

Paris, December 1st, 2023

New car registrations – AAA Data

French new car market up again in November

- **New passenger's car registrations up 14% in November**
- **SUV popularity continues unabated: + 17% increase in registrations**
- **Very buoyant electrics**
- **Used-car sales on the rise in all segments**
- **Contrasting performances by regions**
- **FOCUS: first technical inspections on two-wheelers in 2024**

On thing is certain: 2023 will overtake 2022. At the end of November, the new passenger car market already exceeded, in volume terms, the level achieved for the entire 2022 year. In the first eleven consecutive months of the year, 1.59 million units were sold, compared with 1.53 million units for 2022 in global.

In November alone, new car registrations rose by 14%, again driven by electric momentum. The used car market is also back on the rise.

According to data from AAA, the augmented data expert, new private car registrations amounted to 152 712 units over the past month, an increase of 14%.

SUV popularity remains acute

While the Mairie de Paris recently announced its intention to significantly increase non-resident parking rates for SUVs in Paris – a decision subject to a vote by Parisians in February 2024 – SUVs yet continue to gain ground. They now account for 45.8% of the PCV market, with registrations up 17% to 69,936 units. They are neck-and-neck with the other leading segment bodystyle speaking: sedans (46.4% of the market). The latter saw registrations rise by 13% to 70,818 units, followed by station wagons (5.2% of the market), with 8,012 units (+12%).

Marie-Laure Nivot, Head of Automotive Market Analysis at AAA DATA: *“While this type of vehicle didn't exist two decades ago, SUVs are thriving, with a range that is expanding year on year. Electrification is most likely the upcoming growth driver for this segment”.*

Electrics: ever higher, ever further

Pertaining to powertrains, electric vehicles (20% of the market) made a strong push this month, whereas in October 2023, electric vehicles only accounted for 17% of sales.

Electric car registrations have, indeed, risen sharply to +52% compared with November 2022, to 30,769 cars sold. Motorists plan purchases in advance before the new 2024 bonus comes into force. This will be more restrictive as directly related to the environmental score of the model purchased. In this context, Tesla took a third of EV sales in November 2023.

The same upward trend applies to hybrids (36% of the market): +30% to 54,637 registrations. These include 16% non-plug-in hybrids (+37% to 24,346 units), 10% micro hybrids (+35% to 15,728 units) and 10% plug-in hybrids (+18% to 14,512 units).

Leading model for each hybrid powertrain in November 2023

Non-plug-in hybrids: Toyota Yaris Cross – 3 096 registrations

Micro hybrids : Ford Puma – 1 879 units

Plug-in hybrids: Peugeot 308 III – 1 411 units

Gasoline, which still accounts for 32% of the new car market, displays modest growth, with +1% additional registrations over the past month, to 48,815 units. Diesel sales plunged by 28% (9% of the market) to 13,227 registrations.

Leasing solutions acclaimed for new car purchases

With inflation and ecological transition ongoing, a growing proportion of French people shifts towards rental financing solutions. Over the past month, leasing with purchase option and long-term leasing accounted for a cumulative 58% of new car sales, compared with 38% for direct purchases. For private customers alone, leasing solutions accounted for 56% of sales compared with 44% for purchases. All these cars will be feed and directly expand the used vehicles at the end of the leasing contract.

Regions with contrasting performances

The dynamism of the market does not affect all regions to the same extent. Some are doing much brighter than others. The most dynamic regions include Auvergne Rhone (13% of the market), with a 24% increase in new sales registrations (19,450 units), followed by runner-up Ile de France (21% of the market), up 22% to 31,922 units, Bourgogne Franche Comté (4% of the market), up 17% (5,592 units), and Bretagne and Pays de la Loire up 15% (respectively 6,307 and 7,333 units). The other regions are also on the rise, with one notable exception: Normandy (7% of the market), down by 1% (9,925 units).

Used-car market back on the rise.

After a slight upturn in October, the market picked up again in November (+6%) to 441,424 registrations. Sales of used cars less than five years old rose by 7.5% to 136,265 units, those between five and ten years old by 8.6% to 93,090 units. Older cars, which account for almost half of the used car market (48%) rose by 4.2% to 212,069 units.

With production, delivery and sales of new cars improving this year, tensions are easing on the used car market as well. With more used cars feeding the distributors inventories, there has been a decline in registrations of the oldest cars, i.e., Crit’Air 3 and above: -4% for Crit’Air 3, -7.7% for Crit’Air 4 and -12% for Crit’Air 5.

More and more electrified models (hybrids and 100% electric) appear on the second-hand market. In the first ten months of the year, they accounted for 8%.

FOCUS: First roadworthiness tests for two-wheelers in 2024

The new motorcycle market remained sluggish in November, with 11,863 units registered (-0,4%). Since the start of the year, the trend remains upward, with new motorcycle sales up 8.5% between January and November, to 186,489 units.

After many twists and turns, the technical inspection of two-wheelers will eventually come into force in April 2024 for all vehicles at least four years old, according to the decree of October 23,2023. The oldest two-wheelers, i.e., those registered before 2017 are the first to be affected and will have to undergo the test by December 31, 2024. The first test for vehicles registered between January 1, 2017, and December 31, 2019, will have to be completed in 2025. Finally, vehicles registered between January 1,2020 and December 31, 2021, will have to undergo the test in 2026. The first roadworthiness test for two-wheelers sold after that date will have to be completed “within six months before the expiration of a period of four years from the date of first registrations”.

Distribution of used motorcycle registrations between January and October 2023, breakdown by year of 1st registrations:

AN 1ER CIR	Jan. à Oct.2023 %
2017 and less	
From 2017 à 2019	64%
From 2020 à 2021	15%
2022 and above	13%
	8%
Total	100%

Press Contact :
aaadata@rumeurpublique.fr
 Ingrid Seithumer – 06 64 10 91 78
 Diane Loth – 06 22 73 56 43

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