

A light blue world map with white outlines of continents and countries, serving as a background for the text.

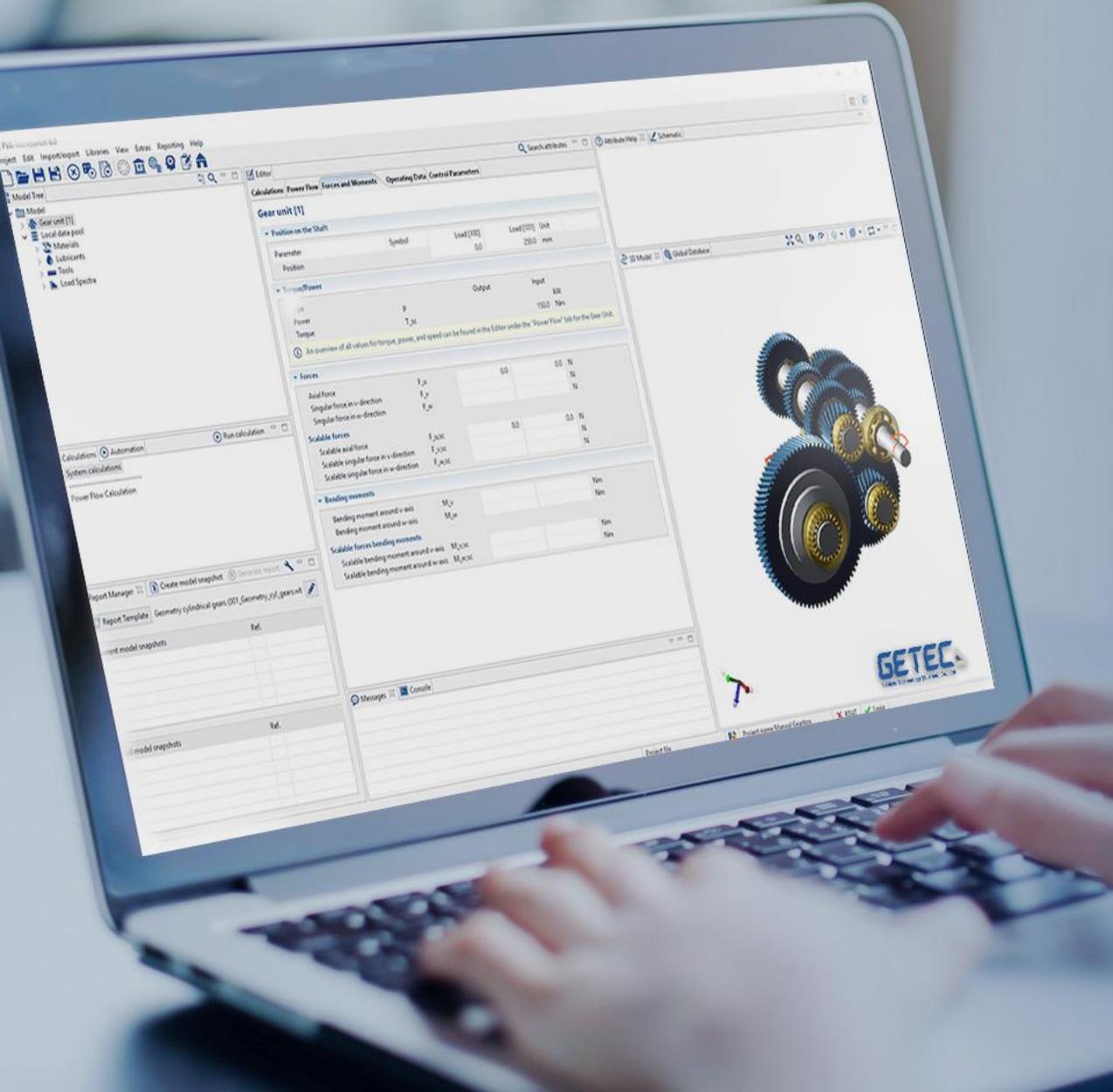
2022

September

Auto Sales

GETEC Market Report

GETEC 
Getriebe Technik GmbH



Overview

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- ❑ China Sales Overview 2022
- ❑ Model Sales
- ❑ New Energy Vehicle
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Global Sales Overview in September



Global Sales Overview in Sep.

- Global (China, Europe, Germany) Passenger Vehicle (PV) sold in September
- In the past third quarter, Chinese auto sales showed rapid growth and the industry rebounded steadily. 1.92 million PV were sold in September, up 21.58% year-on-year and 2.8% month-on-month. But the growth rate started to slow down. With three months of continuous growth, the third quarter was the best quarter for sales so far. In the third quarter, Chinese PV sales total 14.87 million units, up 2.98% year-on-year. The sales of NEPV continued to rise in September, up 83.15% year-on-year to 0.61 million units. Among them, BEV accounted for 23.74% and PHEV accounted for 8.03%. From January to September, the cumulative sales of NEPV were 3.87 million units, up 112.44% year-on-year.
- In September, the EU, EFTA and the UK registered 1.05 million units new PV, up 7.94% year-on-year. Sales declined in the same period last year due to parts shortages, making this year two consecutive months of year-on-year growth, but sales are still below the level of the same period in 2019. From January to September 8.27 million units were sold in Europe, down 9.73% year-on-year. As the fourth quarter approaches, Europe will face a more severe energy crisis, which will have a considerable impact on European companies and the automotive market this year.
- Germany registered 224,816 units new PV in September, up 14.14% year-on-year, the highest increase in the previous months. The cumulative sales volume till September were 1.86 million units, with sales picking up from August to September, but still down 7.42% compared to last year. The sales volume of NEV in Germany was 72,725 units in September accounting for 32.3% of the vehicle market. Among them, 44,389 units of BEVs, up 31.9% year-on-year, and 28,336 units of PHEV, up 24% year-on-year, accounting for 19.7% and 12.6% respectively.

