



2022

Jan. to Mar.

Global & China Auto Sales

GETEC Market Report

GETEC 
Getriebe Technik GmbH

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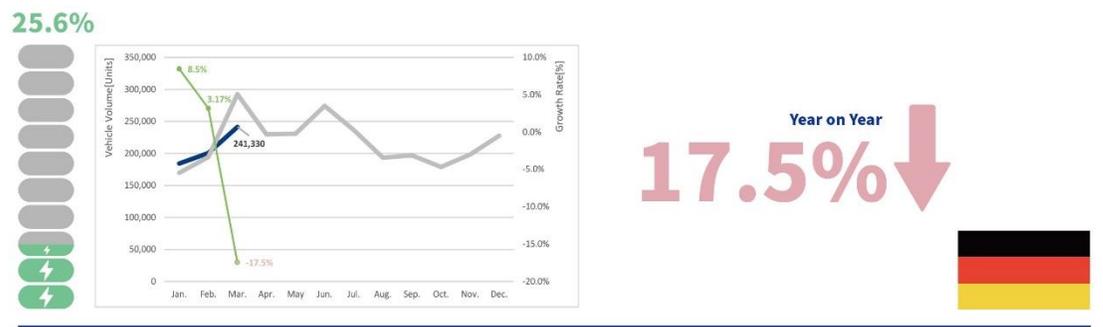
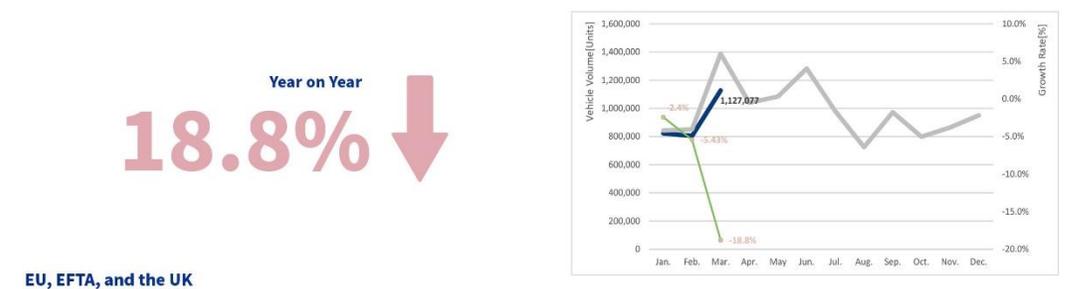


Global Overview



Global Passenger Vehicle Sales

- In March 2022, affected by the new epidemic, chip supply shortage and other factors, the sales of passenger cars in China reached 1.57 million units, a year-on-year decrease of 9.98%. In the first quarter, the cumulative sales volume of passenger vehicles in China was 4.91 million units, a year-on-year decrease of 3.52%. Due to the continuous rise of domestic oil prices, approaching the highest record in history, customers' enthusiasm for purchasing NEV continued to rise. In March, the sales of NEPV reached 445,000, a year-on-year increase of 139.93%. In March, the penetration rate of NEV was 28.16%, of which BEV accounted for 22.8% and PHEV accounted for 5.36%.
- In March, many parts of Europe were affected by supply chain problems, and automakers' factories were shutting down. New car registrations in the EU, EFTA and the UK fell sharply to only 1.12 million units, down 18.8% from the same period last year, the ninth consecutive month of decline. The sales in the first quarter were 2.75 million units, down 10.6%. The current rise in energy and fuel prices in Europe will lay the foundation for the promotion of NEV.
- New car registrations in Germany were 241,000 in March, down 17.5% year-on-year. As of the first quarter, cumulative passenger car sales in Germany were 626,000 units, a year-on-year decrease of 4.65%. Shown the current situation in Europe, new car registrations in Germany are likely to continue to decline in the next few months. The German NEV sold 61,762 units in March, with the penetration rate up to 25.6% year-on-year, but the sales volume fell 6.08% year-on-year. Among them, BEV accounted for 14.3%, and PHEV accounted for 11.3%. In a declining auto market, sales of BEV rose, while sales of PHEV fell slightly.



