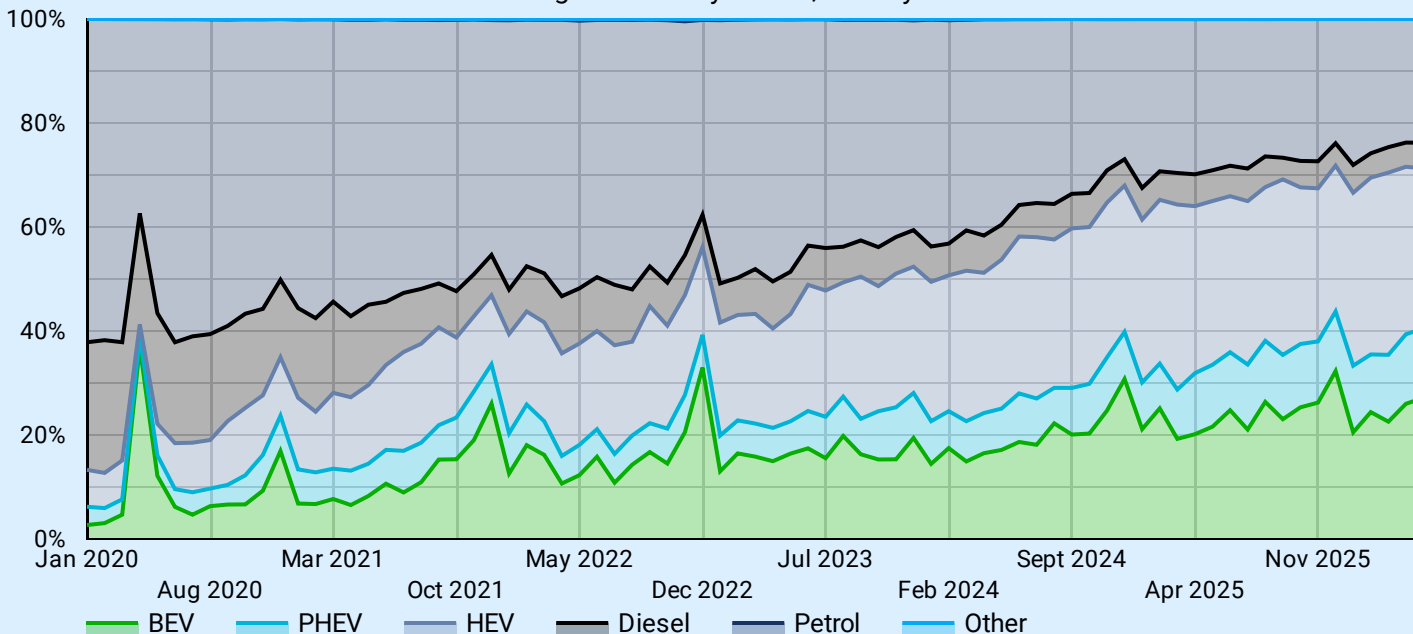


EV registrations surge as motorists seek escape from oil crisis

New registrations by month, to May 2026



Electric Cars

41,346

↑ 31.2%

Electric Vans

2,213

↑ 33.2%

Electric Motorbikes

236

↓ -36.0%

Electric HGVs (BEV)