— 2022 Sales — 2021 Sales

⚡ Proportion of NEV (EV+PHEV)

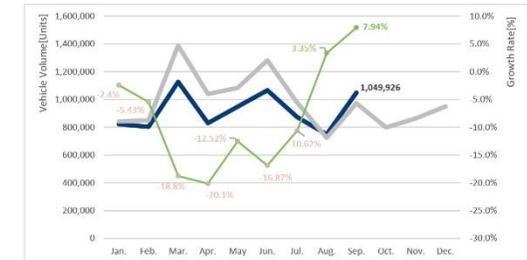
31.8%



Year on Year
21.54% ↑



Year on Year
7.94% ↑



EU, EFTA, and the UK

32.3%



Year on Year
14.14% ↑



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Source From:ACEA | CPCA

China Sales Overview in September



China Sales Data

1.92
Million

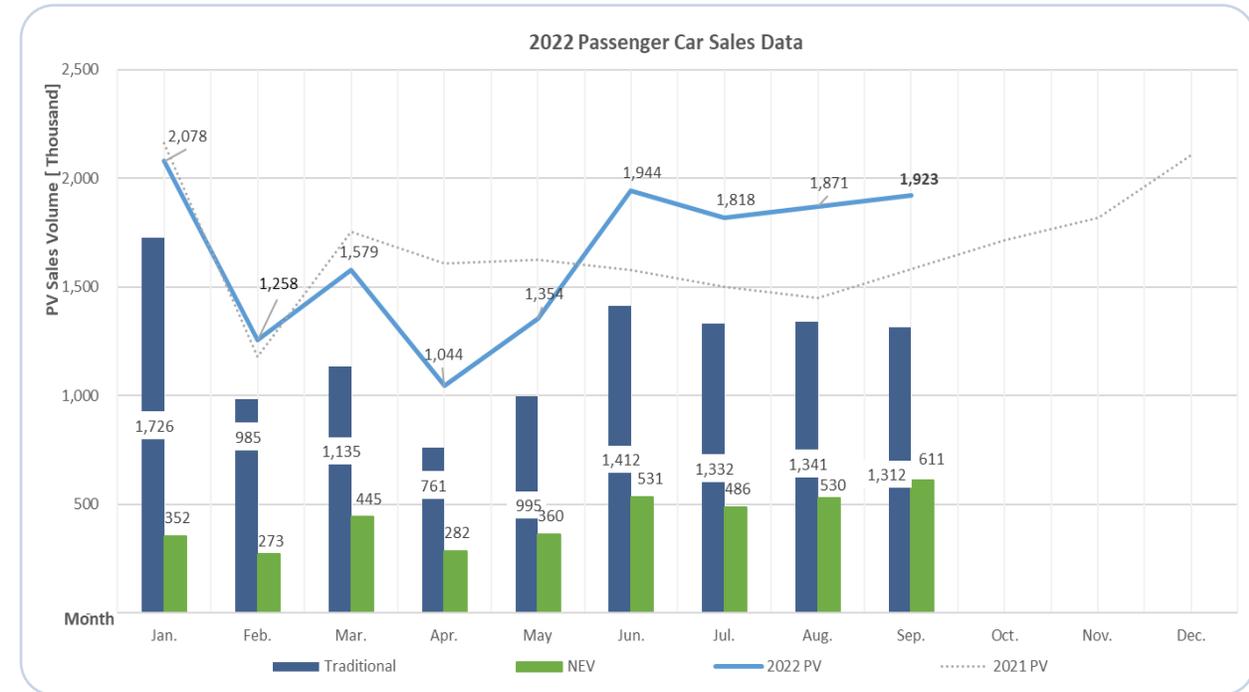
- In September, the sales volume of Chinese passenger vehicles was **1.92 million**, sales showing a steady rise.

21.58% ↑

- Sales in September increased by **21.58%** year-on-year and **2.79%** month-on-month. The growth rate has slowed down compared to last month.

2.98% ↑

- Till September 2022, the overall sales of Chinese passenger vehicles are **14.87 million in 2022**, with a year-on-year increase of **2.98%**.



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%	-35.03%	-16.71%	23.23%	21.03%	28.94%	21.58%			

	Total Jan. ~ Sept.	Compare with 2021	Growth rate
2021	14,438,430	429,759	2.98%
2022	14,868,189		

Traditional vs BEV vs PHEV

83.15% 

NEV (BEV+PHEV) sales were **610,863** in September, with a year-on-year increase of **83.15%**, increase **15.35%** month-on-month.