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Source From: ACEA | PCPA

China Sales Overview in March



China Sales Data

1.57
Million

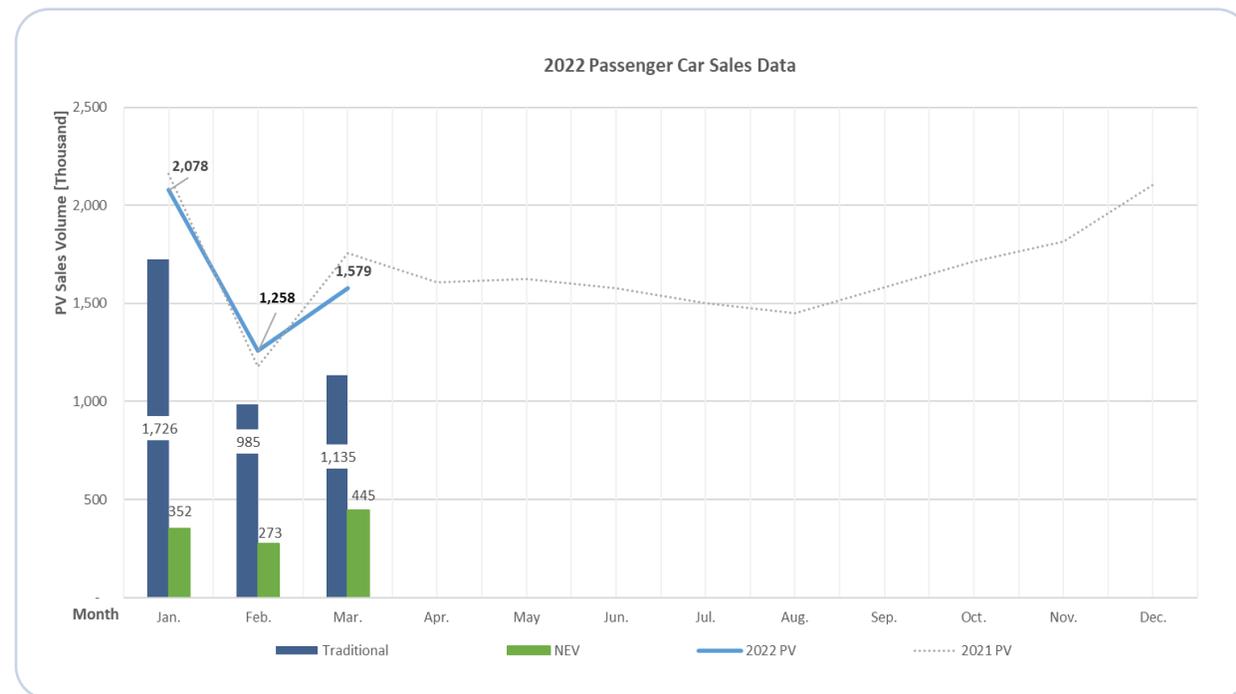
- In March, the sales volume of Chinese passenger vehicles was **1.57 million**.

9.98% ↓

- Due to the virus revive in many parts, compared with March 2021, the sales volume this month decreased by **9.98% YoY**.

3.52% ↓

- In Q1 of 2022, the overall sales of Chinese passenger vehicles are **4.92 million in 2022**, with a year-on-year decrease of **3.52%**.



Passenger vehicle Monthly Increase (2022 VS 2021)											
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
-3.79%	6.61%	-9.98%									

	Total Jan. ~ Mar.	Compare with 2021	Growth rate
2021	5,094,530		
2022	4,915,334	-179,196	-3.52%

Traditional vs BEV vs PHEV

139.93% ↑

- NEV (BEV+PHEV) sales were **444,655** in March, with YoY increase of **139.93%**. MoM increase **63.10%**.

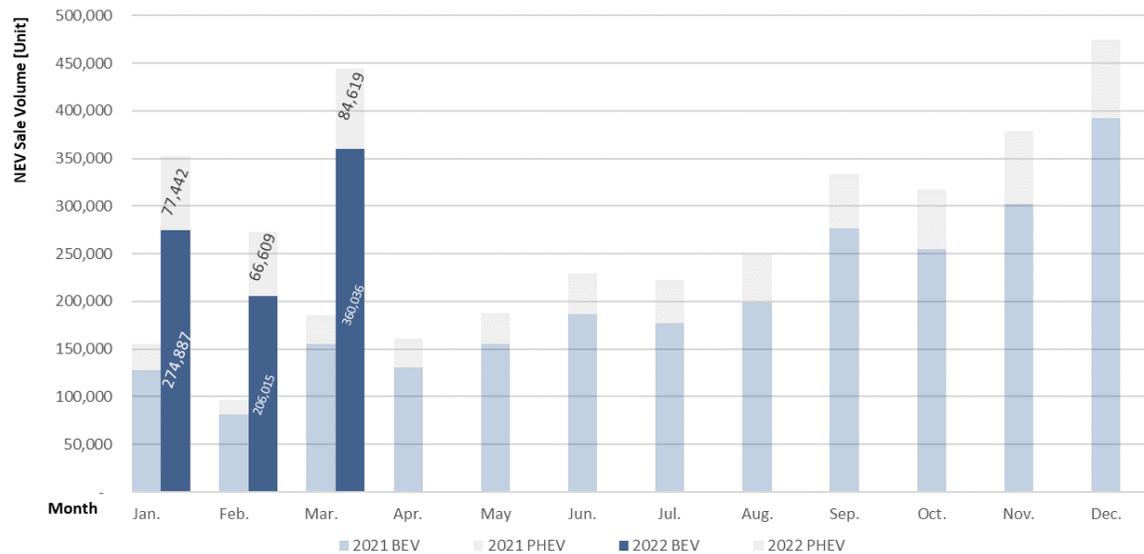
1.07 Million

- In Q1 of 2022, the total sales of NEV reached **1.07 million**. Increase **144.33%** YoY. New energy rises hugely.

