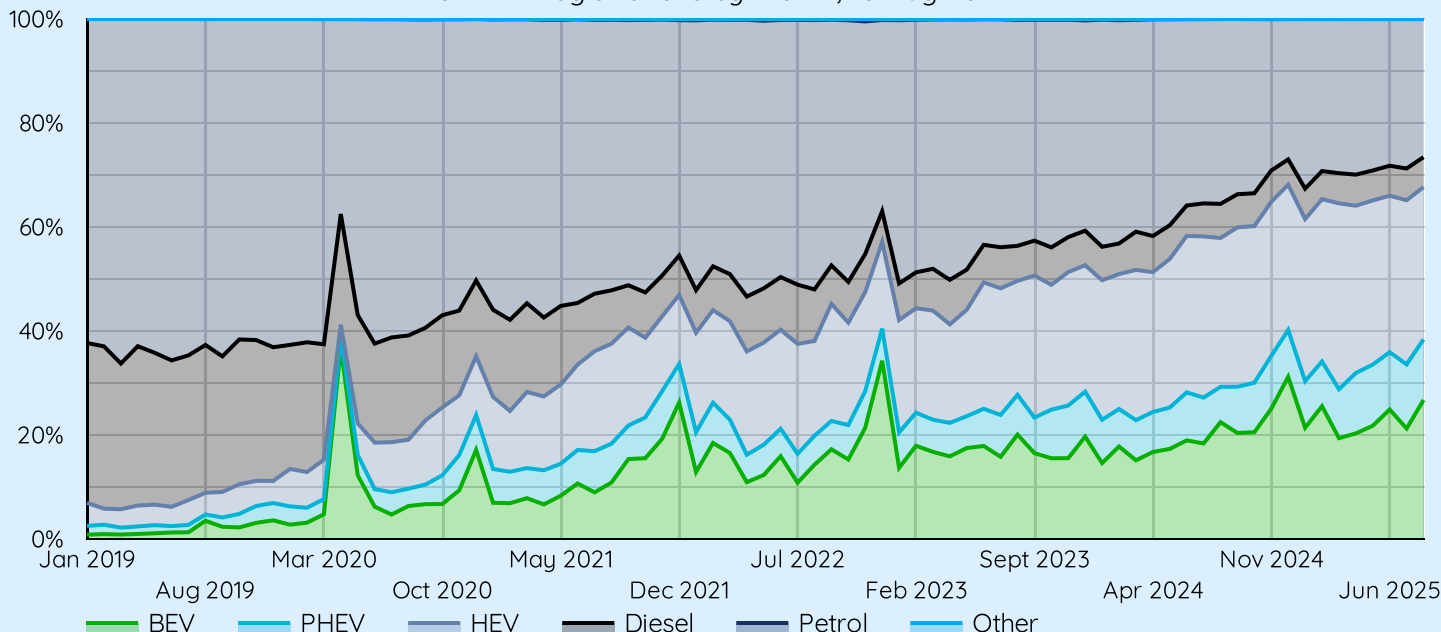


## Annual BEV growth exceeds 20% as manufacturers gear up for a strong end to the year

New BEV registrations by month, to Aug 2025



Electric Cars

**21,408**

↑ 20.4%

Electric Vans

**1,631**

↑ 81.6%

Electric Motorbikes

**237**

↓ -28.6%

Electric HGVs (BEV)

**52**

↑ 147.6%

- EVs captured 26.8% of all new car registrations in August, with sales up 20% compared to the same month in 2024.

- In total, 38.8% of cars joining UK roads this month came with a plug - more than one in three new vehicles.

- August marks the moment when the implied Zero Emission Vehicle (ZEV) Mandate target has been achieved for the year.

