

第四期

2023年主流电动汽车市场情况追踪： 中国、欧洲、美国和印度

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系列报告 -- 主流电动汽车市场情况追踪：中国、欧洲、美国和印度

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BRIEFING
2023 INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION
JANUARY 2023

Electric vehicles market monitor for light-duty vehicles: China, Europe, United States, and India, 2020 and 2021

Prepared by Ilma Fadhill, Yidan Chu, and Lingshi Jin

This is ICCT's first Major Markets Electric Vehicle Monitor. It builds upon another ICCT publication that focuses solely on Europe, and the Major Markets series will analyze the electric vehicle (EV) market development and fleet carbon dioxide (CO₂) emissions trends of manufacturers of light-duty vehicles (LDVs) in China, Europe, the United States, and India.¹ In 2021, these four markets made up approximately 73% of global LDV sales.

This briefing covers 2020 and 2021 and we expect that each future edition will cover an additional 6 months of market activity. Relevant definitions and details about the data sources, methodology, and assumptions that underlie the analysis are in the appendices.

THE GLOBAL MARKET

Sales of EVs globally more than doubled from 3.2 million in 2020 to 6.7 million in 2021 and EVs were 8.5% of the approximately 76 million new LDVs sold worldwide in 2021. Continued policy support for EVs and growing market interest in electrification spurred this sales growth despite the ongoing global economic disruption due to COVID-19 and supply chain problems.

In **Europe**, EVs were 17% of all new LDVs sold in 2021. This was the highest EV market share in the world and a 70% increase from Europe's EV share in 2020. **China** followed with a 13.5% EV market share in 2021. EV market shares in the **United States** and

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¹ The latest in our Europe-focused series is Peter Mock et al., "Market Monitor - European Passenger Car and Light Commercial Vehicle Registrations: January-September 2022," ICCT, Berlin, Germany, 2022; <https://theicct.org/publications/market-monitor-europe-2022/>.

Acknowledgments: Thanks to Atlas Public Policy for providing and processing the U.S. data. We also thank Drew Kodicek, Stephanie Searle, Peter Mock, Zhen Yang, Uwe Tietjen, Yuxian Zhang, Abhishek Arora, Sen, Ash Miller, and Chang Shen for helpful reviews.



BRIEFING
2023 INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION
JUNE 2023

Electric vehicles market monitor for light-duty vehicles: China, Europe, United States, and India, 2022

Prepared by Ilma Fadhill and Chang Shen

This is ICCT's second Major Markets Electric Vehicle Monitor.¹ It analyzes the electric vehicle (EV) market development and fleet carbon dioxide (CO₂) emissions trends of manufacturers of light-duty vehicles (LDVs) in China, Europe, the United States, and India in 2022. These four markets made up approximately 66% of global LDV sales in 2022. Relevant definitions and details about the data sources, methodology, and assumptions that underlie the analysis are in the appendices.

THE GLOBAL MARKET

Global sales of light-duty EVs reached approximately 10.4 million in 2022, and EVs were nearly 13% of the approximately 82 million new light-duty vehicles (LDVs) sold worldwide. About 76% of global EV sales were in the four largest markets: China, the United States, Europe, and India.

In 2022, **China** was the world's largest EV market, both in terms of EV share of new sales and absolute sales of EVs. It sold approximately 4.6 million EVs, about 24% of all new LDVs sold in the country and nearly double the 13.5% EV share in 2021. In **Europe**, EVs were 21% of all new LDVs sold in 2022, an increase over the 17% EV share in 2021. The **United States**' EV share remained in the single digits, 2.3% in 2022, but that was an increase over the 4.8% share in 2021. **India's** share increased slightly in 2022, to 1.2%, and it still significantly lagged the other major markets in terms of both absolute number of EVs sold and EV market share.

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¹ The first was published earlier this year and covered 2020 and 2021. Ilma Fadhill et al., "Electric Vehicle Market Monitor for Light-Duty Vehicles: China, Europe, United States, and India, 2020 and 2021," ICCT, Washington, D.C., 2022; <https://theicct.org/publications/electric-vehicle-market-monitor-2022/>.