34

↑ 100.0%

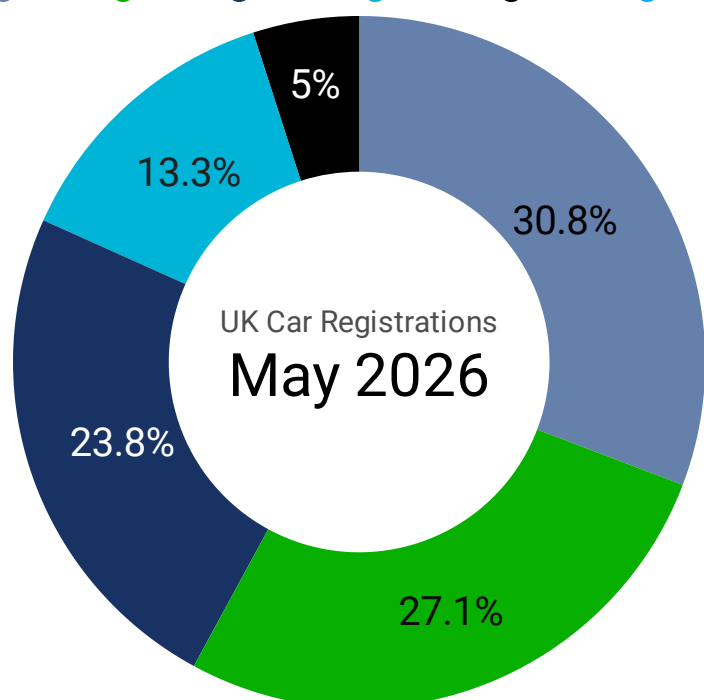
Electric car registrations surged in May as the Iran war entered its third month, and the Strait of Hormuz remained largely closed. As Europe burnt through oil reserves and with an end to the war proving elusive, a growing number of drivers are opting for electric cars, which do not rely on unstable and unreliable energy sources. Here are the key points.

- 27% of vehicles registered in May were BEVs, with the growth in electric car sales almost doubling in May.
- BEVs overtake PHEVs as the fastest growing segment this month, growing by 31% compared to May 2025.
- Volkswagen and KIA top the registrations this month, spurred on by strong demand for their latest generation of EVs.
- Vans have seen their biggest BEV registrations and BEV market share for any May to date with 10% market share.

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

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



Ben Nelmes, CEO at New AutoMotive, said:

"The missing piece of the puzzle for the UK's EV transition is finally in place.

"Carmakers have invested billions to bring a wide range of accessible electric models to market. Now we see decisive evidence that consumer demand is surging as motorists, spurred on by global events and rising prices, are opting for electric cars.

"Electric cars offer Britain a critical opportunity to improve energy security, strengthen our economy and build resilience in an increasingly unstable world."

Cars summary

As we continue to see the fallout from the Iran war and the resulting fuel price volatility, EVs are increasingly looking like the safer option for consumers. BEVs accounted for 27% of registrations in May, one of the highest non-December market shares on record.

Registrations were up 31% compared to last May, making BEVs the fastest-growing segment of the market. PHEVs also continued to grow strongly, increasing by 18%.

As we have come to expect, it was electrified vehicles that drove growth in the market. Despite declining petrol and diesel sales, overall registrations increased by 6%, thanks almost entirely to BEVs and PHEVs, which together grew by nearly a quarter. Hybrids saw only modest growth, while diesel registrations fell by 6% and petrol by 14%. The pattern is now a familiar one: EVs grow, ICE declines.

Looking at the year-to-date figures also shows a similar positive story. 24% of registrations have been BEVs, an increase of 19% compared to the same period last year, if May's performance continues, that figure looks set to increase further. PHEVs remain the fastest-growing segment year-to-date, with registrations up 33%, although the usual questions remain around their real-world emissions and contribution to decarbonisation.

Turning to look at the manufacturers, May saw another shake-up in the monthly rankings. Volkswagen topped the table, with Kia taking second and Tesla third. After leading the market in April, BYD dropped back to sixth place. However, the bigger story is not who topped the table this month, but how competitive the market remains. The top 10 manufacturers accounted for just 58% of BEV registrations, leaving over 40% spread across a long tail of brands.

Volkswagen and Kia's strong performances also reflect the growing availability of compelling mainstream EVs. Rather than relying on premium segments, both manufacturers now offer a range of practical, high-volume electric models that are increasingly competing on price as well as performance.

BEV market share, YTD, vs last year

Marque	BEV re...	% Δ	% of UK BEVs	Δ
TESLA	16,227	-1.8% ↓	7.33%	-1.36% ↓
BYD	15,320	74.3% ↑	6.92%	2.3% ↑
KIA	14,799	37.6% ↑	6.68%	1.03% ↑
FORD	13,924	58.9% ↑	6.29%	1.68% ↑
VOLKSWAGEN	13,430	-12.0% ↓	6.07%	-1.96% ↓
SKODA	12,412	37.5% ↑	5.61%	0.86% ↑
AUDI	11,963	-5.0% ↓	5.4%	-1.22% ↓
BMW	11,710	-28.5% ↓	5.29%	-3.32% ↓
RENAULT	10,816	64.5% ↑	4.89%	1.43% ↑
MERCEDES-BE...	9,867	9.5% ↑	4.46%	-0.28% ↓