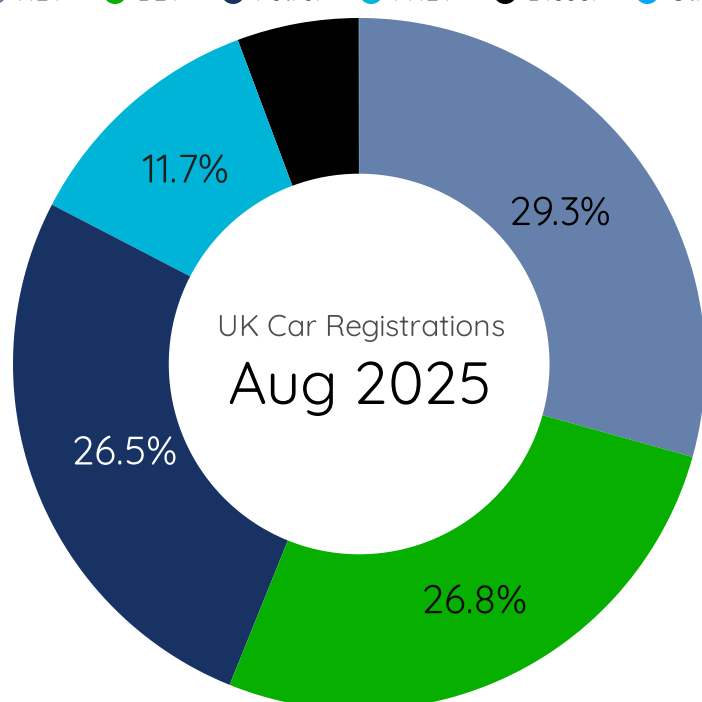
- . Ford recorded a 300% year-on-year surge in BEV registrations, the fastest growth among high-volume manufacturers.

- In the van segment, BEV vans have nearly doubled their market share against last August.

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- Suggestions, feedback or requests for data? We'd love to hear from you:*  
[data@newautomotive.org](mailto:data@newautomotive.org)

HEV BEV Petrol PHEV Diesel Other



### Corrin Reilly, Data Analyst at New AutoMotive, said:

"August's figures saw electric cars win the race for second place, beating out petrol cars for the first time in 2025 with a 26.8% market share, and falling just shy of taking first place from HEVs at 29.3%. More than 1 in 3 of all new cars registered had a plug, with PHEV car registrations rising by more than 80%.

"Electric van registrations were also on the rise seeing their market share more than double to 11.9%. The hybrid van market mirrored the PHEV car market with up-take skyrocketing, showing growth of more than 250%.

"The new registration figures for August go to show the ZEV Mandate is working as intended and driving up-take of electric vehicles across the sector."

## Cars summary

Although August tends to be a quieter month for car sales, this wasn't the case for the electric segment with 26.8% of new cars being electric, and over a third having a plug. EV sales were up 20% compared to last August.

Looking across 2025 to date, there was no reprieve for the petrol and diesel segments that have seen market share continue to decline this year. In the year to date, diesel is down more than 12% and petrol down more than 26% on the same period last year. In contrast, BEVs are meeting the requirements of the ZEV Mandate. With a cumulative market share of 21.92% against the implied 21.82% target, if manufacturers maintain this level for the rest of the year, the market as a whole will meet the mandate.

Behind the headline numbers, fortunes are diverging. Tesla and BMW, still among the UK's best-selling EV brands, have both seen registrations dip year-to-date by 5.7% and 8.4% respectively. Their slowdown suggests that the EV race is becoming more competitive, with newer entrants and established rivals building momentum.

Among the brands gaining ground, four of the top ten EV makers are enjoying triple-digit growth: Volkswagen, Skoda, and BYD registered increases of 122%, 131%, and 224% respectively. However, Ford stands out as the fastest climber among high-volume manufacturers, with BEV registrations surging by 300% compared to last year. This strong performance has propelled Ford into the top three brands for the first time this year, underscoring their rapid progress. The manufacturer has, so far, been the only marque who have models that qualify for the top electric car grant.

## BEV market share, YTD, vs last year

Marque	BEV re... ▾	% Δ	% of UK BEVs	Δ
TESLA	28,163	-5.5% ↓	10.17%	-3.42% ↓
BMW	22,422	-8.4% ↓	8.1%	-3.06% ↓
VOLKSWAGEN	22,198	122.3% ↑	8.02%	3.46% ↑
AUDI	18,114	20.9% ↑	6.54%	-0.29% ↓
KIA	14,441	35.7% ↑	5.22%	0.36% ↑
SKODA	14,074	131.7% ↑	5.08%	2.31% ↑
FORD	13,610	299.7% ↑	4.91%	3.36% ↑
BYD	13,401	223.2% ↑	4.84%	2.95% ↑
MERCEDES-BE...	12,442	-11.2% ↓	4.49%	-1.89% ↓
PEUGEOT	12,157	57.1% ↑	4.39%	0.86% ↑

