Global xEV Sales Tracker

Full Year 2018

17 February 2019
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Executive Summary - Sample Slides

China represents more than 60% of BEV sales globally while Japan is all about HEVs with 45% of global sales. Only 4k FCEVs were sold in 2018 with a majority – 62% - in the US.

EV sales are up 67% in 2018 with 2 million EVs sold (58% BEVs) and an additional 800k units sold compared to 2017 mostly in China (63%) and the US (20%).

Countries
- **China** - 1.1mn EVs (4.5% penetration) - up 83% - 75% BEV – B/EV EC18D/200 = most sold EV
- **U.S.A.** - 361k EVs (2.1% penetration) - up 75% - 65% PHEVs
- **Europe** - 388k EVs (2.5% penetration) - up 40% - 31% BEV
- **Norway** - 73k EVs (49% penetration) - up 17% - 63% PHEV
- **Germany** - 68k EVs (1.9% penetration) - up 24% - 51% BEV
- **UK** - 50k EVs (2.5% penetration) - up 25% - 71% PHEV
- **Japan** - 53k EVs (1.2% penetration) - down 5% - 51% PHEV
- **France** - 46k EVs (2.1% penetration) - up 23% - 70% PHEV

OEMs
- **Tesla** sold almost 250k EVs in 2018 to win the OEM sales crown.
- **BMW Group** is the 4th EV OEM globally behind Tesla, Nissan, and Mitsubishi.

Models
- **Tesla Model 3** won the 2018 EV crown with almost 170k sales.
- **Nissan Leaf** was the major contributor to the Alliance.

HEVs
- In 2019, it is very likely that more EVs will be sold globally than HEVs.
- 53k HEV MHEV were sold in 2018 with the majority in Japan.

Norway was stable at 58% PV share while the Netherlands was exceptionally high at 31% before the incentive reduction. More EVs than HEVs were sold in the UK, China, EU, US and Canada.
More than 2 million EVs were sold in 2018 growing 67% compared to 2017 and representing 2.5% of PV sales with an additional 800k units sold mostly in China (63%) and the USA (20%).

December was the highest EV month ever with more than 4% of PV sales while HEVs were down below the 3% threshold. In 2019, it is very likely that EVs outpace HEVs.

EV penetration was over 8% in China in December. Except Norway with 58%, Netherlands with 31% and Sweden with 12%, all other countries are between 1% and 4% EV penetration.
BEV share increased in December to a record 77% driven by China where more than 80% of the 190k EV sold were BEVs.

Tesla Model 3 won the 2018 EV crown with almost 150k EV sold while Tesla also won the OEM crown with almost 250k EV sold. BYD will challenge Tesla in 2019 for the pole position.

With 40k EVs sold, Tesla was once again in the lead as any end-of-quarter. BYD follows very closely and is likely to take the lead in 2019.
Chinese EV market continues its fast pace development with 83% growth and more than 1 million EVs sold in 2018 which is almost as many EVs sold as in 2017 globally.

Electric Vehicles Sales
- China, 2010 to 2018 -

EV penetration reached a new record high in December with as high as 8% of PV sales. HEVs and PHEVs are slowly but surely increasing while BEVs are now over 6.5% of PV sales.

Monthly x-EV Penetration
- China, January 2016 to December 2018 -

More than 150k BEVs were sold in December while PHEVs also reached a new record high at 34k units. BEVs continue to represent the vast majority of EV sales in China with 82% of EV sales.

Electric Vehicles Sales by Type
- China, January 2018 to December 2018 -

BEV: 41%, 37%, 26%, 24%, 21%, 26%, 32%, 30%, 20%, 22%, 22%, 18%
PHEV: 59%, 63%, 74%, 70%, 78%, 72%, 60%, 70%, 74%, 78%, 78%, 82%
BJEV EC 180/200 kept its EV crown in 2018 in front of 2 BYD EVs. On the OEM side, BYD is by far leading the EV race while BAIC is in 2nd position followed by its Shanghai competitor SAIC.

**Top 10 Electric Vehicles sold - China 2018**

- **BJEV EC180/200 EV**: 60,630
- **BYD e6 300/450 EV**: 48,213
- **BYD Qin PHEV**: 42,048
- **Chery eQ EV**: 39,734
- **JAC iEV6E EV**: 39,731
- **BYD Song PHEV**: 39,918
- **BJEV EU-Series EV**: 37,343
- **BYD Tang PHEV**: 37,148
- **BYD Yuan EV**: 35,889
- **SAIC Roewe i6 PHEV**: 33,347

**Top 10 Electric Vehicles Brands - China, 2018**

BJEV EU-Series took the lead in December in front of the 2017 & 2018 champion the BJEV EC180/200. BJEV EX-Series also performed well in December while BYD also had 3 EVs in Top 6.

**Electric Vehicles Sales by Model - Top 10 Models, July 2018 to December 2018**

BYD consolidated its lead in December with almost 40k EVs sold in China in front of BYD. SAIC could be challenged for the 3rd position in 2019 by JMC, JAC or FAW.

**Electric Vehicles Sales by OEM - Top 10 OEM Groups, July 2018 to December 2018**
About EV-volumes.com

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Our consultancy services combine the facts and figures of EV-volumes.com with our expertise in other areas of the automotive sector. We support planning activities with market studies, policy monitoring, detailed forecasts, reports and insights.

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