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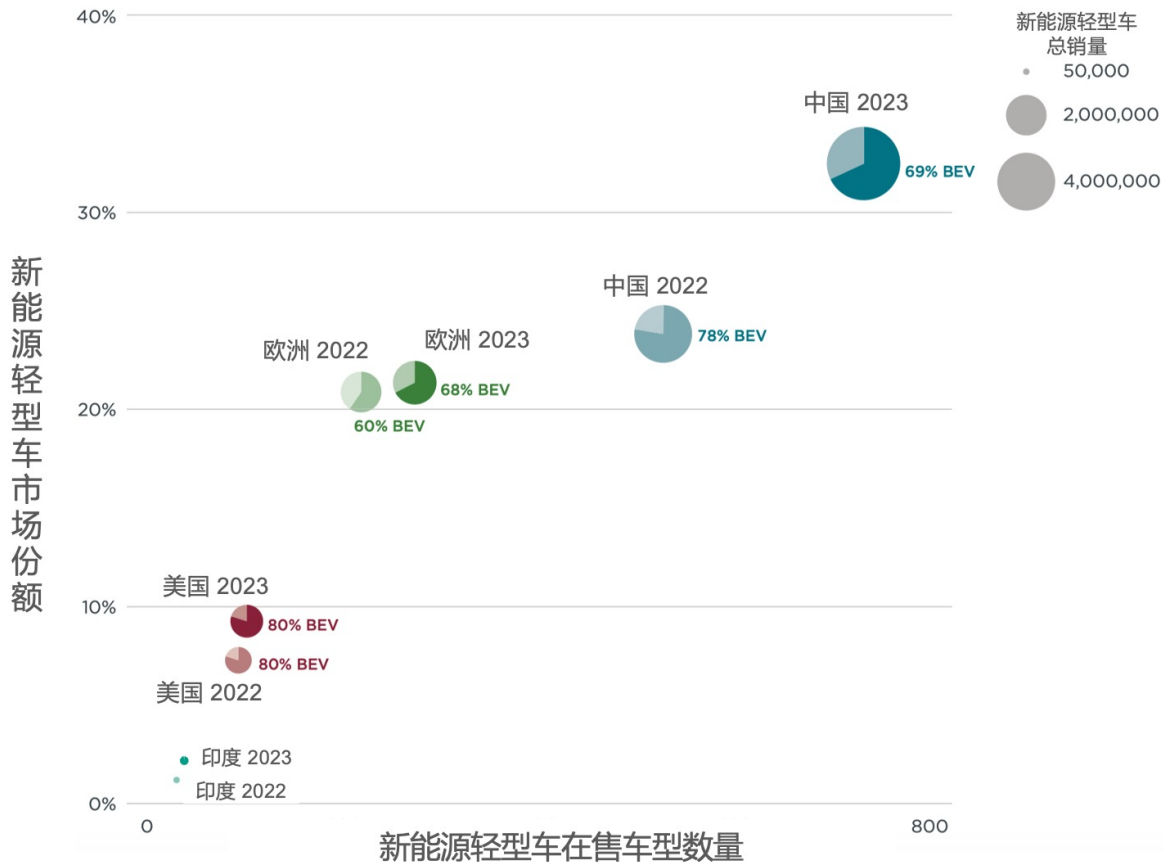
2023四大市场概况

