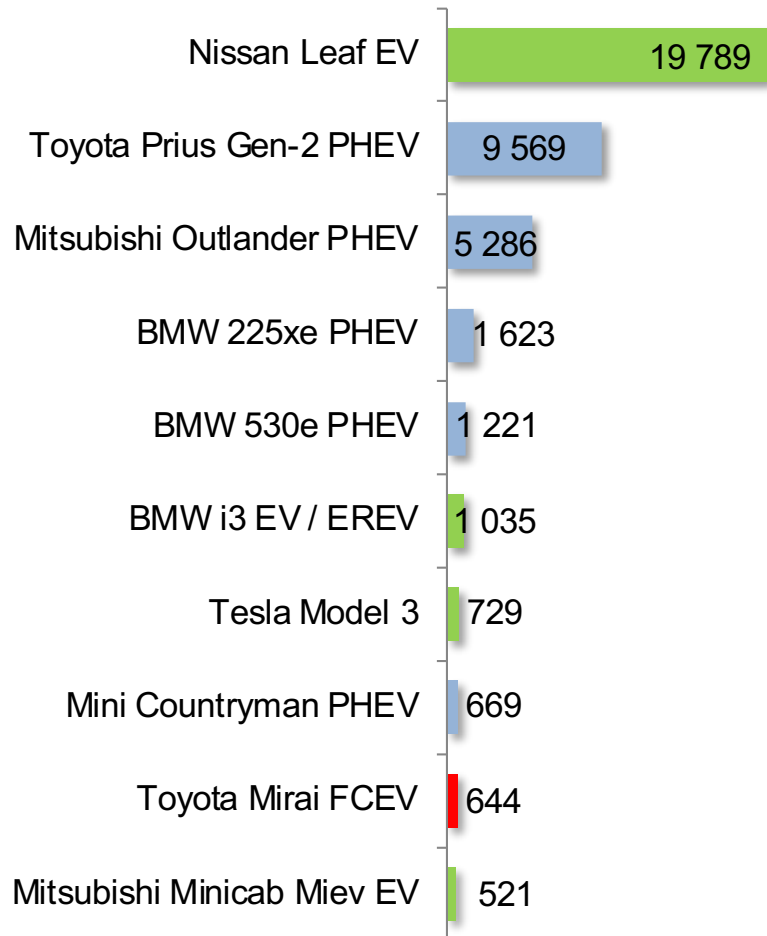
EV market slightly turned BEV in 2019 with the new Nissan Lead.
It does not mean much anyway as 3 EV models represent as much as 80% of sales in Japan.

Electric Vehicles Sales by Type
- Japan, 2010 to 2019 -

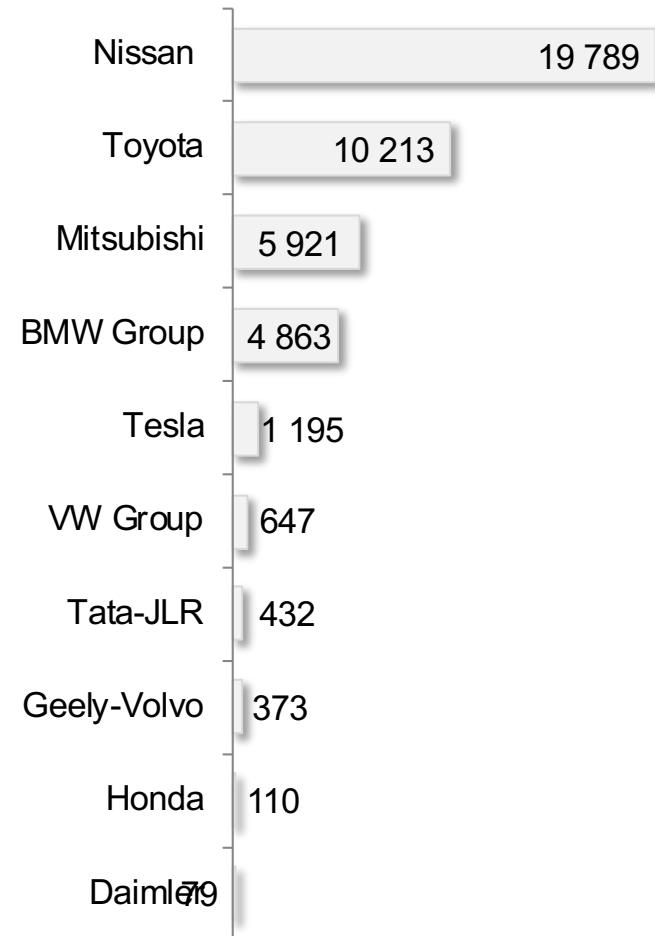


The new Nissan Leaf represented 45% of EV sales YTD followed by Toyota Prius PHEV with 22% and the Mitsubishi Outlander with 12% : 3 models continued to represent 80% of EV sales.

