



Press Release

Paris, December 1st, 2022

## **NEW CAR MARKET IS PICKING UP, THE NEARLY NEW CAR MARKET (MODELS LESS THAN 5 YEARS OLD) IS DROPPING**

- **The new car market confirms its upward trend and sees double-digit growth: 133,960 registrations, up 10%**
- **In the first eleven months of the year, 100% electric models account for 13% of market share.**
- **The used car market suffers another sharp contraction (-10.6% with 416 469 transactions)**
- **Nearly new cars (under 5 years old) are down 22.6% to 126,874 units**
- **Used Crit'Air 3 and labels above still account for 34.5% of the transactions**

### **New car market returns to moderate growth in November**

After long months slump in the French new vehicle market (VPN), the end of summer 2022 stroke sparks that August turned into timid growth. That summer surge was sustained in September and October, both showing a 5.5% growth. In November, the market confirms its upward trend and witnesses a double-digit increase: a 10% with 122,960 registrations.

While the long-awaited upturn is becoming brighter, although the new market seemed to have hit its rock bottom, recovery remains moderate at best. On the one hand, industrial and economic uncertainties related to supply shrinkage and production issues remain present. On the other hand, the comparison index with 2019 remain unchallenged: -22.5% over November (and 632,077 decreased units for the first eleven months of the year).

The new car market thus recorded a fourth consecutive month of growth in November (+10%). However, for the first eleven months of the year, the French new market remains in negative territory with a decline of -9%. AAA DATA, the augmented data leader expert, records 133 960 new car registrations over the past month, compared to 121 994 in November 2021.

Julien Billon, CEO of AAA DATA believes that: "The new car market has been picking up for several months. Does this imply a return to better fortunes? The order's indicator plunges again in October and emphasizes the negative trend observed since the beginning of the year. Uncertainties regarding industrial supply shortages and the purchasing power of the French households continue to weight. On closer examination, the good performance of the new car market is due more to expected deliveries for a couple of brands, but also, and this is the new momentum of the month, to the very beginning of significant volumes from new Chinese players entrants to the electric vehicle marker"

### ***Hauts-de France and Auvergne Rhône-Alpes regions confirm their progressions***

Taking advantage of the recovery in orders, all regions record an increase in new car registrations in November. While Ile-de-France reached the threshold of 1/5 of registrations, Auvergne Rhône-Alpes and Hauts-de-France are neck and neck for the podium. The first shows a rather stable growth (+5%) and the second experienced a strong increase (+12%), respectively accounting for 12% and 11% of market share.

As in October, Corsica and Normandy displayed a robust dynamism, respectively +75% and 34%. Eventually, Occitania also had a buoyant month (+22%).

### ***Diesel vehicles loses to electric models***

It was a first in the history of the French market in September and the trend is now confirmed for November: electric vehicles finally overtook diesel models. Over the first eleven months of the year, 100% electric models account for 13% of the market. Gasoline (37% market share) and Hybrids (28%) still dominate the market, despite the continuing erosion of the plug-in vehicles segment (-11%). Alternative fuels continue to make very significant progress (+69% for a 6% market share), against the backdrop of the purchasing power crisis and the highly volatile gas prices.

### ***The used car market is still in decline***

In November, the used car market suffered another month of steep decline (-10.6% with 416 469 transactions). The nearly new car segments continue its downward spiral (-22.6% for 126,874 units) and the segment of 5- to 10-year-old used cars is also beginning to suffer (-10.7%).

Unsurprisingly, the ten-year older segment is the most resilient with a contained decline of -0.9%.

However, although the Low Emission Zones (LEZ) nationwide program continue to be deployed and European decisions kicking off the countdown to the end of new thermal cars in 2035, it is startling that used vehicles stamped with a Crit'Air 3 and above classification still account for more than 34.5% of registrations

## FOCUS

### First data that shed light on the flagship launches of 2022\*

#### Alfa Romeo Tonale

S-SUV Segment

980 registrations

70,4% of sales to companies

64,4% of personal financing or traditional financing

88,7% of customers aged 56 and over

100% of registrations in hybrid

After several postponements, the Tonale SUV, which is produced at the Pomigliano d'Arco plant near Naples, Italy was launched in June 2022. It is a crucial model for the brands' European recovery plan. The short-term rental path is also used to promote, and test drive the model (17.9% of the sales mix). The share of company sales could increase further with the introduction of the Tonale Q4, a plug-in (PHEV) version.