## YTD vs last year

Fuel Type	Regs. ▾	% Δ	Mkt. Share
HEV	409,768	11.8% ↑	32.44%
Petrol	371,113	-26.6% ↓	29.38%
BEV	276,913	26.2% ↑	21.92%
PHEV	132,929	28.6% ↑	10.52%
Diesel	72,385	-12.4% ↓	5.73%
Other	155	-87.0% ↓	0.01%
<b>Grand total</b>	<b>1,263,263</b>	<b>-1.2% ↓</b>	<b>100%</b>

## Latest month vs last year

Fuel Type	Regs. ▾	% Δ	Mkt. Share
HEV	23,453	6.9% ↑	29.33%
BEV	21,408	20.4% ↑	26.77%
Petrol	21,198	-22.7% ↓	26.51%
PHEV	9,339	80.9% ↑	11.68%
Diesel	4,546	-3.4% ↓	5.69%
Other	15	-	0.02%
<b>Grand total</b>	<b>79,959</b>	<b>3.8% ↑</b>	<b>100%</b>

## Top Brands' Electrification YTD vs last year

Marque	Total ▾	BEVs	BEV (%)	Δ
VOLKSWAGEN	115,452	22,198	19.23%	10.15% ↑
BMW	78,036	22,422	28.73%	1.24% ↑
FORD	77,857	13,610	17.48%	12.87% ↑
KIA	73,793	14,441	19.57%	5.53% ↑
AUDI	66,103	18,114	27.4%	9.43% ↑
HYUNDAI	59,568	12,016	20.17%	1.36% ↑
PEUGEOT	59,065	12,157	20.58%	3.01% ↑
MERCEDES-B...	58,488	12,442	21.27%	0.31% ↑
NISSAN	57,259	2,377	4.15%	-7.59% ↓
TOYOTA	54,763	3,304	6.03%	-3.3% ↓
VAUXHALL	54,658	8,628	15.79%	-1.5% ↓
SKODA	53,633	14,074	26.24%	13.39% ↑
MG	50,339	9,320	18.51%	-4.85% ↓
LAND ROVER	41,134	0	0%	0%
VOLVO	39,828	8,284	20.8%	-8.96% ↓
RENAULT	39,141	8,913	22.77%	13.72% ↑

## Car ZEV Mandate Tracker

Figures shown are based on GB car sales in the current calendar year

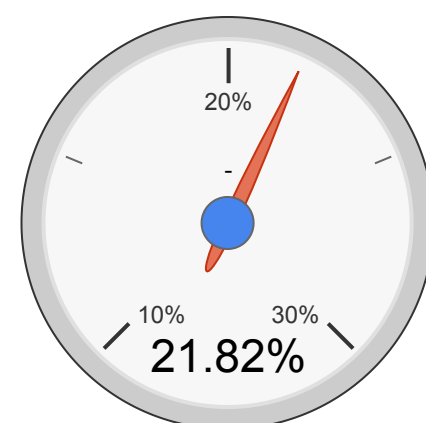
Parent	Car sales	Est real ZEV sales target	BEV % of car sales	ZEV credit shortfall/sur...
VW	286,656	20.6%	23.9%	9,565
STELLANTIS	148,615	26.6%	21.8%	-7,193
HYUNDAI	134,274	22.1%	20.2%	-2,576
BMW	105,718	23.8%	28.8%	5,326
FORD	77,859	24.9%	21.3%	-2,783
TOYOTA	64,865	15.4%	7.7%	-4,976
MERCEDES	59,408	25.6%	22.9%	-1,622
RENAULT	58,659	22.1%	21.9%	-82
NISSAN	57,259	21.8%	4.2%	-10,132
GEELY	50,753	25.1%	37.6%	6,338
SAIC	50,339	15.4%	18.5%	1,568
TATA	43,043	15.4%	4.1%	-4,875
TESLA	28,163	28.0%	100.0%	20,277
BYD	24,070	15.4%	55.7%	9,694
CHERY AUTOMOBILE	21,106	15.4%	16.6%	252
MAZDA	21,049	18.1%	0.8%	-3,639
HONDA	15,278	18.6%	1.4%	-2,623
SUZUKI	11,161	22.8%	0.0%	-2,539

**The estimated real ZEV sales target** - The headline ZEV mandate target for 2025 is 28%. But firms generate additional credits by exceeding CO2 emissions targets on their ICE vehicle sales (including hybrids and plug-in hybrids). We calculate the real target - 21.82 - by estimating the number of credits that each manufacturer is expected to generate based on the CO2 ratings of newly registered ICE cars in the year to date, using publicly available information from the DVLA.

