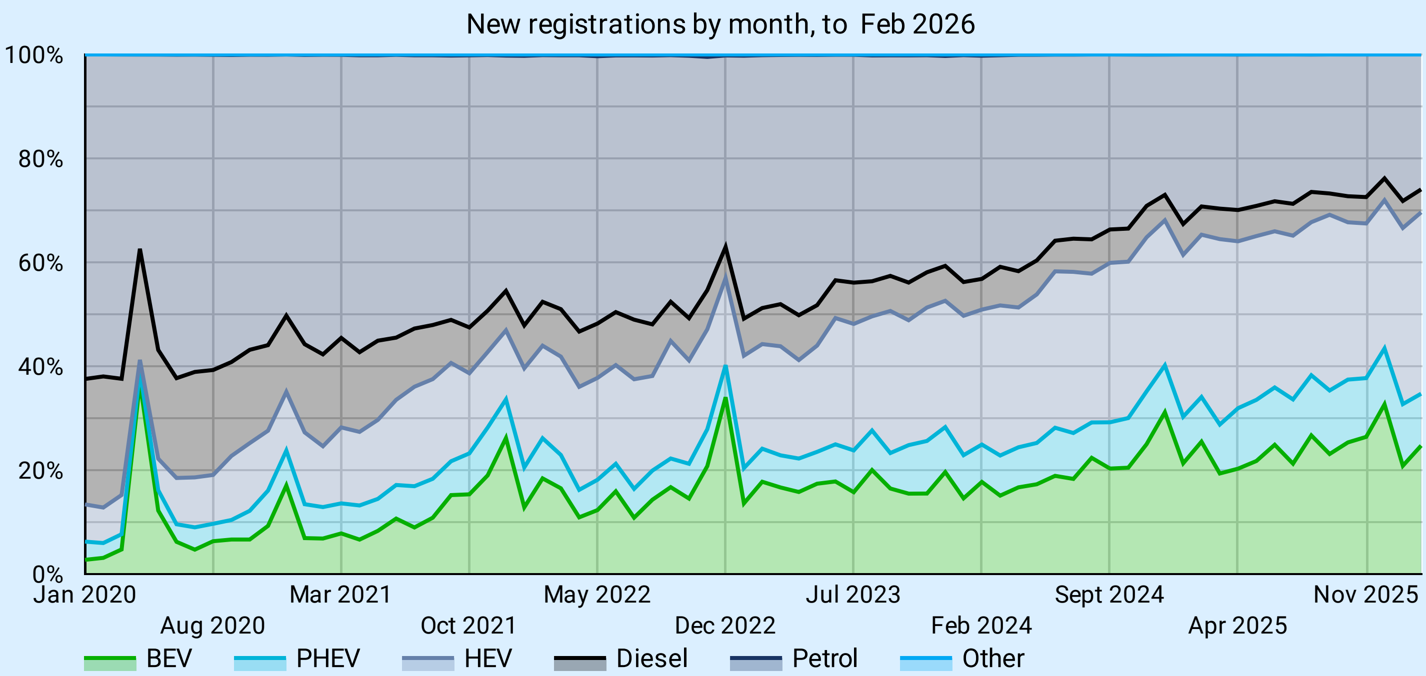
NEW AUTOMOTIVE

Feb 2026

One in four drivers go electric in February 2026



Electric Cars
20,610
-0.2%

Electric Vans
2,015
41.6%

Electric Motorbikes
96
-20.0%

Electric HGVs (BEV)
9
-71.9%

- Battery electric (BEV) cars accounted for 25% of the market, with a third of all new cars having a plug in February.