#### BMW X1

C-SUV Segment (Compact SUV)

5 677 registrations

65,7% of sales to business companies

64,7% of financing through long term-leasing (long term leasing + long term leasing through a short-term leasing company)

86,2% of customers are 56 years old or older

41,7% of registrations in diesel

*Introduced in dealerships in October 2022, this third generation X1 is evolving in a segment where the competition has grown fierce in recent years. Diesel dominates the current mix, ahead of gasoline (30.9%) and PHEV (plug-in hybrid electric vehicles) (24.9%) but keep in mind that the model offers a 100% electric version (BEV – Battery Electric Vehicle) with the iX1.*

#### Citroën C5 X

D Segment (Station Wagon)

2 288 registrations

76,1% of sales to companies

80,6% of personal financing or traditional financing

95,2% of customers aged 56 and over

58,4% of registrations in plug-in hybrids (PHEV)

*C5 X arrived in dealerships in February 2022 and immediately stood out for its assertive styling, reminiscent of the CXperience concept car, which seeks a combination of sedan, SUV, and station wagon silhouettes.*

## **Dacia Jogger**

C Segment (Compact cars)

4 204 registrations

76,5% of sales to private individuals

73% of personal financing or traditional financing

54,8% of customers aged 56 and over 100% of gasoline registrations

*Orders were opened early, but the Dacia Jogger in the brand's network showrooms in March 2022. The model has immediately replaced the Lodgy and won over customers with its dual 5 and 7 seat-offer. Despite its move upmarket, Dacia has successfully attracted a younger-than-average customer base for new models with 19.7% of customers aged 26-40 and 25% aged 41-55. The model's energy mix is set to change with the introduction of a hybrid version in 2023, a first for the brand.*

## **Kia Niro**

C-SUV Segment

6 548 registrations

67,3% of sales to private individuals

47,5% of personal financing or traditional financing

59,3% of customers aged 56 and over

54,5% of registrations are 100% electric (BEV)

*Presented in dealership on the eve of summer 2022, this new generation of Kia Niro renews a model that had arrived on the market in 2016, to meet with great success, even becoming Kia's bestseller in 2021. It benefits from the new K3 platform of the Hyundai group and stands out for its energy mix (54.5% of BEV, 27.1% of HEV and 18.4% of PHEV) and because it manages to be appealing for a younger customer base than the market average (40.2% 26-55 years old).*

## **Kia Sportage**

C-SUV Segment

10 416 registrations

53,7% of sales to companies

44% of financing through leasing

75,2% of customers aged 56 and over

72,2% of registrations in hybrids (HEV)

*This fifth generation of Kia Sportage was fervently awaited by the brand in Europe and arrived in dealerships in January 2022. Claiming a more premium positioning than before, the Sportage boasts a great depth of range : engines, finishes, prices...The model retain a significant part of private customers (46% and confirm its complementarity with the Niro in the C-SUV segment.*

## **MG4**

C segment

334 registrations

58,7% sales to private individuals

79,9% of personal financing or traditional credit

51,8% of customers aged 26 and over

100% electric vehicle registrations (BEV)

*Si les volumes restent pour l'heure modestes, la progression est rapide et MG symbolise l'arrivée des constructeurs chinois sur le marché européen, notamment en France. Une entrée qui se fait par la voie du véhicule 100% électrique. La MG4, commercialisée en septembre 2022, bénéficie de la nouvelle plateforme MSP, pour « Modular Scalable Platform », du groupe SAIC. On constate que près d'un client sur deux a moins de 56 ans et la part des 26-40 ans pèse 24,3% des ventes, un message à prendre au sérieux. Dans le même ordre d'idée, on note que la part des flottes n'est pas anodine dans le mix (41,3%).*