中国、欧洲、美国和印度

四大市场新能源轻型车市场份额和在售车型数量

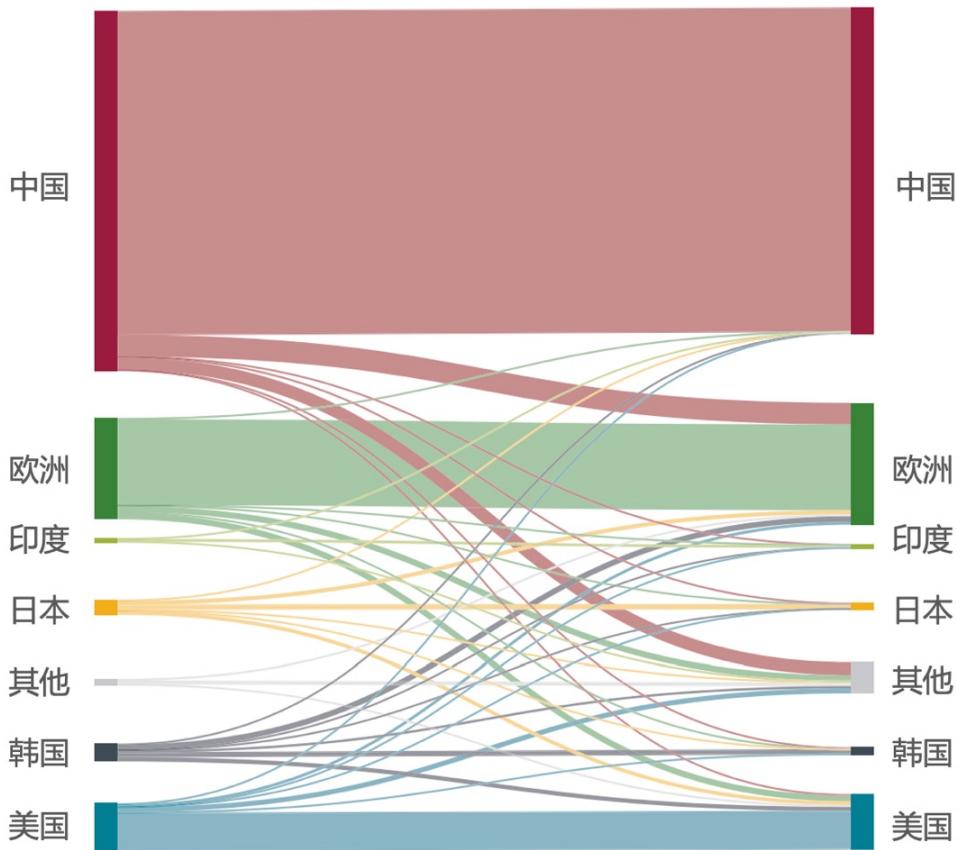
四大主流市场均在电动化转型中有所进步，但在市场发展程度和增长速度方面有所差距。

- 中国：保持领先
- 欧洲：停滞
- 美国和印度：有所进步，仍需努力

