

COUNTRY FACT SHEETS



BELGIUM • BRAZIL • CHINA • FRANCE • GERMANY • ITALY • JAPAN • MEXICO • NETHERLANDS • NORWAY
POLAND • PORTUGAL • SOUTH AFRICA • SPAIN • UNITED KINGDOM • UNITED STATES • TURKEY

What place do cars hold?

Motorization rate¹
2019

174 vehicles per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV market shares⁴

35% South Africa
(+6 pts) /2015

45% World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³

0% South Africa
4.6% World

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.25** | 2021 **0.30** (+22%) | 2022 **0.30** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

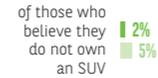
In South Africa, SUVs account for one-third of all car sales. Seen as family cars first and foremost, SUVs are admired for their value for money, with half of non-owners considering buying a vehicle from this category.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

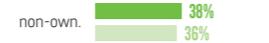


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



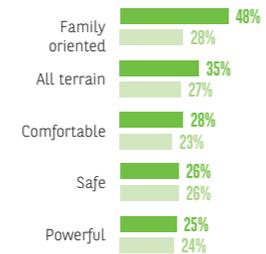
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

575 vehicles per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV market shares⁴

35% Germany
(+12 pts) /2015

45% World

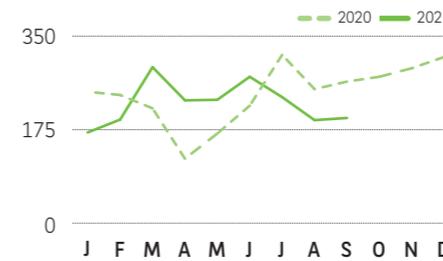
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³

13.5% Germany
4.6% World

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **2.92** | 2021 **2.68** (-8%) | 2022 **2.68** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

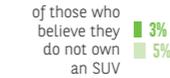
Germany retains a strong attachment to the saloon car, whose silhouette is emblematic of its premium car manufacturers. SUVs are less prevalent here than in many of the other countries surveyed, as well as drawing stronger criticism, especially from non-owners. Nonetheless, SUV sales are growing, driven by the extensive ranges of domestic carmakers.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

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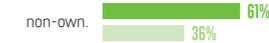


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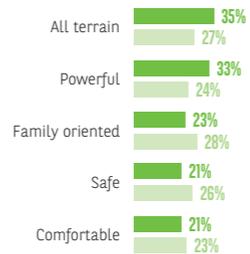
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SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



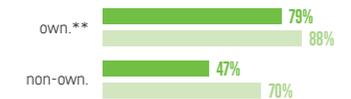
The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

508 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV
market shares⁴

42% (+15 pts)
Belgium /2015

45%
World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

11.2%
4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.43** | 2021 **0.38** (-12%) | 2022 **0.38** (0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

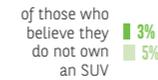
Like in most other European countries, the market share of SUVs in Belgium has increased sharply in recent years. However, the Belgians are fairly critical of this type of vehicle and purchase intentions are low, even among existing SUV owners.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

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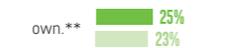


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Percentage of respondents who believe that criticisms of SUVs are justified



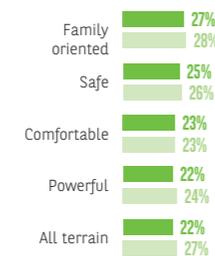
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A vehicle with solid values...

Top 5 characteristics associated with SUVs



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Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

275 vehicles
per 1,000 inhabitants
(World: 182 in 2015)

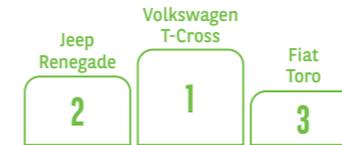


2020 SUV
market shares⁴

26% (+0 pts)
Brazil /2015

45%
World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

0%
4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **1.62** | 2021 **1.59** (-2%) | 2022 **1.59** (+0%)

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SUMMARY

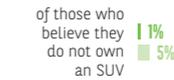
Brazil is one of the few countries in this study where the market share of SUVs, which is relatively small, has not increased in recent years. Chosen for their practicality rather than their style, purchase intentions for these vehicles are nonetheless high, even among non-owners.

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Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

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Percentage of respondents who believe that criticisms of SUVs are justified



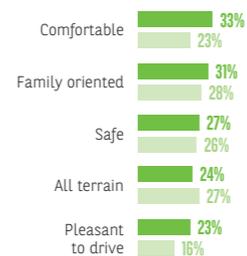
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Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less





What place do cars hold?

