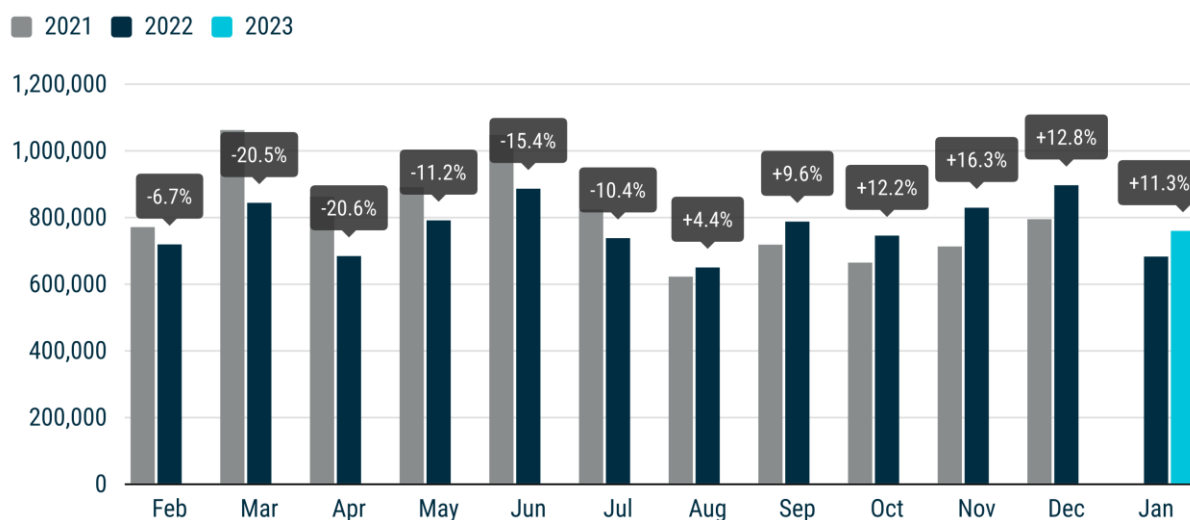


NEW PASSENGER CAR REGISTRATIONS, EUROPEAN UNION

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.

