



# MOKON 2024

11.–12.09.2024 ÖAMTC TEESDORF



15:00 - 16:00 | Fachpanel 2.4: „Finanzierung & Restwert, Risikobewertung und Investitionssicherheit“

**Introvortrag:**

**Welche Trends und Entwicklungen gibt es aktuell auf dem  
Automobilmarkt allgemein und bei EVs im Speziellen?**

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**Markt Analyst**

**Eurotax Österreich GmbH**

**EUROTAX**

Autovista Group, part of **J.D. POWER**

Quellen: Eurotax /Autovistagroup / EV Volumes / Statistik Austria

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# Das Marktanalyse Team bei Eurotax Österreich



**Robert Madas**  
Regional Head  
of Valuations



**Rainer Hintermayer**  
Expert RV Analyst



**Thomas Donnerer**  
RV Analyst

# BEVs sind wieder im Mittelpunkt der Diskussionen

## EU new-car market falls with double-digit BEV decline

22 April 2024



## Has the public perception of electric vehicles changed?

04 April 2024

## July marks new low for Germany's BEVs in 2024

06 August 2024

## Monthly Market Update: BEVs record another used-car market low in August

04 September 2024



The C



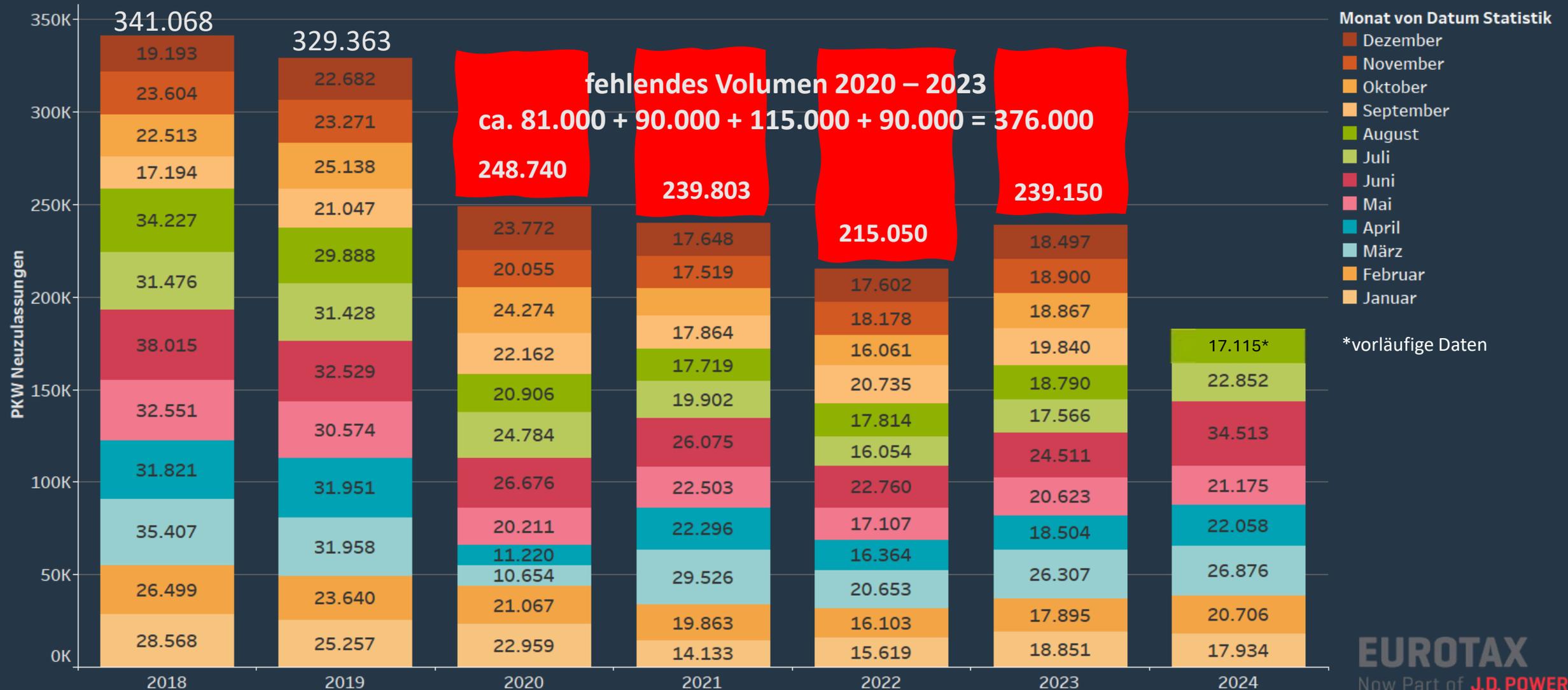
Read next



Balancing the price and performance of EV batteries

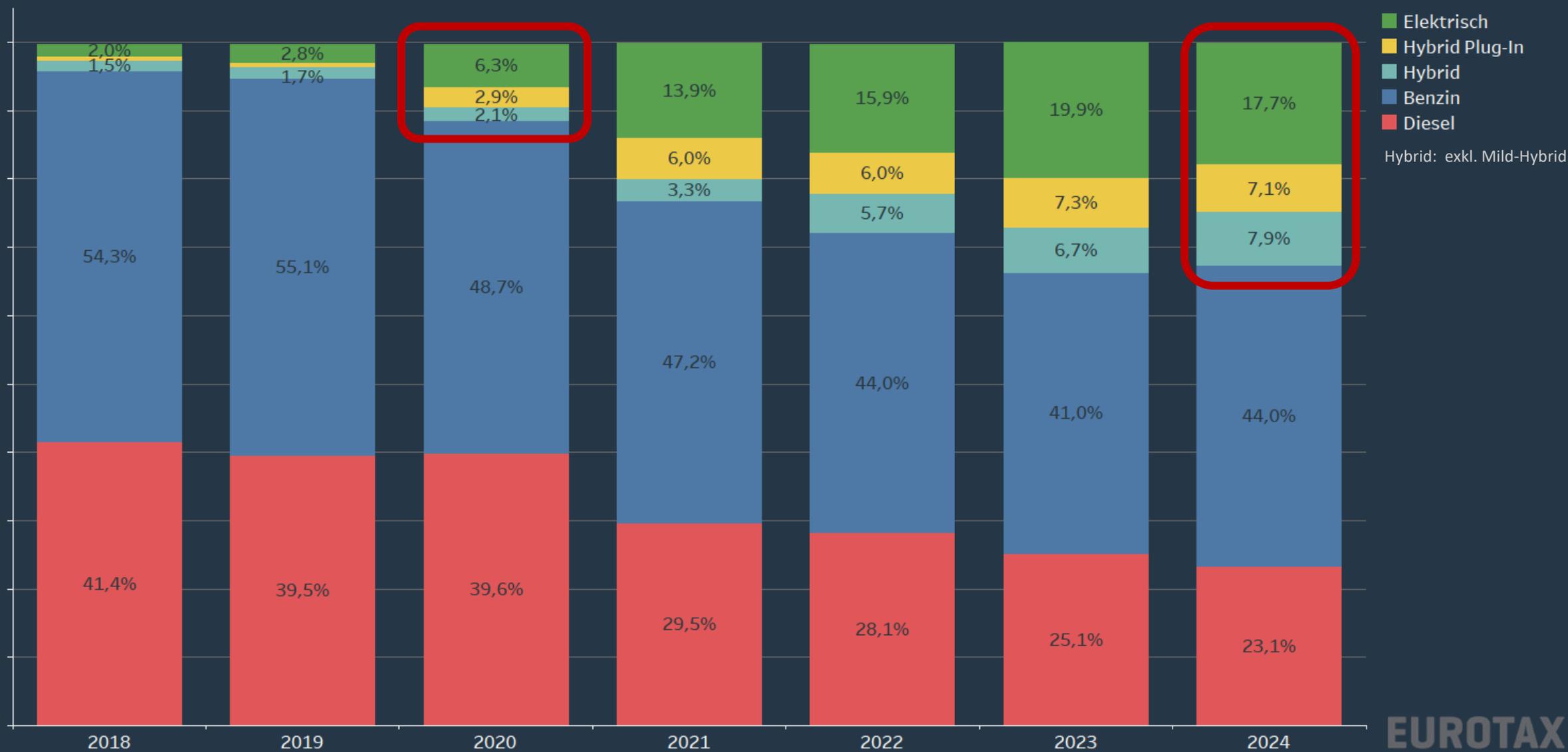
# PKW-Neuzulassungen Österreich

PKW Neuzulassungen 2018 - Juli 2024



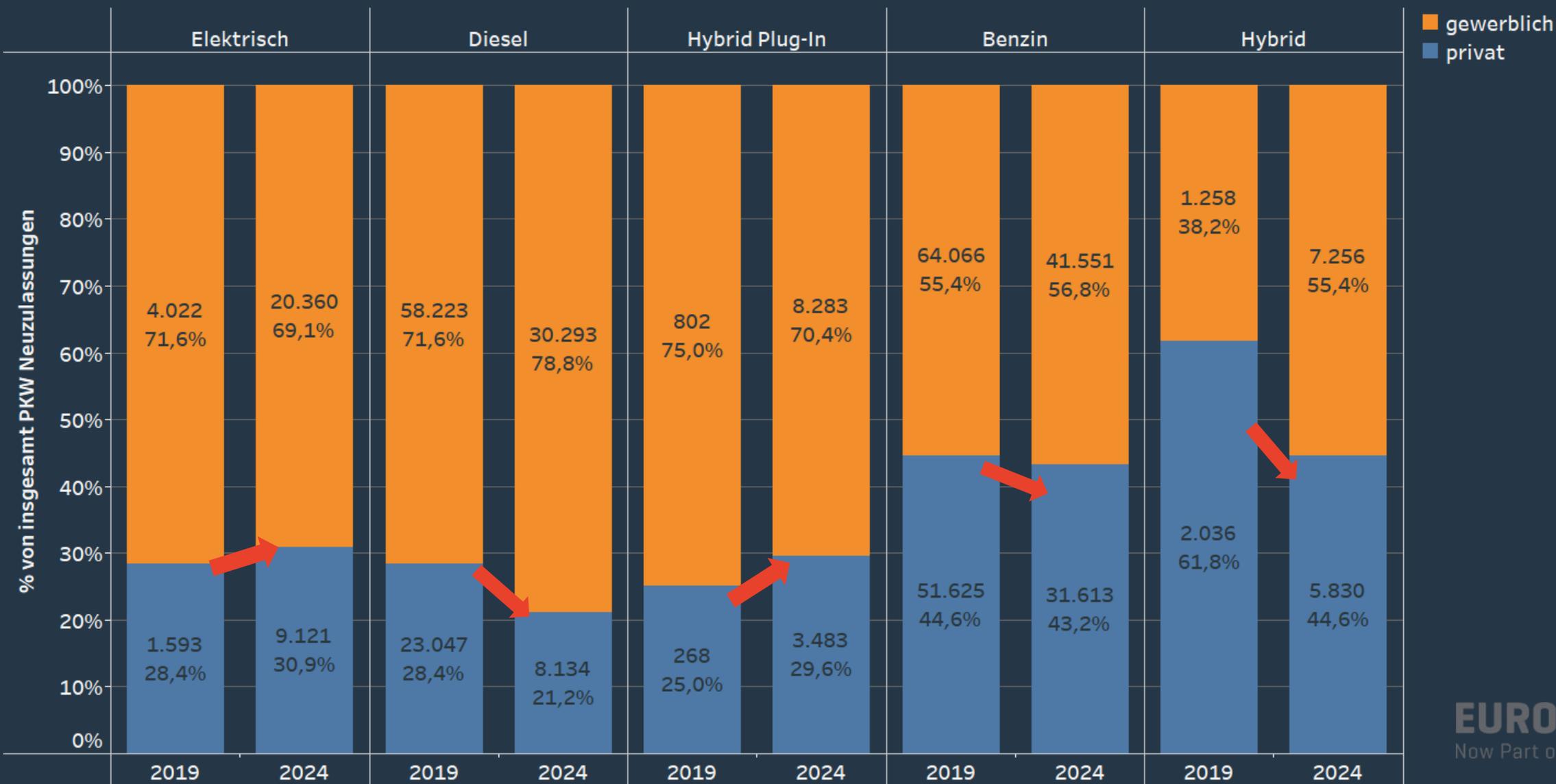
# PKW NZL: Alternative Antriebe stagnieren in 2024