**2025 so far** - Based on year-to-date registrations, several manufacturer groups are tracking well to meet their obligations. Groups such as VW, BMW, Geely, Tesla, BYD, SAIC, and Chery Automobile are currently showing a surplus of ZEV credits, indicating their BEV sales are ahead of their estimated targets. Meanwhile Renault are just under their obligation. Conversely, a number of other major manufacturers are currently facing a shortfall. Stellantis, Hyundai, Ford, Toyota, Nissan, Mercedes, Tata, Mazda, Honda, and Suzuki are all estimated to be behind their required ZEV sales targets for the year so far. Nissan and Stellantis appear to have the most substantial deficits to overcome.

**We have not yet included changes announced in April but not yet legislated**

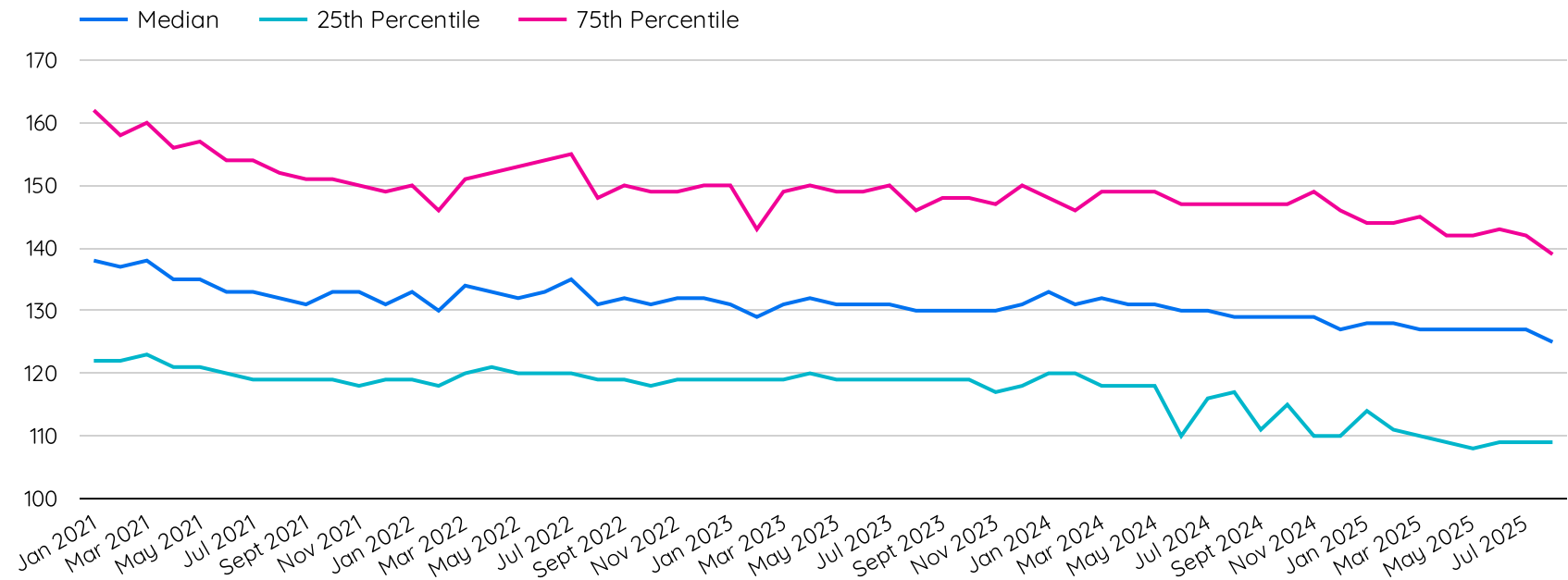
Est. real market-wide ZEV target



The real market-wide ZEV target represents the percentage of GB car sales that need to be fully electric for carmakers to meet their mandated EV sales targets.

