

Europe the new safe haven for EVs as they prevail in volatile market

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- 17% of new passenger car registrations in Europe were electrified in April
- European car registrations tumble to their lowest monthly level since the 1970's
- EVs prevail in a volatile market
- Best performers for April 2020 include BMW X3, Tesla Model 3 and Renault Zoe

As expected, new car registrations in Europe faced a steady decline in April. Volume fell from 1.34 million units in April 2019 to 292,600 vehicles in April 2020. This represents the lowest monthly level since the 1970's, and the worst result among the big three markets – China, USA-Canada, and Europe. Europe's sharp decrease was only outperformed by India (-100%). Year-to-date volume for India was also the lowest result recorded since JATO started to track registration data in 1980.

Felipe Munoz, global analyst at JATO Dynamics commented: "Lockdown across the globe contributed significantly to the huge drop in registrations. Not a single OEM was prepared for this scenario or expecting a crisis on such a large scale. The only silver-lining from this turbulence is that it has created an opportunity for automotive players to reassess their operations and become more agile." As quarantine was not enforced across all countries, registrations fell at different times and different levels. For instance, in Scandinavia, citizens were granted more freedom of movement, thus registrations fell by 37%, the lowest decrease. In contrast, four of the top five markets saw significant declines following strict lockdown restrictions. Combined registrations in Italy, the UK, Spain and France tumbled from 646,000 units in April 2019 to 34,000 one year later.