YTD vs last year (provisional figures)

Fuel Type	Regs. ▼	% Δ	Mkt. Share
HEV	312,979	4.1% ↑	33.51%
Petrol	233,794	-13.7% ↓	25.03%
BEV	221,447	18.5% ↑	23.71%
PHEV	119,824	32.5% ↑	12.83%
Diesel	46,029	-14.3% ↓	4.93%
Other	35	-66.7% ↓	+0%
Grand total	934,108	3.5% ↑	100%

Latest month vs last year (provisional figures)

Fuel Type	Regs. ▼	% Δ	Mkt. Share
HEV	46,887	3.2% ↑	30.78%
BEV	41,346	31.2% ↑	27.14%
Petrol	36,245	-13.6% ↓	23.79%
PHEV	20,302	18.3% ↑	13.33%
Diesel	7,550	-5.8% ↓	4.96%
Other	1	-92.9% ↓	+0%
Grand total	152,331	5.7% ↑	100%

Top Brands' Electrification YTD vs last year

Marque	Total ▼	BEV	BEV (%)	Δ
VOLKSWAGEN	74,299	13,430	18.08%	-0.46% ↓
KIA	52,117	14,799	28.4%	8.74% ↑
BMW	51,201	11,710	22.87%	-4.35% ↓
FORD	49,468	13,924	28.15%	12.15% ↑
AUDI	47,175	11,963	25.36%	-0.65% ↓
MERCEDES-BENZ	42,611	9,867	23.16%	2.4% ↑
VAUXHALL	41,626	8,522	20.47%	2.84% ↑
MG	38,599	9,253	23.97%	8.1% ↑
SKODA	36,919	12,412	33.62%	9.29% ↑
TOYOTA	36,347	3,145	8.65%	2.05% ↑
HYUNDAI	36,323	6,979	19.21%	1.8% ↑
PEUGEOT	36,195	5,889	16.27%	-6.4% ↓
NISSAN	33,063	1,617	4.89%	0.22% ↑
BYD	31,252	15,320	49.02%	-5.96% ↓
LAND ROVER	31,066	0	0%	0%
RENAULT	29,169	10,816	37.08%	14.24% ↑

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	191,628	25.8%	24.2%	-3,163.8
STELLANTIS	108,095	30.3%	21.9%	-9,125.8
HYUNDAI	88,937	29.3%	24.9%	-3,841.8
BMW	74,989	28.9%	26.2%	-2,005.6
FORD	49,468	30.6%	28.1%	-1,226.9
CHERY AUTOMOBILE	44,151	9.9%	13.1%	1,404.6
MERCEDES	43,526	31.0%	24.8%	-2,728.2
RENAULT	42,835	27.5%	31.7%	1,770.0
TOYOTA	42,731	19.7%	9.4%	-4,380.8
SAIC	38,599	12.5%	24.0%	4,432.6
GEELY	35,624	31.1%	34.8%	1,332.9
NISSAN	33,063	24.7%	4.9%	-6,565.7
BYD	31,252	6.6%	49.0%	13,257.4
TATA	31,076	13.4%	0.0%	-4,155.9
TESLA	16,227	33.0%	100.0%	10,872.1
MAZDA	12,979	23.2%	0.0%	-3,010.7
SUZUKI	11,560	28.1%	11.1%	-1,962.8
HONDA	9,764	22.5%	14.2%	-806.2

The estimated real ZEV sales target - The headline ZEV mandate target for 2026 is 33%. But firms generate additional credits by exceeding CO₂ 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 CO₂ ratings of newly registered non-ZEV cars in the year to date, using publicly available information from the DVLA.

The year so far - Currently, the estimated real target is 24.6%. This reflects the additional flexibilities introduced into the scheme midway through the year. The Y-T-D market share is currently sitting at 23.7%, showing that a quarter of the way through the year the market is in touching distance of the target.