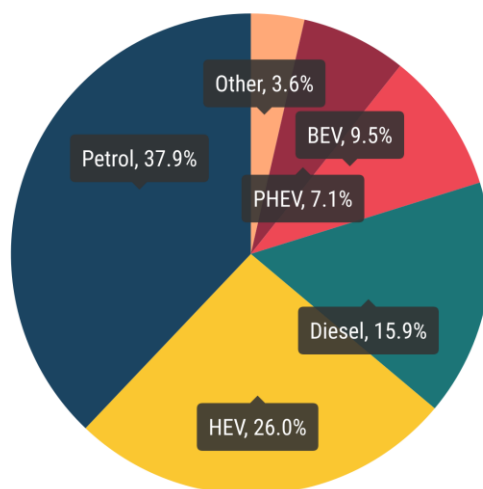
FUEL TYPES OF NEW CARS

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	January 2022	% change 23/22	January 2023	January 2022	% change 23/22	January 2023	January 2022	% change 23/22	January 2023	January 2022	% change 23/22	January 2023	January 2022	% change 23/22	January 2023	January 2022	% change 23/22	January 2023	January 2022	% change 23/22
Austria	2,745	2,013	+36.4	1,218	1,104	+10.3	3,743	2,652	+41.1	1	4	-75.0	7,220	6,134	+17.7	3,923	3,712	+5.7	18,850	15,619	+20.7
Belgium	5,696	2,766	+105.9	7,247	4,885	+48.4	3,291	2,472	+33.1	281	425	-33.9	18,231	16,644	+9.5	5,101	6,755	-24.5	39,847	33,947	+17.4
Bulgaria	51	34	+50.0	16	7	+128.6	53	62	-14.5	3	8	-62.5	1,696	1,572	+7.9	408	346	+17.9	2,227	2,029	+9.8
Croatia	192	109	+76.1	80	73	+9.6	720	605	+19.0	138	142	-2.8	1,634	1,397	+17.0	596	618	-3.6	3,360	2,944	+14.1
Cyprus	82	15	+446.7	29	9	+222.2	491	224	+119.2	0	1	-100.0	620	763	-18.7	53	99	-46.5	1,275	1,111	+14.8
Czech Republic	429	187	+129.4	488	271	+80.1	2,783	2,125	+31.0	297	461	-35.6	9,320	8,505	+9.6	3,820	4,714	-19.0	17,137	16,263	+5.4
Denmark	2,202	1,668	+32.0	795	1,212	-34.4	2,422	2,082	+16.3	0	1	-100.0	4,551	3,839	+18.5	433	600	-27.8	10,403	9,402	+10.6
Estonia	58	44	+31.8	32	39	-17.9	739	671	+10.1	6	36	-83.3	735	633	+16.1	203	301	-32.6	1,773	1,724	+2.8
Finland	1,862	992	+87.7	1,295	1,651	-21.6	2,470	2,739	-9.8	53	73	-27.4	1,183	1,947	-39.2	312	480	-35.0	7,175	7,882	-9.0
France	14,629	10,218	+43.2	10,301	7,934	+29.8	26,030	23,138	+12.5	5,087	4,007	+27.0	43,340	38,746	+11.9	12,552	18,856	-33.4	111,939	102,899	+8.8
Germany	18,136	20,892	-13.2	8,853	18,900	-53.2	41,919	35,226	+19.0	1,187	1,806	-34.3	69,922	67,575	+3.5	39,230	39,713	-1.2	179,247	184,112	-2.6
Greece	273	92	+196.7	447	271	+64.9	2,516	1,424	+76.7	240	408	-41.2	4,968	2,530	+96.4	2,088	797	+162.0	10,532	5,522	+90.7
Hungary	369	323	+14.2	367	372	-1.3	3,598	3,283	+9.6	99	34	+191.2	3,006	3,205	-6.2	875	874	+0.1	8,314	8,091	+2.8
Ireland	3,675	2,697	+36.3	1,956	2,174	-10.0	6,197	6,969	-11.1	0	3	-100.0	9,254	7,554	+22.5	6,236	5,617	+11.0	27,318	25,014	+9.2
Italy	3,332	3,648	-8.7	6,049	5,445	+11.1	47,178	37,843	+24.7	13,507	11,446	+18.0	34,166	29,571	+15.5	24,205	19,932	+21.4	128,437	107,885	+19.0
Latvia	183	52	+251.9	21	13	+61.5	401	346	+15.9	40	30	+33.3	491	533	-7.9	239	225	+6.2	1,375	1,199	+14.7
Lithuania	167	87	+92.0				927	991	-6.5	0	0		707	828	-14.6	235	335	-29.9	2,036	2,241	-9.1
Luxembourg	674	401	+68.1	328	308	+6.5	684	570	+20.0	0	2	-100.0	1,247	1,186	+5.1	793	833	-4.8	3,726	3,300	+12.9
Malta	56	66	-15.2	93	99	-6.1	90	76	+18.4	1	2	-50.0	141	166	-15.1	40	13	+207.7	421	422	-0.2
Netherlands	5,082	3,082	+64.9	4,024	4,039	-0.4	7,779	8,540	-8.9	160	326	-50.9	15,457	14,333	+7.8	343	528	-35.0	32,845	30,848	+6.5
Poland	1,077	512	+110.4	689	734	-6.1	13,444	9,188	+46.3	945	1,171	-19.3	15,648	14,755	+6.1	3,243	2,615	+24.0	35,046	28,975	+21.0
Portugal	2,258	962	+134.7	1,575	1,275	+23.5	2,437	1,722	+41.5	730	206	+254.4	5,220	3,736	+39.7	2,419	1,966	+23.0	14,639	9,867	+48.4
Romania	1,073	571	+87.9				3,354	2,454	+36.7	2,187	1,420	+54.0	4,361	3,774	+15.6	1,291	1,118	+15.5	12,266	9,337	+31.4
Slovakia	105	74	+41.9	142	105	+35.2	1,751	1,290	+35.7	138	175	-21.1	3,448	3,031	+13.8	1,096	1,064	+3.0	6,680	5,739	+16.4
Slovenia	316	140	+125.7	88	51	+72.5	434	600	-27.7	63	74	-14.9	2,743	2,687	+2.1	781	768	+1.7	4,425	4,320	+2.4
Spain	3,060	1,776	+72.3	4,115	3,209	+28.2	20,901	13,119	+59.3	1,798	980	+83.5	25,863	16,226	+59.4	8,410	7,067	+19.0	64,147	42,377	+51.4
Sweden	4,202	5,157	-18.5	3,401	5,363	-36.6	1,630	1,685	-3.3	609	223	+173.1	3,153	4,900	-35.7	1,606	2,565	-37.4	14,601	19,893	-26.6
EUROPEAN UNION	71,984	58,578	+22.9	53,649	59,543	-9.9	197,982	162,096	+22.1	27,570	23,464	+17.5	288,325	256,770	+12.3	120,531	122,511	-1.6	760,041	682,962	+11.3
Iceland	196	329	-40.4	112	290	-61.4	150	117	+28.2	1	0		122	67	+82.1	151	81	+86.4	732	884	-17.2
Norway	1,237	6,659	-81.4	182	539	-66.2	263	371	-29.1	0	1	-100.0	36	175	-79.4	142	212	-33.0	1,860	7,957	-76.6
Switzerland	2,840	2,126	+33.6	1,387	1,531	-9.4	4,667	3,912	+19.3	10	22	-54.5	5,905	6,280	-6.0	1,628	2,028	-19.7	16,437	15,899	+3.4
EFTA	4,273	9,114	-53.1	1,681	2,360	-28.8	5,080	4,400	+15.5	11	23	-52.2	6,063	6,522	-7.0	1,921	2,321	-17.2	19,029	24,740	-23.1
United Kingdom	17,294	14,433	+19.8	9,109	9,047	+0.7	41,338	34,131	+21.1	0	0	#DIV/0!	58,973	51,468	+14.6	5,280	6,008	-12.1	131,994	115,087	+14.7
EU + EFTA + UK	93,551	82,125	+13.9	64,439	70,950	-9.2	244,400	200,627	+21.8	27,581	23,487	+17.4	353,361	314,760	+12.3	127,732	130,840	-2.4	911,064	822,789	+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		2023	2022	2023	2022	
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
Porsche	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
Porsche	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
Mercedes-Benz	4.6	5.7	42,258	47,280	-10.6	4.6	5.7	42,258	47,280	-10.6
Mercedes	4.5	5.5	40,869	45,463	-10.1	4.5	5.5	40,869	45,463	-10.1
Smart	0.2	0.2	1,389	1,817	-23.6	0.2	0.2	1,389	1,817	-23.6
Ford	4.1	4.7	37,609	38,380	-2.0	4.1	4.7	37,609	38,380	-2.0
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