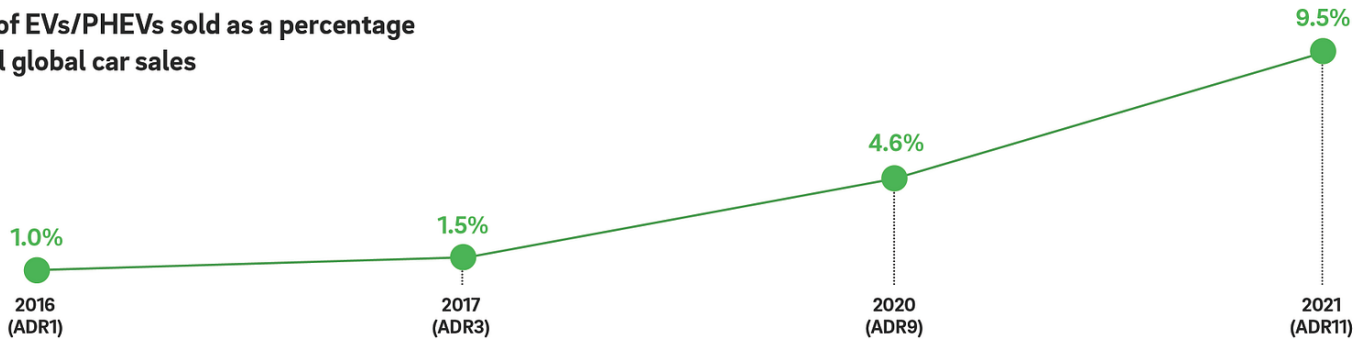
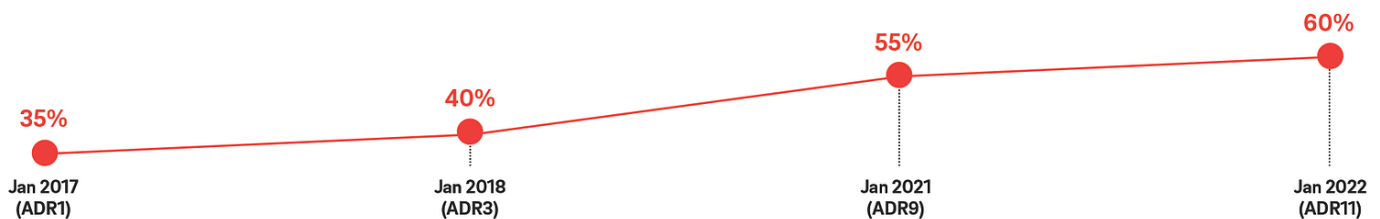


## Automotive Disruption Radar

Share of EVs/PHEVs sold as a percentage  
of total global car sales



Share of potential buyers considering  
purchasing an EV (global average)



Source: Roland Berger

Jun 22, 2022 09:18 CEST

## Automotive Disruption Radar: 60% of potential car buyers consider buying an electric vehicle

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- Global EV sales as a percentage of total vehicle sales rise to 9.5%
- China, the Netherlands and Singapore top the ADR ranking
- Customers prefer electric models from electric-only automakers

Munich, June 2022: Electric mobility is booming in spite of the difficult

economic situation and tight global supply chains. As a share of global new car sales, electric vehicles and plug-in hybrids rose from 4.6% (2020) to 9.5% (2021). The trend shows no sign of slowing, with 60% of potential car buyers around the world already considering an electric vehicle as their next car. These are among the key findings of Roland Berger's latest Automotive Disruption Radar (ADR), a twice-yearly study of 26 automotive indicators in 23 countries.

"Innovations like autonomous driving and electric mobility must be pushed if we are going to reduce global carbon emissions," says Wolfgang Bernhart, Partner at Roland Berger. "Even though many countries have made progress, we are only just beginning to reach an inflection point for modern mobility. The task now is to take existing technologies to the next level. The automotive industry should take this challenge as an opportunity to build competitiveness for the future. The customer demand is there. Automakers that act fast can power ahead of their competition."

China back on top

After a two-year gap, China tops the ADR ranking once again. Reasons include the fact that, as a leading country in the electric vehicle industry, it is more open to new driving technologies. Added to that, almost 500 million Chinese now have access to a 5G mobile network, a must-have for autonomous vehicles. The inflection point has arrived in China, with the 5G standard overtaking 4G.