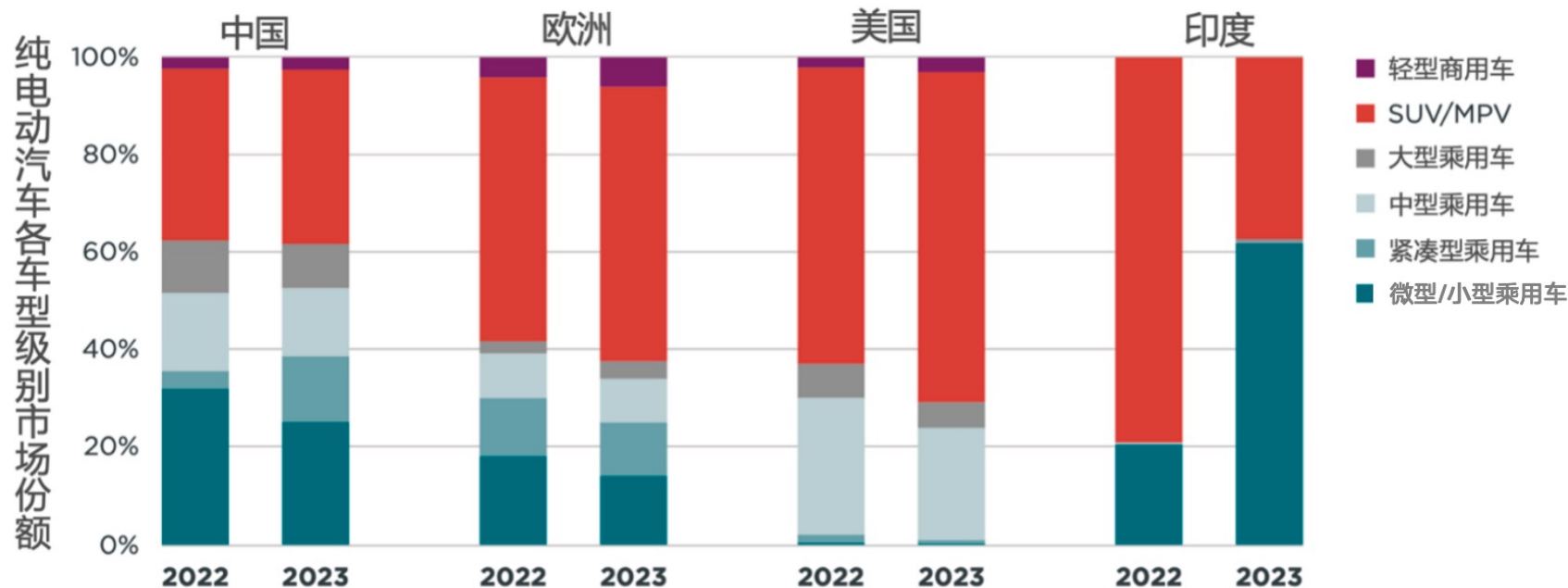


全球新能源轻型车市场的生产和销售流向

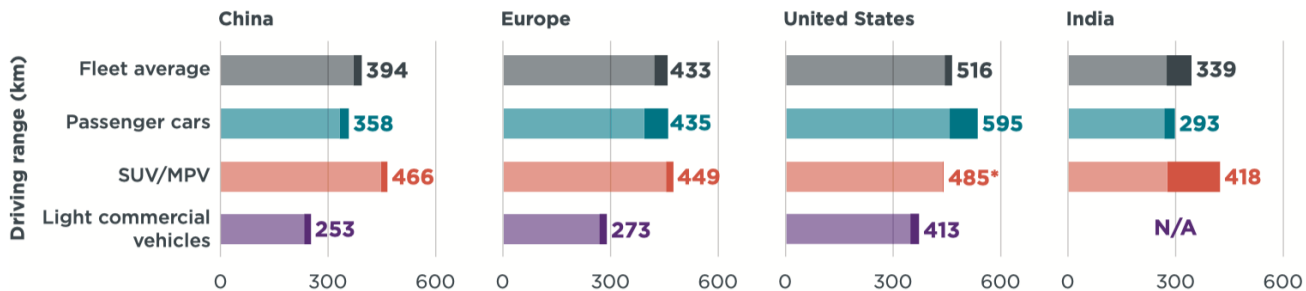
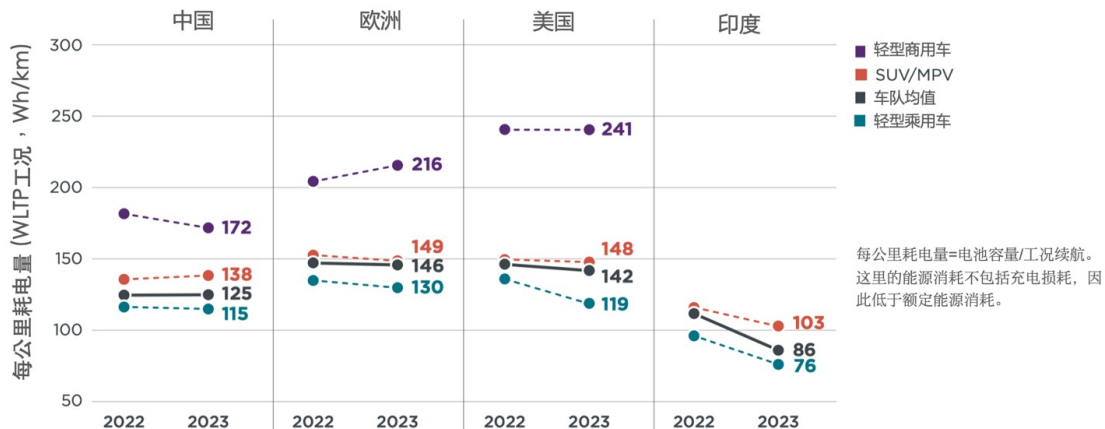
主流市场的大部分新能源车自产自销