Motorization rate¹
2018

90 vehicles per 1,000 inhabitants (World: 182 in 2015)



2020 SUV market shares⁴

48% China (+12 pts) /2015

45% World

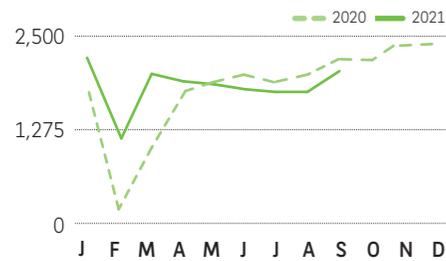
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³

5.7%
4.6%

Monthly new passenger vehicle (NPV) sales (In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **20.14** | 2021 **20.82** (+3%) | 2022 **20.82** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

Even in China, where the three-box saloon has traditionally been a mark of status, SUVs now occupy a prominent position, both in terms of sales and purchase intentions. Given that the motorization rate is still low, the potential of SUVs is considerable.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

China World All countries surveyed

SUV: three divisive letters

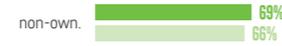
A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

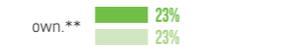


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



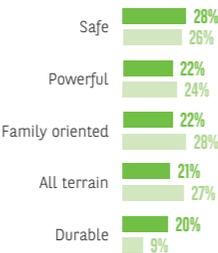
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

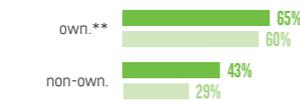


Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

533 vehicles per 1,000 inhabitants (World: 182 in 2015)



2020 SUV market shares⁴

43% Spain (+16 pts) /2015

45% World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³

5%
4.6%

Monthly new passenger vehicle (NPV) sales (In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.85** | 2021 **0.84** (-1%) | 2022 **0.84** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

SUV sales have risen rapidly in Spain over the last few years. There is considerably less criticism of SUVs here than in other countries.

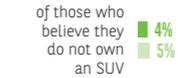
* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

Spain World All countries surveyed

SUV: three divisive letters

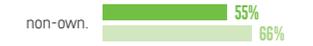
A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own



... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



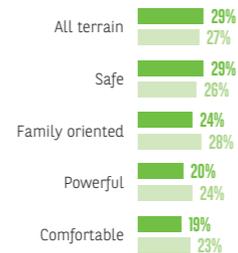
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SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven

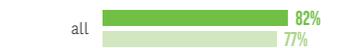


The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2018

767 vehicles per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV market shares⁴ **52%** (+14 pts) /2015 **44%** World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³ **2%** **4.6%**

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **14.47** | 2021 **15.27** (+5%) | 2022 **15.27** (+0%)

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SUMMARY

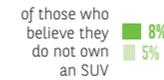
In the United States, the land of cars and wide open spaces, the SUV is king, accounting for over half of all sales. Yet, the Americans are relatively sensitive to the criticisms levelled at SUVs, particularly with regard to pollution. While intentions to purchase this category of vehicle remain high, it is quite possible that the segment's growth will experience a slowdown over the coming years.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

SUV: three divisive letters

A body style some find hard to identify... and which is sometimes criticised, especially by non-SUV owners

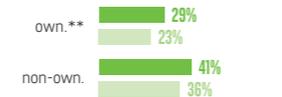
Percentage of respondents who are mistaken about the type of vehicle they own



Percentage of respondents who believe that criticisms of SUVs are justified



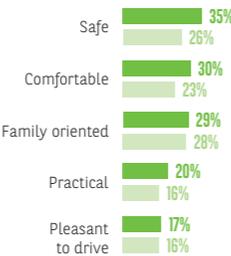
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...

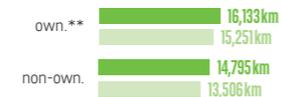


... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

570 vehicles per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV market shares⁴ **40%** (+9 pts) /2015 **45%** World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³ **11.3%** **4.6%**

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **1.65** | 2021 **1.63** (-1%) | 2022 **1.63** (+00%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

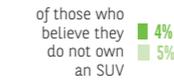
Even in France, the birthplace of the MPV, SUVs have become the number one body style in terms of desirability. Domestic manufacturers have adjusted their ranges and their vehicles are now the best-selling models in this market segment. Neither criticism, sometimes virulent, nor the mention of specific taxes or even sales restrictions are enough to undermine the SUV's success.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

SUV: three divisive letters

A body style some find hard to identify... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who are mistaken about the type of vehicle they own



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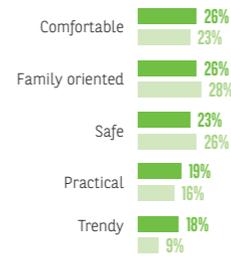
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SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



The growth in sales is set to continue

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... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less





Italy

Italy World All countries surveyed

What place do cars hold?