PKW NZL 2018 bis 07/2024 - Treibstoffart



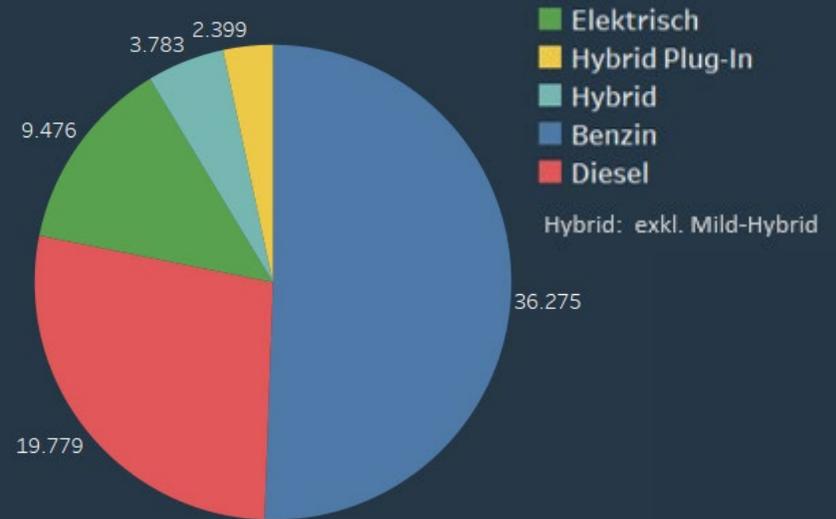
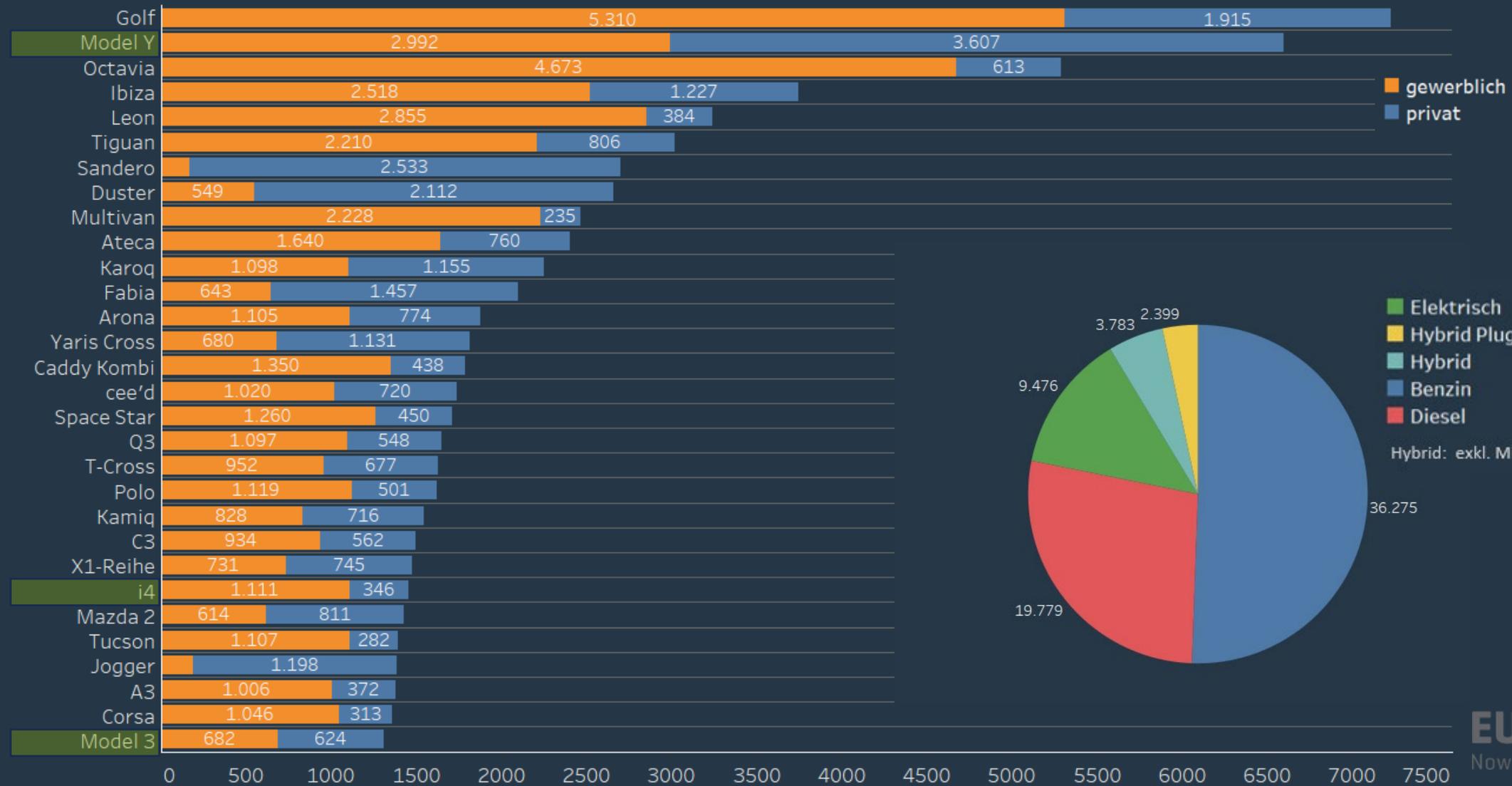
# Nutzungsart: Private Zulassungsanteile von BEVs und PHEVs steigen