# ICE Car CO2 Emissions Ratings

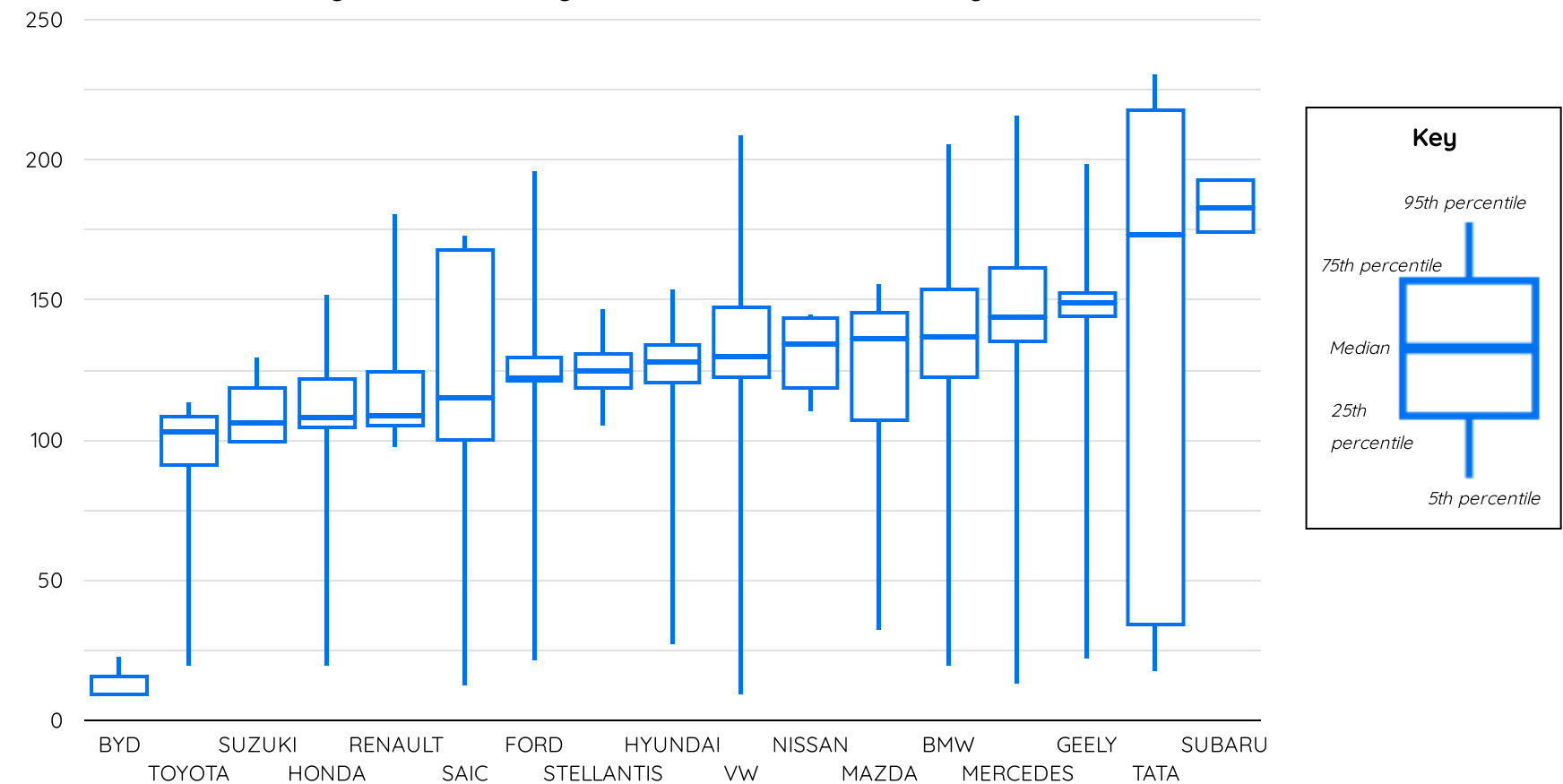
Average CO2 ratings of newly registered internal combustion engine cars by month of registration, gCO2/km



As the UK transitions to zero emissions vehicles, it is important that the new petrol and diesel cars that are sold between now and their phase-out in 2035 do not become less fuel efficient and more polluting. This page provides a way of tracking this trend, with metrics based on the WLTP emissions ratings of new passenger cars in the UK, which have been mandatory for new cars registered in the UK since April 2020.

There has been a steady trend of improvements in WLTP emissions ratings. This is likely to be driven by the flexibilities in the ZEV mandate, which rewards car makers who sell more fuel efficient/lower emission vehicles.