Top 10 Electric Vehicles sold
- Japan, 2019 -



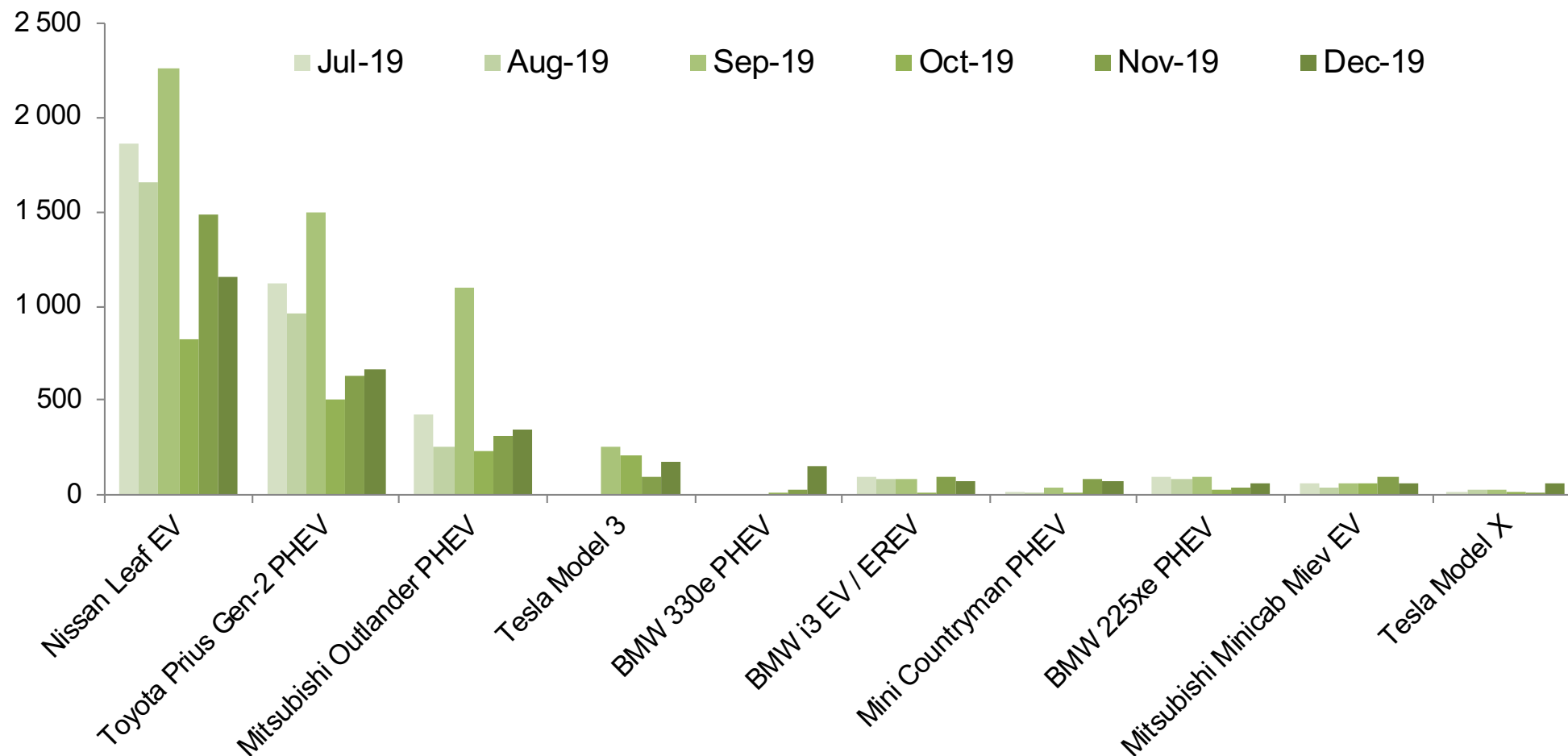
Top 10 Electric Vehicles Brands
- Japan, 2019 -



Nothing new in Japan with always the 3 same EVs in Top 3.
Will Tesla Model 3 manage to “disrupt” the Top 3 in 2020?