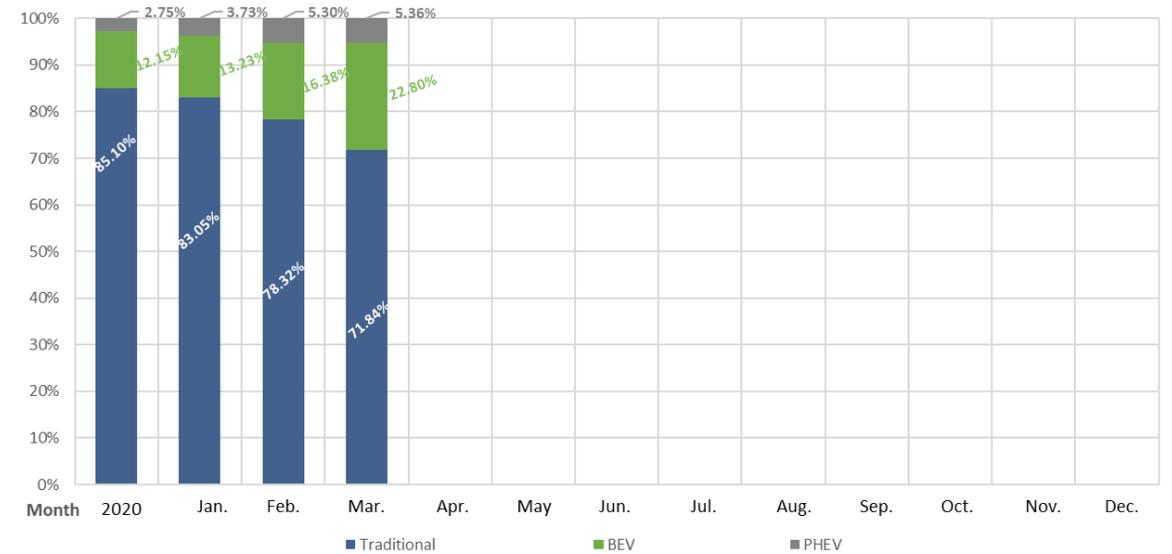
28.16%

- In March Chinese NEPV account for **28.16%**, of which BEVs account for **22.80%** and PHEVs account for **5.36%**. The NEPV proportion reaches the highest in history.

BEV vs PHEV Sales Data



2022 Traditional vs BEV vs PHEV



OEM



OEM

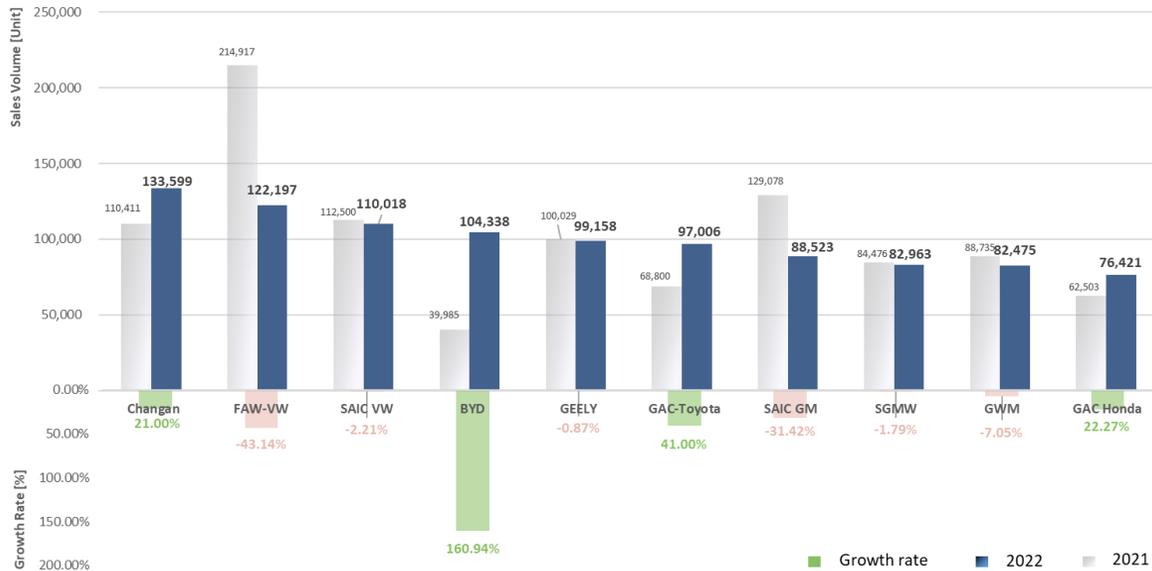
Chang'an

- In March's OEM, **Chang'an** sold **133,599** units, up **21.00%** YoY. and became the sales champion. On the other hand, **BYD** sales only NEV, and increased by **160.94%** YoY in March, with a huge increase.

