

# Market Study: Hybrid & Electric Cars - Europe



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# This brochure provides further information on the study “Hybrid & Electric Cars (PHEV & BEV) - Europe”

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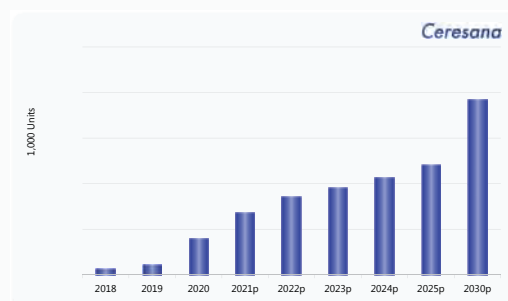
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#### 2.1.7 Germany

##### 2.1.7.1 New Registrations and Stock

New registrations of PHEV and BEV in Germany amounted to about XXX in 2020. We expect an increase of X% p.a. and a volume of approx. XXX in 2030. BEV are forecast to develop most dynamically during the next ten years with annual growth of X%. Detailed information about the market development of the individual types of drive can be found in the respective tables.



Graph: New Registrations of PHEV and BEV in Germany from 2018 to 2030

in 1,000 Units	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
BEV	X	X	X	X	X	X	X	X	X	X% p.a.
PHEV	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: New Registrations of passenger cars in Germany from 2018 to 2030 – split by fuel type

# Market Study: "Hybrid & Electric Cars (PHEV & BEV) - Europe"

20 Countries, 90 Pages, 29 Graphs, 56 Tables, 03/2021

## Summary

Ceresanas expects new registrations of electrically powered vehicles (PHEV & BEV) across Europe to increase to over 8.7 million p.a. by 2030. For BEVs, this means an average increase of 25% per year, while PHEVs are expected to grow by 11.7%. With increases of around 33.8% for BEVs and 29.2% for PHEVs, the Eastern European countries will achieve the highest growth rates - albeit starting from a comparatively low level. Other drive technologies, i.e. primarily cars with conventional internal combustion engines, are expected to decline by a total of 3.4% p.a. across Europe. According to Ceresana's prediction, there will be nearly 34 million BEVs and 13.8 million PHEVs on European roads in 2030. In Western Europe, this will increase the share of electric cars in the total passenger car stock from around 1% in 2020 to an expected 20% in 2030.

Ceresana's latest study looks at changes in innovation and market cycles, technology and efficiency improvements in powertrains, as well as the specific situation in different countries: societal and economic trends such as income development, mileage, demographic change, and urbanization differ greatly across Europe.

The study in brief:

**Chapter 1** provides an overview of the European market for passenger cars, including forecasts up to the year 2030. Clear tables and figures provide data on new registrations, stock, and production of passenger cars. In addition to the overall market, the figures for BEV, PHEV, and other passenger cars (aggregate of all other drive technologies) are also presented individually.

**Chapter 2** examines the automotive markets of the various European countries in depth. The development of total passenger car sales is examined first, followed by individual new registrations of PHEVs and BEVs. The study analyzes 19 EU and EFTA member states as well as the United Kingdom in detail.

in 1,000 Units	2.018	2.019	2.020	2.021p	2.022p	2.023p	2.024p	2.025p	2.030p	2020-2030
BEV	X	X	X	X	X	X	X	X	X	X% p.a.
PHEV	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: Stock of passenger cars in Germany from 2018 to 2030 – split by fuel type

In order to comply with the Paris Climate Protection Agreement and meet the EU's targets, the German government has formulated principles in its "Climate Protection Plan 2050" and set targets in its "Climate Protection Program 2030" in 2019: The transportation sector is to reduce its CO2 emissions by 40 to 42% by 2030 in comparison with 1990. These plans are supported by numerous funding measures at federal, state, and municipal level, the most important of which are listed below. At present, there are no concrete plans in Germany to ban the registration of cars with internal combustion engines.

The German government passed the "Charging Infrastructure Master Plan" in November 2019. In addition to subsidies, its key points are the improvement of the legal framework and active coordination between the federal government, the states, local authorities, and industry. Among other things, the technology for payments is to be standardized (eRoaming and calibration law). The activities are coordinated on behalf of the Federal Ministry of Transport by the National Charging Infrastructure Control Center, which is also developing a learning platform to train municipal employees as "electric mobility managers for charging infrastructure".

#### Laws and Regulations:

Climate Protection Act: The EU targets for the transportation sector in Germany require a reduction of greenhouse gas emissions by 38% to a maximum of 95 to 98 million tonnes of CO2 by 2030 in comparison to 2005. Annual reduction targets have been set.

Privileges for electrically powered vehicles in road traffic: The Electromobility Act (E-moG) of 2015 enables municipalities to introduce privileges for BEVs, PHEVs, and fuel cell vehicles, for example in terms of parking spaces and parking fees or through exemptions from access restrictions (special lanes).

Tax Benefits: In November 2019, the Federal Council finalized the Act on the Further Tax Promotion of Electromobility and Other Tax Regulations (JStG 2019). It contains amendments to a wide range of taxes and adjustments to EU law (for specific regulations, see chapter "Taxes").

#### 2.1.7.2 Production

The production of PHEV and BEV in Germany amounted to about XXX in 2020. This value is forecast to increase by X% p.a. to about XXX in 2030. While PHEV will achieve annual growth of X%, the production of BEV will increase by X% until 2030.

in 1,000 Units	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
BEV	X	X	X	X	X	X	X	X	X	X% p.a.
PHEV	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: Production of passenger cars in Germany from 2018 to 2030 – split by fuel type

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