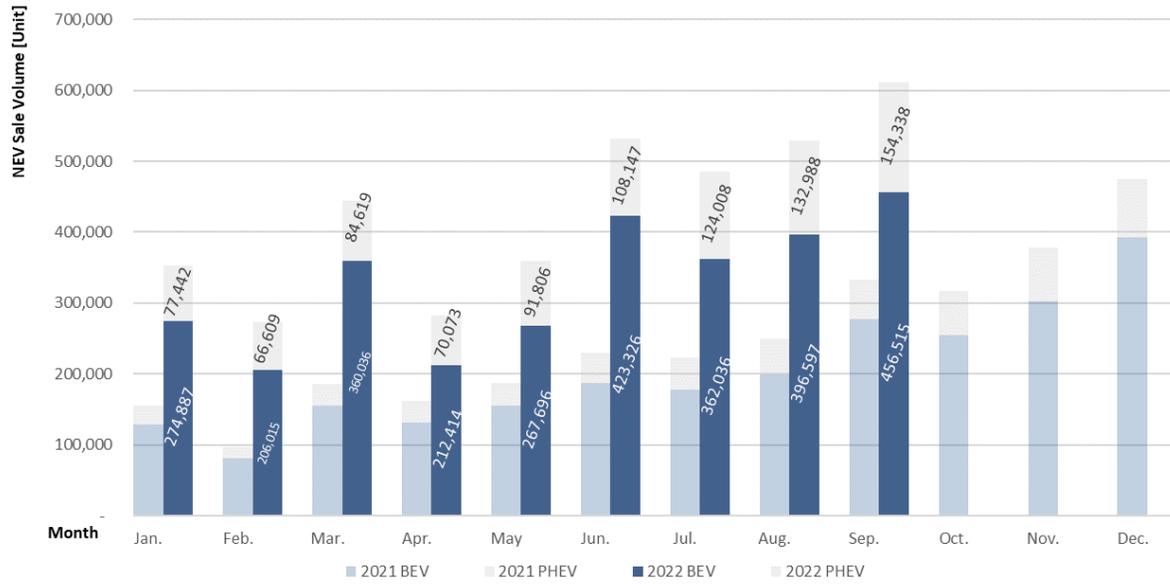
3.87 Million

By September 2022, the total sales of NEV around **3.87 million**, increase **112.44%** year-on-year.

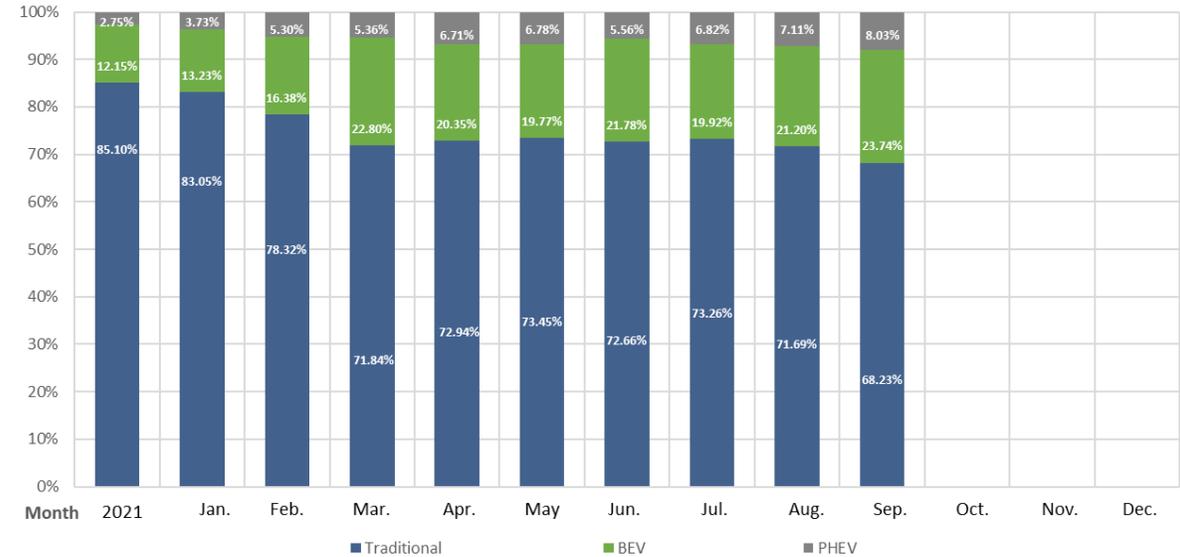
31.77%

New energy accounted for **31.77%** in September, become the largest month of this year's, and also the first time to break into **30%**, of which BEVs account for **23.74%** and PHEVs account for **8.03%**.

BEV vs PHEV Sales Data



2022 Traditional vs BEV vs PHEV



OEM



OEM

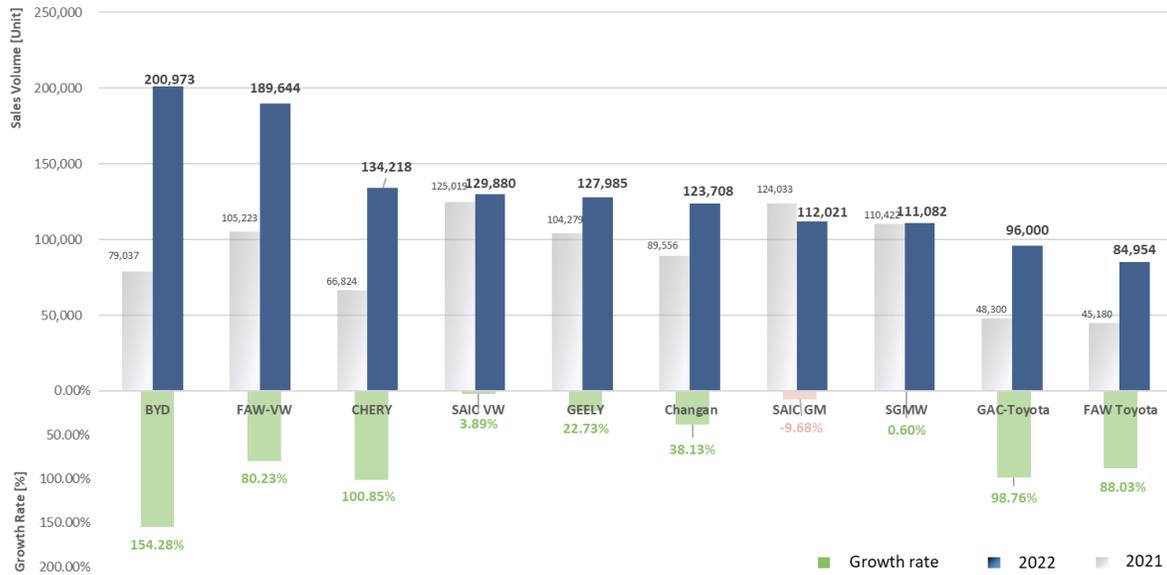
154.28% ↑

- BYD won the top ranking of vehicle companies in September with 0.2 million units, up **154.28%** year-on-year. Among the top 10 companies, only **SAIC GM** saw a slight decline in year-over-year sales in September.