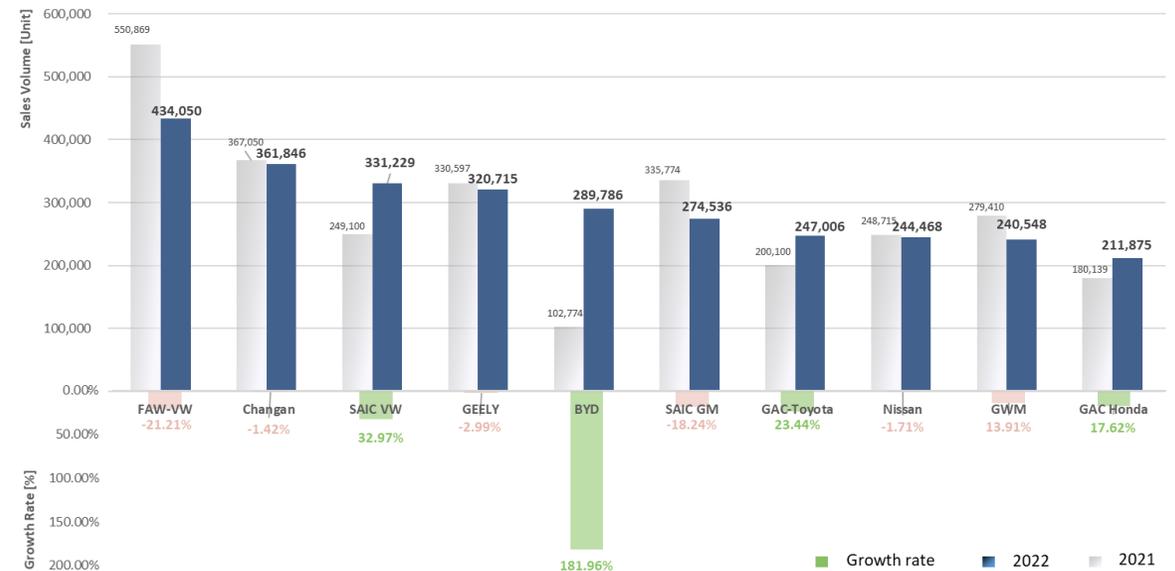
181.96%

- From the view of the Q1 in 2022, the sales of most OEM decreased slightly. **FAW-VW** has the best-selling in Q1, and reached **434,050** units, but decreased by **21.21%** YoY. **BYD** sold **289,786** units, a YoY increase of **181.96%**, became the OEM with the largest growth rate in Q1.

2022 March Top 10 OEM's Sales



Jan. ~ Mar. 2022 Top 10 OEM's Sales



Model Sales



Sedan

11.97% ↓

- Sedan sale **765,162** in March, decrease **11.97%** YoY, Sales growth slowed down, with MoM increase of **27.15%**.

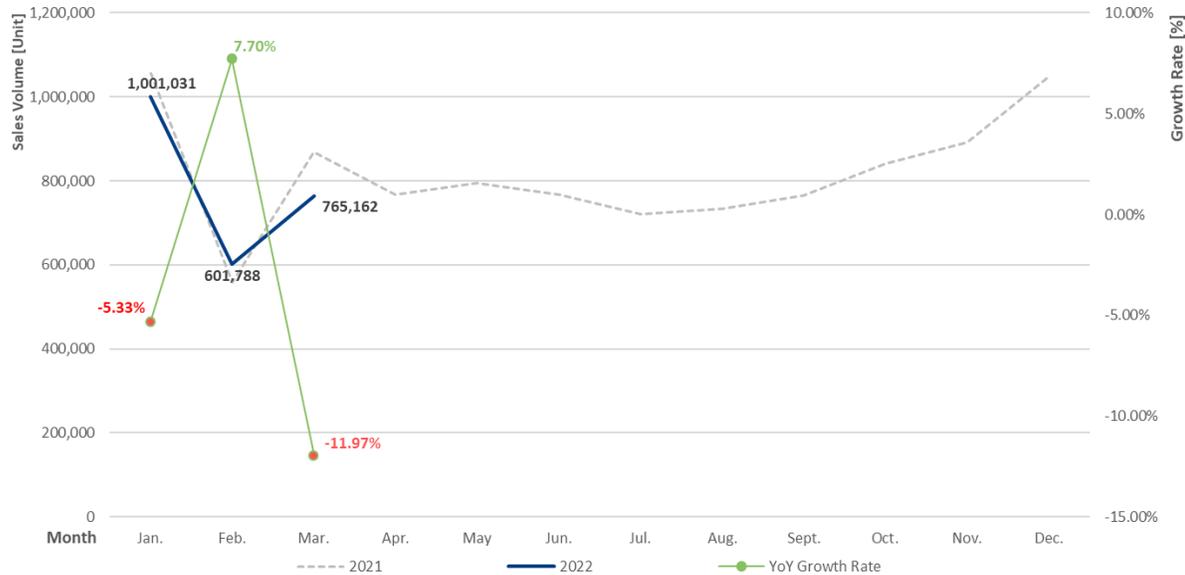
2.37 Million

- In Q1 of 2022, the total sales of Sedan reached **2.37 million**. Overall sales decrease **4.72%** than 2021.