PKW NZL 2019 vs 2024 (jeweils 1-7) Treibstoffart nach Nutzung



# PKW Neuzulassungen 2024 nach Nutzungs- & Treibstoffart – Top 25 Modelle

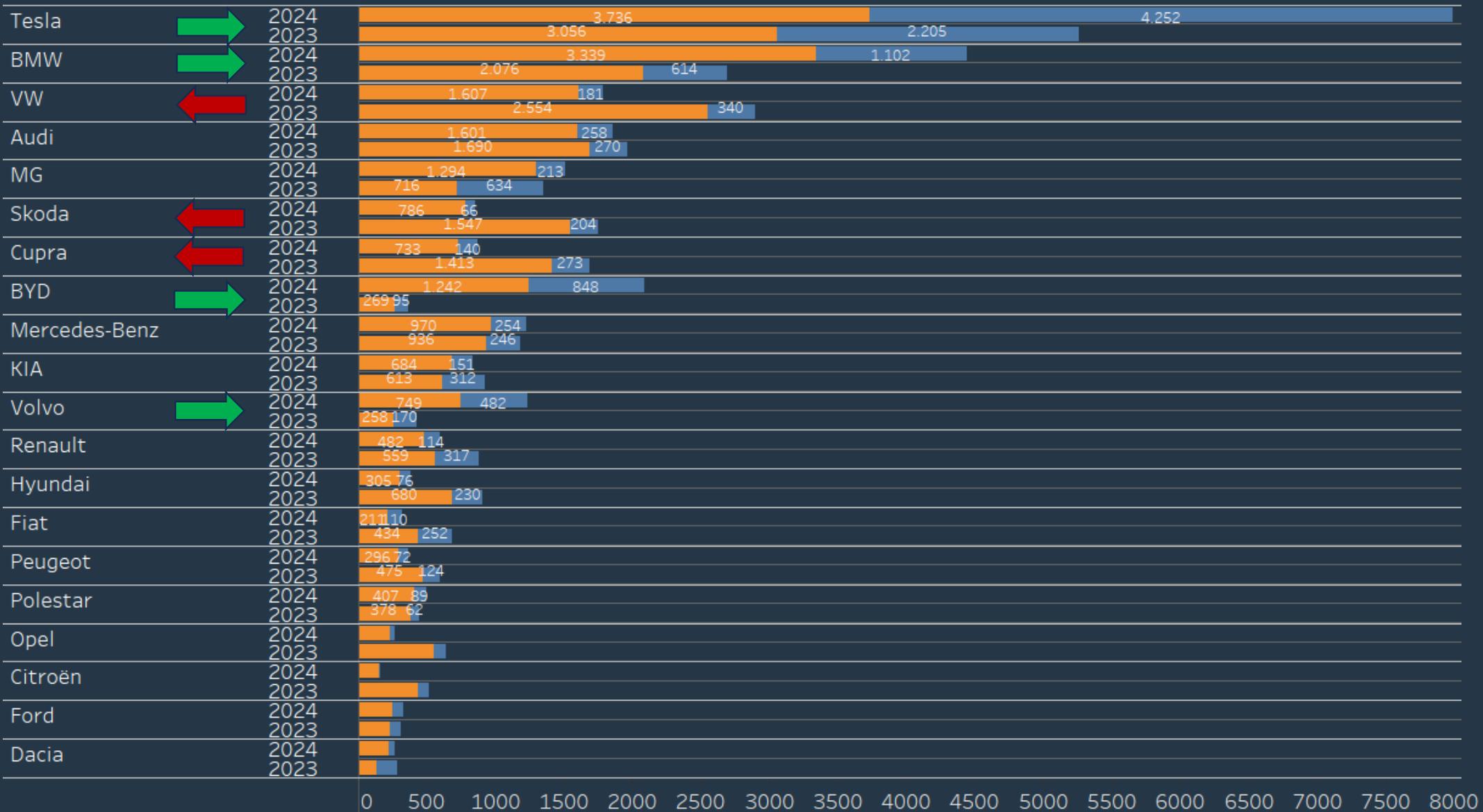
PKW Neuzulassungen 2024: Top 25 Modelle



# BEV PKW – NZL nach Marke (Top 20) und Nutzungsart 2023 vs 2024 jew. 1-7

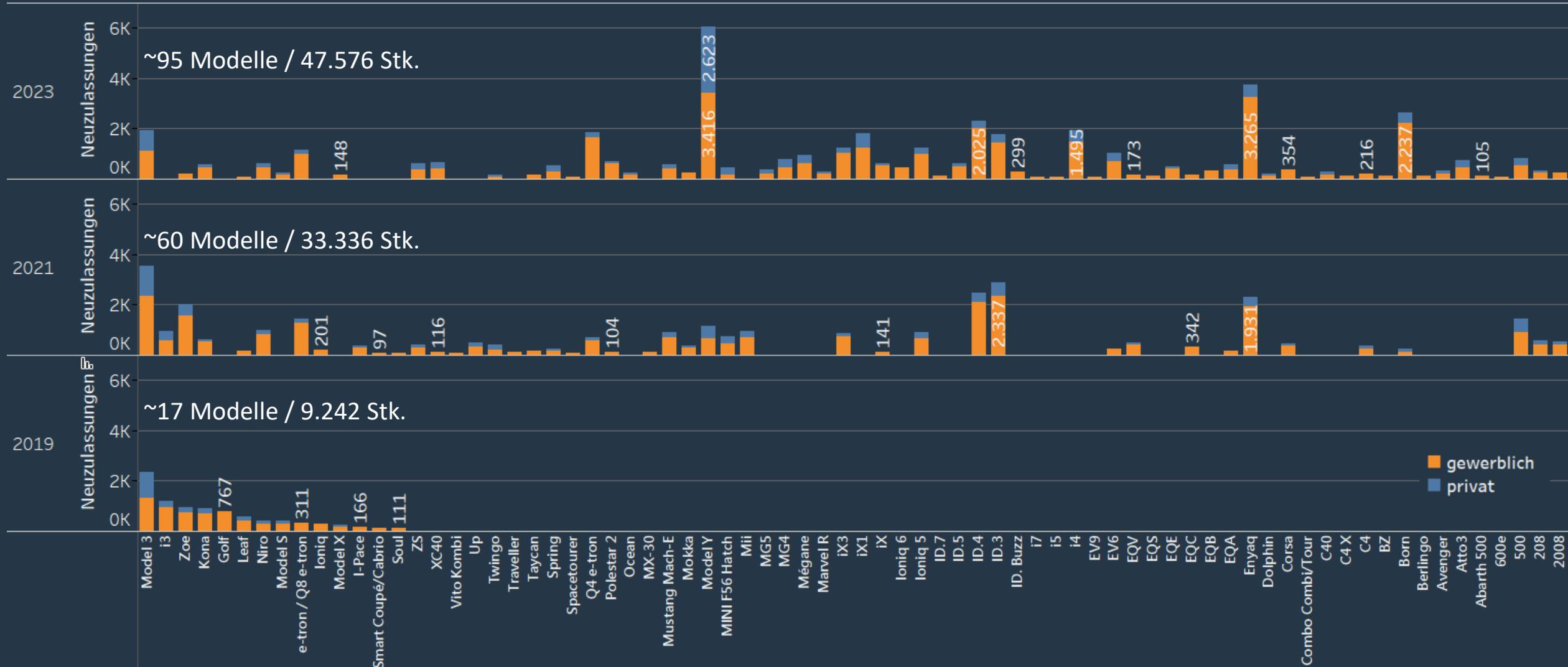
PKW Neuzulassungen 2023 vs 2024 (1-7): BEV nach Marke