CO2 emissions ratings of new cars registered in the last 12 months, by manufacturer



### Vans Summary

On the back of what was a much improved July compared to previous years, August saw a strong turn-out for new BEV registrations with the van market returning a 2025 high of 11.9% market share. Much like in the car market where hybrids, especially PHEVs, have seen a huge insurgence in up-take - the long dormant hybrid market for vans has seen its new registrations more than triple compared to a year earlier. The market inevitably continues to see the diesel market share be eaten away at by the ever-increasing number of BEV and HEV registrations.

Three of the top four manufacturers for BEV vans saw their BEV market share significantly outpace the headline ZEV Mandate target of 16%, with each managing to achieve 20% BEV market share in their registrations. If these manufacturers can maintain these levels they could all see a financial windfall come their way from manufacturers facing significant credit deficits.

While Ford continues to outsell its competitors in sheer numbers of BEVs, it still finds itself with work to do to keep up with the headline target of 16%. Ford's closest competitor, Volkswagen, are more than over-compliant having managed to achieve an 18.7% BEV market share for 2025 thus far. Ford may often look like it risks being left in the past as the world transitions to electric vehicles, however it is worth noting that its 10.4% BEV share in August 2025 comes on the back of managing a measly 0.7% BEV share just one year earlier so their catch-up could be just on the horizon.

### BEV Van Market Shares (YTD)

Make	BEVs	BEVs
FORD	5,164	30.23%
VOLKSWAGEN	3,465	20.28%
VAUXHALL	2,090	12.24%
PEUGEOT	1,659	9.71%
RENAULT	785	4.6%
MERCEDES-BENZ	1,285	7.52%
CITROEN	607	3.55%
NISSAN	628	3.68%
LAND ROVER	0	0%
MAXUS	704	4.12%
IVECO	217	1.27%
ISUZU	1	0.01%
FIAT	70	0.41%
MAN	11	0.06%
RENAULT TRUCKS	115	0.67%

### Sales by fuel type, YTD vs last year

Fuel	Regs. ▼	Δ	Share
Diesel	159,023	-41,433 ↓	83.83%
BEV	16,512	5,788 ↑	8.7%
HEV	9,872	8,330 ↑	5.2%
Petrol	4,274	-348 ↓	2.25%
Grand total	189,691	-27,656 ↓	100%

### Sales by fuel type, latest month vs last year

Fuel	Regs. ▼	Δ	Share
Diesel	11,265	-3,316 ↓	82.05%
BEV	1,631	733 ↑	11.88%
HEV	632	453 ↑	4.6%
Petrol	201	-55 ↓	1.46%
Grand total	13,729	-2,185 ↓	100%

### Top van sellers' sales: BEV vs non-BEV (YTD)

Make	Total	BEVs	BEV %
FORD	67,776	5,164	7.62%
VOLKSWAGEN	18,512	3,465	18.72%
VAUXHALL	15,652	2,090	13.35%
PEUGEOT	13,673	1,659	12.13%
RENAULT	13,341	785	5.88%
MERCEDES-B...	11,958	1,285	10.75%
CITROEN	11,550	607	5.26%
NISSAN	4,932	628	12.73%
LAND ROVER	4,836	0	0%
MAXUS	3,516	704	20.02%
IVECO	2,844	217	7.63%
ISUZU	2,450	1	0.04%
FIAT	1,904	70	3.68%
MAN	1,901	11	0.58%
RENAULT TRU...	1,573	115	7.31%
ISUZU TRUCKS	680	2	0.29%
INEOS	174	0	0%
TOYOTA	136	59	43.38%

# Van ZEV Mandate Tracker

Figures shown are based on UK van sales in current calendar year.

Entities	Total Registrations ▼	Est. Real ZEV Sales Target	ZEV Share	Credit Balance
FORD	66,912	13.82%	6.72%	-4,752
STELLANTIS	42,708	8.8%	10.19%	595
VOLKSWAGEN	20,331	16%	17.04%	212
RENAULT	13,348	10.81%	5.88%	-658
TOYOTA	13,302	15.2%	6.61%	-1,143
MERCEDES-BENZ	10,899	12.11%	9.78%	-253
NISSAN	4,932	8.8%	12.71%	193
JLR	4,842	10.29%	0%	-498
SAIC	3,354	16%	16.1%	3
ISUZU	2,742	8.8%	0.04%	-240
GEELY	612	8.8%	18.63%	60
INEOS	174	8.8%	0%	-15