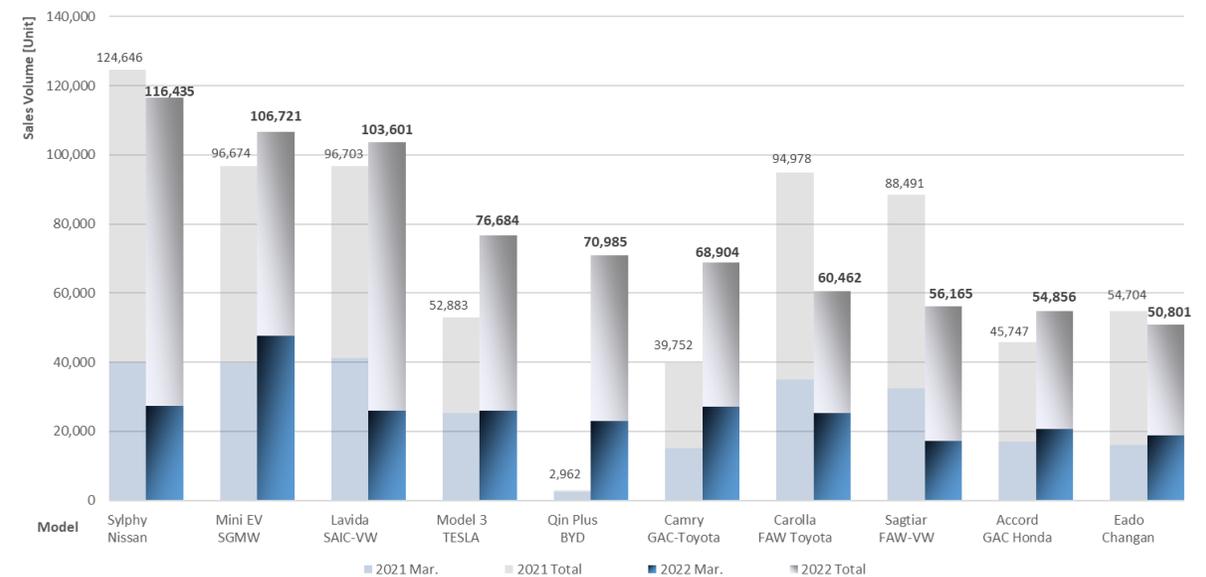
19.67% ↑

- The highest sales volume of sedan in March was **Wuling mini EV**, which reached **47,563** units, a year-on-year increase of **19.67%**.

Jan. ~ Dec. 2022 Sedan Sales Data



Jan. ~ Mar. 2022 Sedan Sales TOP 10



SUV

4.75% ↓

- SUV sale **742,281** in March, decrease **4.75%** YoY, increase **25.92%** on the previous month.

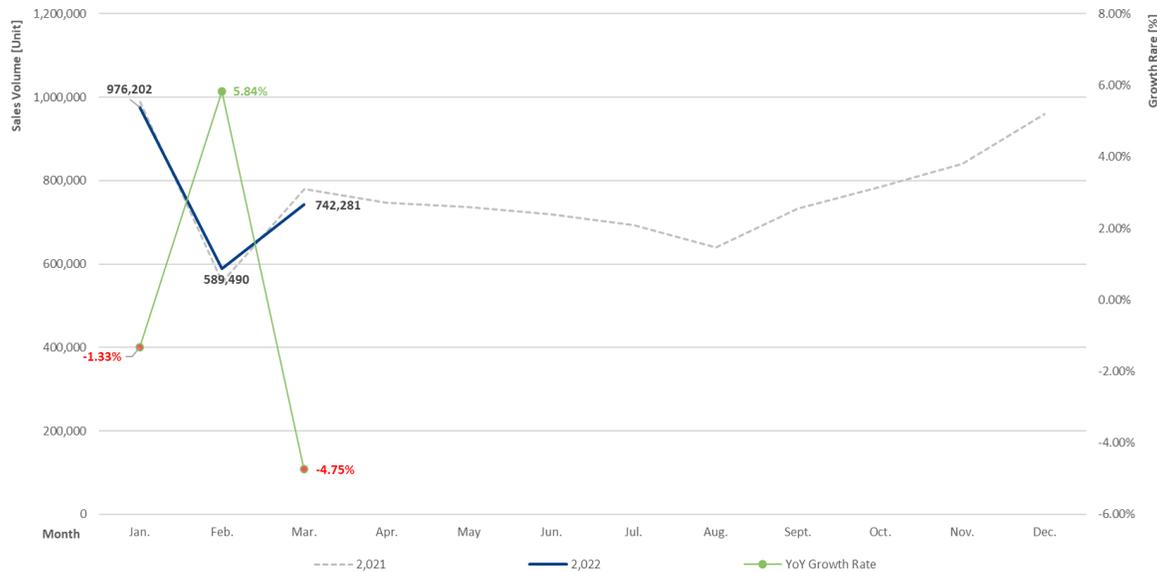
2.31 Million

- In Q1 of 2022, the total sales of SUV reached **2.31 million**. Overall sales decrease **0.76%** than 2021.

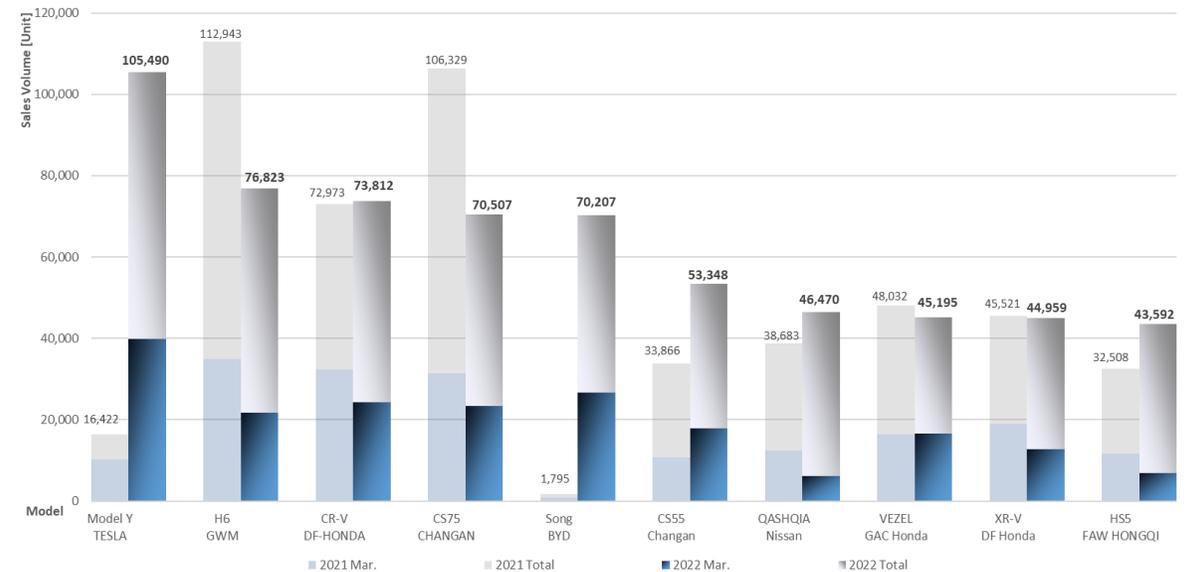
Tesla Model Y

- Model Y** has become the best-selling SUV model in China, with sales **39,790 units** in March, and total **105,480** units in Q1.

