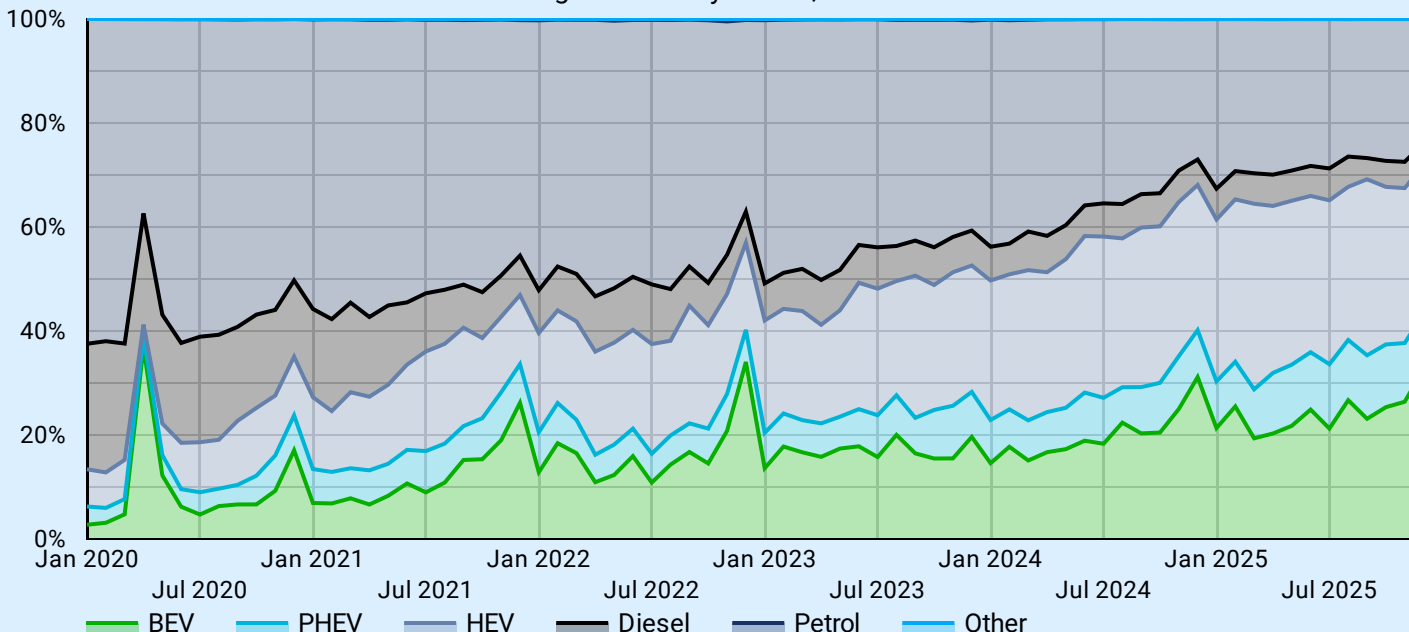


BEVs Reach One-Third of the Market in December, Capping a Record-Breaking 2025

New registrations by month, to Dec 2025



Electric Cars

46,112

↑ 3.9%

Electric Vans

3,027

↓ -10.7%

Electric Motorbikes

151

↓ -29.1%

Electric HGVs (BEV)