四大市场各车型级别纯电动汽车的市场份额



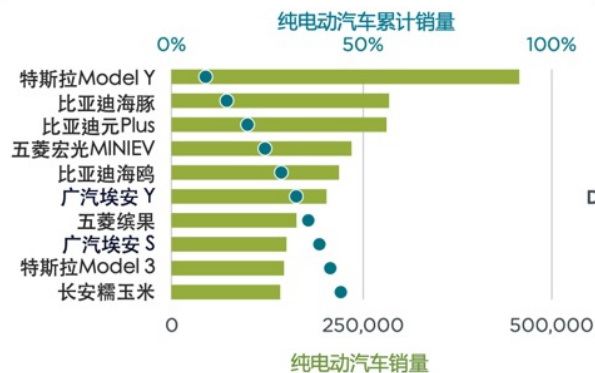
四大市场关键性能参数



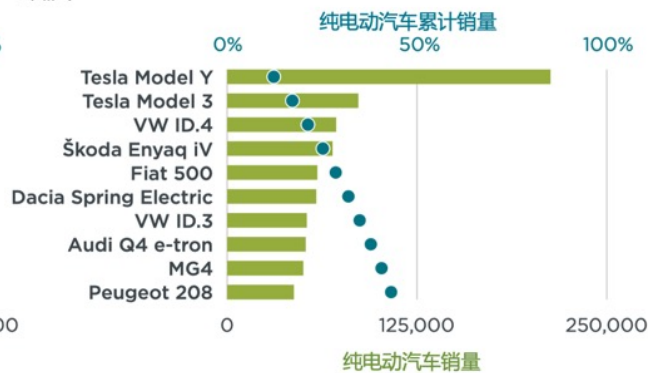
四大市场纯电动汽车前十畅销车型

- 各国的前十畅销车型大多是本土车型
- 中国和欧洲的纯电动车市场的更加多样化

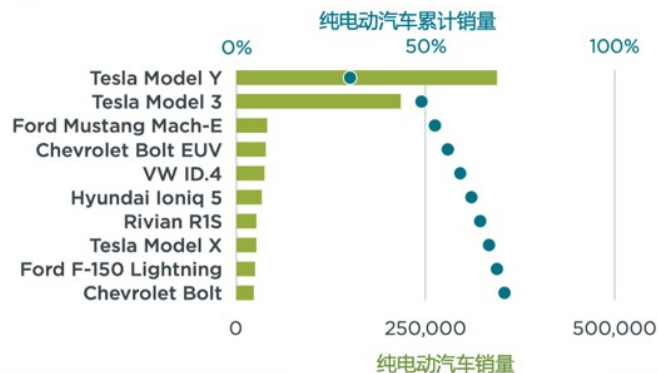
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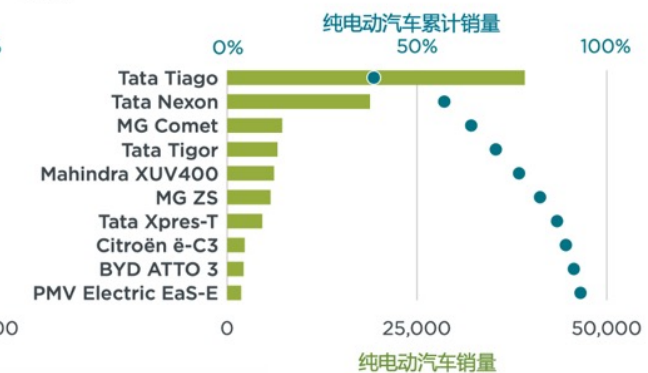
欧洲