Motorization rate¹ 2021

655 vehicles per 1,000 inhabitants (World: 182 in 2015)



2020 SUV market shares⁴

Italy 40% (+15 pts) /2015 World 45%

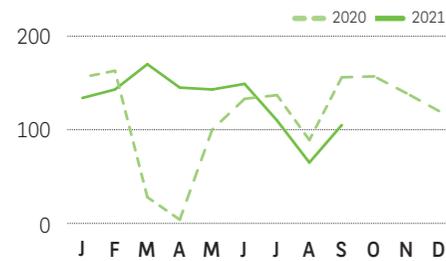
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³

4.3% 4.6%

Monthly new passenger vehicle (NPV) sales (In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 1.38 | 2021 1.47 (+6%) | 2022 1.47 (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

In Italy, a country whose city cars have traditionally been very popular, the SUV is also enjoying an impressive and ever increasing level of success. Much like in the domestic car market as a whole, the most compact SUVs tend to achieve the highest sales.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners Sources: 1 ACEA. 2 OICA. 3 IEA. 4 Statista. 5 Autoways.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

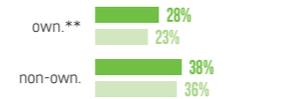


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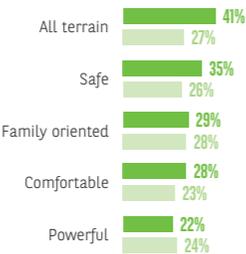
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SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



Japan

Japan World All countries surveyed

What place do cars hold?

Motorization rate¹ 2017

488 vehicles per 1,000 inhabitants (World: 182 in 2015)



2020 SUV market shares⁴

Japan 36% (+1 pt) /2015 World 45%

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³

0.6% 4.6%

Monthly new passenger vehicle (NPV) sales (In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 3.81 | 2021 3.7 (-3%) | 2022 3.7 (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

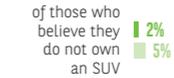
In Japan, where domestic manufacturers have been producing market-leading SUVs for many years, the category's market share is quite stable and comparatively moderate. Domestic carmakers, which had previously led the way in hybrid technology, are lagging behind when it comes to electric vehicles, whose market share is tiny.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners Sources: 1 ACEA. 2 OICA. 3 IEA. 4 Statista. 5 Autoways.

SUV: three divisive letters

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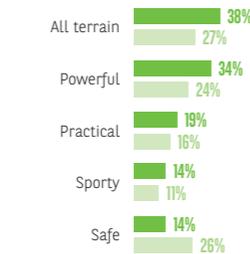
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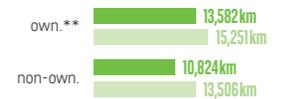


... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less





What place do cars hold?

Motorization rate¹
2020

264 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV
market shares⁴

19%
Mexico

(+4 pts)
/2015

45%
World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

| 0.3%
4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.53** | 2021 **0.54** (+2%) | 2022 **0.54** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

In Mexico, one in every five cars sold is an SUV, the lowest market share of all the countries surveyed. And yet, this is a category that is lauded for the value for money it offers. If the purchase intentions expressed materialise, SUVs will make greater headway.

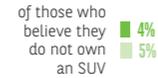
* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

Mexico World All countries surveyed

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

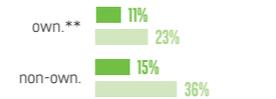


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



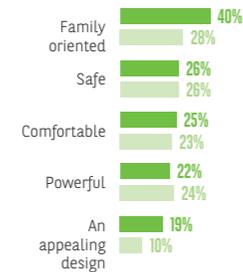
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

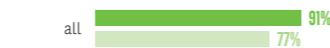
Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2018

516 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV
market shares⁴

35%
Norway

(+12 pts)
/2015

45%
World

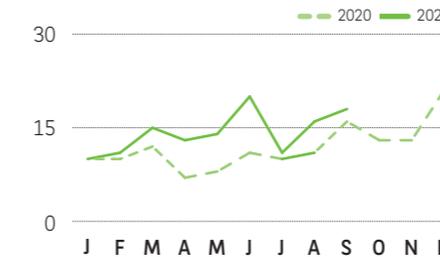
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

| 4.6%
74.8%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.14** | 2021 **0.17** (+1.7%) | 2022 **0.17** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

Three-quarters of the vehicles sold in Norway are electric, so it is no surprise that the best-selling SUV is the Audi E-tron.