104

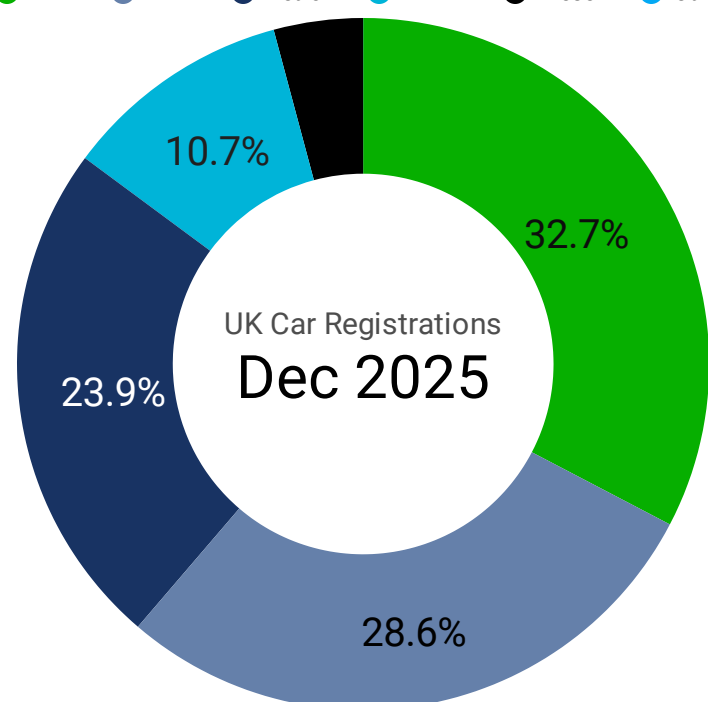
↑ 395.2%

- BEV registrations reached a record high in 2025, with 477,000 vehicles registered, 23% higher than in 2024.
- BEVs accounted for a third of all registrations in December adding over 46,000 new EVs onto the road. With 44% of registrations having a plug.
- No car manufacturer will face fines for ZEV mandate non-compliance in the car segment due to a surplus of 60,000 credits across the market. Van manufacturers will benefit from reforms which allow overcompliance in the car market to make up for van target shortfalls.
- The BEV share of the market in December 2025 was already meeting the new 2026 target of 33%.

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data@newautomotive.org

● BEV ● HEV ● Petrol ● PHEV ● Diesel ● Other



Ben Nelmes, CEO at New AutoMotive, said:

"Over 40,000 motorists received the gift of cheaper and better driving over the holidays as one in three motorists opted for an electric car.

"This is fantastic news for family budgets as well as the UK's energy security. As 2026 starts with countries fighting over oil resources, the UK is increasingly turning to domestic clean electricity.

"This success is the result of pragmatic policy that rewards carmakers for the billions they are investing in delivering EVs that British motorists increasingly want."

Cars summary

December closed out the year with BEVs taking 33% of the UK new car market, a striking result that exactly matches the 2026 ZEV Mandate target. While month-on-month growth was modest, BEV registrations were still 4% higher than December 2024, impressive given that December is traditionally a high sales month for BEVs.

The broader picture continues to underline the pace of electrification. 44% of all cars registered in December had a plug, with BEVs and PHEVs together comfortably outstripping petrol and diesel combined. Once again, combustion sales bore the brunt of the adjustment: petrol registrations fell 12% year-on-year, while diesel declined even more sharply at -16%. While the month did not deliver dramatic shifts in market structure, it confirmed the underlying trends.

Looking across 2025 as a whole, the direction of travel is unmistakable. BEVs finished the year with a 23.4% share of the market, placing them comfortably above the real-world ZEV Mandate target for the year. Registrations were up 22% compared to 2024, making BEVs the second fastest growing drivetrain segment in the market, after PHEVs.

Growth in 2025 was confined almost entirely to electrified vehicles. Taken together, the BEV and PHEV market expanded by 24% year-on-year, underlining the accelerating shift toward plug-in powertrains. Petrol and hybrid models combined fell 7.4% year-to-date, reinforcing the message that growth is now firmly concentrated in vehicles with a plug.

Tesla continued to lead the BEV market despite registrations falling 9% year-on-year, while BMW saw its share slip by around two percentage points even as volumes edged up. By contrast, seven of the top ten manufacturers recorded growth, led by BYD and Ford, both of which saw registrations rise by over 200%, alongside strong gains from Volkswagen and Škoda. Ford's transition was particularly notable, with BEVs rising from 8% to 24% of its total sales, while Cupra completed a rapid shift to become BEV-led, with electric models accounting for 36% of its registrations in 2025.

BEV market share, YTD, vs last year

Marque	BEV re...	% Δ	% of UK BEVs	Δ
TESLA	47,940	-8.9% ↓	10.05%	-3.36% ↓
BMW	34,430	-2.5% ↓	7.22%	-1.78% ↓
VOLKSWAGEN	33,795	44.6% ↑	7.08%	1.13% ↑
AUDI	31,251	25.1% ↑	6.55%	0.18% ↑
BYD	30,066	267.9% ↑	6.3%	4.22% ↑
FORD	29,287	202.4% ↑	6.14%	3.67% ↑
SKODA	22,491	88.4% ↑	4.71%	1.67% ↑
KIA	21,869	38.6% ↑	4.58%	0.56% ↑
MERCEDES-BE...	21,708	-15.2% ↓	4.55%	-1.98% ↓
HYUNDAI	19,828	9.0% ↑	4.16%	-0.48% ↓