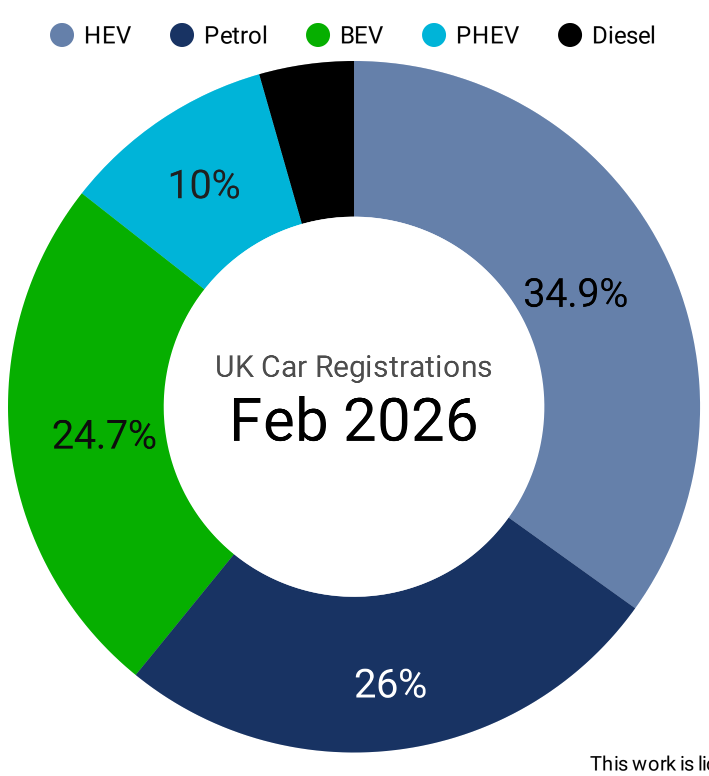
- The top 10 electric brands were dominated by European and US manufacturers. With BYD (in tenth) the only exception.

- BEV vans see record market share accounting for 13.8% of the market, with growth in that segment driven solely by plug-ins.

- The effective ZEV mandate target for cars has been pushed down to 19.4%, lower than last year's target, mainly driven by a surge in hybrid registrations. This means the market is currently tracking above the real world target.

Contents

Suggestions, feedback or requests for data? We'd love to hear from you: *data@newautomotive.org*



Ben Nelmes, CEO at New AutoMotive, said:

"It is fantastic to see one in four motorists opting for an electric car in February.

"This great progress is consolidating UK leadership in electrified transport.

"As we enter yet another fossil fuel price crisis, every electric vehicle is yet another step on the road to energy independence."

NEW AUTOMOTIVE

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Cars summary

February maintained a steady start to 2026 with BEVs accounting for 25% of the UK new car market, with over a third of all registrations having a plug. Once again, it was ICE vehicles absorbing most of the decline with diesel registrations falling 11% compared to February 2025, while petrol declined 8%.

By contrast, hybrids and PHEVs recorded the strongest growth, up 11% and 15% respectively. This significant growth in hybrids has drastically reduced the real world ZEV Mandate target to 19.4%, a smaller target than last year, and one the market is already outperforming this year, currently the market is at 22% for year-to-date figures. This is troubling for the UK's climate change ambitions, compounded by PHEVs gap between official and real-world emissions, a greater reliance on PHEVs risks overstating headline CO_2 reductions.

Looking at manufacturers, Tesla had another weak month, with registrations down 45% compared to February 2025. While its delivery patterns are typically volatile, with year-to-date figures down 5% it is likely the decline will still prompt scrutiny. Škoda and Ford, by contrast, posted strong gains of 146% and 105% respectively, while Audi, Renault, Mercedes and BYD also recorded growth. Volkswagen, BMW and Mini were among those that did record some drop offs in registrations this month.

The top ten manufacturers for February were once again dominated by European and US manufacturers. Tesla and Ford in first and second make up the US manufacturers. While Skoda, Volkswagen, Audi, BMW, Mini, Renault, and Mercedes represent the European brands. Only BYD in tenth bucks this trend, showing that the fear of a Chinese takeover of BEVs remains unfounded.

Renault stands out among legacy brands, with BEVs accounting for 35% of its registrations which was its largest fuel type share. Meanwhile, BMW and Citroën, which last year saw BEVs lead their mix, have now seen hybrids overtake electric models.