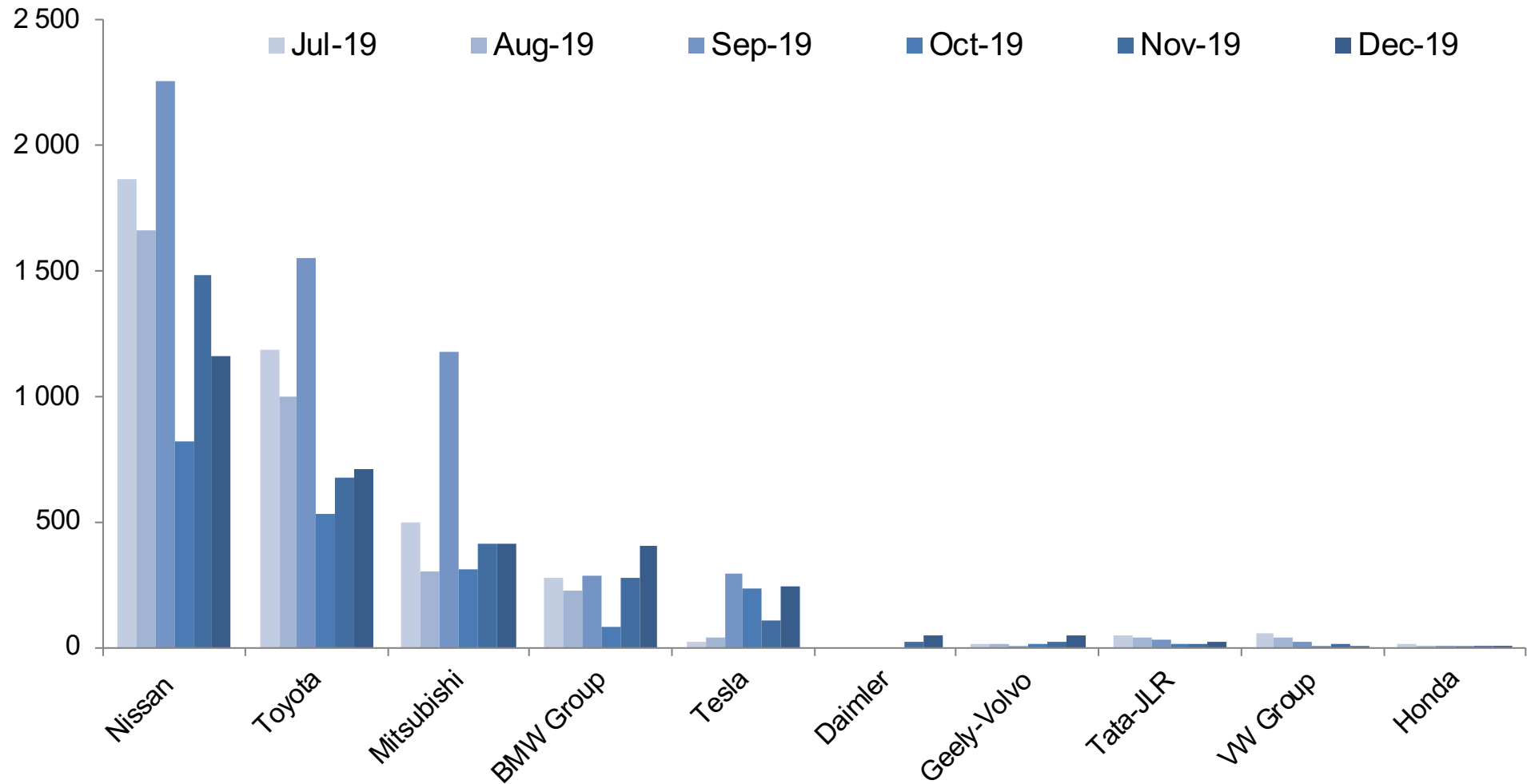
Electric Vehicles Sales by Model
- Top 10 Models, July 2019 to December 2019 -



BMW was very close to the Top 3 in December while Tesla could also be a candidate next year.

Finally a bit of action is one of the most boring EV market?

Electric Vehicles Sales by Model
- Top 10 OEM Groups, July 2019 to December 2019 -



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