YTD vs last year

Fuel Type	Regs. ▼	% Δ	Mkt. Share
HEV	652,637	11.0% ↑	31.99%
Petrol	577,276	-22.0% ↓	28.3%
BEV	477,317	21.6% ↑	23.4%
PHEV	223,618	29.5% ↑	10.96%
Diesel	108,969	-16.4% ↓	5.34%
Other	196	-85.0% ↓	0.01%
Grand total	2,040,013	0.7% ↑	100%

Latest month vs last year (provisional figures)

Fuel Type	Regs.	% Δ	Mkt. Share
PHEV	15,090	17.3% ↑	10.69%
Other	5	-83.3% ↓	+0%
BEV	46,112	3.9% ↑	32.67%
Petrol	33,685	-12.5% ↓	23.87%
Diesel	5,867	-15.9% ↓	4.16%
HEV	40,370	1.5% ↑	28.61%
Grand total	141,129	-1.0% ↓	100%

Top Brands' Electrification YTD vs last year

Marque	Total ▼	BEV	BEV (%)	Δ
VOLKSWAGEN	180,665	33,795	18.71%	5.25% ↑
BMW	123,553	34,431	27.87%	1.25% ↑
FORD	123,421	29,287	23.73%	15.42% ↑
KIA	112,806	21,869	19.39%	5.51% ↑
AUDI	111,428	31,251	28.05%	8.36% ↑
HYUNDAI	93,000	19,828	21.32%	1.77% ↑
MERCEDES-BENZ	90,116	21,708	24.09%	0.31% ↑
NISSAN	90,086	3,931	4.36%	-7.84% ↓
TOYOTA	90,059	4,726	5.25%	-2.8% ↓
MG	85,298	17,314	20.3%	-6.4% ↓
PEUGEOT	84,498	16,909	20.01%	-1.26% ↓
SKODA	83,012	22,491	27.09%	12.04% ↑
VAUXHALL	82,949	14,785	17.82%	-2.37% ↓
VOLVO	69,065	15,571	22.55%	-4.16% ↓
RENAULT	65,810	18,937	28.78%	14.15% ↑
LAND ROVER	61,193	0	0%	0%

Car ZEV Mandate Tracker

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

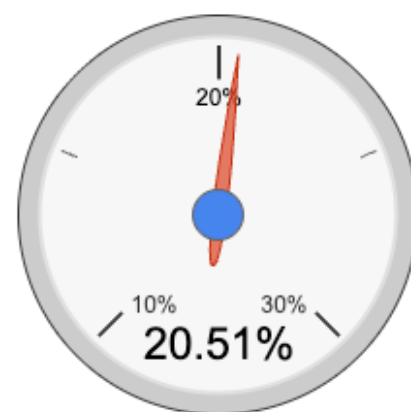
Parent	Car Sales	Est. Real ZEV Sales Target	BEV Share of Sales	ZEV Credit Balance
VW	460,596	20.0%	23.9%	17,799
STELLANTIS	223,888	26.0%	20.5%	-12,310
HYUNDAI	207,051	22.3%	20.6%	-3,639
BMW	170,038	23.5%	28.4%	8,245
FORD	123,424	25.0%	23.7%	-1,595
TOYOTA	106,145	12.5%	6.6%	-6,172
RENAULT	97,235	22.1%	26.4%	4,196
MERCEDES	91,910	25.5%	25.6%	81
NISSAN	90,086	21.1%	4.4%	-15,100
GEELY	88,661	25.5%	38.6%	11,611
SAIC	85,298	12.5%	20.3%	6,668
TATA	63,115	7.0%	2.8%	-2,624
BYD	51,353	2.8%	58.5%	28,628
CHERY AUTOMOBILE	48,595	9.9%	14.5%	2,263
TESLA	47,940	28.0%	100.0%	34,517
MAZDA	31,347	18.0%	0.5%	-5,472
HONDA	22,899	19.0%	1.3%	-4,060
SUZUKI	18,058	23.0%	4.4%	-3,357

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 - 20.5% - 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 - Based on year-to-date registrations, several manufacturer groups have met their obligation. Groups such as VW, BMW, Geely, BYD, and SAIC, Chery, Mercedes, and Renault are showing a surplus of ZEV credits, indicating their BEV sales are ahead of their estimated targets. Conversely, a number of other major manufacturers face a shortfall. Ford, Stellantis, Hyundai, Toyota, Nissan, Tata, Mazda, Honda, and Suzuki are all estimated to be behind their required ZEV sales targets for the year. Nissan and Stellantis appear to have the most substantial deficits.