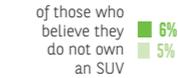
* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

Norway World All countries surveyed

SUV: three divisive letters

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Percentage of respondents who are mistaken about the type of vehicle they own



... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



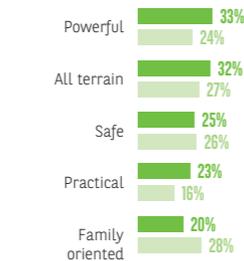
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SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



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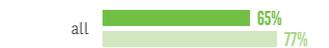
Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

517 vehicles per 1,000 inhabitants
(World: 182 in 2015)



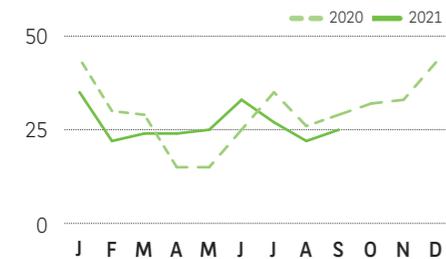
2020 SUV market shares⁴
33% Netherlands (+14 pts) /2015
45% World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³
25% Netherlands
4.6% World

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.36** | 2021 **0.32** (-9%) | 2022 **0.32** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

SUVs have a strong presence in the land of the bicycle. However, they attract more criticism in the Netherlands than elsewhere, particularly from non-SUV owners, few of whom are considering purchasing one as their next car.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

SUV: three divisive letters

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Percentage of respondents who are mistaken about the type of vehicle they own

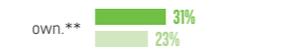


... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



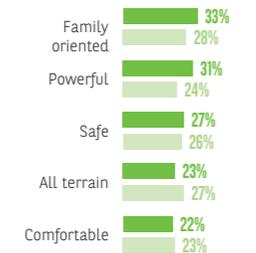
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs

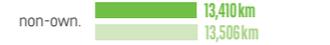


... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven

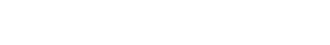


The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

642 vehicles per 1,000 inhabitants
(World: 182 in 2015)



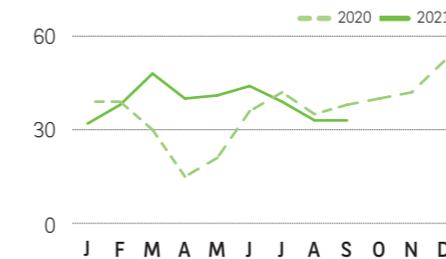
2020 SUV market shares⁴
36% Poland (+9 pts) /2015
45% World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV market shares³
0.8% Poland
4.6% World

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.43** | 2021 **0.46** (+6%) | 2022 **0.46** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

Along with Italy, Poland is the European country with the highest level of car ownership. SUVs enjoy a decent market share and the value for money they offer is appealing to Poles, with the Dacia Duster taking the top spot in terms of sales.

* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

SUV: three divisive letters

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Percentage of respondents who are mistaken about the type of vehicle they own



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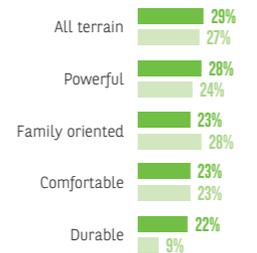
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SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2021

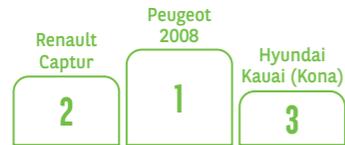
506 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV
market shares⁴

28% Portugal
(+11 pts) /2015
45% World

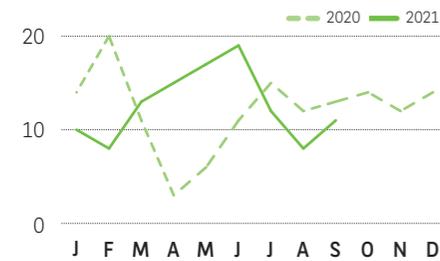
TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

13.8%
4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **0.15** | 2021 **0.14** (-2%) | 2022 **0.14** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

Portugal is one of the European countries where the market share of SUVs is the lowest. Like in Italy, the most compact SUVs achieve the highest sales.