Quelle: Statistik Austria / Eurotax Marketanalyser

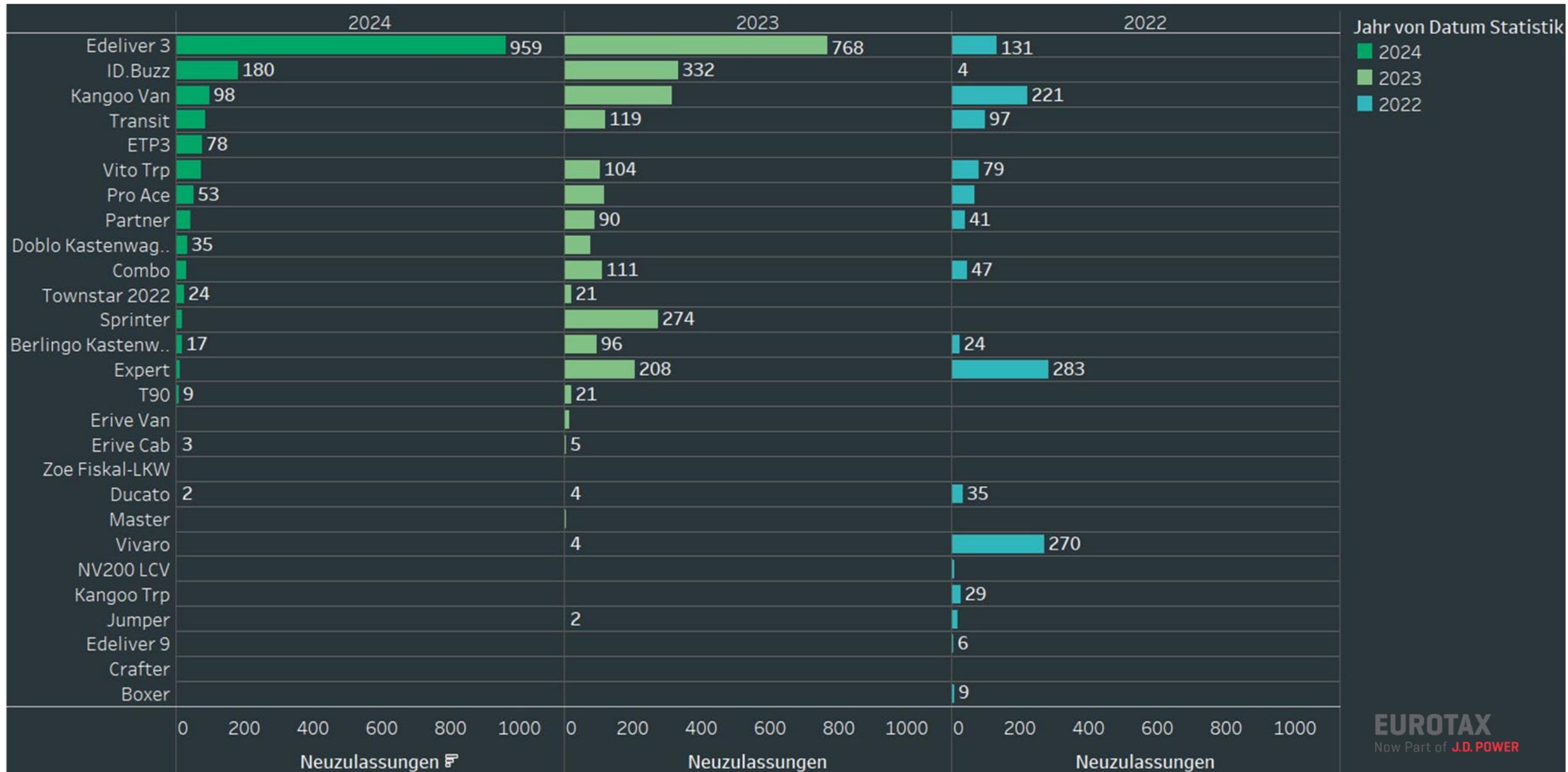


# BEV Modelle: Neuzulassungen 2019 / 2021 / 2023

BEV NZL 2019, 2021, 2023 inkl. Nutzungsart

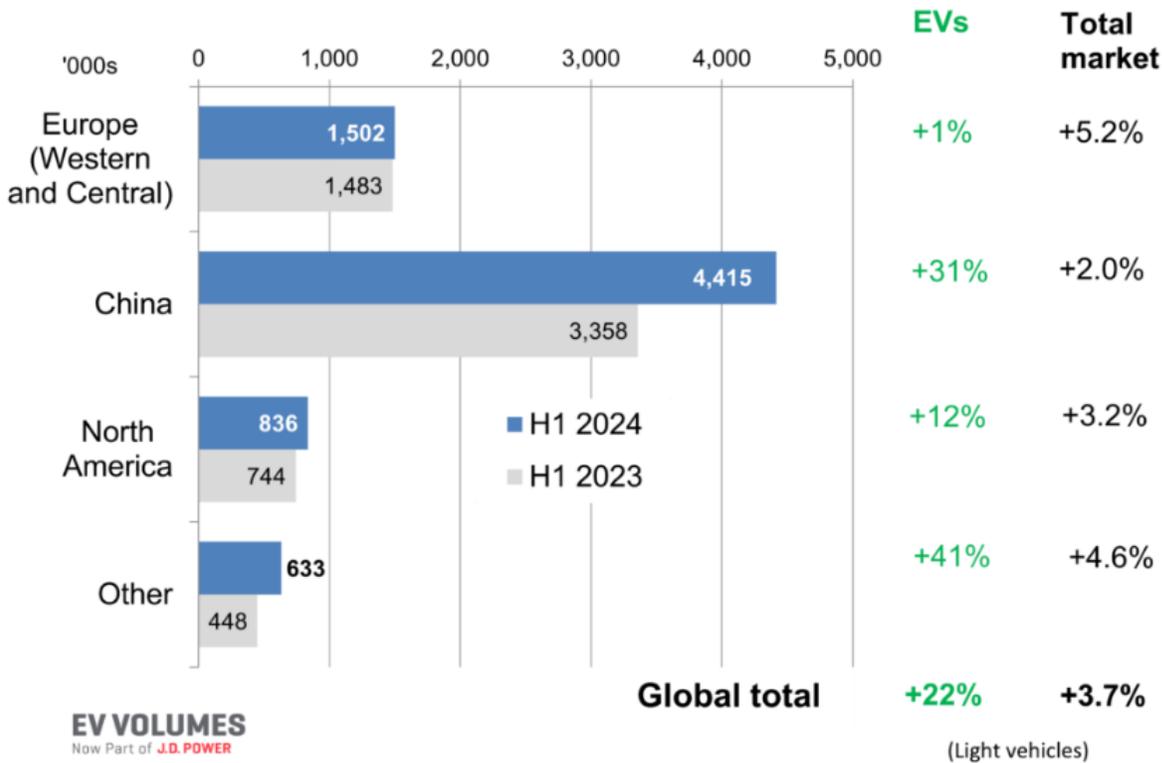


# LCV-Neuzulassungen BEV 2022 bis 7/2024



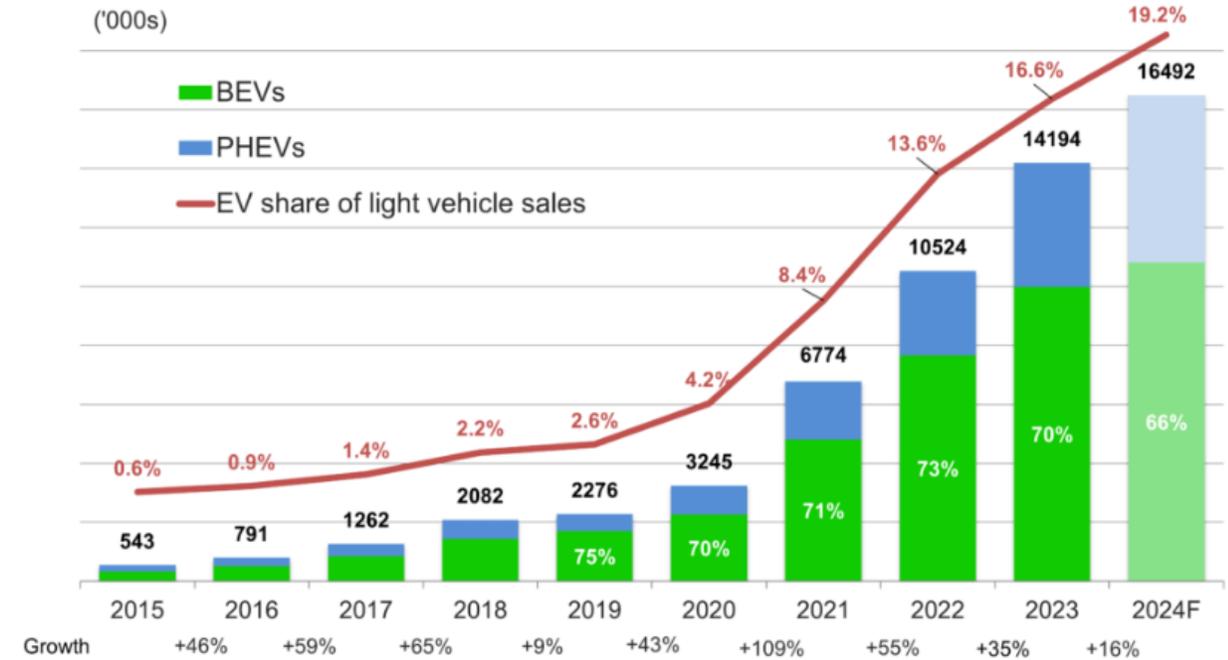
# Is the global EV market slowing down?

EV sales and year-on-year percentage growth in first half 2024



Global sales of new EVs

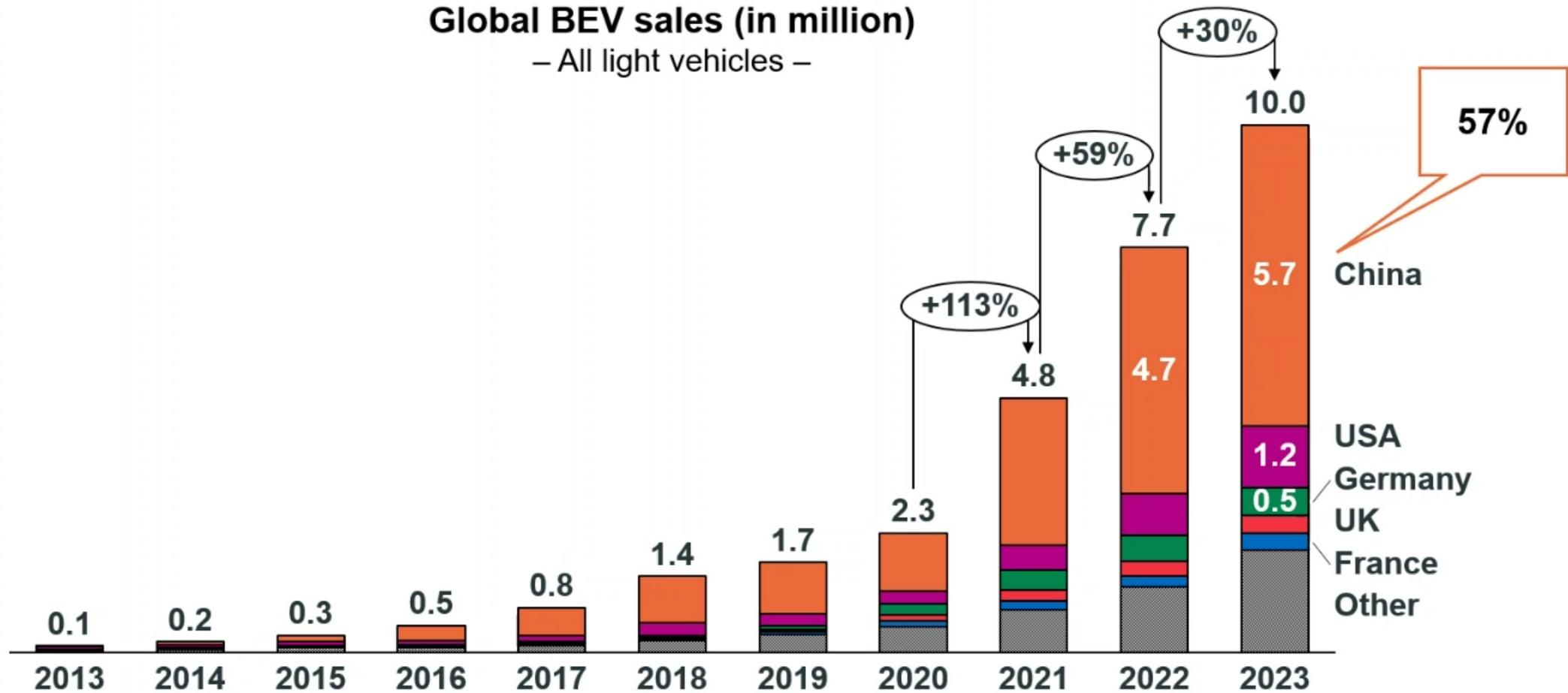
EV VOLUMES  
Now Part of J.D. POWER



Source: EV Volumes. Light vehicles include passenger cars and LCVs. EVs include BEVs and PHEVs. 2024 figures are forecast.

Source: EV Volumes. Light vehicles include passenger cars and LCVs. EVs include BEVs and PHEVs.

# More than every second BEV was sold in China

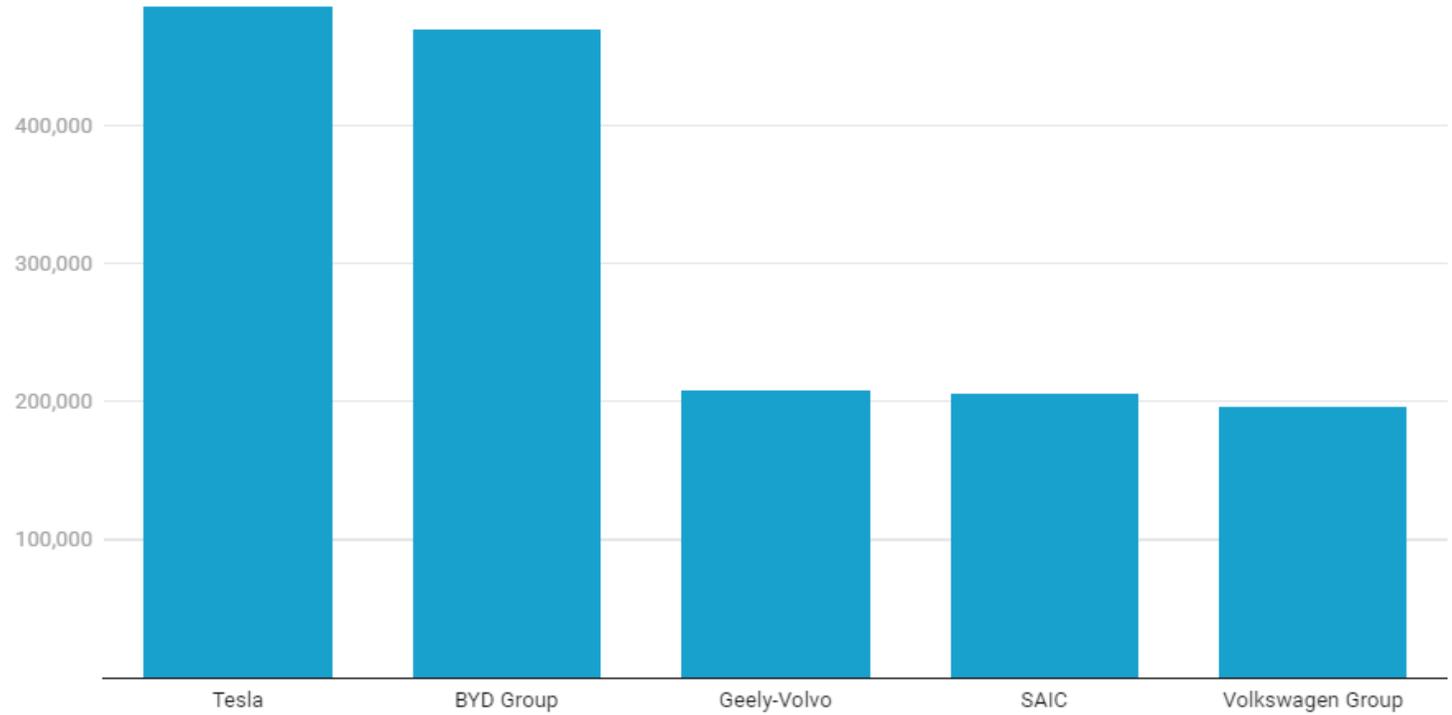




# Weltweite Verkaufszahlen

## Top five OEMs in global BEV sales

January to April 2024



BEV: battery-electric vehicle

Chart: Autovista24 • Source: [EV Volumes](#) • Created with [Datawrapper](#)

