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E-Mobility Index 2021: Electric vehicles in strong demand despite corona pandemic – especially in Europe

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- **China leads in battery production and overall ranking**
- **Germany and France move up to second and third place**
- **Electric vehicle sales rise in Germany, France, Italy and South Korea**

Munich, March 2021: Producing the largest number of electric vehicles and battery cells, China leads in the overall and the industry ranking of the "E-Mobility Index 2021". In the market category, Germany climbed from fifth place to the top spot – due to an increase in sales of electric vehicles of over 250 percent. South Korea takes over the lead in terms of technology, because of constantly improving vehicle performance.

The "E-Mobility Index 2021", the country comparison for China, Germany, France, Italy, Japan, South Korea and the USA, which was jointly developed by the management consultancy Roland Berger and fka GmbH Aachen, examines the three indicators of market, industry and technology.

"The trend toward e-mobility has once again gained significant momentum in recent months. While overall sales in the automotive industry are down because of the coronavirus pandemic, e-mobility is on the rise globally," says Wolfgang Bernhart, Partner at Roland Berger. "Momentum will remain high because the industry has recognized the need to adapt and accelerate the transition. In 2021 and 2022 alone, more than 20 new electric models from German, US and Chinese manufacturers each are expected to hit the market."

One in eight vehicles in Germany is electric

Germany ranks first in the market category, ahead of France and China. Almost 400,000 electric vehicles were sold in Germany last year, representing an increase of over 250 percent. In terms of units sold, this means that Germany is now the second largest market for electric vehicles in the world, behind China. The share of electric vehicles in Germany's overall market rose to 12.6 percent, with government subsidies in the form of purchase premiums supporting the upward trend. In France, where the electric car share is 9.5 percent, as well as in Italy and South Korea, the sales figures for electric vehicles also rose significantly. Italy demonstrated the best progress in terms of fully electric vehicle market share, which is up 376 percent. The USA and China recorded only moderate sales growth. "The upward trend in Europe, helped by government subsidies, indicates that the gap with China can narrow in the long term," says Alexander Busse, Senior Consultant at fka GmbH Aachen.

China still dominates production volumes

In terms of units produced, China continues to dominate both electric vehicles and battery cells. According to the authors' forecast, worldwide production of fully electric vehicles and plug-in hybrids will increase by 13 percent in the period from 2018 to 2023, compared to the previous period. China is also stepping up production activities in the field of batteries: domestic cell production capacity created in this period is expected to account for over 70 percent of global capacity.

"China is well ahead in cell production, yet Europe is on the right path. But the backlog in cell production can only be reduced with high investment and continuous optimization of technology, such as cell chemistry," says Wolfgang Bernhart.

Vehicle performance and diversity on the rise

South Korea takes the lead in the technology category. Overall, the average vehicle performance has improved and yet they still offer a very good price-performance ratio. While South Korean OEMs continue to enhance the technology in existing models, rather than introducing new models, in the other markets the following trend can be seen: Manufacturers are increasingly focusing on the production of new fully electric vehicles. In 2021 and 2022, Germany, the USA and China each plan to launch more than 20 new electric models. "Consumers now have a choice. They benefit from an ever-increasing variety of electric vehicles across all classes," said Alexander Busse, co-author of the study.

Roland Berger

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