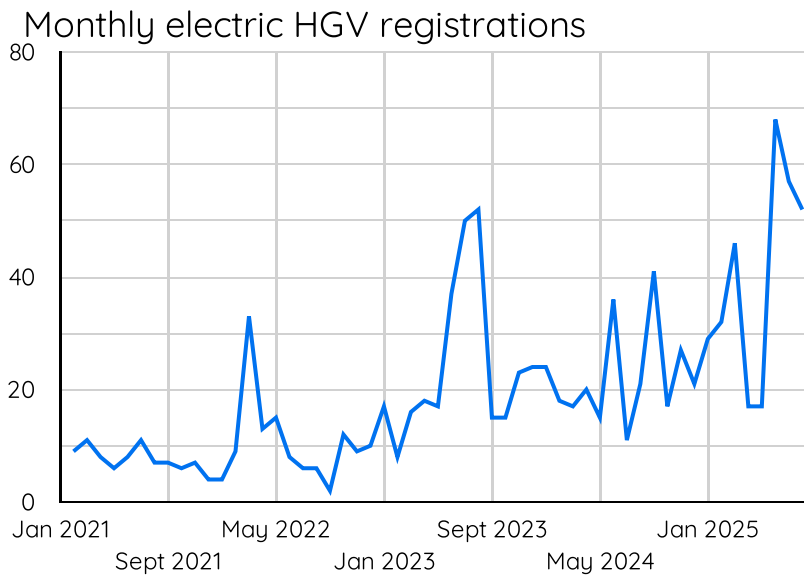
**The estimated real ZEV registrations target** - the ZEV Mandate requires manufacturers to meet an increasing percentage target of electric vans (16% in 2025) by selling more electric vans as a proportion of sales. They can also generate additional credits by exceeding easy-to-meet CO<sub>2</sub> emissions targets on their ICE van registrations. We calculate the implied target by estimating the number of credits that each manufacturer is expected to generate based on the CO<sub>2</sub> ratings of newly registered ICE vans in 2025.

**2025 so far:** Stellantis continues to incrementally increase its ZEV credit surplus putting it in a strong position for 2025, whereas Ford continue to see their deficit increase. Ford's deficit is so large that it is now equivalent to nearly three quarters of the market-wide net deficit. If this wasn't bad enough for Ford, the changes in the ZEV Mandate may not benefit them much at all, with Nissan and Stellantis looking likely to benefit most from the changes. This puts them in a good position to see a small potential windfall if companies such as Ford need to buy ZEV credits to comply.

**Please note that this table does not reflect changes announced in April but not yet legislated.**



## HGVs



HGVs by fuel type, last 12 months vs previous

Fuel Type	Regs. ▾	Δ	Mkt. Share	Δ
Diesel	40,905	-6,187 ↓	98.97%	-0.52% ↓
BEV	424	185 ↑	1.03%	0.52% ↑

Grand total41,329-6,002 ↓100%0%

HGVs latest month vs last year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Diesel	2,161	-27.4% ↓	97.65%	-1.65% ↓
BEV	52	147.6% ↑	2.35%	1.65% ↑
Grand total	2,213	-26.1% ↓	100%	0%

52 electric HGVs were registered in August, down on the previous month but equalling the previous record set in August 2023. This recent growth spurt means electrified trucks have accounted for more than 1% of market share over the previous year. Nevertheless Government is right to say that more needs to be done to decarbonise the road freight sector. Back in May it said that "we are currently considering our regulatory approach". No hurry chaps.

## Motorbikes

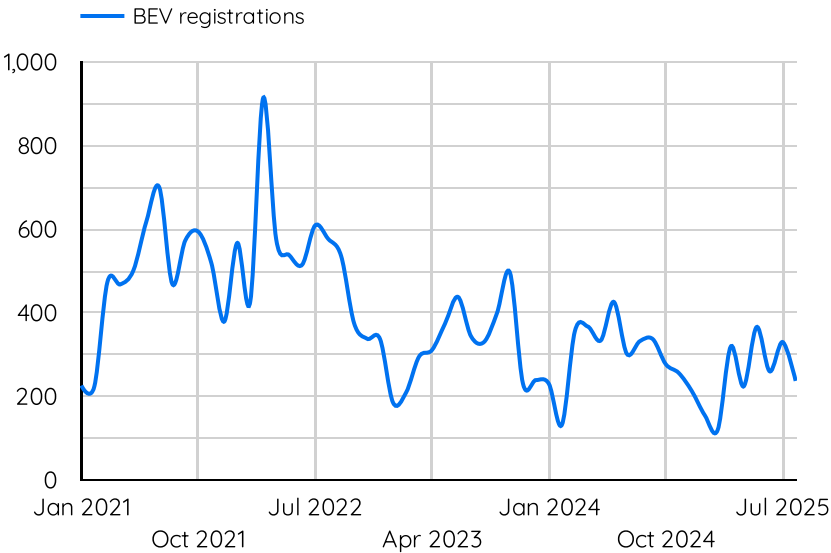
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	59,806	-20.7% ↓	96.75%	-0.07% ↓
BEV	2,011	-18.9% ↓	3.25%	0.07% ↑
Grand total	61,817	-20.6%...	100%	0%