## Top twenty brands in global EV sales

January to April 2024

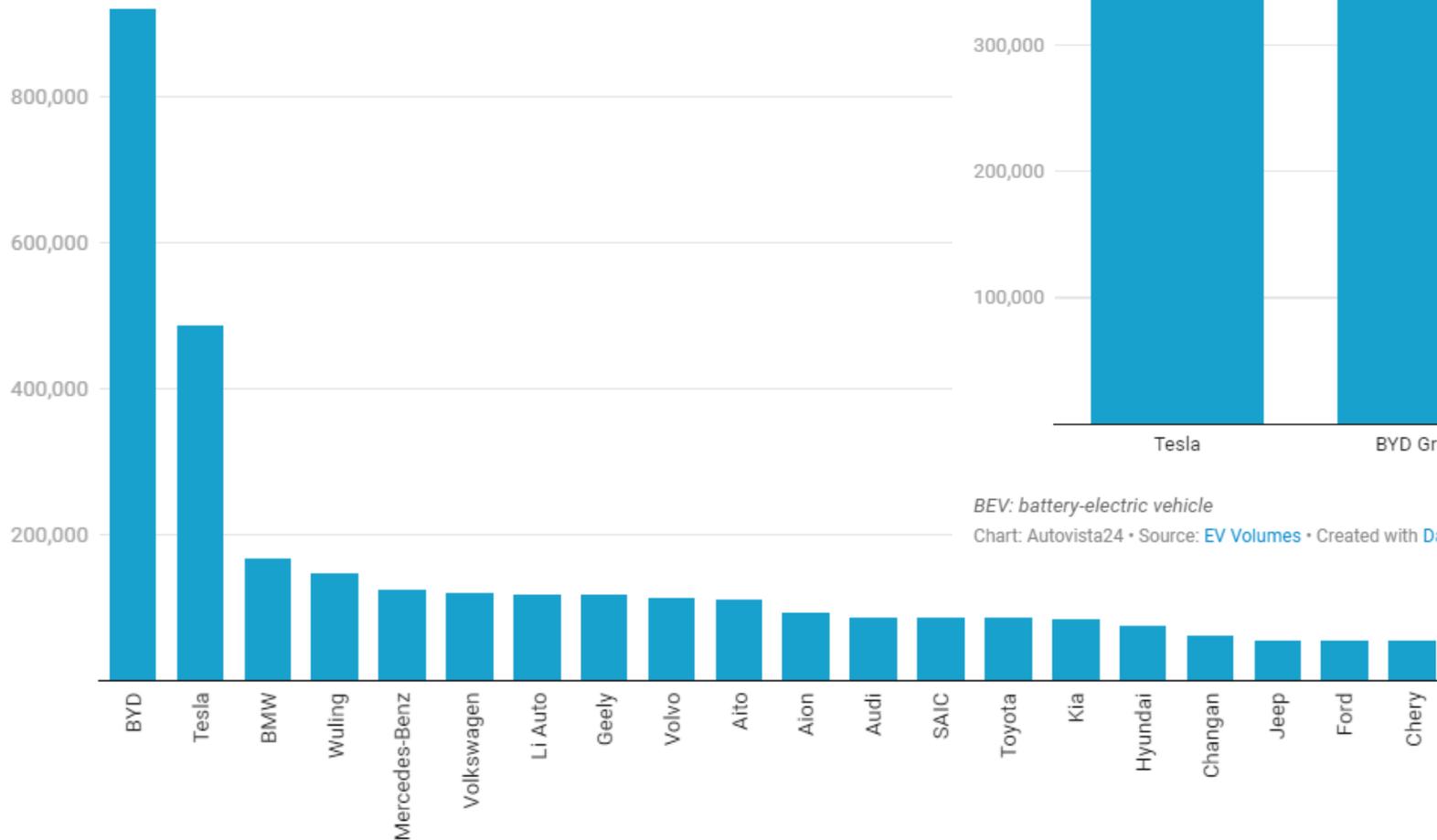
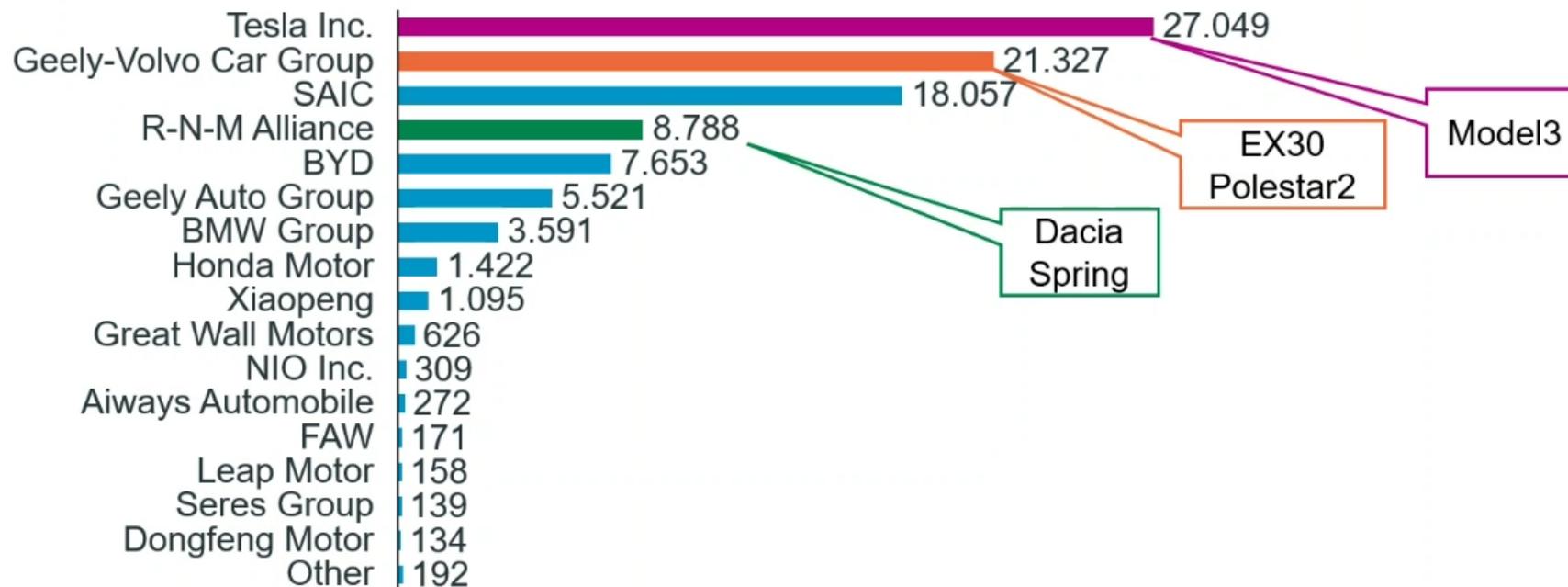


Chart: Autovista24 • Source: [EV Volumes](#) • Created with [Datawrapper](#)

# EU Strafzölle – wer ist betroffen?

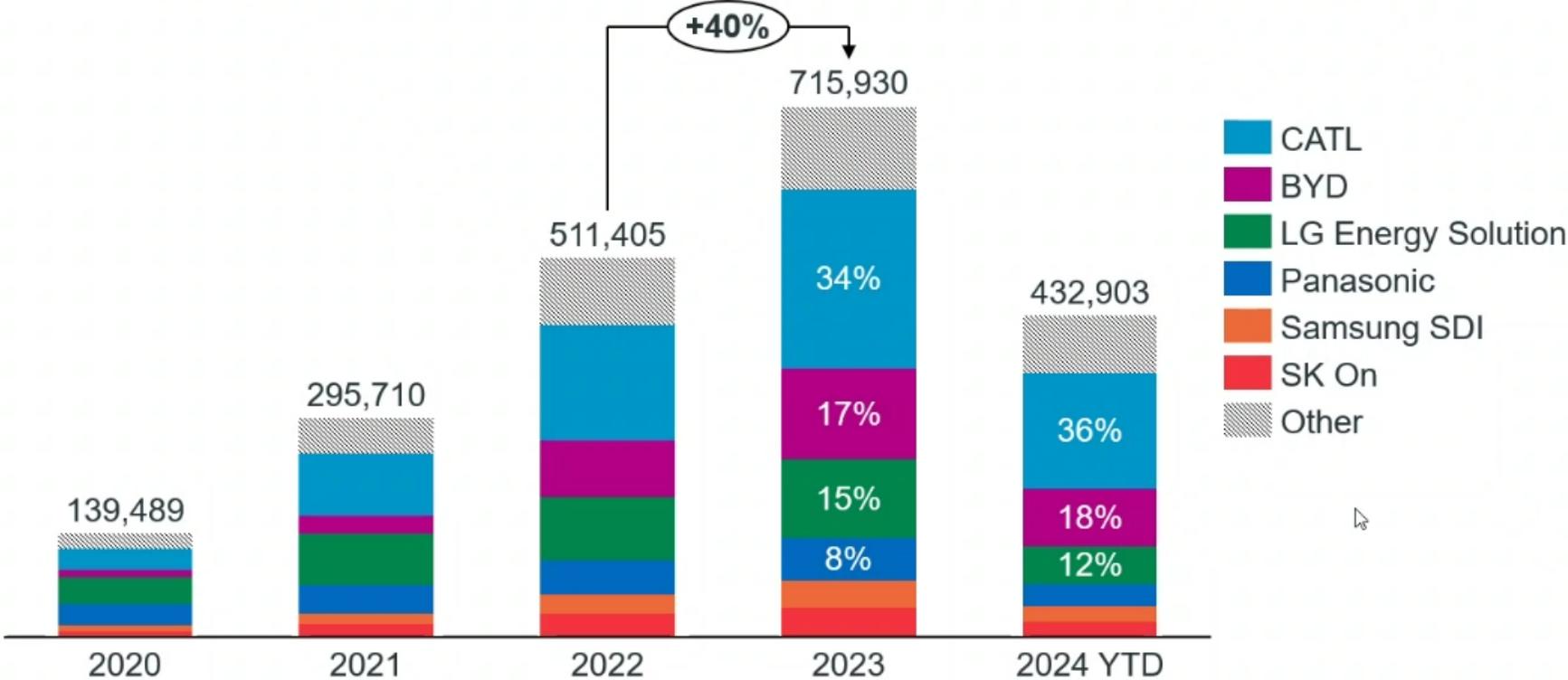
## Not only Chinese OEMs will be impacted by announced EU tariffs

Impacted by EU tariffs: BEVs sold in the EU and produced in China by OEM  
– YTD April 2024 –