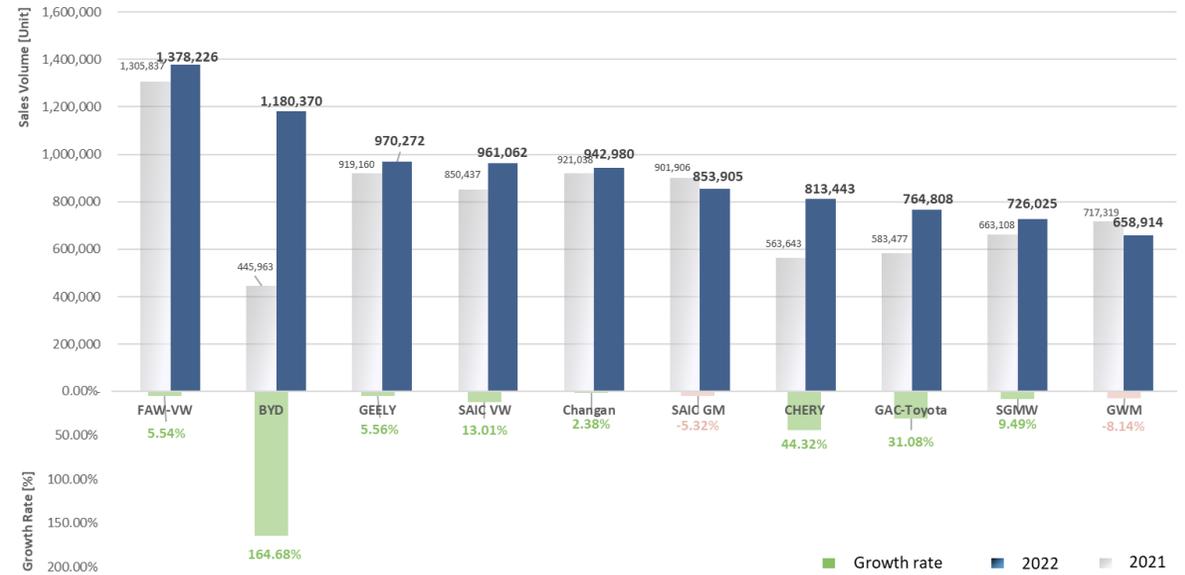
5.54% ↑

- The **FAW-VW** was the first in cumulative sales from January to September, with sales of **1.38 million** units, sales also began to grow year-on-year, up **5.54%**. and **BYD** sales of **1.18 million** units, up **164.68%** year-on-year, ranking second.

2022 Sept. Top 10 OEM's Sales



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



Model Sales



Sedan

27.74% ↑

- Sedan sale **977,729** units in September, increase **27.74%** year-on-year, with a month-on-month increase of **5.08%**.

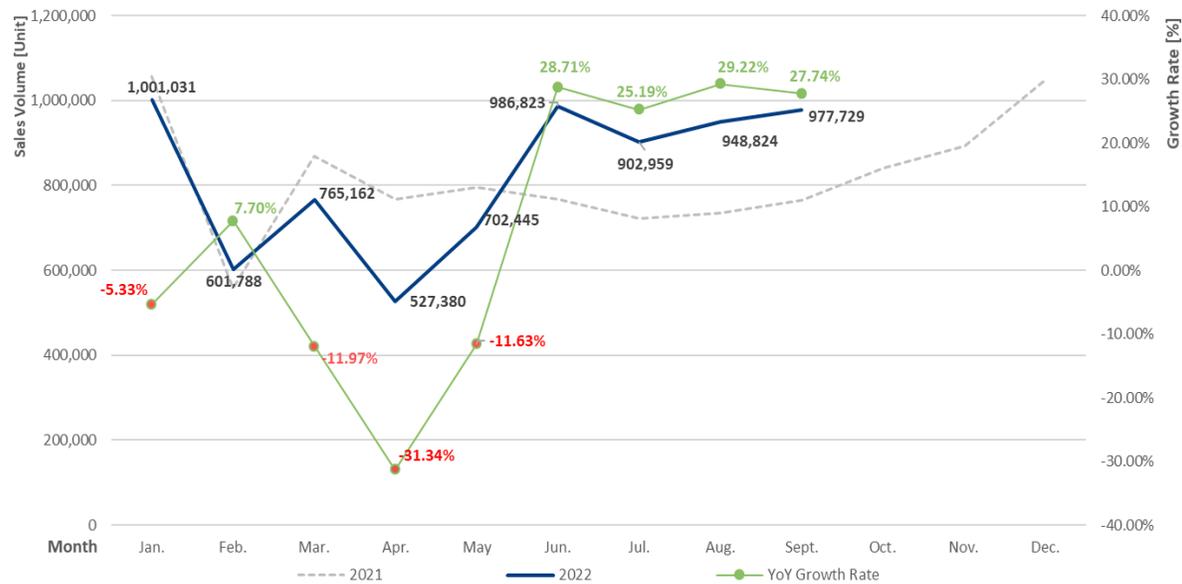
7.41 Million

- End of September, the total sales of Sedan reached **7.41 million**. Overall sales increase **5.37%** than 2021.