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	6,121	-15.2% ↓	96.27%	0.68% ↑
BEV	237	-28.6%...	3.73%	-0.67% ↓
Grand total	6,358	-15.8%...	100%	0%

Monthly electric motorbike registrations



The electric motorbike market continued to flatline - market share over the past 12 months is 3.25%, unchanged on 2024 levels. The big manufacturers generally aren't bothering to innovate, so the only models on the market are short range or very expensive. Whilst responsible for less than 0.5% of vehicle emissions, motorbikes should be relatively easy and low cost to electrify compared to larger vehicles - especially as battery costs fall and energy density increase.

## About this bulletin

### Introduction

Electric Car Count is a monthly data series from New AutoMotive, a not-for-profit independent transport research organisation with a mission to accelerate and support the UK's transition to electric vehicles. You can find out more about New AutoMotive by visiting [www.newautomotive.org/mission](http://www.newautomotive.org/mission)

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### Data Sources & Methodology

The data we present comes from a mixture of sources. Data on vehicle registrations comes from the DVLA, and is based on a snapshot of the vehicle licensing database taken in the first few days of each month to gain a view of the last month's new registrations of vehicles. We also obtain some information from the DVSA's MOT database.

#### Updates to methodology

**May 2025:** Following a review of our approach to calculating baselines under the CCTS, we have amended the estimated baseline for BYD, which has resulted in a significantly reduced implied target. For both car and van trackers, we have not yet updated our methodology to account for proposed changes to mandate's flexibilities. We will make an update when legislation has been approved by Parliament.

**November 2024:** From November 2024 we have changed our approach to obtaining the snapshot of the UK car market, as part of our efforts to improve the quality of our data. This has boosted the volume of registrations in our historical dataset, which is used for comparisons with past periods. This will mean that the numbers in bulletins from December 2024 may not entirely accord with bulletins published prior to this point.

### Terminology

#### Fuel Types

In our view, a vehicle's fuel type refers to its *primary* form of propulsion. Most vehicles are straightforwardly propelled by a diesel-fuelled engine, petrol-fuelled engine, or an electrically powered motor. Fuel types become complicated when vehicles have multiple forms of propulsion, for instance in the case of hybrid electric vehicles. Except in some rare cases, our view is that hybrids are just more efficient petrol or diesel vehicles, since the electric power is not the primary energy source for propulsion. Therefore we refer to the following fuel types:

*Pure electric, or Electricity* - these are battery-electric vehicles which are propelled exclusively by an electric motor and have no tailpipe emissions, to which the DVLA assigns an 'ELECTRICITY' fuel type classification. They do not include fuel cells. In some very rare cases, these vehicles can carry a fossil-fuelled range extender.

*Hybrid, or hybrid electric* - these are primarily petrol or (less commonly) diesel-fuelled vehicles that have some kind of electric motor to assist in reducing fuel consumption.

*PHEV* - these are hybrids as above, but they have a plug to take external charge.

Other fuel type terminology in this bulletin is hopefully self explanatory.

#### Vehicle Types

We refer to four main categories of vehicles. They are as follows, with an explanation of what is included in each category:

*Cars* - vehicles with a type approval of 'M1' and 'M2', indicating that they are light vehicles for the purpose of carrying passengers.

*Vans* - vehicles with a type approval of 'N1', or with a type approval of 'N2' that are also zero emissions up to 4,250kg, in line with the DfT's proposed definition for the ZEV mandate, to recognise the heavier weight of zero emissions light goods vehicles.

*LCVs* - vehicles with a type approval of 'N3' or 'N2' that are also not zero emissions, and with a weight of less than 4,250kg.