# Only a few major player are dominating global Cell Production

**Battery Installations by Cell Supplier (in GWh)**  
– Global, All Light Vehicles –

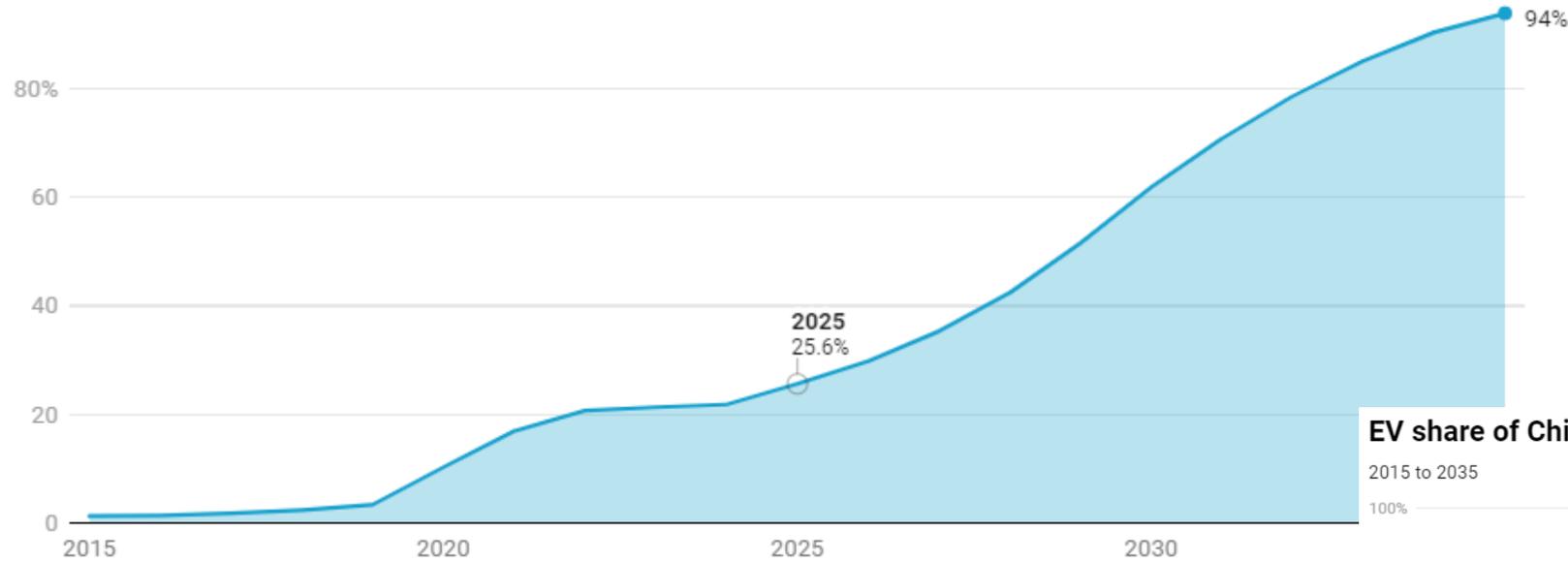


Source: EV Volumes  
YTD July 2024

# Zukünftige Marktentwicklung

## EV share of European new light-vehicle market

2015 to 2035

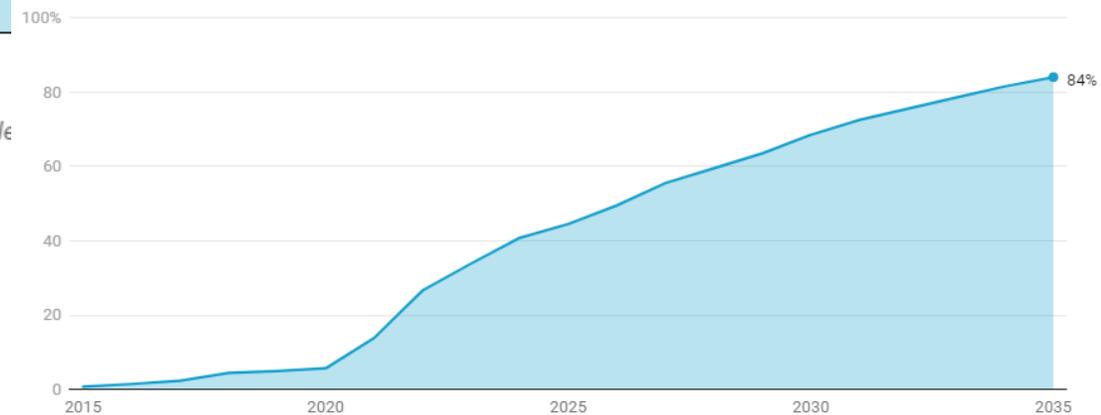


Actuals from 2015 to 2023. Forecasts from 2024 to 2035. Light vehicles include passenger cars and light-commercial vehicles. EVs include battery-electric vehicles (BEVs) and plug-in hybrids (PHEVs). Region includes Western and Central Europe.

Chart: Autovista24 • Source: [EV Volumes](#) • Created with [Datawrapper](#)

## EV share of Chinese new light-vehicle market

2015 to 2035

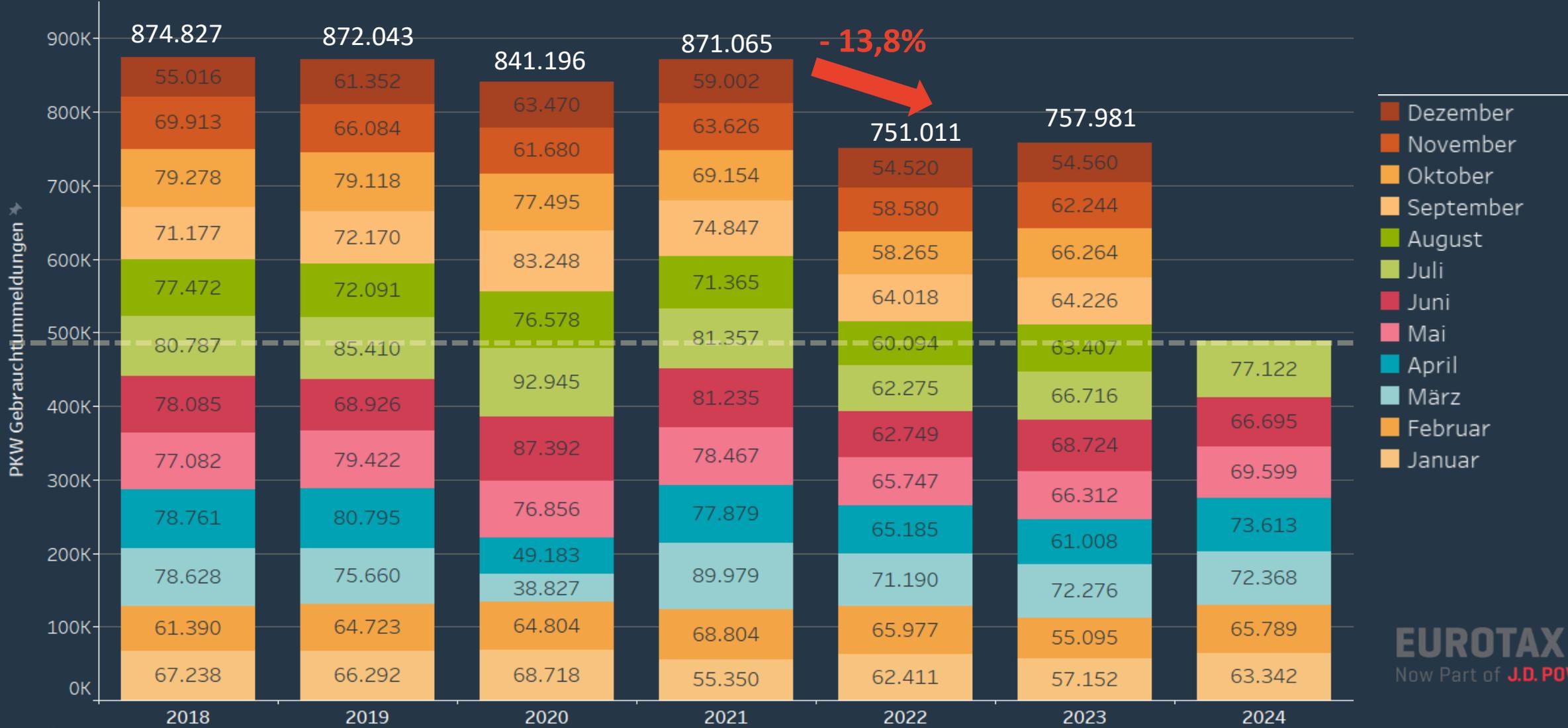


Actuals from 2015 to 2023. Forecasts from 2024 to 2035. Light vehicles include passenger cars and light-commercial vehicles. Electric vehicles (EVs) include battery-electric vehicles (BEVs) and plug-in hybrids (PHEVs).

Chart: Autovista24 • Source: [EV Volumes](#) • Created with [Datawrapper](#)