美国

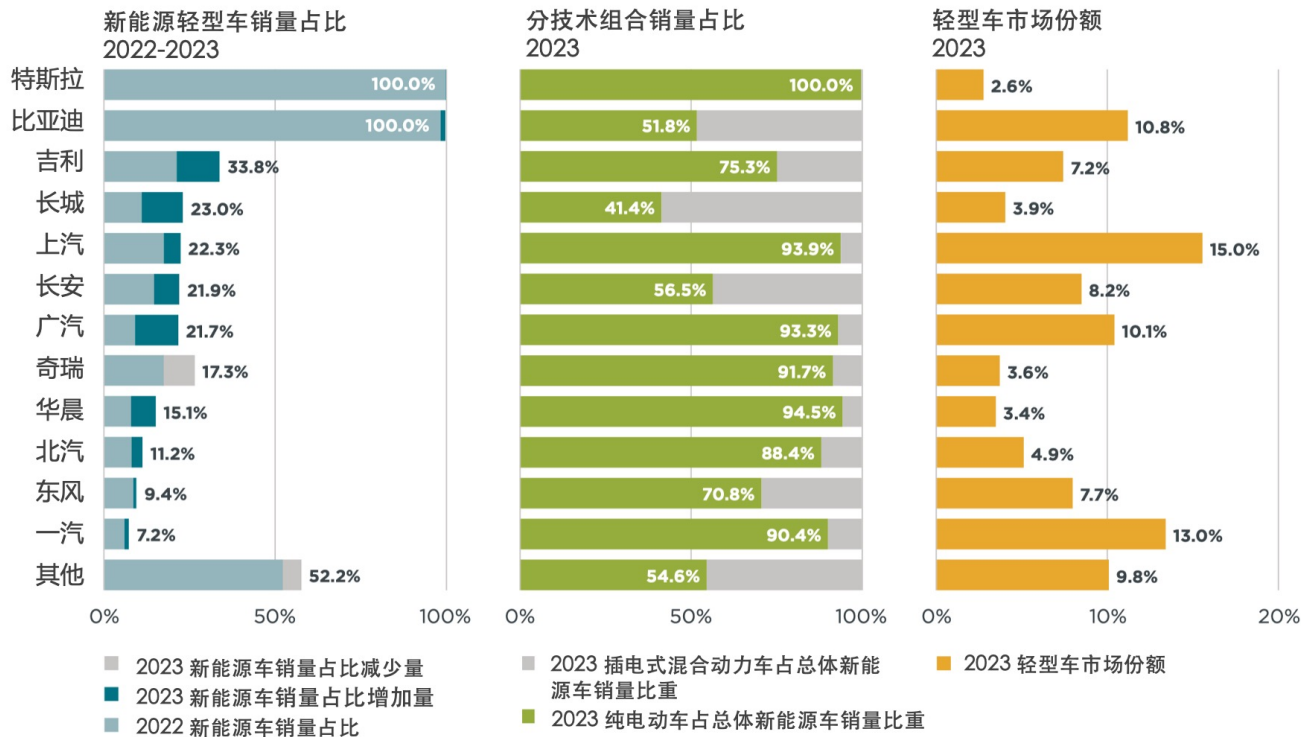


印度

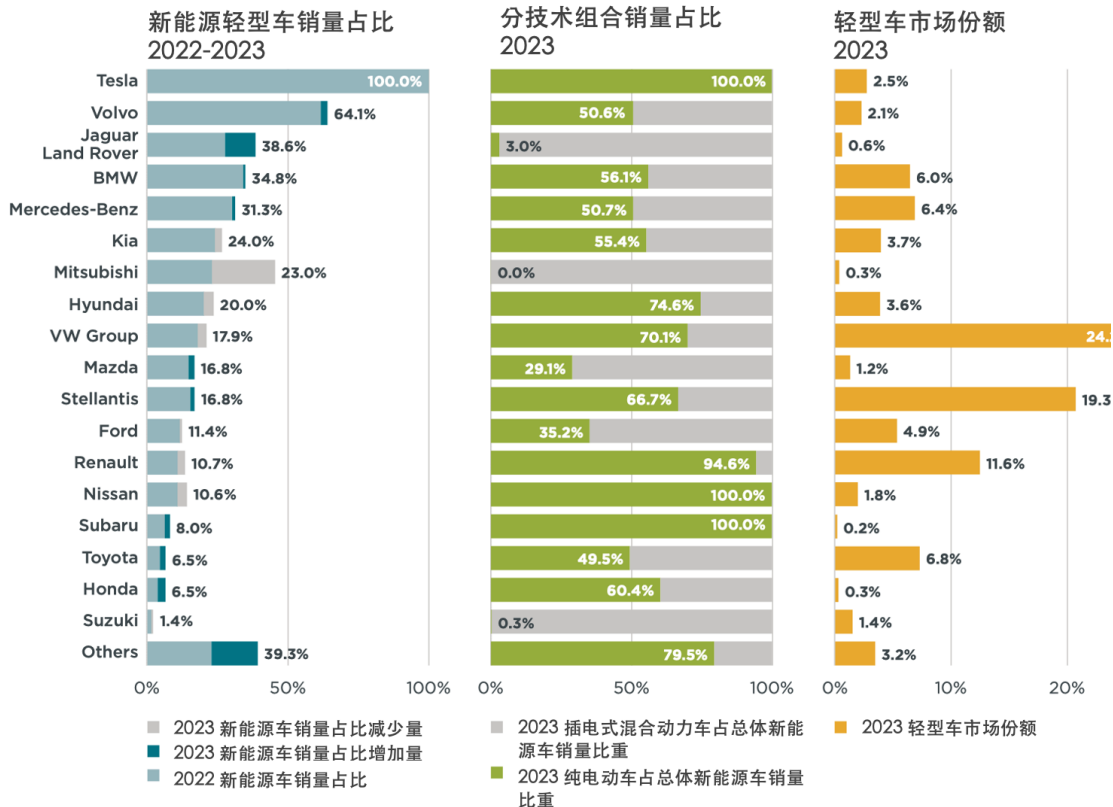


2023四大市场主要车企概况： 新能源轻型车销量占比、技术组合和市场份额

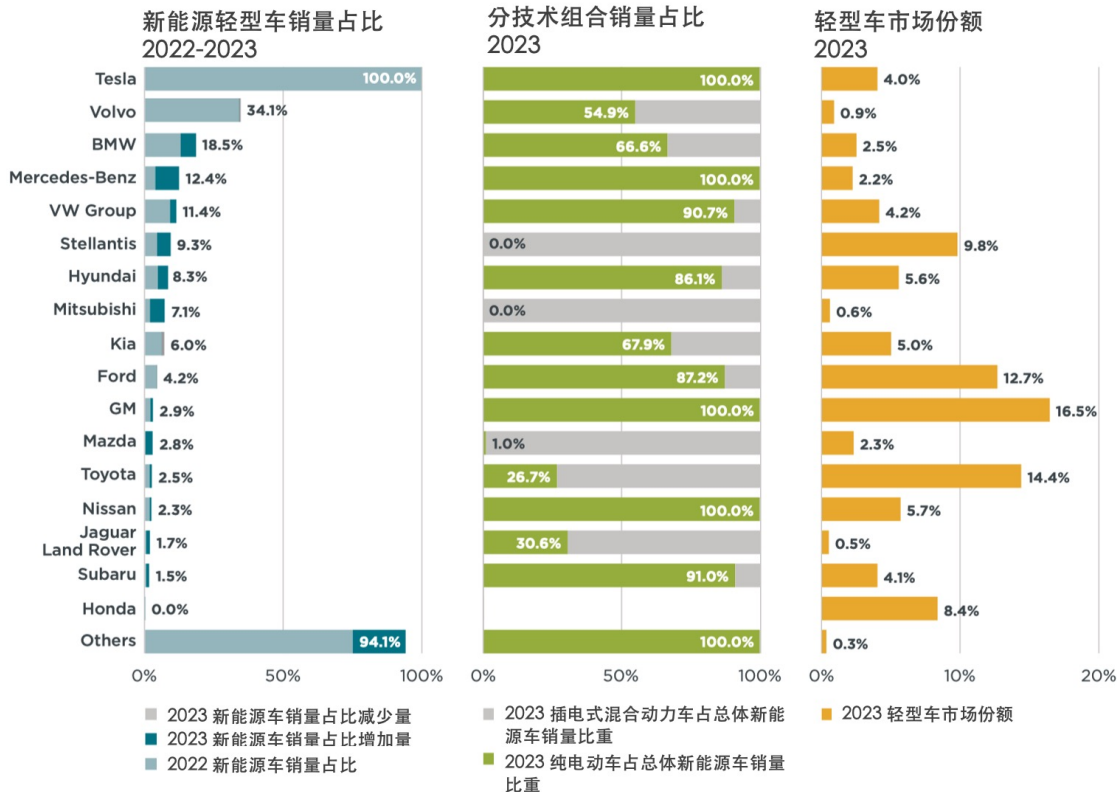
