

Major Automaker Sales Analysis

主要车厂销售分析 for 2021

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2021 drew a critical dividing line between every country's automotive market status before and after recovery. The sales figures from global automakers reveal the demand for automotive fasteners. **F&I Tools disclosed the top 15 automaker sales in 2019 - 2022. This numeric data comparing the past three years happen to unveil the sales transition of global automakers going from the COVID outbreak to coexisting with the virus.**

Sales Yet to Recover to Pre-Pandemic Level

The top 5 best-selling automakers last year were Toyota, Volkswagen, Hyundai, General Motors and Stellantis. The world sold 82,684,788 vehicles last year, among which the top 15 automakers' sales totaled 63,688,675 vehicles, sharing 77% of the global sales. **Looking at the 3-year sales numbers of the 15 automakers comes to a conclusion that up to last year most of them on the chart haven't had their sales recovered nor surpassing the pre-pandemic level back in 2019. They haven't recovered their full strength.**

Only three automakers were the exception. BMW from Germany bounced back from the pre-pandemic 2.520 million vehicles to last year's 2.521 million, up 0.05%. Changan Automobile from China sold 1.75 million vehicles before the pandemic and grew 32% (2.31 million vehicles) last year. Maruti Suzuki grew 5.7% from 1.56 million to 1.65 million vehicles. Although Geely Auto from China in 2021 didn't sell as many as it did in 2019, it remained on a gradual growth track. **There is a stronger growth momentum and larger growth margin for sales in the Chinese automotive market.** In 2020 when the pandemic peaked, the 15 automakers mostly shared a two-digit sales drop and the average drop margin was 13.4%.

The COVID outbreak brought the annual sales of the two automotive giants Toyota and Volkswagen down from the 10 million vehicles mark. The top 3 automakers with the largest sales drop in 2020 were Stellantis (down 23%), Nissan and Ford (both down 22%), and Renault (down 21%).

Global Top 15 Automaker Sales

Automakers	Year	Sales in Vehicles	Change	Global Ranking
Toyota	2021	9,562,483	↑ 1%	1
	2020	9,528,753	↓ 11%	1
	2019	10,741,556	↑ 2%	2
Volkswagen	2021	8,882,346	↓ 5%	2
	2020	9,305,427	↓ 15%	2
	2019	10,975,352	↑ 1%	1
Hyundai	2021	6,668,037	↑ 5%	3
	2020	6,353,514	↓ 12%	4
	2019	7,189,893	↓ 3%	5
General Motors	2021	6,294,385	↓ 8%	4
	2020	6,833,592	↓ 11%	3
	2019	7,724,163	↓ 12%	4
Stellantis	2021	6,142,200	↓ 1%	5
	2020	6,205,996	↓ 23%	5
	2019	8,091,825	↓ 10%	3
Honda	2021	4,456,728	↓ 7%	6
	2020	4,790,438	↓ 10%	6
	2019	5,323,319	↑ 1%	7
Nissan	2021	4,064,999	↑ 1%	7
	2020	4,029,174	↓ 22%	8
	2019	5,176,211	↓ 8%	8
Ford	2021	3,942,755	↓ 7%	8
	2020	4,231,549	↓ 22%	7
	2019	5,385,972	↓ 10%	6



Weak Foundation Amid Less Desirable Prospect

Moving on to the year 2021 of market recovery, the ones with the largest sales regain were Changan Automobile (up 15%), Maruti Suzuki (up 13%) and BMW (up 8%). **In that year, only 7 out of the 15 automakers were back to positive growth. We can roughly estimate that about half the automakers will increase sales and others otherwise this year. The foundation for the automotive industry is still weak and could anytime be subject to sudden impacts from the macro-environment.**

In fact, there are still many hidden concerns with the automotive industry going forward: there is still the ongoing semiconductor shortage that constricts a part of the automakers' capacity; steel price remains on the rise and cost pressure encroaches on automakers. After the Russia-Ukraine war broke out, Ukraine has been unable to supply automotive wires to automakers. A research institute forecast that it led to Mercedes-Benz, Volkswagen and BMW announcing to reduce production this March. The war has resulted in a loss of 70 thousand new vehicles for Europe and this is not a small number.

On the other hand, EVs have a better prospect. Given that EV sales were supported by a large number of purchase in the last two years, if most of the automakers succeed in transitioning from gasoline-powered vehicles to EVs, it is believed that EV sales will no doubt have an explosive growth after the supply of semiconductors and special materials stabilizes. ▣

Global Top 15 Automaker Sales

Automakers	Year	Sales in Vehicles	Change	Global Ranking
Renault	2021	2,689,454	↓ 5%	9
	2020	2,949,871	↓ 21%	9
	2019	3,749,815	↓ 3%	9
BMW	2021	2,521,596	↑ 8%	10
	2020	2,324,778	↓ 8%	10
	2019	2,520,146	↑ 1%	10
Changan	2021	2,314,547	↑ 15%	11
	2020	2,003,663	↑ 14%	12
	2019	1,759,971	↓ 15%	12
Mercedes	2021	2,093,476	↓ 3%	12
	2020	2,164,275	↓ 8%	11
	2019	2,339,024	↑ 1%	11
Maruti Suzuki	2021	1,652,653	↑ 13%	13
	2020	1,457,861	↓ 7%	13
	2019	1,563,297	↓ 16%	13
Geely	2021	1,328,029	↑ 1%	14
	2020	1,320,471	↓ 1%	14
	2019	1,361,556	↓ 9%	15
Mazda	2021	1,074,987	↓ 11%	15
	2020	1,243,039	↓ 17%	15
	2019	1,454,112	↓ 9%	14



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