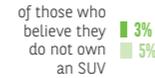
* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

Portugal World All countries surveyed

SUV: three divisive letters

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... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



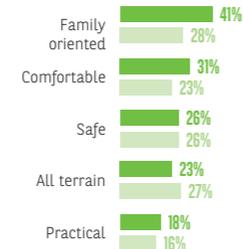
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs



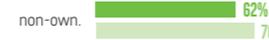
The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2018

488 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV
market shares⁴

41% United Kingdom
(+15 pts) /2015
45% World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

11.3%
4.6%

Monthly new passenger vehicle (NPV) sales
(In thousands of vehicles)



Market forecasts (In millions of new passenger vehicles)

2020 **1.63** | 2021 **1.58** (-3%) | 2022 **1.58** (+00%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

The SUV market is growing fast in the UK. However, there is a clear divide between owners and non-owners of SUVs, with the latter being very critical of these vehicles and voicing their reluctance to acquire one.

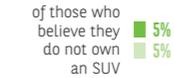
* Countries covered by L'Observatoire Cetelem de l'Automobile. ** own.: SUV owners. non-own.: non-SUV owners
Sources: ¹ ACEA. ² OICA. ³ IEA. ⁴ Statista. ⁵ Autoways.

United Kingdom World All countries covered by the survey

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own



... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified



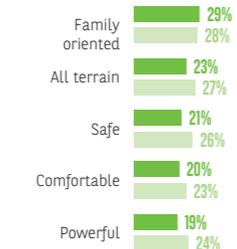
Percentage of respondents who believe that SUVs pollute more than other vehicles



SUVs: a stunning success story

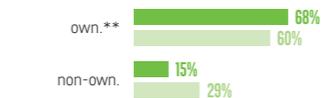
A vehicle with solid values...

Top 5 characteristics associated with SUVs



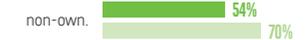
The growth in sales is set to continue

Many are considering choosing an SUV as their next car...



... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money



Annual distance driven



... especially since they believe that going electric should mean that SUVs pollute less



What place do cars hold?

Motorization rate¹
2018

151 vehicles
per 1,000 inhabitants
(World: 182 in 2015)



2020 SUV
market shares⁴

28%
Turkey
(-5 pts)
/2015

45%
World

TOP 3 best-selling SUVs in 2020⁴



2020 EV + PHEV
market shares³

↓ 0.3%
■ 4.6%

Monthly new passenger vehicle (NPV) sales
(in thousands of vehicles)



Market forecasts (in millions of new passenger vehicles)

2020 **0.61** | 2021 **0.58** (-4%) | 2022 **0.58** (+0%)

The 2022 forecast is contingent on microchip supplies returning to normal, but it is difficult to predict when this will occur. If this were to happen at the end of 2022, the market would remain at a similar level to 2021.

SUMMARY

Turkey is the only country in our survey where the (relatively modest) market share of SUVs is contracting. But this could soon change, as intentions to purchase SUVs are high. This is a category of vehicle admired for the value for money it offers.

SUV: three divisive letters

A body style some find hard to identify...

Percentage of respondents who are mistaken about the type of vehicle they own

of those who believe they own an SUV

Turkey	61%
World	45%

of those who believe they do not own an SUV

Turkey	3%
World	5%

... and which is sometimes criticised, especially by non-SUV owners

Percentage of respondents who believe that criticisms of SUVs are justified

own.**

Turkey	48%
World	50%

non-own.

Turkey	60%
World	66%

Percentage of respondents who believe that SUVs pollute more than other vehicles

own.**

Turkey	13%
World	23%

non-own.

Turkey	25%
World	36%

SUVs: a stunning success story

A vehicle with solid values...

Top 5 characteristics associated with SUVs

Safe	38%	26%
Powerful	29%	24%
All terrain	28%	27%
Comfortable	25%	23%
Family oriented	15%	28%

... and offering good value for money

Percentage of respondents who consider that SUVs offer good value for money

own.**

Turkey	96%
World	88%

non-own.

Turkey	85%
World	70%

Annual distance driven

own.**

Turkey	17,235 km
World	15,251 km

non-own.

Turkey	15,420 km
World	13,506 km

The growth in sales is set to continue

Many are considering choosing an SUV as their next car...

own.**

Turkey	67%
World	60%

non-own.

Turkey	45%
World	29%

... especially since they believe that going electric should mean that SUVs pollute less

all

Turkey	89%
World	77%