With BEV uptake running ahead of target since August, the ZEV Mandate system has built up a substantial surplus of credits. There are now just under 60,000 excess credits available, providing a significant buffer for manufacturers. As a result, no car manufacturer should face fines for non-compliance this year, despite ongoing variation in brand performance.

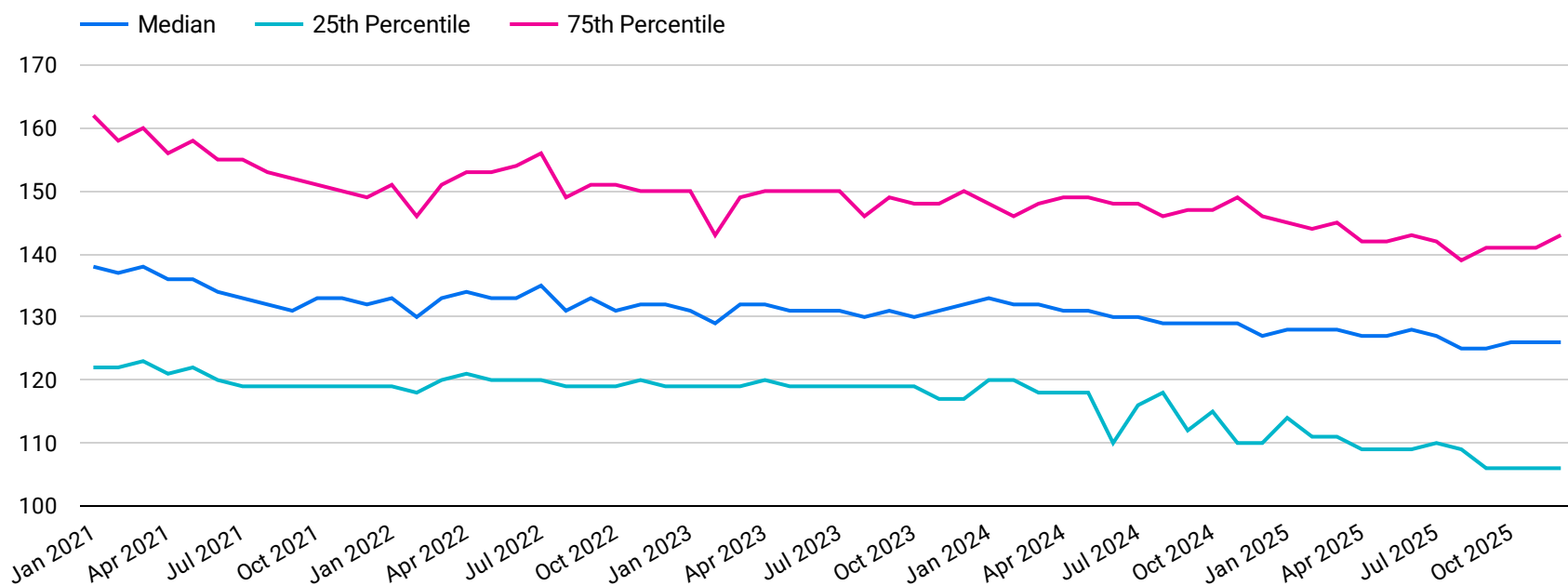
Est. Real Market-Wide ZEV Target



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

ICE Car CO2 Emissions Ratings

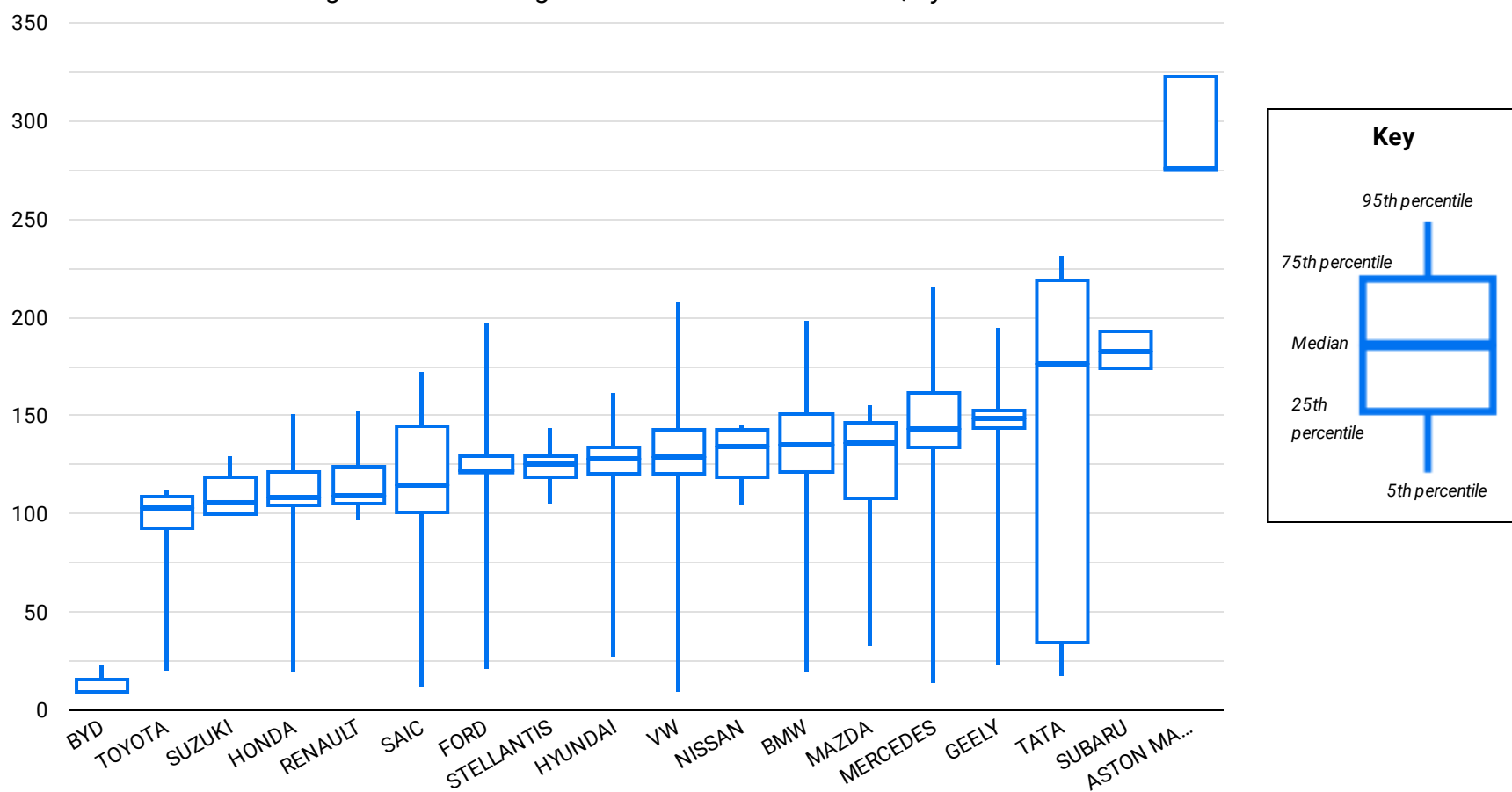
Average CO2 ratings of newly registered internal combustion engine cars by month of registration, gCO2/km



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

December saw van registrations drop by 0.6% year-on-year, with all fuel types except hybrid seeing decline. Hybrids grew by 210.5% reaching a combined 5.6% market share. This hybrid growth was driven almost entirely by Ford and Toyota who accounted for 60.0% and 37.6% of hybrid sales respectively.

Electric vans accounted for 11.19% of the van market falling just shy of the 11.21% required to comply with the estimated "real world" ZEV Mandate target for 2025.

Volkswagen and Maxus complied outright with the headline ZEV Mandate target for 2025 of 16% meaning they do not need to apply any of the generous flexibilities in the scheme to comply this scheme year. Peugeot were the next closest reaching 15.7% putting them well above our estimated real world target.