Jan. ~ Dec. 2022 SUV Sales Data



Jan. ~ Mar. 2022 SUV Sales TOP 10



MPV

32.33% ↓

- MPV sale **71,820** in March, decrease **32.22%** than 2021, with the biggest drop. And increase **8.23%** on the previous month.

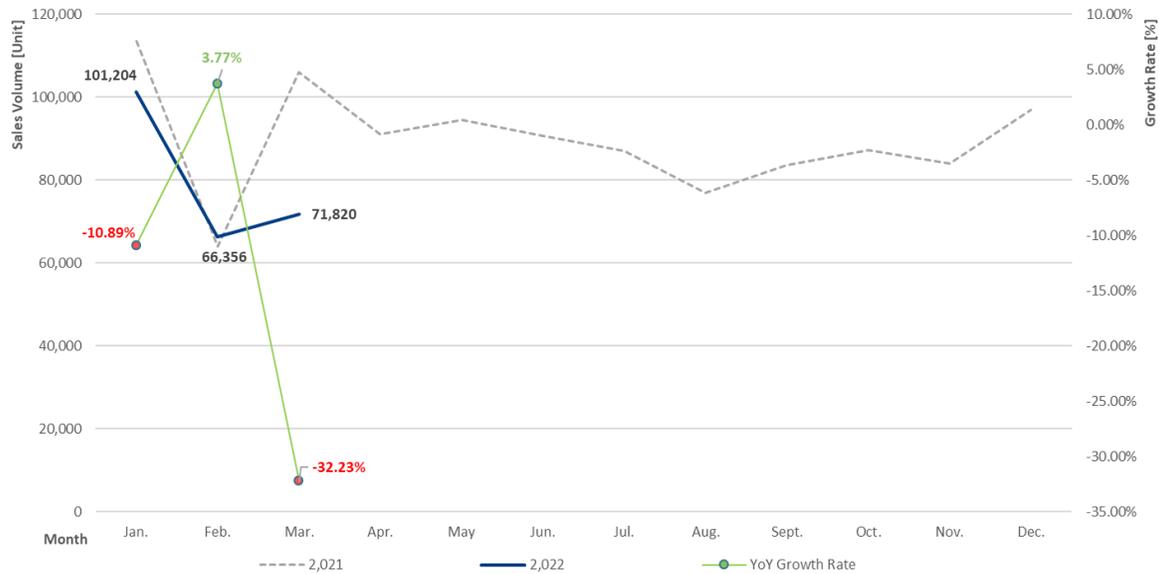
0.24 Million

- In Q1 of 2022, the total sales of MPV reached **0.24 million**. Overall sales decrease **15.56%** than 2021.

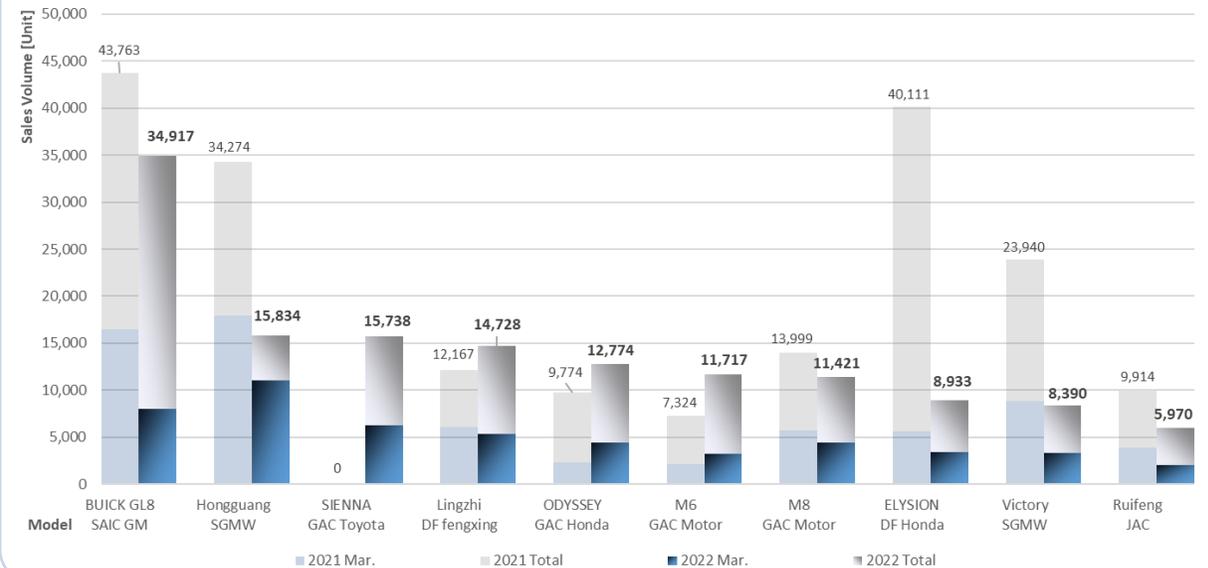
38.30% ↓

- Sales of MPVs in China continued to decline, with **Hongguang** having the most sales in March with **11,062** units, a YoY decrease of **38.30%**.