Percentage decrease

78%

less vehicles sold in April 2020 compared to April 2019

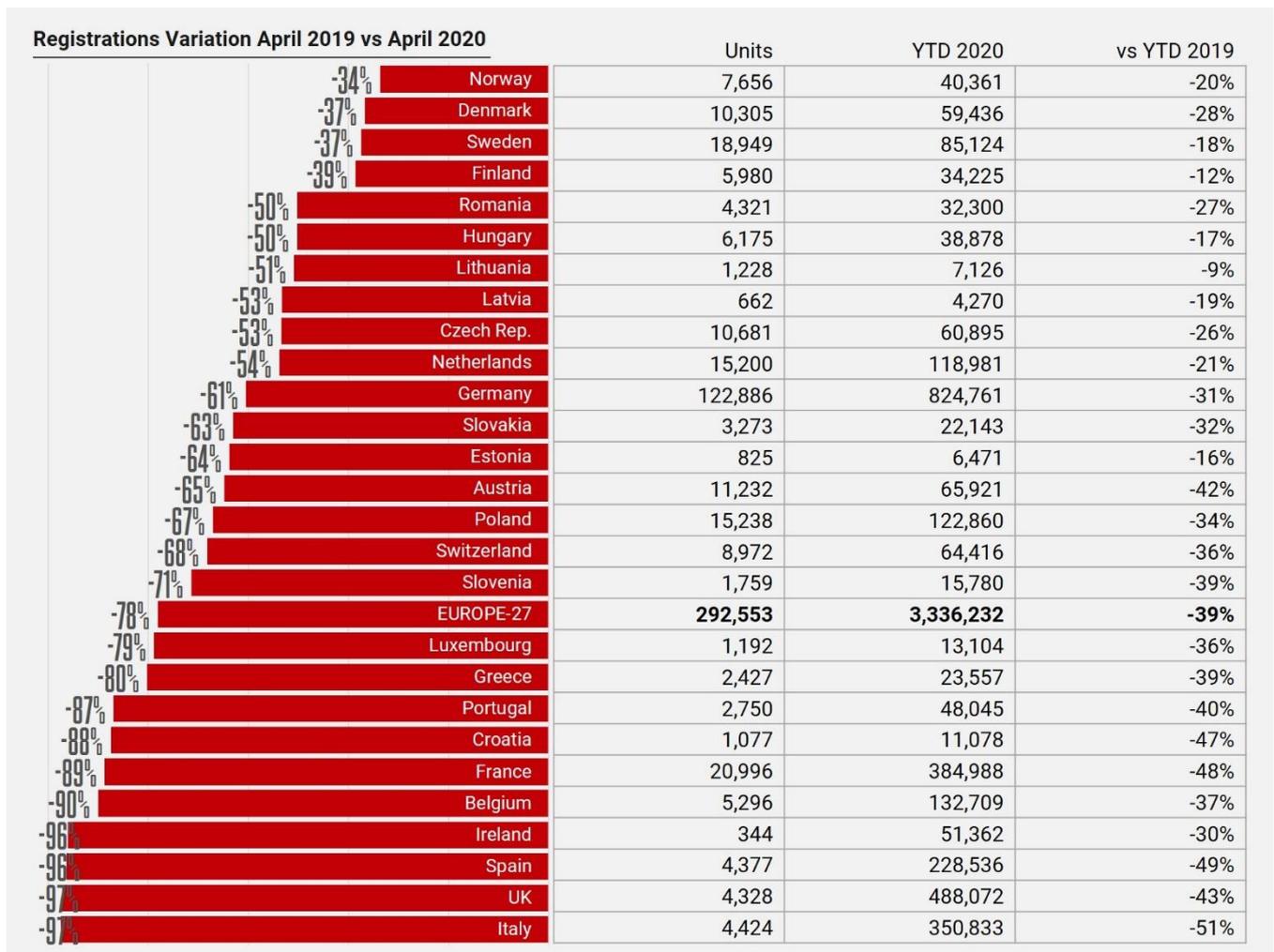
Million units April

0.29 - 2020

1.34 - 2019

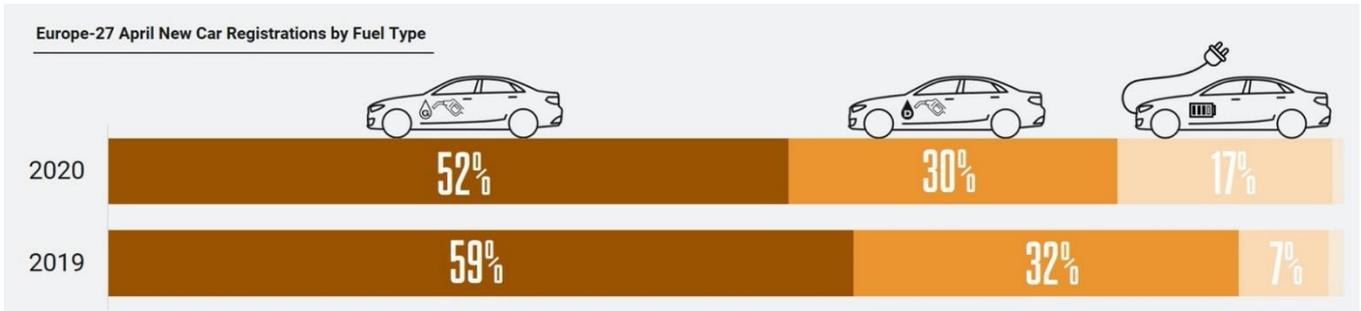
EVs: the new safe haven

However, not every aspect of the automotive industry saw a downturn in April. Despite the all-encompassing lockdown that took hold in Q1 and the negative economic indicators, electrified vehicles continued to gain traction. Their registrations totalled 50,400 units, making up 17% of total market share. Demand fell by 46% compared to April 2019 but it was mostly due to the hybrid cars, which saw a decline of 66% to 18,900 units. Pure electric cars registered a decrease of 29% to 16,700 vehicles, while Plug-in hybrids saw almost 14,000 new clients, up by 7%.



Munoz explained: "EVs were already driving part of the small growth that remained in 2019. This year, as governments have acted quickly to protect their people and economies, EVs have gained even more traction and visibility due to incentives." Munoz continued: "These cars are likely to become the top choice for consumers seeking private transportation. OEMs who have invested heavily in EVs, are best placed to navigate the tough months ahead."

Registrations of Volkswagen’s, Volvo’s, Audi’s and Ford’s EVs posted double-digit growth. They were able to gain traction arising from the Volkswagen Passat PHEV (981 units), Up BEV (678 units), Volvo V60 PHEV (897), XC40 PHEV (339 units); Audi E-Tron (1,289 units), A3 PHEV (465); and Ford Puma HEV (1,170 units), Kuga PHEV (753). Other key models such as the Tesla Model 3, Renault Zoe and Nissan Leaf registered declines of 37%, 47% and 56% respectively.



SUVs registrations in line with overall market performance

Registrations of SUV in April totalled 109,500 units, 78% less than April 2019. Their market share remained stable at approximately 37%. Volume fell mostly due to the B-SUV and C-SUV subsegments – as they are very popular in France, Italy and Spain, the models were badly hit given these were three of the most affected markets. In contrast, the bigger and more expensive SUVs posted more moderate declines. SUVs lost market share in the UK from 43% in April 2019, down to 37% in April 2020. Spain also saw a decrease, down from 45% in April 2019 to 41% in April 2020. Contrary to this, SUVs gained notable traction in Greece, with their market share rising to 47% in April 2020, compared to just 28% in April 2019. Similarly, in Ireland their market share increased to 62% in April 2020 from 47% in April 2019.