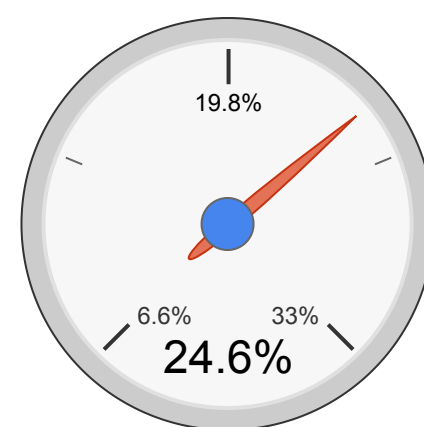
For manufacturers with a high proportion of PHEV sales, the effective target is significantly lower. We can see this most clearly with BYD's target being pushed down to 6.6% as they have around a 50/50 split of BEV and PHEV registrations. This is a result of the governments flexibilities introduced last year.

A small group of manufacturers are already operating with a surplus of ZEV credits, Tesla, BYD, SAIC, Geely, Chery and Renault.

Honda and Subaru are just under their implied target.

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

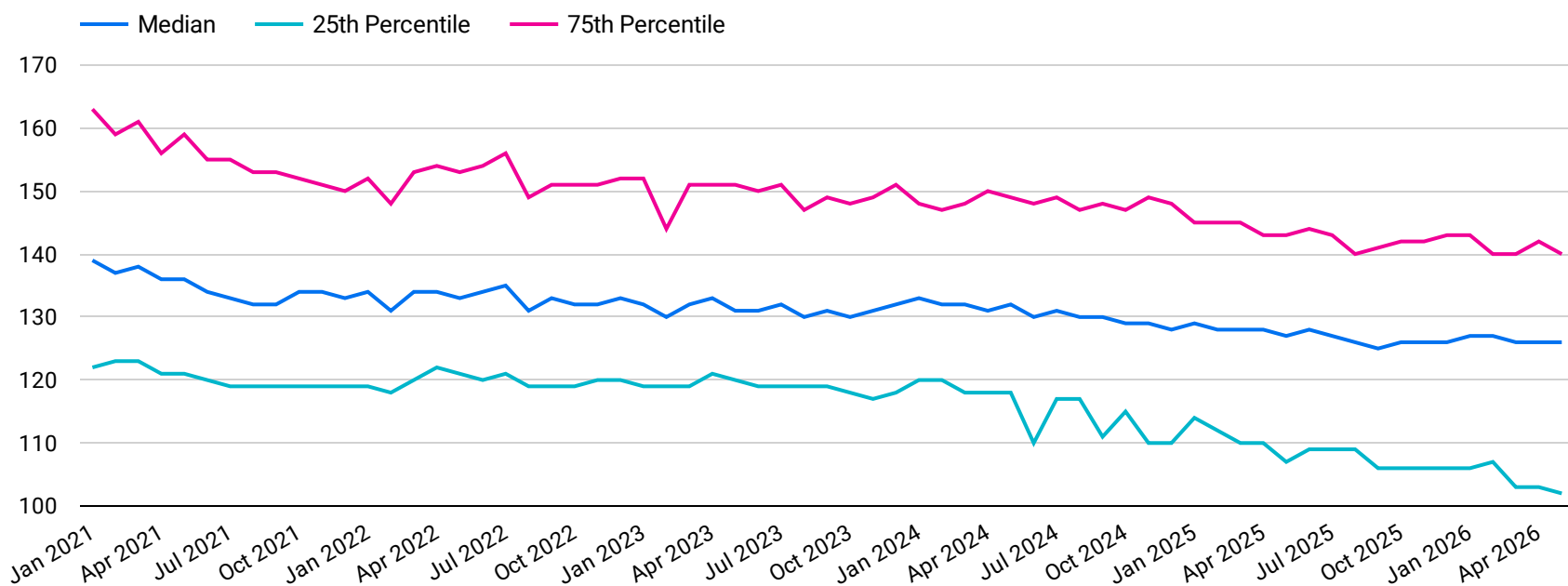
Est. Real Market-Wide ZEV Target