BEV market share, YTD, vs last year

Marque	BEV re...	% Δ	% of UK BEVs	Δ
FORD	3,681	130.8%	7.44%	4.33%
SKODA	3,574	124.9%	7.22%	4.12%
VOLKSWAGEN	3,310	-4.1%	6.69%	-0.04%
KIA	3,087	10.9%	6.24%	0.81%
TESLA	2,942	-46.9%	5.95%	-4.86%
AUDI	2,837	7.8%	5.73%	0.6%
BMW	2,808	-38.9%	5.67%	-3.29%
RENAULT	2,646	57.0%	5.35%	2.06%
MERCEDES-BE...	2,442	-21.7%	4.94%	-1.15%
BYD	2,331	30.7%	4.71%	1.23%

YTD vs last year (provisional figures)

fuelType	Regs.	% Δ	Mkt. Share
HEV	76,093	10.5%...	34.27%
Petrol	60,742	-12.2%...	27.36%
BEV	49,502	-2.0%	22.29%
PHEV	24,781	27.3%...	11.16%
Diesel	10,921	-12.1%...	4.92%
Other	5	-66.7%...	+0%
Grand total	**222,044**	**0.7%**	**100%**

Latest month vs last year (provisional figures)

fuelType	Regs.	% Δ	Mkt. Share
HEV	29,102	15.2%	34.9%
Petrol	21,649	-8.0%	25.97%
BEV	20,610	-0.2%	24.72%
PHEV	8,328	20.6%	9.99%
Diesel	3,688	-10.5%	4.42%
Grand total	**83,377**	**3.6%**	**100%**

Top Brands' Electrification YTD vs last year

Marque	Total	BEV	BEV (%)	Δ
VOLKSWAGEN	19,136	3,310	17.3%	1.3%
KIA	13,982	3,087	22.08%	3.3%
FORD	13,376	3,681	27.52%	13.42%
BMW	11,761	2,808	23.88%	-8.24%
VAUXHALL	11,615	2,328	20.04%	0.15%
AUDI	11,269	2,837	25.18%	-0.54%
MERCEDES-BENZ	10,700	2,442	22.82%	-9.71%
PEUGEOT	10,078	1,445	14.34%	-7.17%
SKODA	9,973	3,574	35.84%	17.94%
HYUNDAI	9,305	1,979	21.27%	0.63%
NISSAN	8,414	251	2.98%	-5.36%
TOYOTA	7,996	360	4.5%	-4.23%
MG	7,991	1,625	20.34%	2.92%
RENAULT	7,172	2,646	36.89%	12.16%
LAND ROVER	6,932	0	0%	0%
JAECOO	6,733	644	9.56%	9.56%

NEW AUTOMOTIVE

Feb 2026

Car ZEV Mandate Tracker

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

Parent	Car Sales	Est. Real ZEV Sales Ta...	BEV Share of Sales	ZEV Credit Balance
VW	29,087	27.2%	28.6%	387.1
STELLANTIS	28,780	31.2%	20.9%	-2,983.0
FORD	13,376	30.5%	27.5%	-399.3
MERCEDES	10,827	29.4%	23.7%	-619.0
RENAULT	10,418	27.7%	30.1%	248.8
CHERY AUTOMOBILE	9,793	12.0%	12.6%	60.9
HYUNDAI	9,449	27.0%	22.0%	-471.1
TOYOTA	9,256	18.2%	5.3%	-1,196.2
NISSAN	8,414	24.7%	3.0%	-1,828.1
GEELY	8,331	31.3%	39.7%	702.8
SAIC	7,991	17.0%	20.3%	265.2
TATA	6,942	11.5%	0.0%	-794.1
BYD	6,013	6.6%	38.8%	1,934.1
MAZDA	4,009	26.4%	0.0%	-1,059.4
TESLA	2,942	33.0%	100.0%	1,971.1
SUZUKI	2,787	28.1%	6.4%	-605.7
HONDA	1,612	22.3%	3.7%	-299.8