# PKW-Ummeldungen: 2023 schließt nur leicht über 2022, 2024 bisher mit positivem Trend

PKW Gebrauchtummeldungen 2018 - Juli 2024



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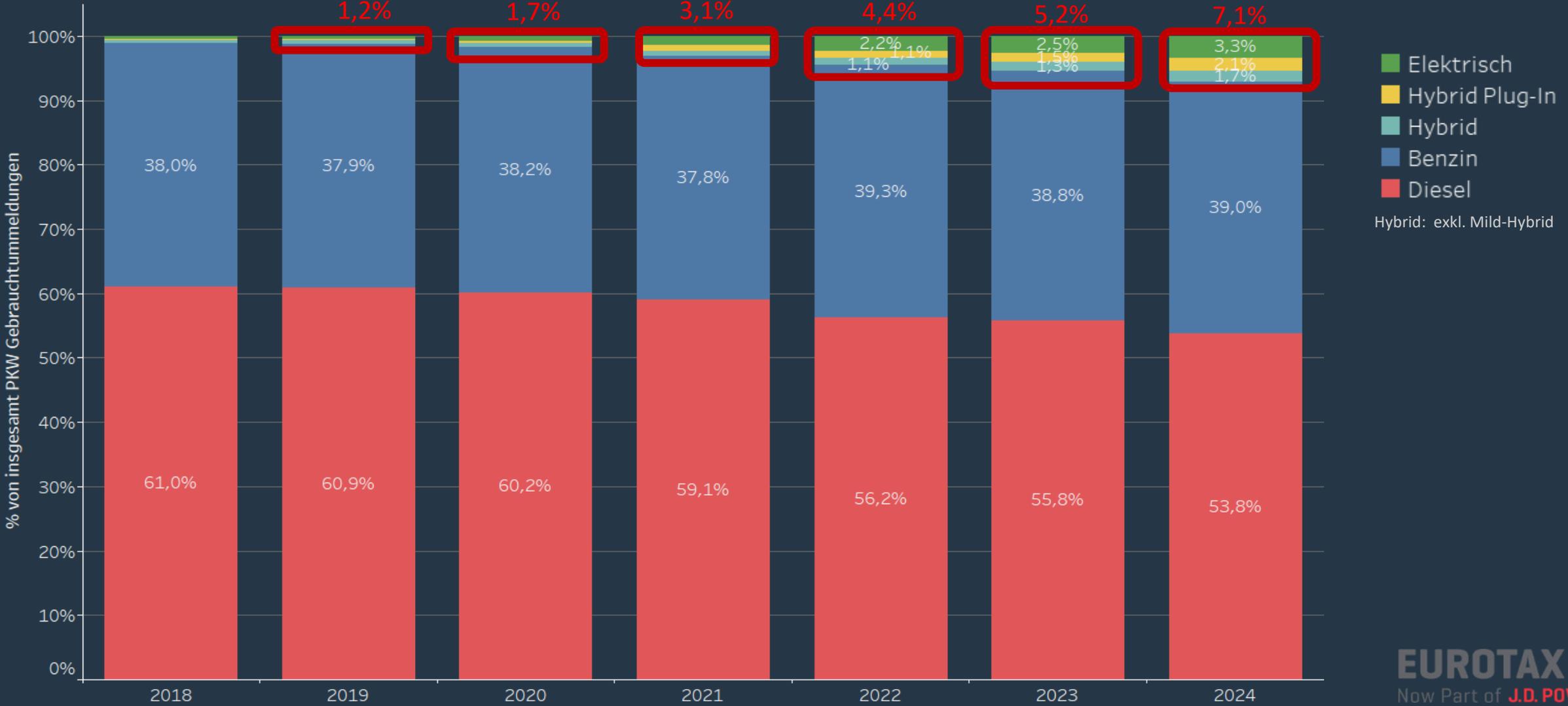
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Quelle: Statistik Austria / Eurotax Marketanalyser



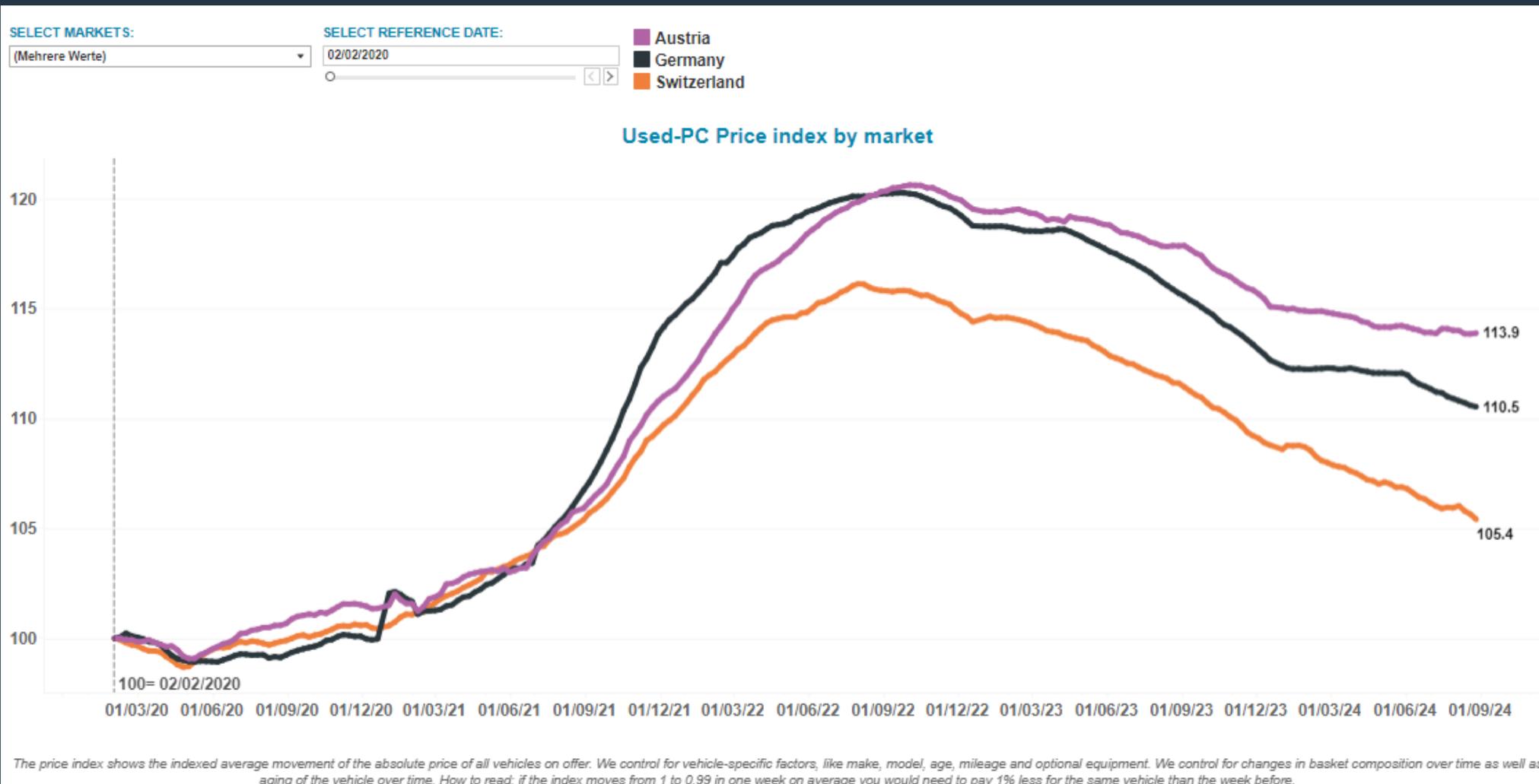
# PKW-Ummeldungen: Anteil an alternativen Antrieben nimmt zu

PKW Gebrauchtummeldungen 2018 bis Juli 2024 - Treibstoffart



Quelle: Statistik Austria / Eurotax Marketanalyser

# Gebrauchtwagen-Angebotspreisentwicklung



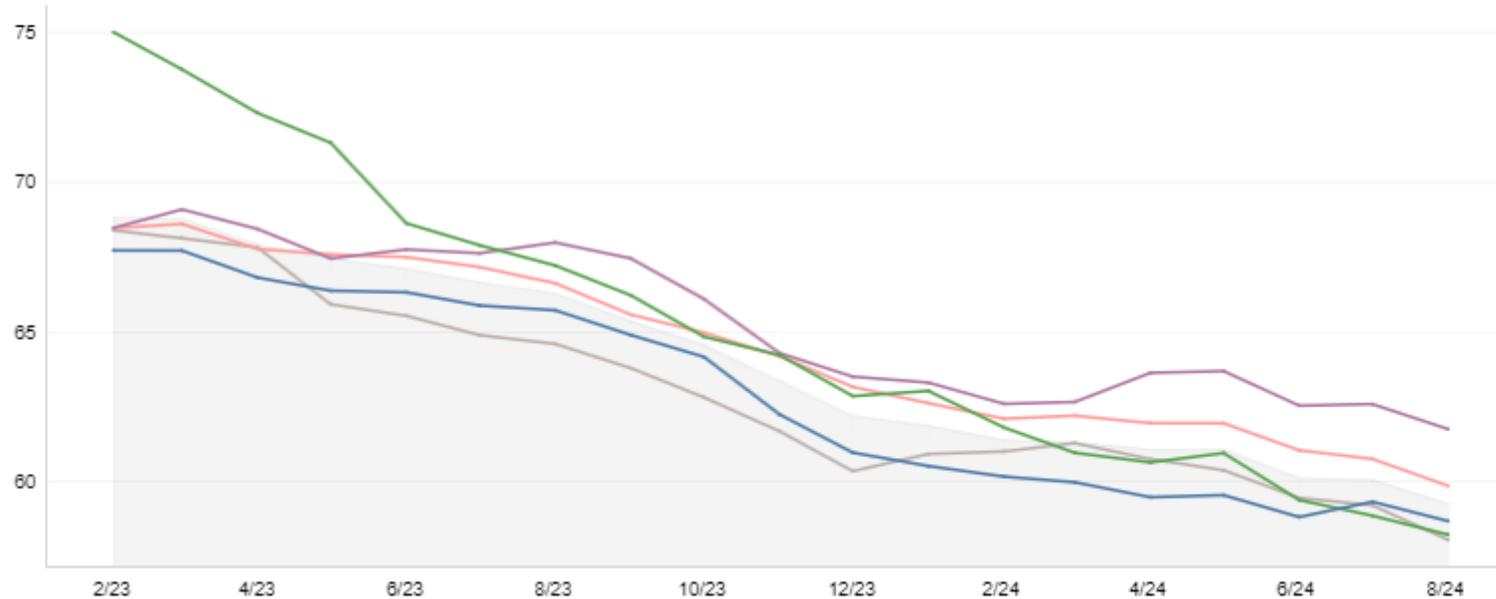
# Restwert Trends – Treibstoff (Einkauf / 12 Monate / 20.000 km)

## Residual Value Intelligence

SELECT COUNTRY: Austria | SELECT SEGMENT: (Alle) | SELECT FUEL TYPE: (Alle) | SELECT BRAND: (Alle) | SELECT BODY TYPE: (Alle)

SELECT CONTENT: Top 5 share of used car market | SELECT SCENARIO: 12mths / 20kkm | SELECT TRADE / RETAIL: Trade | SELECT RV % / VALUE: RV % | SELECT DATES: 1/23 to 8/24

Fuel type: Trade RV %



Variance

Order by market ...	Latest	3 mths	6 mths	12 mths
Petrol	59.8%	▼-2,1 pp	▼-2,2 pp	▼-7,3 pp
Diesel	58.6%	▼-0,9 pp	▼-1,5 pp	▼-7,2 pp
Electric	58.2%	▼-2,7 pp	▼-3,6 pp	▼-9,7 pp
Plug-in Hybr..	58.0%	▼-2,3 pp	▼-2,9 pp	▼-6,8 pp
Hybrid	61.7%	▼-1,9 pp	▼-0,8 pp	▼-5,9 pp

Share of used car market

	Latest	3 mths	6 mths	12 mths
Petrol	46,9%	▼-1,2 pp	▲+1,3 pp	▼-0,9 pp
Diesel	31,1%	▲+0,7 pp	▲+1,0 pp	▲+1,5 pp
Electric	10,5%	▲+1,1 pp	▼-0,1 pp	▼-0,2 pp
Plug-in Hybr..	7,3%	▼-0,2 pp	▼-2,5 pp	▼-1,1 pp
Hybrid	4,3%	▼-0,4 pp	▲+0,2 pp	▲+0,6 pp