Only 13 models posted growth

The global pandemic impacted the sales performance of 419 (out of 433) models that were available in both April 2019 and April 2020. Only 13 models saw an increase in registrations, among which were the Mercedes EQC (42 units to 409), Porsche Cayenne Coupe (68 to 210), Skoda Scala (713 to 1,673), BMW X7 (202 to 341), Audi E-Tron (963 to 1,307), Mercedes GLE (1,047 to 1,272), BMW X6 (405 to 471), and Mercedes GLS (174 to 195).

Top 10 Best-Selling cars Europe-27 April 2020

* Europe-23

Overall Ranking	Hybrid*	Plug-in Hybrid*	Electric*
1 Volkswagen Golf 7,810	Toyota Corolla 3,146	Volkswagen Passat 981	Tesla Model 3 2,278
2 Skoda Octavia 6,529	Toyota C-HR 2,178	Mitsubishi Outlander 920	Renault Zoe 2,112
3 Renault Clio 6,370	Toyota RAV4 1,728	Volvo V60 897	Volkswagen Golf 1,634
4 Ford Focus 4,971	Toyota Yaris 1,565	BMW X3 828	Audi E-Tron 1,289
5 Opel/Vauxhall Corsa 4,198	Ford Puma 1,170	Ford Kuga 753	Hyundai Kona 926
6 Peugeot 208 4,141	Volvo XC60 790	BMW X5 680	Nissan Leaf 906
7 Volkswagen Tiguan 4,111	Suzuki Ignis 528	Skoda Superb 580	Kia Niro 802
8 Toyota Corolla 4,006	Kia Niro 518	Kia Niro 482	BMW i3 765
9 Volkswagen Passat 3,968	Suzuki Swift 480	Mercedes C-Class 473	Volkswagen Up 678
10 Volkswagen T-Roc 3,840	BMW 3-Series 429	Audi A3 465	Mini Hatch 576



Among the top-selling models, were the Volkswagen Passat, BMW X3 (the top-selling premium car), and Volvo S60/V60 in 24th position. Top market share was awarded to the Skoda Kamiq, BMW X3, Skoda Octavia, Ford Puma and Mercedes GLC. In contrast, the Fiat Panda, Nissan Qashqai, Volkswagen Polo, Opel Mokka and Peugeot 3008 recorded the largest declines in market share.

Europe-27 April 2020 Registrations by Segment

City-car



Subcompact



Compact



Midsize



Executive



Luxury



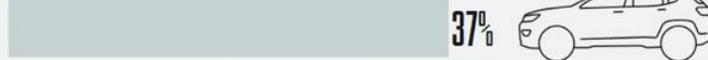
MPV



Sport



SUV



Van



Top 3 Units vs Apr-19

Top 3	Units	vs Apr-19
Fiat 500	2,111	-86%
Toyota Aygo	1,869	-76%
Volkswagen Up	1,543	-77%
Renault Clio	6,370	-79%
Opel/Vauxhall Corsa	4,198	-75%
Peugeot 208	4,141	-79%
Volkswagen Golf	7,810	-78%
Skoda Octavia	6,529	-67%
Ford Focus	4,971	-76%
Volkswagen Passat	3,968	-66%
BMW 3-Series	3,565	-64%
Volvo S60/V60	2,855	-54%
Audi A6	2,113	-65%
BMW 5-Series	2,104	-72%
Mercedes E-Class	1,476	-85%
Mercedes S-Class	406	-52%
BMW 7-Series	226	-78%
Mercedes AMG GT 5d	181	-48%
Volkswagen Touran	1,806	-74%
Volkswagen Golf Sportsvan	1,125	-74%
BMW 2-Series Tourer	938	-81%
Porsche 911	679	-55%
BMW Z4	368	-73%
Porsche 718	298	-61%
Volkswagen Tiguan	4,111	-78%
Volkswagen T-Roc	3,840	-78%
BMW X3	3,644	-41%
Fiat Ducato	2,889	-55%
Volkswagen Caddy	2,232	-59%
Dacia Dokker	1,367	-65%

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About JATO

JATO Dynamics, founded in 1984, now has representation in over 51 countries around the world. We provide precision under pressure, providing the world's most timely, accurate and up-to-date automotive information on vehicle specifications, pricing, sales and registrations for over 30 years. We offer more than just data, as we've watched the world change, and consumer mindsets alter with it we have been able to offer insights that help inform the industry. We're able to react to short-term market movements, plan for long-term developments and ultimately to meet the needs of our clients. Visit JATO at www.jato.com for more information.