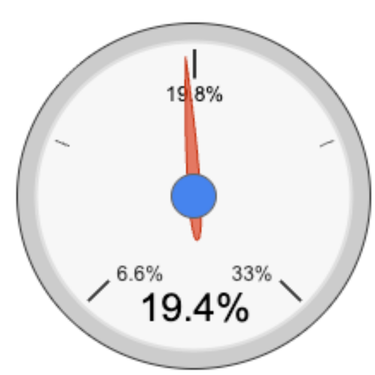
The estimated real ZEV sales target - The headline ZEV mandate target for 2026 is 33%. But firms generate additional credits by exceeding CO_2 emissions targets on their non-ZEV vehicle sales. We calculate the real target by estimating the number of credits that each manufacturer is expected to generate based on the CO_2 ratings of newly registered non-ZEV cars in the year to date, using publicly available information from the DVLA.

Currently, the estimated real target is 19.4%, below last year's target. This reflects the additional flexibilities introduced into the scheme midway through the year. For manufacturers with a high proportion of PHEV sales, the effective target is significantly lower. For example, BYD's real ZEV target so far is approximately 6%, reflecting the large volume of PHEVs it sells and the corresponding credits generated from its non-ZEV fleet.

The year so far - A small group of manufacturers are already operating with a surplus of ZEV credits, Tesla, BYD, SAIC, Geely, Chery, Renault and VW.

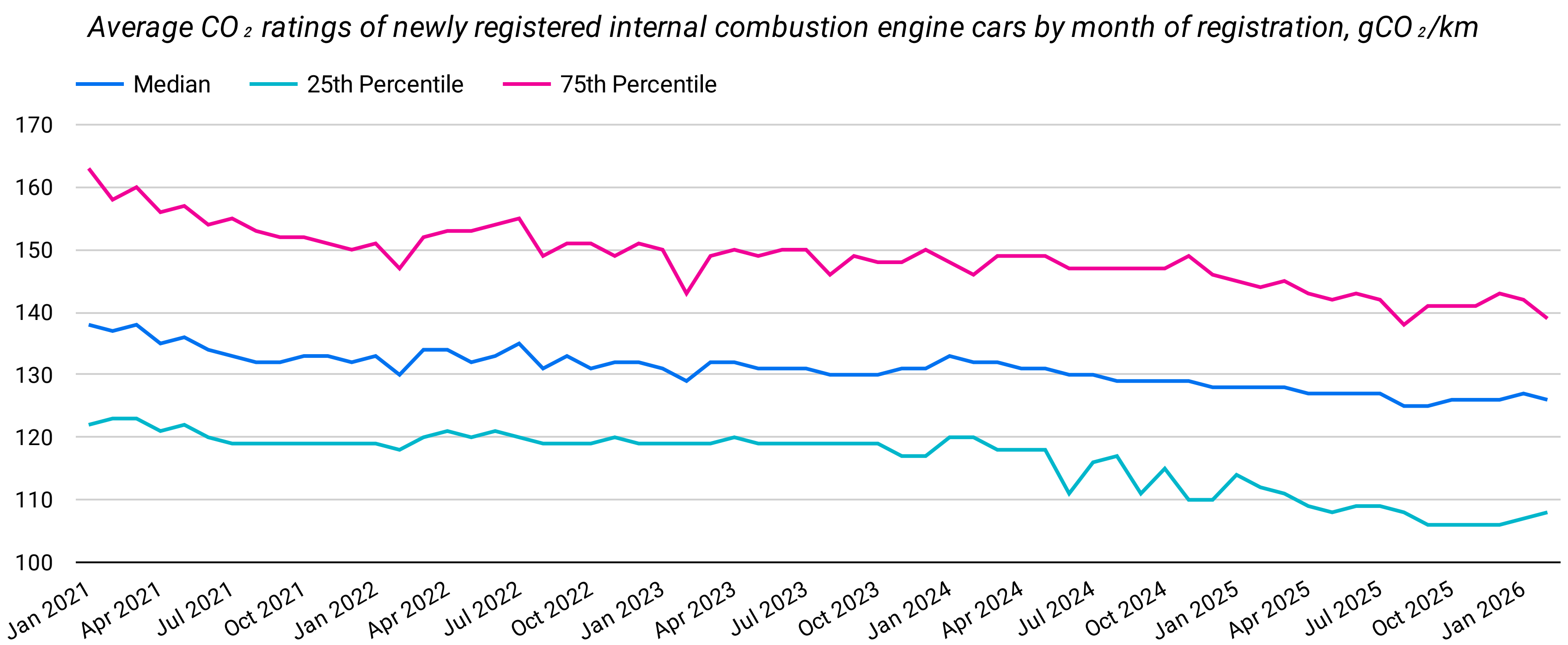
Ford, Honda, Suzuki, Mazda, Tata, Toyota, Nissan, Mercedes, BMW, Hyundai, Stellantis, and VW currently have deficits. Many are small deficits, so manufacturers have plenty of time to recify this.