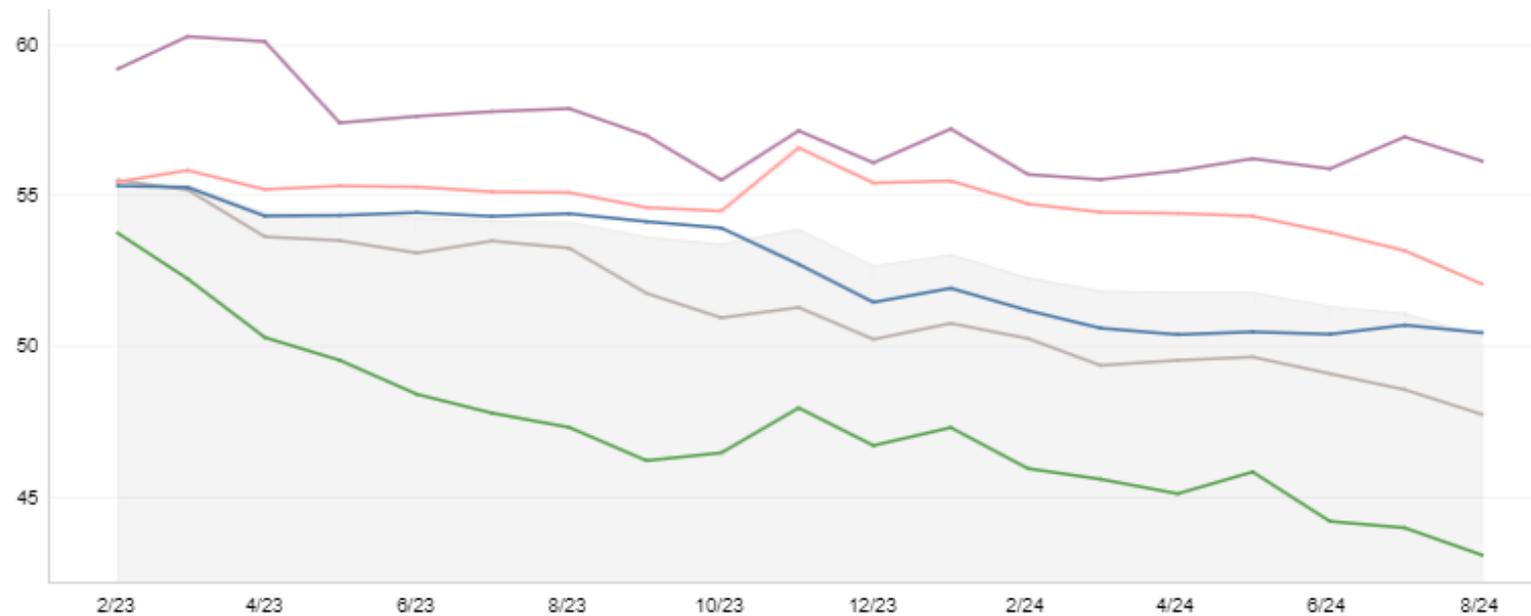
# Restwert Trends – Treibstoff (Einkauf / 36 Monate / 60.000 km)

3-jährige HEVs und Benziner derzeit mit dem höchsten RW

## Residual Value Intelligence

SELECT COUNTRY: Austria (Alle)  
 SELECT SEGMENT: (Alle)  
 SELECT FUEL TYPE: (Alle)  
 SELECT BRAND: (Alle)  
 SELECT BODY TYPE: (Alle)  
 SELECT CONTENT: Top 5 share of used car market  
 SELECT SCENARIO: 36mths / 60kkm  
 SELECT TRADE / RETAIL: Trade  
 SELECT RV % / VALUE: RV %  
 SELECT DATES: 1/23 to 8/24

Fuel type: Trade RV %



Variance

Order by market ...	Latest	3 mths	6 mths	12 mths
Petrol	52.0%	▼-2,3 pp	▼-2,7 pp	▼-3,1 pp
Diesel	50.4%	0,0 pp	▼-0,7 pp	▼-3,9 pp
Plug-in Hybr..	47.7%	▼-1,9 pp	▼-2,5 pp	▼-5,8 pp
Electric	43.0%	▼-2,8 pp	▼-2,9 pp	▼-4,7 pp
Hybrid	56.1%	▼-0,1 pp	▲+0,4 pp	▼-1,6 pp

Share of used car market

	Latest	3 mths	6 mths	12 mths
Petrol	40,2%	▼-1,7 pp	▼-0,5 pp	▲+0,8 pp
Diesel	39,3%	▲+1,0 pp	▼-0,5 pp	▼-5,2 pp
Plug-in Hybr..	9,3%	▲+0,5 pp	▼-0,2 pp	▲+3,1 pp
Electric	8,3%	▲+0,4 pp	▲+1,2 pp	▲+1,1 pp
Hybrid	2,7%	▼-0,1 pp	▲+0,0 pp	▲+0,3 pp

# Restwert Trends – Treibstoff (Einkauf / 48 Monate / 80.000 km)

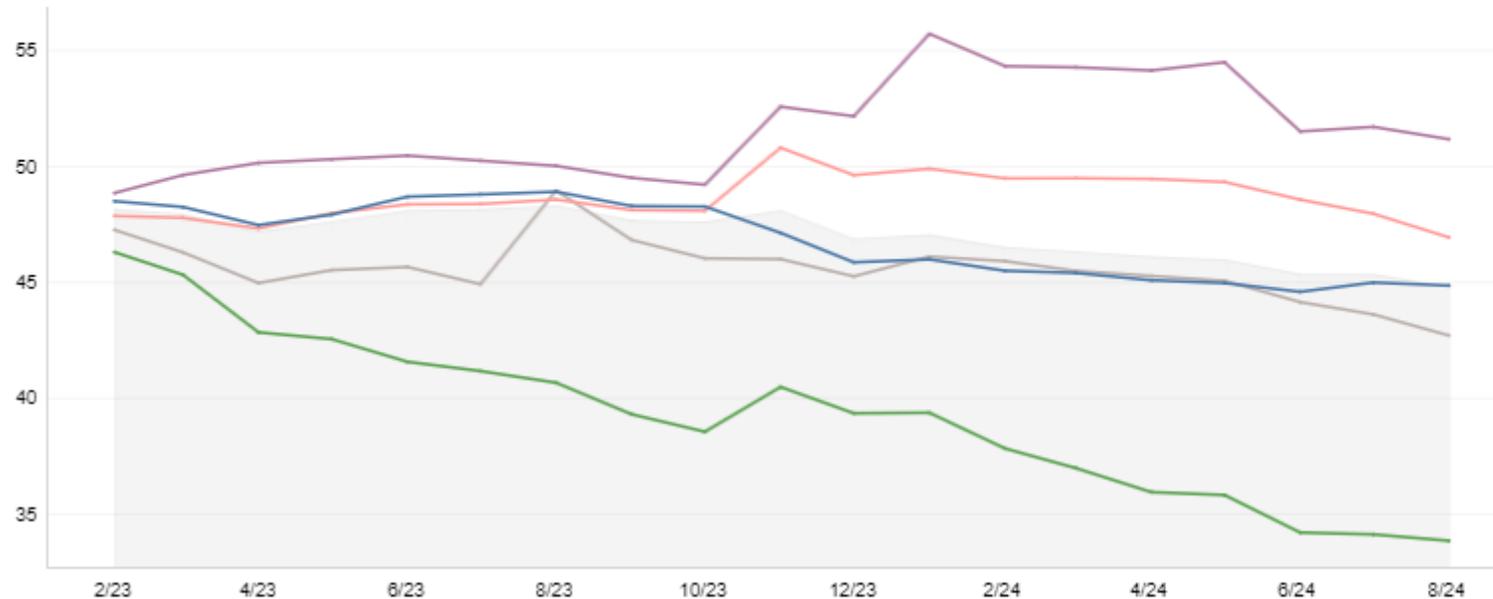
## RW von 4-jährigen BEVs sind weiterhin unter Druck

### Residual Value Intelligence

SELECT COUNTRY: Austria | SELECT SEGMENT: (Alle) | SELECT FUEL TYPE: (Alle) | SELECT BRAND: (Alle) | SELECT BODY TYPE: (Alle)

SELECT CONTENT: Top 5 share of used car market | SELECT SCENARIO: 48mths / 80kkm | SELECT TRADE / RETAIL: Trade | SELECT RV % / VALUE: RV % | 1/23 | SELECT DATES: 8/24

Fuel type: Trade RV %



Variance

Order by market ...	Latest	3 mths	6 mths	12 mths
Diesel	44.8%	▼-0,1 pp	▼-0,6 pp	▼-3,9 pp
Petrol	46.9%	▼-2,4 pp	▼-2,5 pp	▼-1,4 pp
Plug-in Hybr..	42.6%	▼-2,4 pp	▼-3,2 pp	▼-2,2 pp
Electric	33.8%	▼-2,0 pp	▼-4,0 pp	▼-7,3 pp
Hybrid	51.1%	▼-3,3 pp	▼-3,2 pp	▲+0,9 pp

Share of used car market

	Latest	3 mths	6 mths	12 mths
Diesel	46,7%	▼-5,4 pp	▼-5,2 pp	▼-7,4 pp
Petrol	37,2%	▲+3,7 pp	▲+2,6 pp	▲+0,5 pp
Plug-in Hybr..	7,0%	▲+1,8 pp	▲+1,9 pp	▲+5,8 pp
Electric	6,9%	▲+0,0 pp	▲+0,2 pp	▲+1,1 pp
Hybrid	2,1%	▲+0,1 pp	▲+0,5 pp	▲+0,3 pp



# Vielen Dank!

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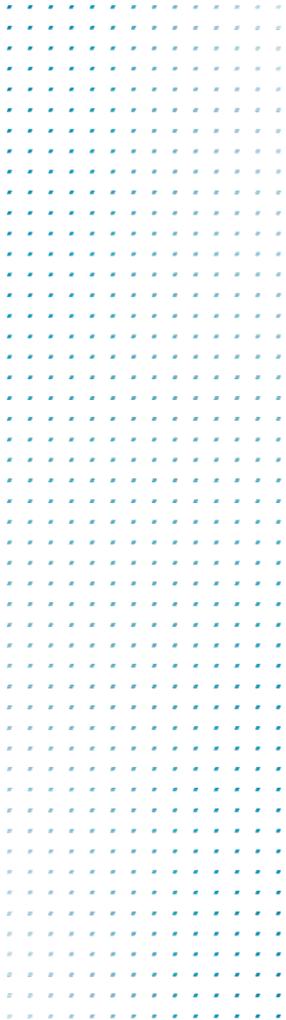
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Quellen: Eurotax / Autovista Group / EV Volumes / Statistik Austria

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