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 CO₂ Emissions Ratings

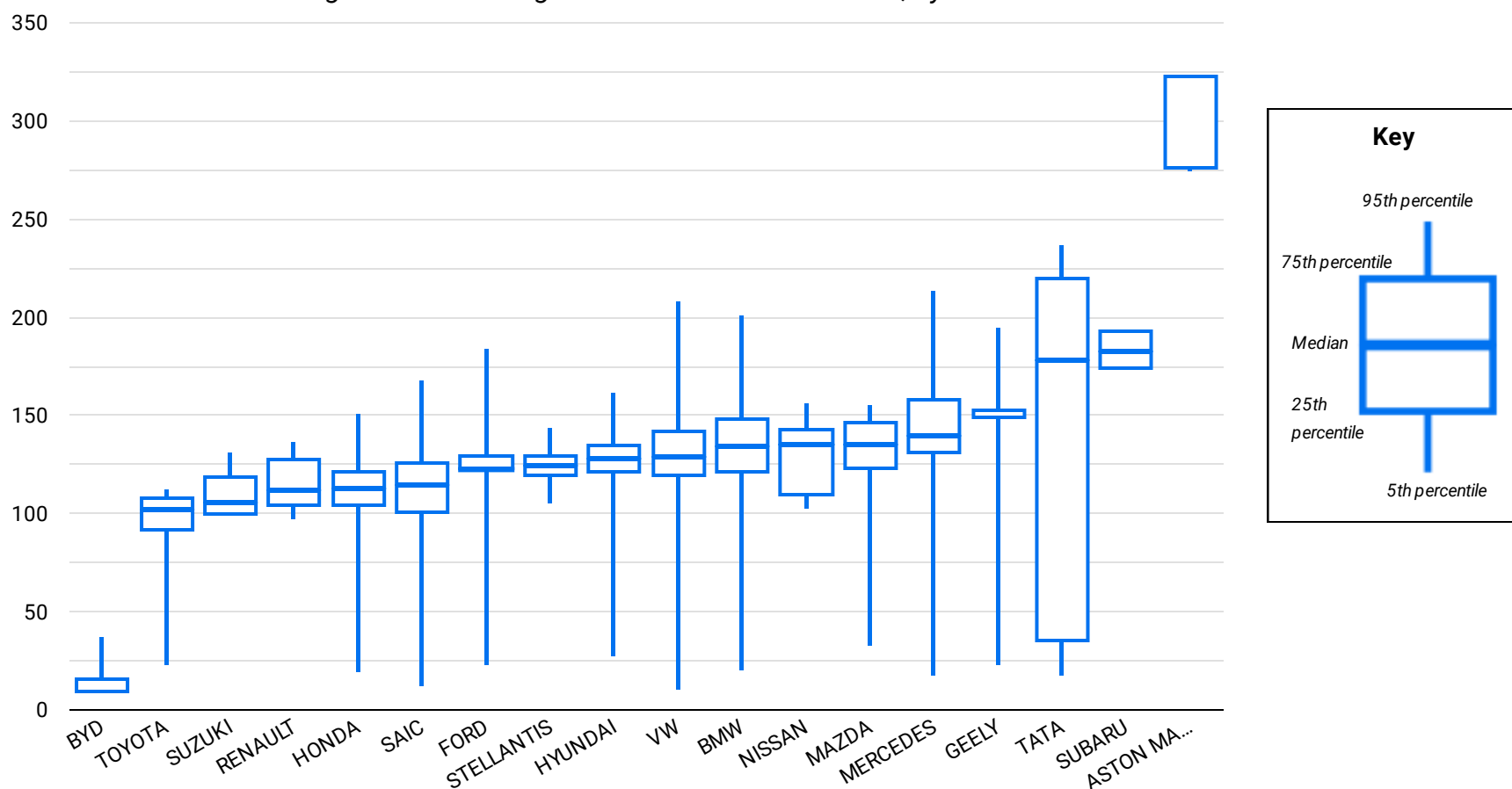
Average CO₂ ratings of newly registered internal combustion engine cars by month of registration, gCO₂/km



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

2026 has once again given us another monthly record, with this May providing both the biggest BEV registrations and BEV market share for any May to date. BEVs managed 33.2% growth year-on-year, bested only by the growth in PHEVs which was 41.4%. This comes amongst a backdrop of decline across all other fuel types, once again showing the ever increasing demand for switching to plug-in technologies over the drive-trains of yesterday.