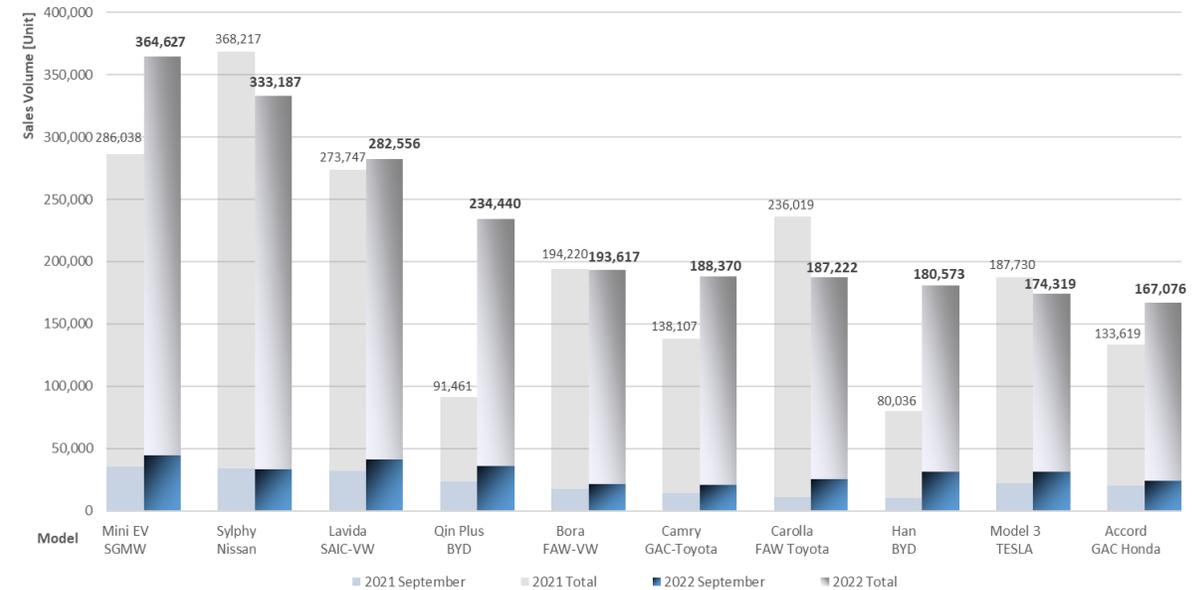
27.40% ↑

- In the third quarter, Sedan sales increased by **27.40%** year-on-year, is the fastest growing model.

Jan. ~ Dec. 2022 Sedan Sales Data



Jan. ~ Sept. 2022 Sedan Sales TOP 10



SUV

16.87% ↑

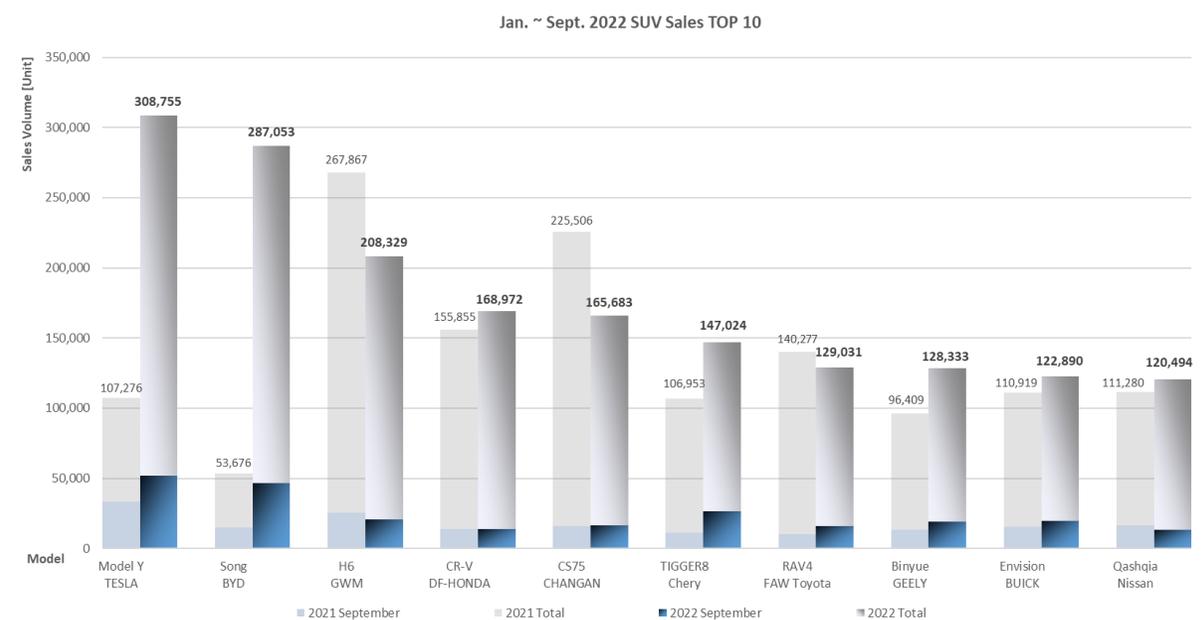
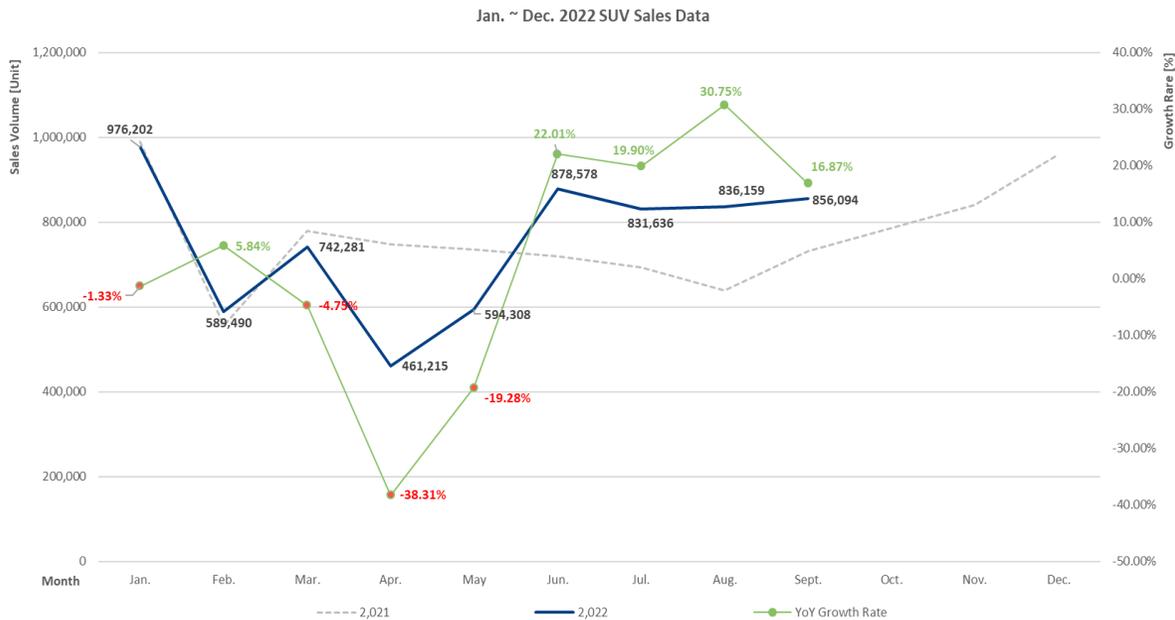
- SUV sale **856,094** in September, increase **16.87%** year-on-year, and increase **2.38%** on the previous month.