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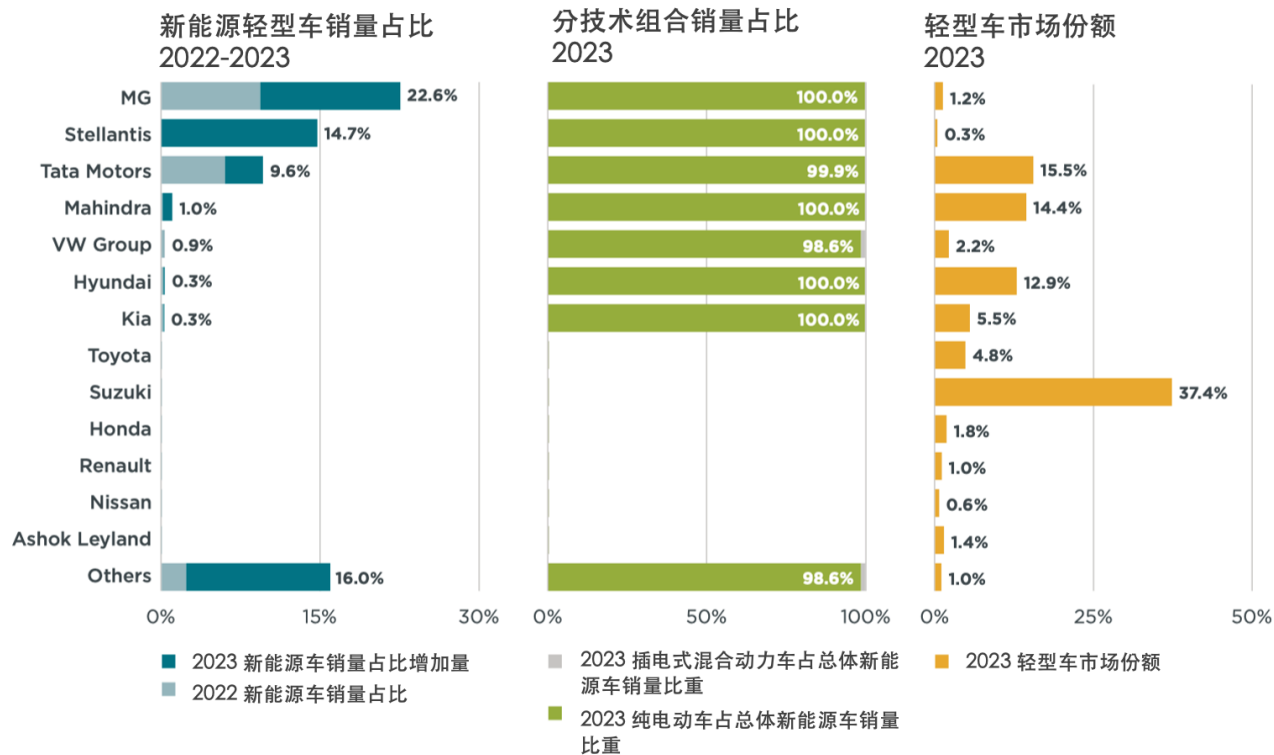
欧洲车企轻型电动汽车销量占比、技术组合和市场份额



美国车企轻型电动汽车销量占比、技术组合和市场份额



印度车企轻型电动汽车销量占比、技术组合和市场份额



原文：<https://theicct.org/publication/ev-ldv-major-markets-monitor-2023-may24/>

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