*Although volumes are still modest, growth is rapid and MG symbolizes the arrival of Chinese manufacturers on the European market, particularly in France. This entry is made through the 100% electric vehicle. The MG4, available for sale in September 2022, benefits from the SAIC group's new MSP platform (Modular Scalable Platform). Nearly one in two customers is under 56 years old and the 26-40 age group accounts for 24.3 percent of sales, a message to be taken seriously. Similarly, the fleet share is not insignificant in the mix (41.3%).*

## **MG5**

C Segment

789 registrations

61,9% of sales to individuals

72,9% personal financing or traditional credit

50,3% of customers aged 56 and over

100% electric vehicle registrations (BEV)

*Launched in February 2022, the MG5 derived from the Roewe Ei5 cousin, already proven in China, allow the brand to occupy the vacant space of 100% electric station wagons. In relation to the age of customers and the presence in the fleet segment, the same comments as for the MG4 apply; which is therefore not a coincidence.*

## **Mercedes-Benz GLC**

D-SUV Segment (Family SUV)

6 159 registrations

78,4% of sales to companies

53,4% of lease financing

90,9% of clients are 56 years old and older

78,9% of registrations in plug-in hybrids (PHEV)

*The silhouette has existed in the brand since 2008 with the launch of the GLK, whose style is sometimes considered divisive. One of Mercedes-Benz's best sellers in our latitudes, the new GLC is characterized by a balanced family positioning and a successful modernization of its interior. The brand met their challenge towards electrification with the overwhelming dominance of plug-in hybrids in the mix, even though subsidies are less important than before. Diesel (19.4%) provides the rest.*

## **Nissan Ariya**

D-SUV Segment

232 registrations

87,5% of sales to companies

78,0% of personal financing or traditional credit

94,4% of customers aged 56 and older

100% of electric vehicle registrations (BEV)

*Introduced in dealerships in June 2022, Arya's is Nissan's first 100% electric SUV, directly derived from the eponymous concept car presented at the 2019 Tokyo Motor Show. For its debut, it asserts a very univocal positioning : a large majority of sales to companies without a rental formula and a high average buyer age.*

## **Opel Astra**

C Segment

907 registrations

86,3% of sales to companies

79,8% of personal financing or traditional credit

92,6% of customers aged 56 and over

47% gasoline registrations

*Introduced in dealerships in 2022, the new Astra is a "pure" Stellantis product, with a technical base shared with the Peugeot 308 and the DS 4. Its style is more distinctive than that of its "cousins" and it makes its first foray into the field of hybridization. With a certain success, because still at first scores, the plug-in hybrids version is equal to the diesel one (26.7% vs 26.4).*

## **Toyota Aygo X**

A Segment (Urban)

7 207 registrations

62,4% of sales to individuals

50,4% of leasing financing

79,1% of customers aged 56 and over

100% gasoline registrations

*Presented in March 2022, the Aygo X reflects Toyota's choice to remain in a segment deserted by most manufacturers. The Aygo X will be produced without the Peugeot 108 and the Citroen C1, Stellantis has decided to leave the partnership with Toyota. Thanks to the TNG A/B platform of the Yaris, the Aygo X is slightly heightened to display the charm of a baby SUV look. A charm that still works mainly with a senior clientele, customers aged under 50 only accounting for 6.7% of the mix.*

*\*Data extracted by AAA DATA, the augmented data expert, are consolidated at the end of October 2022 regarding VPNs. The list of vehicles is based on the 2022 selection of the Car of the Year organization, or European Car of the Year Trophy, which has been awarding the best car marketed in Europe, since 1964. It does not claim to be exhaustive. Some models have not been analyzed because they evolve in niche markets or were launched too late, as is the case for the Peugeot 408 and Renault Austral.*

### **About AAA DATA:**

AAA DATA, historical and reference actor of the valued data, detects and identifies behaviors, needs and trends of consumers to anticipate tomorrow's uses and propose to its customers tailor-made models. AAA DATA relies on a reliable and proven database. Thanks to its data repository and its expertise, AAA DATA has been able to shape and provide powerful innovative solutions to anticipate tomorrow's needs, in a wide variety of consumption areas.

<https://www.aaa-data.fr>

More information or data available on request from the press service.

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