6.77 Million

- Until September, the total sales of SUV reached **6.77 million**. Overall sales increase **2.59%** than 2021.

Model Y

- In the third quarter, SUV sales increased by **22.18%** year-on-year. The best-selling SUV in the third quarter was the **Model Y**, with **0.13 million** units.



MPV

6.45% ↑

MPV sale **88,915** in September, a year-on-year increase of **6.45%**, and increase **3.84%** month-on-month.

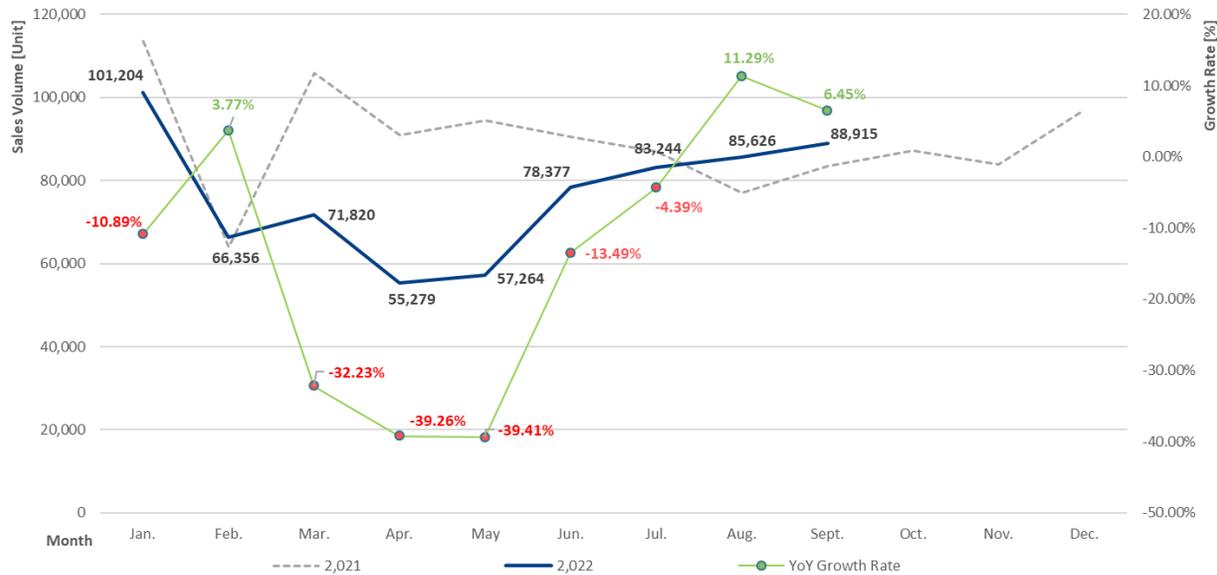
0.69 Million

End of September, the total sales of MPV reached **0.69 million**. Overall sales decrease **14.75%** than 2021.

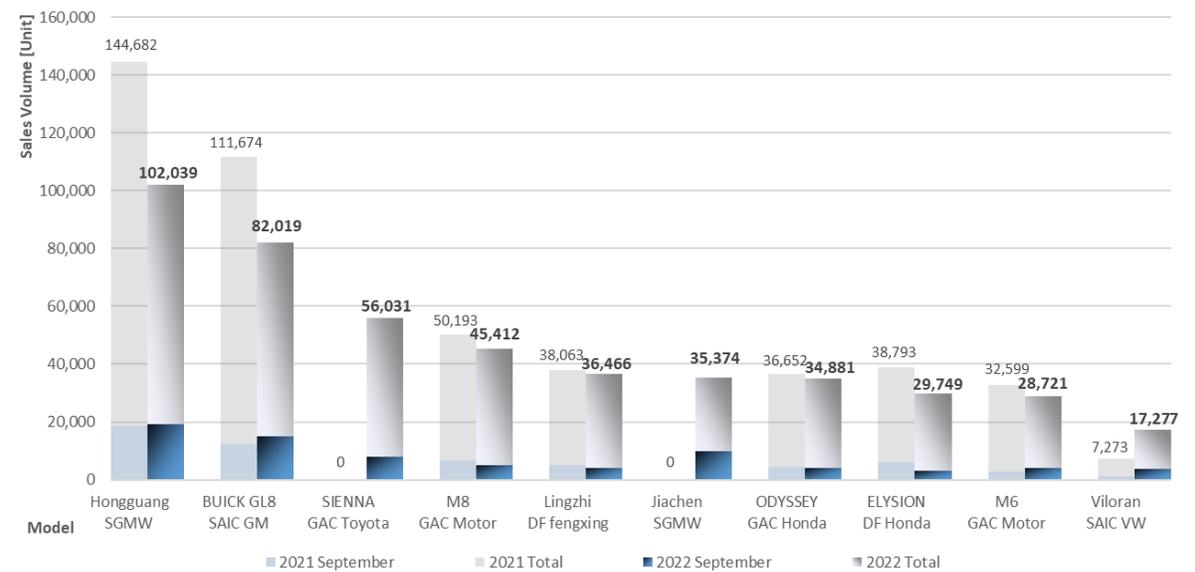
4.14% ↑

MPV sales recovered in the third quarter, up **4.14%** year-on-year, but overall sales remained sluggish.