As we approach the half-way point of the year BEVs are now up 13.1% year-to-date, with PHEV registrations more than doubling, now accounting for more than 1 in 20 van registrations in 2026.

Kia have continued to deliver strong BEV registration numbers sitting in third place in May, as well as for year-to-date registrations. Having entered the UK market less than a year ago they already account for nearly 1 in 5 BEV registrations this year. Volkswagen nearly doubled their BEV registrations year-on-year, only outshone by Dacia managing a near 10-fold increase in BEV

BEV Van Market Shares (YTD)

Make	BEVs ▾	BEVs
VOLKSWAGEN	3,278	27.66%
FORD	2,923	24.67%
KIA	2,125	17.93%
TOYOTA	672	5.67%
MAXUS	631	5.33%
MERCEDES-BENZ	465	3.92%
VAUXHALL	442	3.73%
RENAULT	389	3.28%
RENAULT TRUCKS	183	1.54%
PEUGEOT	178	1.5%
CITROEN	158	1.33%
IVECO	129	1.09%
SKODA	69	0.58%
NISSAN	68	0.57%
FIAT	49	0.41%

Sales by fuel type, YTD vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	12,103	1,398 ↑	9.69%
Diesel	101,987	-9,619 ↓	81.65%
Petrol	1,602	-1,703 ↓	1.28%
PHEV	6,481	3,364 ↑	5.19%
HEV	2,730	-1,127 ↓	2.19%
Grand total	124,903	-7,687 ↓	100%

Sales by fuel type, latest month vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	2,213	551 ↑	10.33%
Diesel	17,705	-1,801 ↓	82.62%
Petrol	314	-204 ↓	1.47%
HEV	283	-595 ↓	1.32%
PHEV	915	268 ↑	4.27%
Grand total	21,430	-1,781 ↓	100%

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

Make	Total	BEVs	BEV %
FORD	37,282	2,923	7.84%
VOLKSWAGEN	14,018	3,278	23.38%
RENAULT	10,846	389	3.59%
VAUXHALL	10,641	442	4.15%
PEUGEOT	9,943	178	1.79%
MERCEDES-BE...	8,014	465	5.8%
CITROEN	7,106	158	2.22%
TOYOTA	5,351	672	12.56%
LAND ROVER	4,657	1	0.02%
NISSAN	4,080	68	1.67%
MAXUS	2,846	631	22.17%
KIA	2,125	2,125	100%
FIAT	1,674	49	2.93%
RENAULT TRU...	1,423	183	12.86%
MAN	1,343	0	0%
IVECO	1,294	129	9.97%
KGM	604	10	1.66%
ISUZU	453	9	1.99%

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	36,911	15.1%	7.9%	-2,654
STELLANTIS	29,311	7.9%	2.6%	-1,544
VOLKSWAGEN	15,233	22.8%	21.5%	-201
RENAULT	10,844	17.6%	3.6%	-1,520
MERCEDES-BENZ	7,353	19.9%	6.2%	-1,004
TOYOTA	5,333	19.0%	12.3%	-360
JLR	4,656	18.2%	0.0%	-846
NISSAN	3,966	8.2%	1.7%	-258
SAIC	2,846	24.0%	22.2%	-52
KIA MOTORS CORPORATION	2,125	24.0%	100.0%	1,615
ISUZU	787	17.2%	1.1%	-126
GEELY	557	4.8%	32.7%	155
INEOS	185	9.0%	0.0%	-17

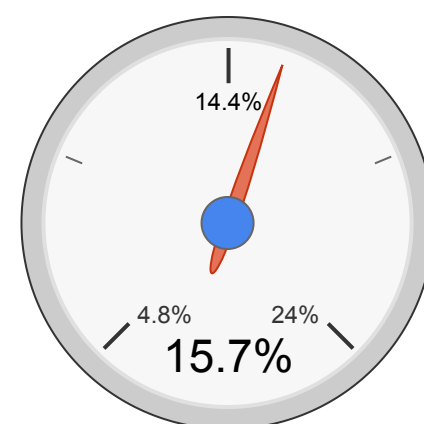
The estimated real ZEV registrations target - the ZEV Mandate requires manufacturers to meet an increasing percentage target of electric vans (24% in 2026) by selling more electric vans as a proportion of sales. They can also generate additional credits by exceeding easy-to-meet CO₂ emissions targets 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 CO₂ ratings of newly registered non-ZEV vans in 2025.