Jan. ~ Dec. 2022 MPV Sales Data



Jan. ~ Mar. 2022 MPV Sales Data TOP 10



New Energy Vehicle



BEV

131.60% ↑

- BEV sale **360,036** in March, increase **131.60%** than 2021 and increase **74.76%** MoM.

0.84 Million

- In Q1 of 2022, the total sales of BEV reached **0.84 million**, increase **130.38%** than last year.

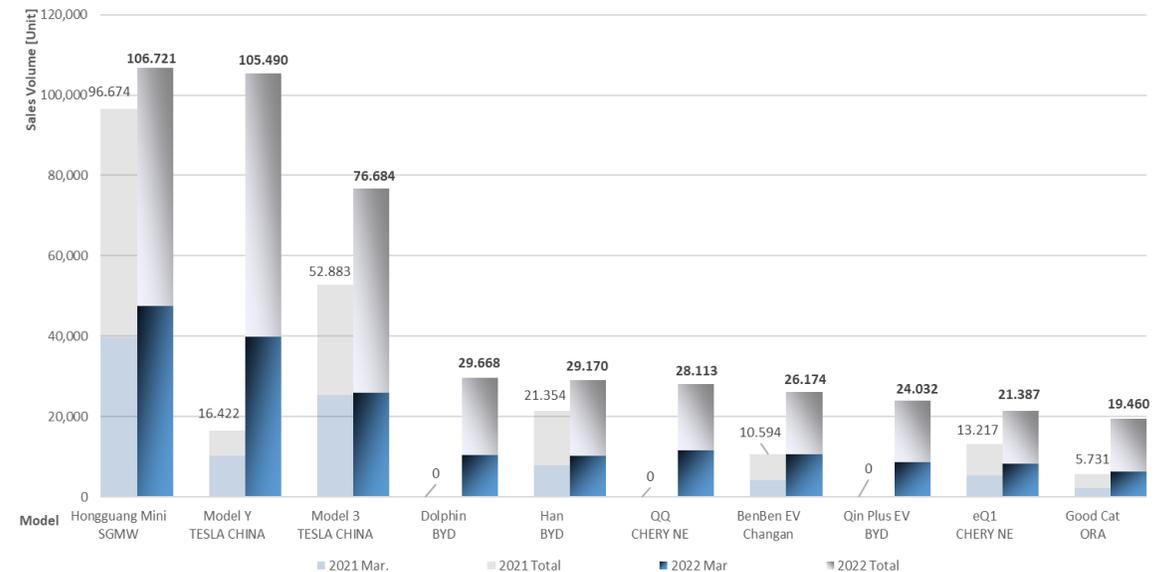
19.67% ↑

- Among BEVs, **Hongguang Mini EV**, **Model Y**, and **Model 3** have the best sales and are much higher than their counterparts. Among them, **Hongguang Mini EV** sold **47,563** units in March, a YoY increase of **19.67%**.

Jan. ~ Dec. 2022 BEV Sales Data



Jan. ~ Mar. 2022 BEV Sales TOP 10



PHEV

183.26% ↑

- PHEV sale **84,619** in March, increase **183.26%** than 2021, and increase **27.04%** MoM.

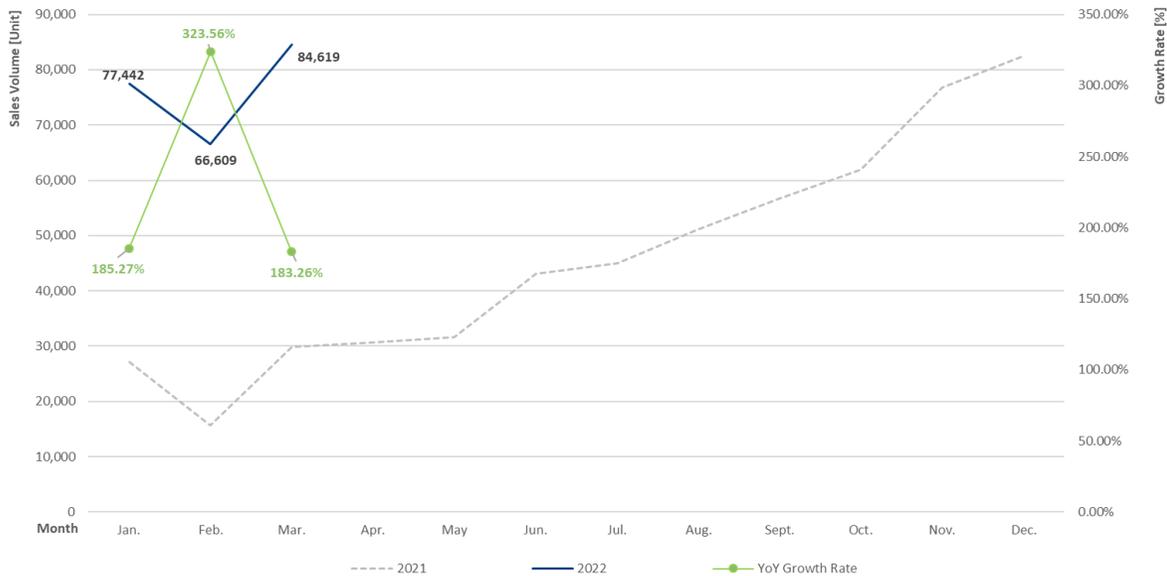
0.23 Million

- In Q1 of 2022, the total sales of PHEV reached **0.23 million**, increase **214.34%** than last year.