Jan. ~ Dec. 2022 MPV Sales Data



Jan. ~ Sept. 2022 MPV Sales Data TOP 10



New Energy Vehicle



BEV

64.95% ↑

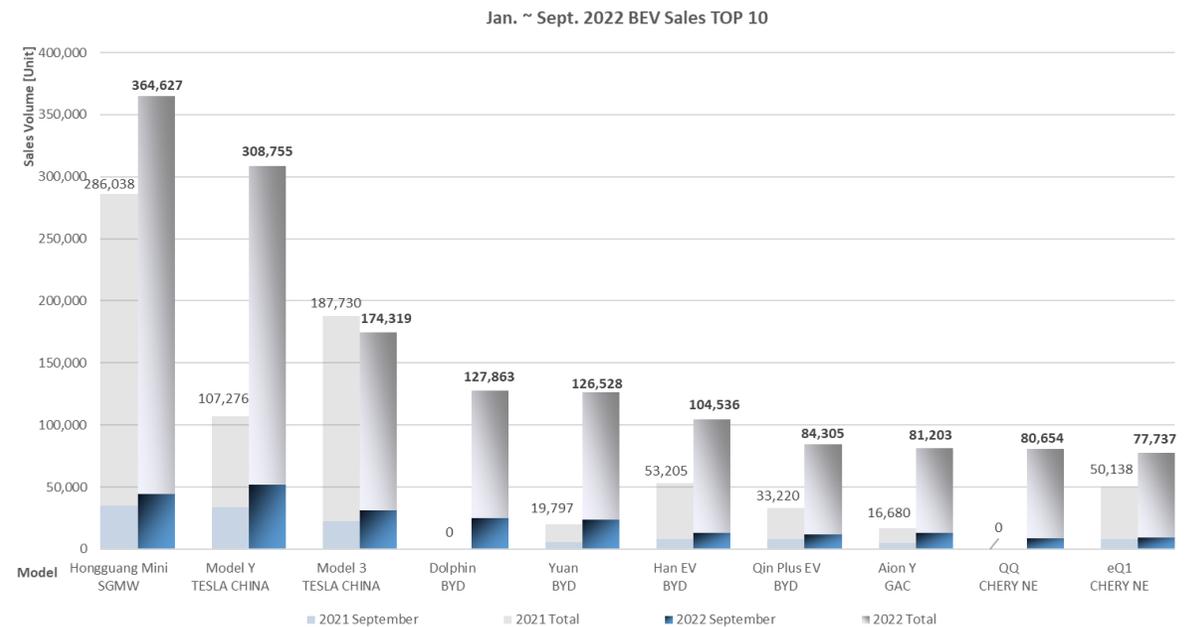
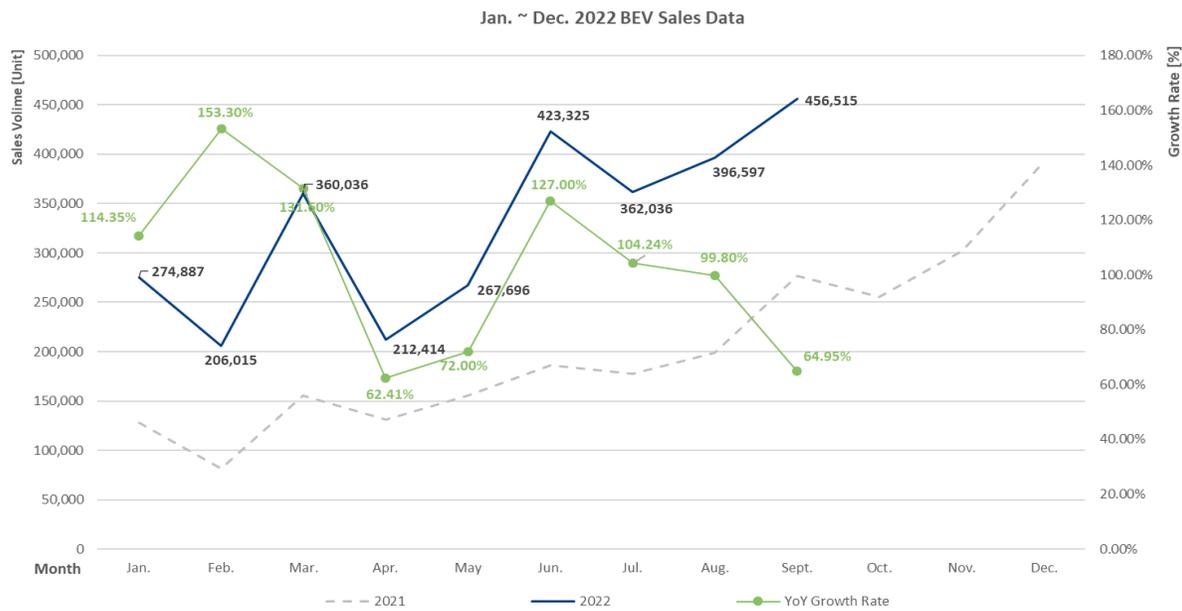
- BEV sale **456,515** in September, increase **64.95%** than 2021 and increase **15.11%** month-on-month.