Est. Real Market-Wide ZEV Target



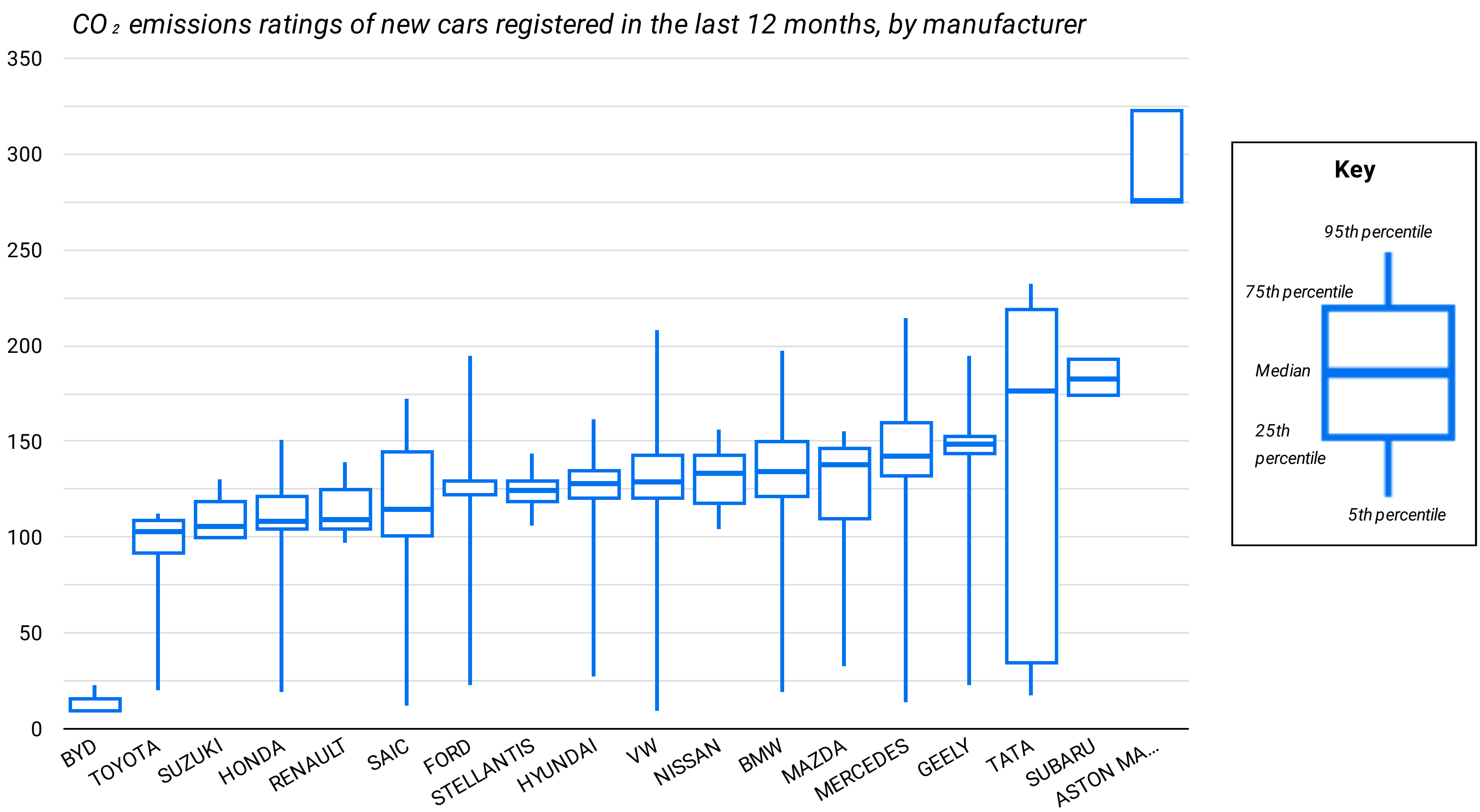
The real market-wide ZEV target represents the percentage of UK car sales that need to be fully electric for carmakers to meet their mandated EV sales targets.