2026 so far: As we edge closer to the end of the first half of 2026 only two manufacturers currently hold a credit surplus, although a number are only just in the red at this early stage.

Kia now see their credit surplus rise to 1,615 on the back of another month of strong BEV registrations. Selling a range of exclusively electric vans means that they register 3 surplus credits for every 4 vans they manage to sell allowing them to have a great range of options to benefit from this when the 2026 scheme year concludes, including transferring those credits into the car scheme if they run a deficit, banking them for use in later years, or potentially turning them into additional revenue by selling them to manufacturers who have failed to supply enough BEVs to comply.

While demand is increasing for BEV vans government may need to do more to assist businesses in getting the grid connections they require to set up adequate charging infrastructure where fleet vans may be stored overnight for charging.

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	15,459	-1,380 ↓	99.09%	-0.08% ↓
BEV	142	1 ↑	0.91%	0.08% ↑
Grand total	15,601	-1,379 ↓	100%	0%

HGVs latest month vs last year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Diesel	2,777	-19.4% ↓	98.79%	-0.72% ↓
BEV	34	100.0% ↑	1.21%	0.72% ↑
Grand total	2,811	-18.8% ↓	100%	0%

34 trucks were registered in May 2026, accounting for 0.91% of the market. A comparatively slower month, especially when comparing to the end of last year. Registrations for the first 5 months of 2026 have failed to build on the momentum seen in the market at the end of 2025. With the government still proposing to end the sale of diesel HGVs by 2035 for vehicles under 26 tonnes, and 2040 for those over, the sector has a mountain to climb. This is especially the case for the heavier vehicles - nearly all the electrification has occurred in the under 26 tonnes class. More supportive policies, such as a ZEV Mandate, are needed to drive investment and R&D into the heavier vehicles.

Motorbikes

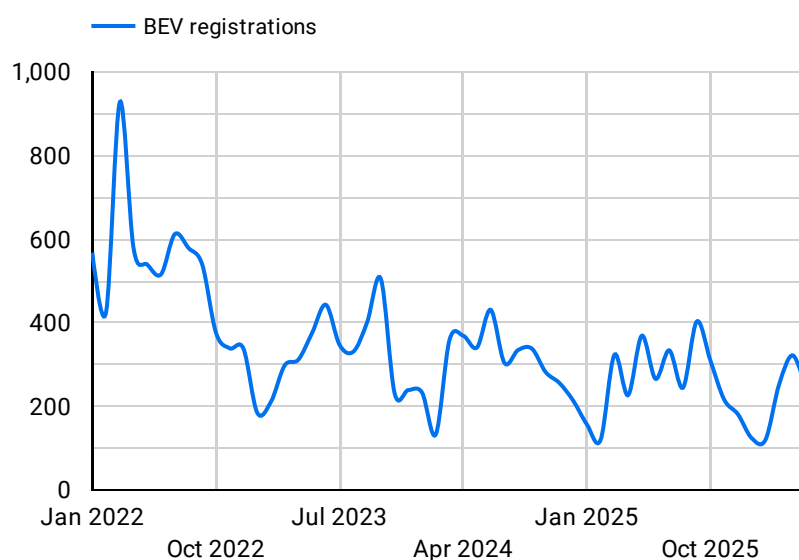
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	41,161	10.7% ↑	97.5%	0.62% ↑
BEV	1,055	-11.8% ↓	2.5%	-0.62% ↓
Grand total	42,216	10.0% ↑	100%	0%

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	10,252	10.7% ↑	97.75%	1.58% ↑
BEV	236	-36.0%...	2.25%	-1.58% ↓
Grand total	10,488	8.9% ↑	100%	0%

Monthly electric motorbike registrations



The electric motorbike market continues to underperform, with 324 BEVs registered in May, making up 2.3% 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 legacy brands show little interest in 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'.