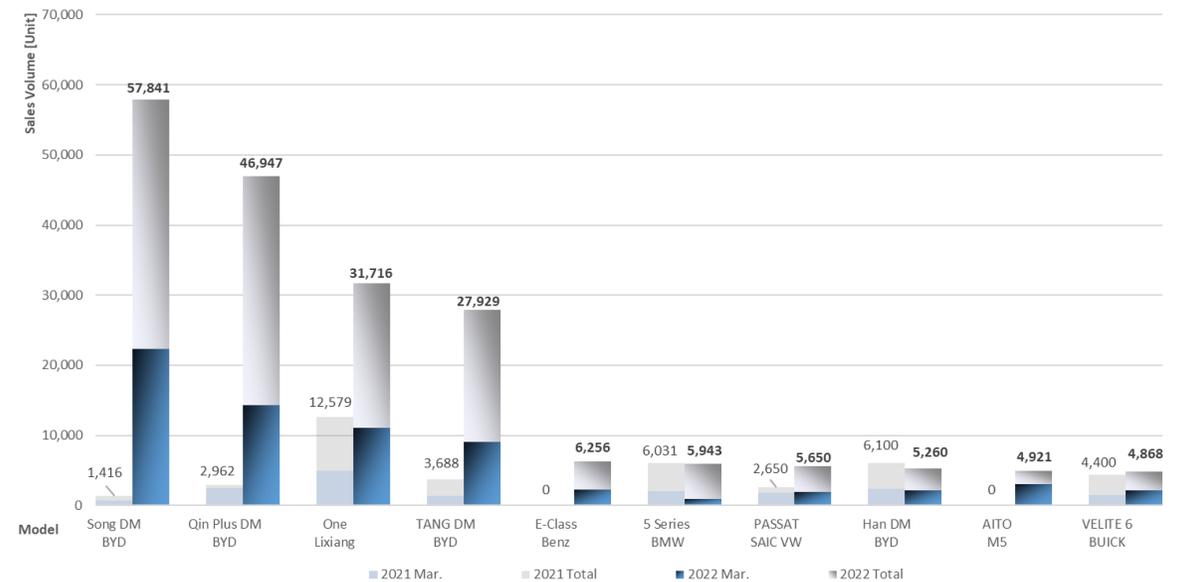
BYD

- Among PHEVs, BYD has the best sales. With the DM-i hybrid system, The rise in BYD sales has led to an overall rise in phev sales.

Jan. ~ Dec. 2022 PHEV Sales Data



Jan. ~ Mar. 2022 PHEV Sales TOP 10



Subjective Summary

- ❑ Q1 2022 is a rough start, The chaotic international situation led to the global energy crisis. In March, the domestic epidemic relapsed, factories were shut down, and consumption was sluggish. The following months may be affected by the impact of March, and domestic sales will continue to decline.
- ❑ In March 2022, the sales of passenger cars in China with slowing growth and reached **1.57 million** units, a year-on-year decrease of **17.5%**. In the first quarter, the cumulative sales volume of passenger vehicles in China was **4.91 million** units, a year-on-year decrease of **3.52%**.
- ❑ Due to the continuous rise of domestic oil prices, approaching the highest record in history, customers' enthusiasm for purchasing NEV continued to rise. The market situation of electric vehicles is very good. In March, the sales of NEPV reached **445,000**, a year-on-year increase of **139.93%**. In March, the penetration rate of NEV was **28.16%**, of which BEV accounted for **22.8%** and PHEV accounted for **5.36%**.
- ❑ Sales will fall in April and are expected to pick up after the virus is over, but will likely decline compared to 2021.

News & Policy



News (2022 Mar.~ 2022 Apr.)

According to the MIIT, Chinese new energy vehicle industry has promoted a total of 10.33 million vehicles, breaking the 10 million mark, becoming an important force leading the electrification transformation of the global automotive industry. Chinese new energy vehicle industry has entered a new stage of large-scale and rapid development, and it is expected to maintain a rapid development trend this year.



On April 3, 2022, BYD officially announced the suspension of the production of fuel vehicles, becoming the first traditional auto company in the world to stop the production of fuel vehicles. According to the company's strategic development needs, BYD will stop the production of fuel vehicles from March 2022. In the future, we will devote ourselves to technological innovation, and adhere to the new development concept of "innovation" and "green" around the "double carbon" strategic goal. Leading the automotive industry with new impetus for technological innovation.



Germany registered 61,762 electric vehicles in March, down 6 percent year-on-year, but its market share rose to 25.6 percent from 22.5 percent last year. Among them, the registration of pure electric vehicles in Germany was 34,474 units, a year-on-year increase of 15%, with a market share of 14.3%; the registration of plug-in hybrid vehicles was 27,288 units, a year-on-year decrease of 23%, with a market share of 11.3%.



HONDA

Honda and General Motors are reportedly expanding their electric vehicle partnership with a range of future models that will be available in North America in 2027. According to reports, these new products will share a new global platform in the future, which will use GM's Ultium battery technology.

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