ICE Car CO_2 Emissions Ratings



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.



Feb 2026

Vans Summary

February saw a return to growth in the UK van market as well as a record market share for BEV vans. This growth was *purely* driven by plug-in vehicles with BEVs and PHEVs seeing significant growth as all other fuel types saw declining registrations. PHEVs more than doubled to take a more than 5% market share with BEVs now just shy of 14%.

Ford continues to lead the way in total numbers of BEVs registered, but continues to raise their levels to comply outright with the headline ZEV Mandate target of 24% for this year. In similar fashion Volkswagen retain their number 2 spot for BEVs sold, however in the reverse of Ford continue to see ZEV Mandate busting levels of BEV registration share managing just shy of 30% this month.

Kia continue being the best performing all-electric van brand accounting for just over 1 in 8 BEV registrations in the year to date. This innate over-performance against the ZEV Mandate therefore could go some way to assisting it's pool in the car scheme with the recently introduced trading between car and van schemes allowing 1 surplus van credit to be converted into 2 credits the car scheme.

BEV Van Market Shares (YTD)

Make	BEVs ▾	BEVs
FORD	1,112	28.8%
VOLKSWAGEN	846	21.91%
KIA	507	13.13%
TOYOTA	304	7.87%
MERCEDES-BENZ	218	5.65%
RENAULT	174	4.51%
VAUXHALL	157	4.07%
MAXUS	127	3.29%
RENAULT TRUCKS	119	3.08%
IVECO	118	3.06%
PEUGEOT	70	1.81%
CITROEN	46	1.19%
NISSAN	28	0.73%
SKODA	19	0.49%
GOUPIL	7	0.18%

Sales by fuel type, YTD vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	3,850	948 ⬆	11.95%
Diesel	25,533	-2,924 ⬇	79.28%
Petrol	608	-297 ⬇	1.89%
PHEV	1,696	974 ⬆	5.27%
HEV	521	-89 ⬇	1.62%
Grand total	**32,208**	**-1,388** ⬇	**100%**

Sales by fuel type, latest month vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	2,015	592 ⬆	13.75%
Diesel	11,400	-719 ⬇	77.81%
Petrol	243	-106 ⬇	1.66%
HEV	234	-14 ⬇	1.6%
PHEV	759	432 ⬆	5.18%
Grand total	**14,651**	**183** ⬆	**100%**