2.96 Million

- Until September, the total sales of BEV reached **2.96 million**, increase **98.56%** than last year.

16.32%

- As of the third quarter, **Tesla Model Y/3** cumulative sales of **0.48 million** units, accounting for **16.32%** of the BEV market. The sales volume of vehicle companies ranked first.



PHEV

160.29% ↑

PHEV sale **154,338** in September, increase **171.88%** than 2021, and increase **16.05%** month-on-month.

0.91 Million

End of September, the total sales of PHEV reached **0.91 million**, increase **174.90%** than last year.

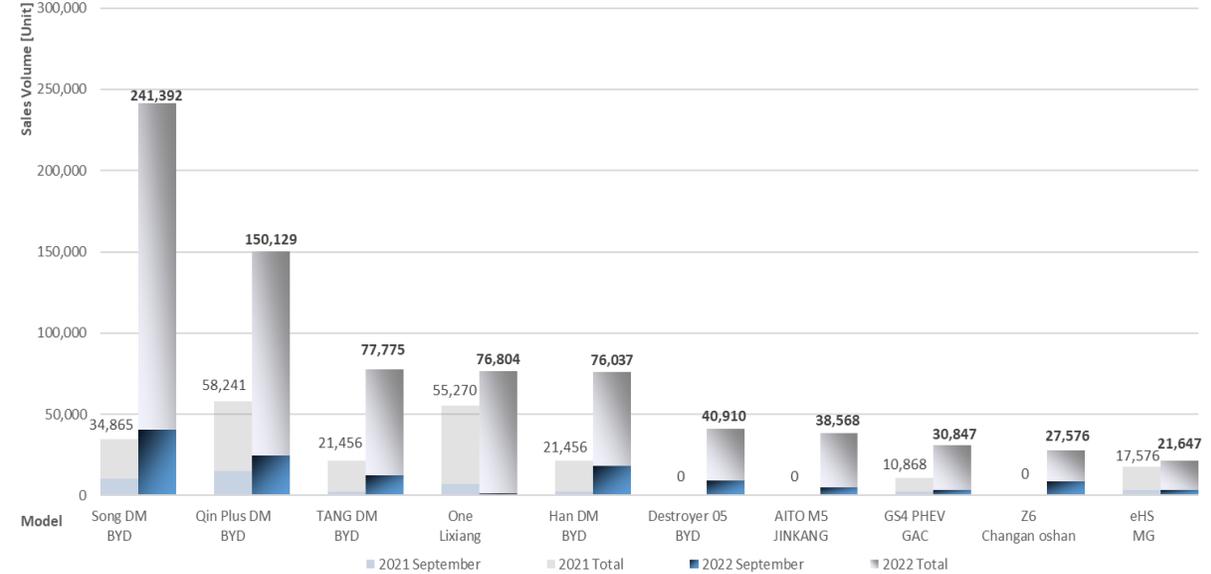
169.14% ↑

PHEV sales have grown rapidly since April, with a year-on-year increase of **169.14%** in the third quarter, and the rapid growth of BYD sales has played an important role in PHEV's overall sales

Jan. ~ Dec. 2022 PHEV Sales Data



Jan. ~ Sept. 2022 PHEV Sales TOP 10



Subjective Summary

- ❑ Different from the sluggish sales of China's auto market in the first two quarters, relying on the recovery of the national economy and the continuous investment in favorable auto sales policies, the domestic auto market has recovered rapidly, the monthly sales in the third quarter have maintained a steady increase, and the overall sales volume has also exceeded the same period last year.
- ❑ In the past third quarter, Chinese auto sales showed rapid growth and the industry rebounded steadily. **1.92 million** PV were sold in September, up **21.58%** year-on-year and **2.8%** month-on-month. With three months of continuous growth, the third quarter was the best quarter for sales so far. In the third quarter, Chinese PV sales total **14.87 million** units, up **2.98%** year-on-year.
- ❑ In September, the new energy passenger vehicle market hit a record high, BYD's BEV and PHEV strategy is leading among new energy independent brands. The traditional vehicle companies like Chery and GAC in the field of new energy performance is quite outstanding. Fuel and new energy new vehicle ratio reflects the NEV gradually become the mainstream of the market.

News & Policy



News (2022 Sept. ~ 2022 Oct.)

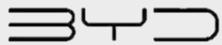


In September, ZF's 800V E-Axle products were officially launched in Hangzhou. The project is led and developed by ZF's local team in Shanghai of the Electric Drive Technology Division, which not only has many years of mass production experience in plug-in hybrid and pure electric drive systems and components, but also has a leading position in 800-volt electric drive technology.



LEAPMOTOR

The future product plan of Leapmotor will be developed on its A, C and D platforms, and seven new pure electric models will be launched one after another from 2023 until the end of 2025, covering sedans, SUVs and MPVs of various sizes. As for the drivetrain, Leapmotor also plans to launch a number of new models based on the self-researched program-extended technology.



BYD held a brand launch in India to announce its official entry into the Indian passenger car market and unveiled its first premium pure electric SUV. The Yuan PLUS is the first sporty pure electric SUV and the first model equipped with the e platform 3.0 in the Indian automotive industry. by 2023, BYD plans to sell 15,000 units Yuan PLUS in India and plans to establish a new production base.



Germany registered 224,816 units new PV in September, up 14.14% year-on-year, the highest increase in the previous months. The cumulative sales volume till September were 1.86 million units, with sales picking up from August to September, but still down 7.42% compared to last year. The sales volume of NEV in Germany was 72,725 units in September accounting for 32.3% of the vehicle market. Among them, 44,389 units of BEVs, up 31.9% year-on-year, and 28,336 units of PHEV, up 24% year-on-year, accounting for 19.7% and 12.6% respectively.

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