European New Energy Vehicle Industry Report, 2017-2021

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

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Abstract

After a really close race for the “Best Seller” title, with the deliveries delay of the 40 kWh Renault Zoe units artificially dragging down the Zoe performance, with 21,735 units registered in 2016 (422 of them being 2-seater LCVs -- aka, vans). The Outlander PHEV, despite seeing its sales drop 32% compared to 2015, still managed to give chills to Renault and leave the “Best Seller” title decision to the last week of December, when the Zoe deliveries really took off.

Nissan LEAF ended 2016 in 3rd, with 18,827 registrations, up 21% YoY, being effectively its best year in Europe since it arrived in 2011 -- all thanks to the 30 kWh battery in the first half of the year and heavy discounting later.

A hot item on the EV market today is the luxury SUV class. The Volvo XC90 T8 won this category, with almost 10,000 units, three times more sales than the 2015 winner had back then (Porsche Cayenne PHEV, 3,385 units). Interestingly, this year, four luxury SUVs (Volvo XC90, BMW X5, Audi Q7, and Tesla Model X) sold more than last year’s winner.

In the manufacturer ranking, BMW won its first manufacturer title, with 17% market share, leaving last year’s winner, Volkswagen, in 2nd place (15%), and Renault in 3rd, with 13% share. Nissan and Mitsubishi followed, both at 10%.

In 2015, BMW was only 6th, with 8% share. The reasons for this turnaround lie in BMW’s ever-expanding i-Performance PHEV lineup pumping out sales at full speed and the new 33 kWh version of the i3, which pulled sales of the RWD hatchback to record heights.

At present, Renault-Nissan Alliance takes the leading position in European electric vehicle market, but European automakers like Volkswagen, BMW and Daimler also spare no efforts to advance their electrification strategies.

Daimler vows to make investments of EUR10 billion in EV field in the next five to seven years; Mercedes-Benz will launch over 10 EV models by 2025, and then EV will occupy 15%-25% of its total sales.

In current stage, BMW has two EV segments: i series (i3 and i8) and iPerformance (PHEV models). BMW will devote itself to iNext strategy in the next decade.

Volkswagen will unveil 17 new energy models before 2020, and introduce its MEB (Modular Electrification Toolkit) pure electric platform to complete EV strategic layout. 13 of the 17 models will be developed based on the existing MQB and MLB platforms, and the other 4 models will be I.D. series BEVs, employing MEB platform. Volkswagen will reconstruct several plants in Germany and build EV production lines to make MEB-based EVs.

Given the global trend towards accelerating CO2 emission reduction, fuel efficiency standards will be further tightened. Stronger policy to push the expansion of EVs may be put into place, but policy is not the only important factor. Technological advances are crucial as well. While lithium-ion battery prices3 are decreasing, energy density and thus driving range is increasing. In October 2016, a succession of EV models with a range of around 300 km debuted at the Paris Motor Show. In 2020 and beyond, models with a range of over 500 km may hit the road, due to greater battery performance. Lightweighting, or reducing vehicle body weight, is another key factor.

Norway will lead Europe in proliferating EVs, followed by the Netherlands, and large countries such as France, the UK, and Germany. Should the current incentives to promote the adoption of EVs remain unchanged, it will be post-2020 that EVs enter a period of expansion in the major markets. By then, the total cost of EV ownership is expected to further decrease. Technological advances such as improving battery performance and lightweighting materials would contribute to acceleration of EVs becoming popular throughout Europe.

The report highlights the following:
◆Output, sales and trade of passenger cars and commercial vehicles in Europe;
◆New energy vehicle development strategies, incentives and electrification in major European countries;
◆European new energy vehicle market (registration, sales of new energy passenger cars and commercial vehicles, charging infrastructure construction, etc.);
◆6 European new energy passenger car manufacturers (operation, electrification strategy, new energy layout in China, etc.);
◆18 European new energy bus manufacturers (main models, technical parameters of battery and electric drive systems, suppliers, etc.);
◆Medium- and long-term outlook for development of global and European new energy vehicle markets.

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Sales of Main EV Models in Europe, 2011-May 2017

		2011	2012	2013	2014	2015	2016	Jan.-May 2017
Renault	Zoe	0	68	8,833	11,029	18,566	21,735	12,957
Nissan	Leaf	1,740	5,383	10,894	14,691	15,346	18,827	9,404
BMW	i3	0	0	998	5,458	6,217	15,060	8,660
Tesla	Model S	0	0	3,975	9,550	16,643	12,549	5,191
Tesla	Model X	0	0	0	0	0	3,680	4,036
Volkswagen	e-Golf	0	48	0	2,931	11,170	6,657	2,417
Hyundai	Ioniq Electric	0	0	0	0	0	1,113	2,146
Kia	Soul EV	0	0	0	598	5,812	4,417	1,804
Mercedes	B250e	0	0	0	185	2,795	3,508	1,450
Volkswagen	e-Up!	0	0	940	5,838	2,976	2,557	1,162
	Others	8,601	12,280	7,090	6,980	8,197	7,331	2,513

Source: ResearchInChina

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