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

Make	Total	BEVs	BEV %
FORD	10,080	1,112	11.03%
VAUXHALL	3,449	157	4.55%
VOLKSWAGEN	3,313	846	25.54%
RENAULT	2,842	174	6.12%
MERCEDES-BE...	2,061	218	10.58%
PEUGEOT	1,895	70	3.69%
CITROEN	1,785	46	2.58%
TOYOTA	1,568	304	19.39%
NISSAN	1,411	28	1.98%
LAND ROVER	848	0	0%
RENAULT TRU...	567	119	20.99%
KIA	507	507	100%
MAXUS	387	127	32.82%
IVECO	381	118	30.97%
FIAT	347	5	1.44%
MAN	343	0	0%
KGM	111	0	0%
ISUZU	101	0	0%

Feb 2026

Van ZEV Mandate Tracker

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

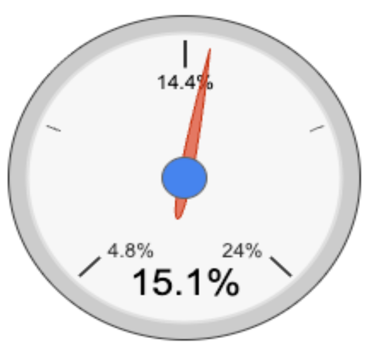
Pools	Total Vans	Est. Real ZEV Target	BEV Share	ZEV Credit Balance
FORD	9,978	13.7%	11.1%	-255.2
STELLANTIS	7,469	10.8%	3.6%	-533.9
VOLKSWAGEN	3,312	22.6%	25.5%	97.2
RENAULT	2,841	18.5%	6.1%	-352.6
MERCEDES-BENZ	1,893	20.1%	11.5%	-164.3
TOYOTA	1,567	12.3%	19.3%	110.3
NISSAN	1,391	7.2%	2.0%	-71.9
JLR	1,355	20.2%	37.4%	232.8
SAIC	387	24.0%	32.8%	34.1

The estimated real ZEV registrations target - the ZEV Mandate requires manufacturers to meet an increasing percentage target of electric vans (24% in 2026) by selling more electric vans as a proportion of sales. They can also generate additional credits by exceeding easy-to-meet CO_2 emissions targets on their non-ZEV van registrations. We calculate the implied target by estimating the number of credits that each manufacturer is expected to generate based on the CO_2 ratings of newly registered non-ZEV vans in 2025.

2025 so far: In a month of significant growth of BEV and PHEV sales the van market its now moving closer towards compliance market-wide with the real world target which is now down below even the 2025 headline target of 16% at 15.1%. While this is only the early stages of the 2026 scheme, it is becoming increasingly clear that in a year where manufacturers are able to reduce their ZEV Mandate target down as low as 4.8%, many have coined on to the scale of the reduction now available to them following the amendment to the ZEV Mandate in 2025.

With most manufacturers not required to improve their BEV registration share in 2026 on 2025 levels, many look as though they are pivoting towards PHEVs in order to comply with the ZEV Mandate this year meaning the ZEV Mandate in 2026 may be just as much about the split of non-ZEV vans between different drive trains as it is the ZEV share of their registrations. While this is the case, those that can meet the target outright such as Volkswagen, JLR, and SAIC will be in the best position to dominate the market post 2030 having appropriately scaled up their supply chains and having less of a distance to travel to get them from 70% to 100% in those final years.