The Netherlands placed second in the ranking, partly because of the government's very early decision to ban the sale of combustion engine vehicles from 2030. Third is Singapore, followed by Norway and Sweden in joint fourth place. South Korea came in sixth, with Germany and the UK sharing seventh spot. Germany passed a law in May 2022 permitting vehicles with Level 4 autonomous driving capability (no human interaction needed) to be driven on public roads. This currently counts as the most progressive national legislation on autonomous driving.

Strong interest in electric vehicles leads to rising sales figures

Global supply is higher than ever, with 550 different electric vehicle (EV) and plug-in hybrid (PHEV) models, and customer demand is growing. China takes pole position in absolute numbers, with almost 3.4 million EVs and PHEVs sold. Germany is in second place, with 691,000 electric vehicles sold. In terms of the market penetration of EV/PHEV/FCEVs, Norway (76.4%), Sweden

(41.2%) and the Netherlands (25.2%) lead the field.

#### Traditional OEMs risk falling behind

The survey reveals that new, specialized manufacturers that produce electric vehicles only and are thus able to position themselves as zero emission companies have a significant advantage against traditional OEMs. Only 12% of respondents said they would stick with the traditional OEMs when buying an electric car. Conversely, more than three times as many (38%) said they would only buy an electric vehicle from one of the new electric-only automakers.

"If the incumbent OEMs do not adapt fast to the new conditions on the market and redesign their business model from both a financial and a technological standpoint, they will find themselves overtaken by the competition," states Stefan Riederle, Partner at Roland Berger.

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#### **Companies behind the ADR Platform:**

**Automotive World** is a leading B2B publication for the mobility sector. It draws on a global network of expert contributors to produce insightful articles, reports, data sets, forecasts, webinars and conferences. Right now, Automotive World is focusing on connected and autonomous vehicle technology, urban and shared mobility, advanced propulsion and the future of trucking.

**carbometrix** mission is to make companies' carbon performance data accessible and comparable. We help decision makers direct financial flows towards a low carbon economy. We are developing the most comprehensive carbon data and rating platform in the world. We believe carbon transparency and benchmarks are essential to trigger a drastic change towards the reduction of greenhouse gas emissions.

**CHARGING RADAR** analyzes the charging infrastructure in over 50 countries and visualizes the development and quality of charging stations and services as well as the charging behavior of electric car drivers in interactive dashboards. CHARGING RADAR partners with industry leaders and new market entrants across automotive and utility industries, CPO and MSP networks, consulting firms, investment companies and governmental bodies to support them in their strategic

planning and day-to-day operations and enables them to make fact-based decisions. CHARGING RADAR is a service by THEON Data Solutions GmbH powered by CIRRANTiC GmbH.

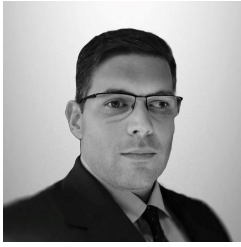
**CoMotion** is a global platform where leaders of the most innovative transportation and technology companies around the world meet with urban policymakers to share ideas, do business and plan the new mobility future. CoMotion organizes exclusive world-class events such as CoMotion LIVE, CoMotion LA and CoMotion MIAMI, and is the new mobility industry's premiere source for news, insights and analysis.

**fka GmbH**, as a research partner to the automotive industry since 1981, develops innovative solutions and delivers strategic consulting. We are a research facility, provider of creative ideas and driver of innovation. Our holistic approach and unique infrastructure for simulation, testing and evaluation allows us to see the big picture and be your specialist for details at the same time.

**Roland Berger** is the only management consultancy of European heritage with a strong international footprint. As an independent firm, solely owned by our Partners, we operate 50 offices in all major markets. Our 2400 employees offer a unique combination of an analytical approach and an empathic attitude. Driven by our values of entrepreneurship, excellence and empathy, we at Roland Berger are convinced that the world needs a new sustainable paradigm that takes the entire value cycle into account. Working in cross-competence teams across all relevant industries and business functions, we provide the best expertise to meet the profound challenges of today and tomorrow.

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