While holding less than a third of the market share for vans Ford possesses, Volkswagen managed to take a 20.6% stake of the battery electric van market for 2025, less than 8% shy of Ford. This effort from Volkswagen sets a great example for other manufacturers that the headline target can be proved to be shy of demand given the conviction to meet the ZEV Mandate face on.

BEV Van Market Shares (YTD)

Make	BEVs	BEVs %
FORD	8,654	28.27%
VOLKSWAGEN	6,299	20.58%
VAUXHALL	2,448	8%
RENAULT	1,450	4.74%
PEUGEOT	3,263	10.66%
TOYOTA	1,812	5.92%
MERCEDES-BENZ	2,081	6.8%
CITROEN	898	2.93%
NISSAN	730	2.39%
LAND ROVER	0	0%
MAXUS	1,850	6.04%
ISUZU	4	0.01%
IVECO	375	1.23%
FIAT	106	0.35%
MAN	12	0.04%

Sales by fuel type, YTD vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	30,332	7,725 ↑	9.63%
Diesel	261,244	-58,607 ↓	82.92%
PHEV	9,779	8,045 ↑	3.1%
Petrol	6,371	-983 ↓	2.02%
HEV	7,328	5,066 ↑	2.33%
Grand total	315,054	-38,754 ↓	100%

Sales by fuel type, latest month vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	3,027	-362 ↓	11.19%
Diesel	22,009	-705 ↓	81.39%
Petrol	500	-116 ↓	1.85%
PHEV	905	605 ↑	3.35%
HEV	601	416 ↑	2.22%
Grand total	27,042	-176 ↓	100%

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

Make	Total	BEVs	BEV %
FORD	111,010	8,654	7.8%
VOLKSWAGEN	34,698	6,299	18.15%
VAUXHALL	23,927	2,448	10.23%
RENAULT	22,114	1,450	6.56%
PEUGEOT	20,851	3,263	15.65%
TOYOTA	20,559	1,812	8.81%
MERCEDES-BE...	19,938	2,081	10.44%
CITROEN	17,806	898	5.04%
NISSAN	7,958	730	9.17%
LAND ROVER	7,134	0	0%
MAXUS	6,974	1,850	26.53%
ISUZU	5,163	4	0.08%
IVECO	4,641	375	8.08%
FIAT	3,049	106	3.48%
MAN	2,980	12	0.4%
RENAULT TRU...	2,784	217	7.79%
KGM	1,466	2	0.14%
ISUZU TRUCKS	1,047	2	0.19%

Van ZEV Mandate Tracker

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

Pools	Total Vans	Est. Real ZEV Target	BEV Share	ZEV Credit Balance
FORD	110,658	13.3%	7.8%	-6,069
STELLANTIS	65,501	2.8%	10.1%	4,757
VOLKSWAGEN	37,525	16.0%	16.8%	295
RENAULT	22,111	10.5%	6.6%	-869
TOYOTA	20,501	14.6%	8.6%	-1,241
MERCEDES-BENZ	18,646	12.9%	11.1%	-337
NISSAN	7,952	1.6%	9.2%	602
JLR	7,134	10.2%	0.0%	-725
SAIC	6,974	16.0%	26.5%	734
ISUZU	5,756	2.2%	0.1%	-120

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 CO₂ 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 CO₂ ratings of newly registered ICE vans in 2025.

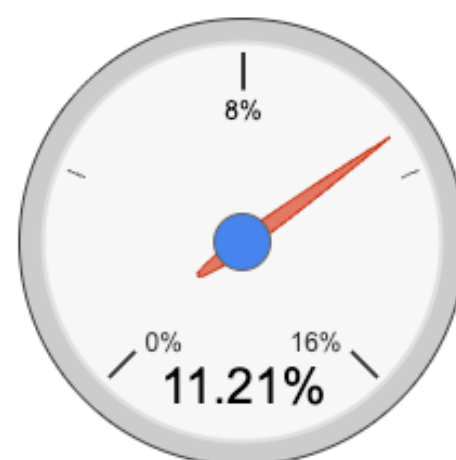
2025 so far: The battery electric van share for 2025 rose to 9.63% from the 9.49% reported in November's ECC bulletin taking the market as a whole closer to compliance, but not quite over the line for scheme year. However, with the new flexibilities introduced by the Government in 2025 manufacturers will have the chance to comply by a mix of borrowing and/or transferring surplus credits over from the car scheme to the van scheme, especially given the significant credit surplus available in the car scheme.