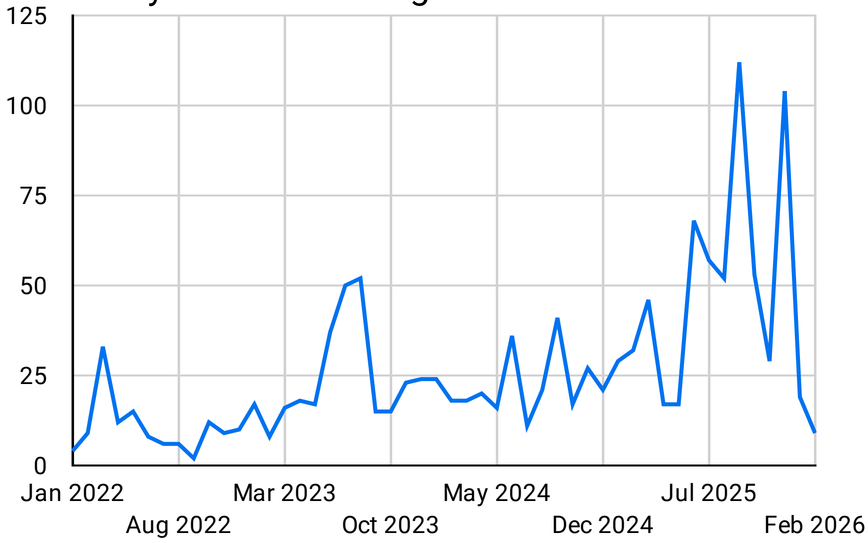
Est. Real Market-Wide ZEV Target



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	4,530	-730 ↓	99.39%	0.53% ↑
BEV	28	-33 ↓	0.61%	-0.53% ↓
Grand total	**4,558**	**-763** ↓	**100%**	**0%**

HGVs latest month vs last year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Diesel	2,009	-17.1% ↓	99.55%	0.86% ↑
BEV	9	-71.9% ↓	0.45%	-0.86% ↓
Grand total	**2,018**	**-17.8%** ↓	**100%**	**0%**

BEV registrations in this market remained low, with only 9 e-HGVs entering service this month. While year-end figures are typically stronger, this relatively slow month highlights the uneven pace of adoption in the sector. The data underscores the importance of a ZEV Mandate, illustrating how policy intervention is necessary to accelerate the transition to zero-emission heavy vehicles and provide consistent market signals..

The UK government launched a consultation on the long awaited ZEV Mandate for HGVs. You can find the consultation and submit a response here.

Motorbikes

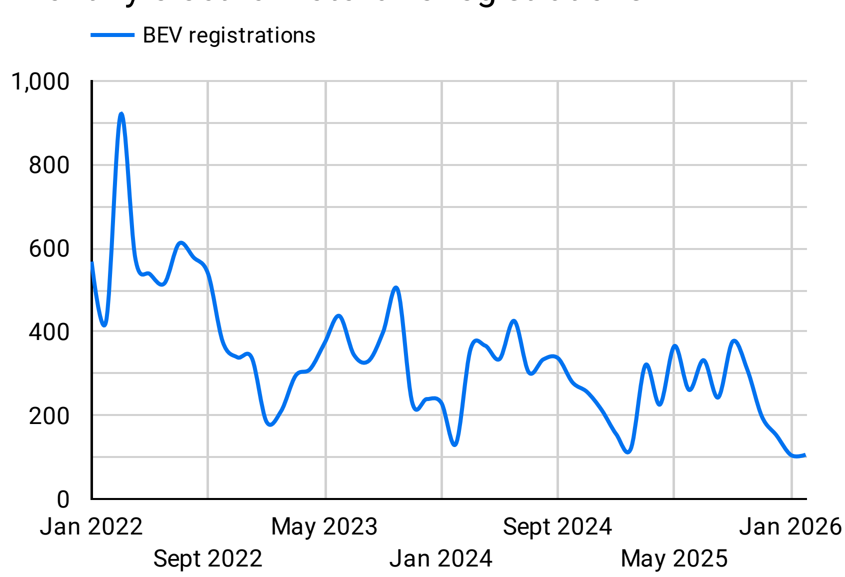
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	7,615	11.9% ↑	97.3%	1.19% ↑
BEV	211	-23.3% ↓	2.7%	-1.19% ↓
Grand total	**7,826**	**10.5%** ↑	**100%**	**0%**

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	3,328	7.7% ↑	96.91%	0.65% ↑
BEV	106	-11.7%...	3.09%	-0.65% ↓
Grand total	**3,434**	**7.0%** ↑	**100%**	**0%**

Monthly electric motorbike registrations



The electric motorbike market continues to underperform, with 102 BEVs registered in January, making up 3% of the market.

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.

NEW AUTOMOTIVE

Back to home page

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

Terms of Use

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'.