Due to the generosity of the amendments made to the ZEV Mandate in 2025, we estimate the market wide credit deficit to be nearly half of what it would be without the amendments - potentially awarding some van manufacturers a "get out of jail free" card for the scheme year.

Stellantis lead the way in surplus credits leaving them in a good position to either profit from other firms under-performances, or to bank them giving them a leg up on future years as the scheme, in the end, only rewards compliance once all is said and done.

Please note that this table now reflect the changes announced in April and legislated in October.

Est. Real Market-Wide ZEV Target



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

HGVs

Monthly electric HGV registrations



HGVs by fuel type, last 12 months vs previous

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	40,593	-5,498 ↓	98.51%	-0.91% ↓
BEV	616	346 ↑	1.49%	0.91% ↑
Grand total	41,209	-5,152 ↓	100%	0%

HGVs latest month vs last year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	2,982	-4.2% ↓	96.63%	-2.7% ↓
BEV	104	395.2% ↑	3.37%	2.7% ↑
Grand total	3,086	-1.6% ↓	100%	0%

HGVs ended 2025 with another jump in registrations, with 104 e-HGVs registered in December, accounting for 3.4% of the monthly market. This brings total e-HGV registrations to 616 in 2025, up from 346 in 2024, highlighting the rapid early growth of what remains a nascent segment. While volumes are still low, 2025 has clearly demonstrated the market's potential, and attention will now turn to whether 2026 can build on this momentum, with well-timed policy signals or targets playing a key role in helping the segment break through.

Motorbikes

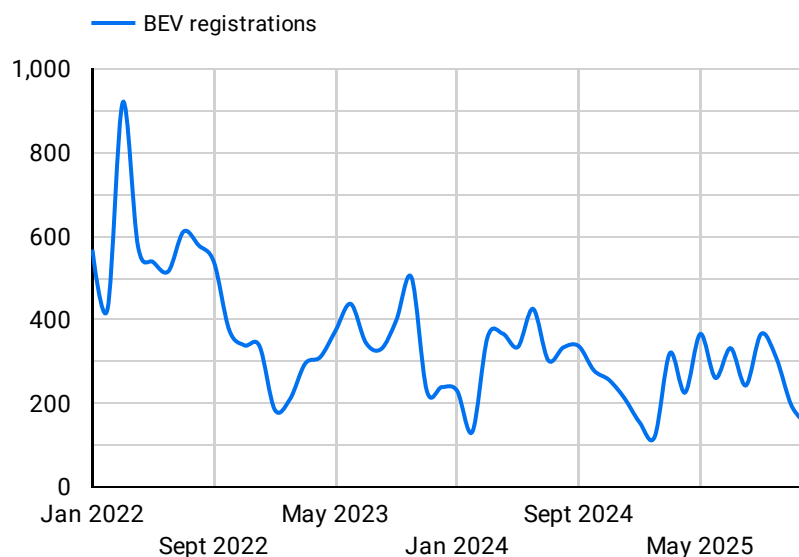
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	86,183	-22.8% ↓	96.59%	-0.31% ↓
BEV	3,044	-14.7% ↓	3.41%	0.31% ↑
Grand total	89,227	-22.6% ↓	100%	0%

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	4,240	-61.3%...	96.56%	-1.53% ↓
BEV	151	-29.1%...	3.44%	1.53% ↑
Grand total	4,391	-60.7%...	100%	0%

Monthly electric motorbike registrations



The electric motorbike market continues to underperform, with market share still expected to end the year at around 3.3–3.4%, showing little change on 2024. Volumes remain weak, with just 151 electric motorbikes registered this month, highlighting the lack of momentum.

This is striking given motorbikes should be among the easiest segments to electrify, as they are typically used for shorter daily journeys, with predictable use patterns and relatively simple vehicle architectures. Instead, progress remains confined to city bikes and premium models, while the bulk of the market shows little sign of transitioning.

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

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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

December 2025: We implemented changes to our ZEV mandate trackers for cars and vans reflecting the amendments to the VETS Order legislated in October 2025.

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.

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

Motorbikes - vehicles with a type approval of 'L1' or 'L3'.