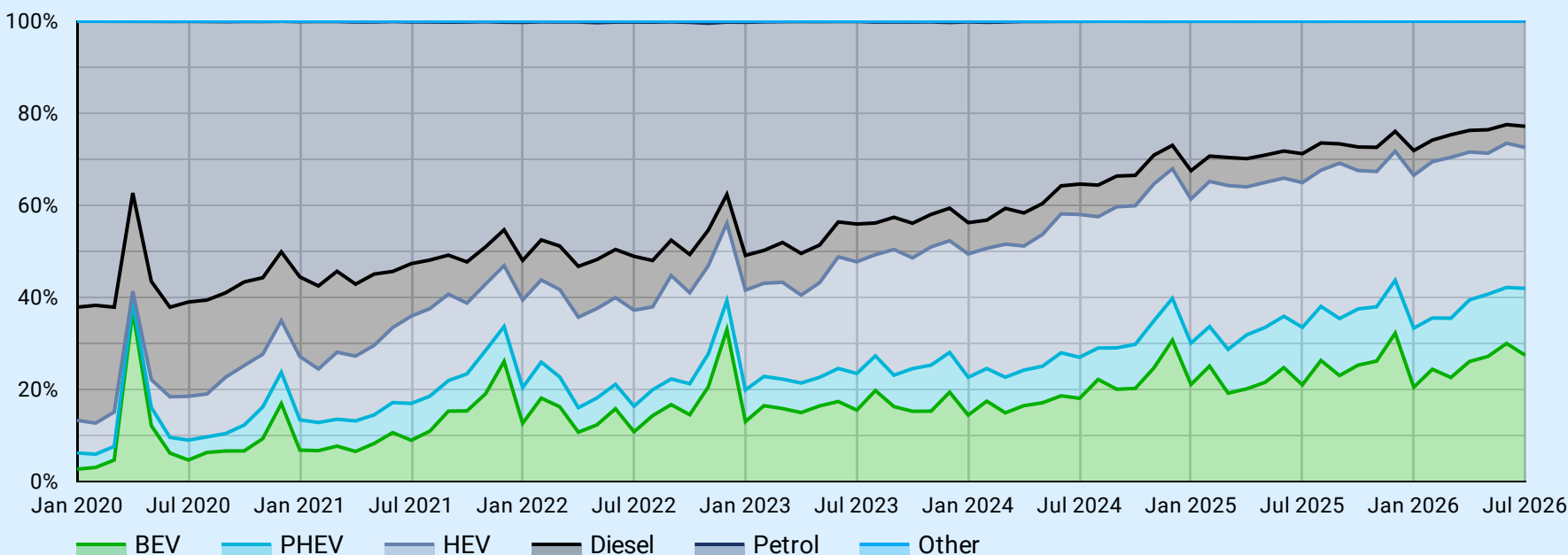


Electric car sales jump 50% in July



- BEVs accounted for 27% of new car registrations in July, with 43,547 vehicles sold, up 49% compared to July 2025

- For the second consecutive month, BEVs sales were above mandated levels trajectory, further increasing the surplus of credits within the system.

- Manufacturers who are behind on targets will see compliance costs - likely through trading - fall even lower as the number of surplus credits further outnumbered those needed to secure compliance.

- Kia, Volkswagen and BYD led monthly BEV registrations, with Kia recording its highest ever BEV share at 41% of sales, alongside record BEV shares for Renault (53%) and Suzuki (41%).

- BEV van registrations reached their third strongest month on record in July, with 15% of the market.

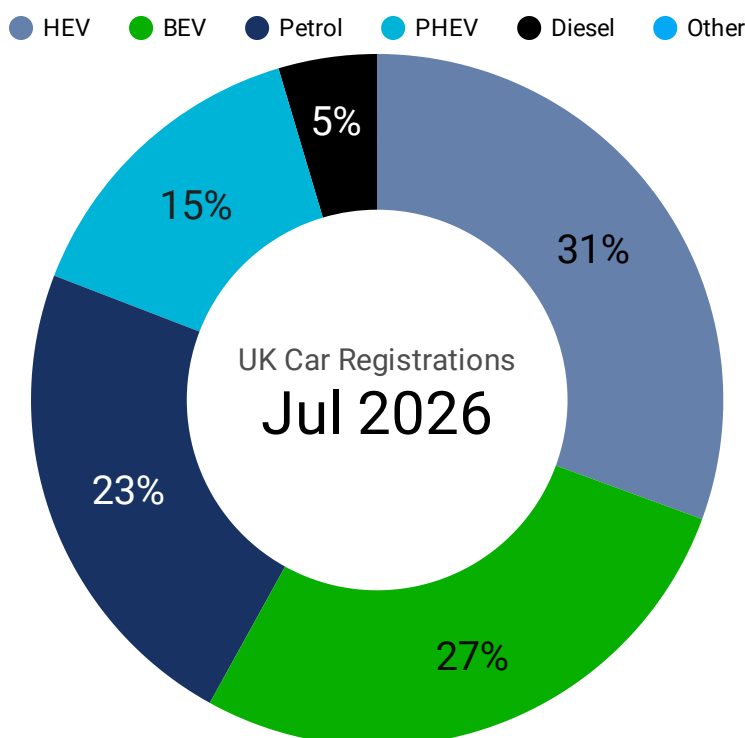
- UK BEV sales were markedly lower than those in peer European markets, such as France where BEV sales accounted for 35% of new cars in July.

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Suggestions, feedback or requests for data? We'd love to hear from you:

data@newautomotive.org



Ben Nemes, CEO at New AutoMotive, said:

"It is fantastic to see such good growth in every postcode - in electric car registrations. We can expect celebrations in Downing Street, because electric cars are the single best way to reduce household energy costs.

"Growing numbers of people are seeing electric cars as a way out of the cost of living crisis. Thanks to the UK's Zero Emissions Vehicle mandate, there are more models to choose from, at competitive prices, making electric cars a realistic option for millions of motorists.

"This progress is not guaranteed, and if Ministers meddle with this policy it will be households who pay the price."

Cars summary

July 2026 saw the UK's EV market maintain its strong momentum. BEVs accounted for 27% of all new car registrations, with 43,547 new BEVs registered during the month, up from 29,226 in July 2025. This made BEVs the fastest growing segment in an expanding market, with registrations increasing by almost 50% year-on-year.

The wider new car market also continued to grow, with registrations up 16% compared to July 2025. As we have seen month after month it is electrified vehicles who are responsible for that growth. While BEVs recorded the strongest increase, petrol registrations fell by 8% and diesel by 11%, continuing their long term downward shift. The strong performance seen throughout the year is continuing to build. BEVs now account for one in four new cars.

Overall registrations are up 5% compared to the same point last year, driven almost entirely by electrified vehicles. BEV registrations have increased by 24% year-on-year, making them the second fastest growing powertrain after PHEVs. July marks the second consecutive month that the market has exceeded the real world trajectory required by the mandate, further increasing the surplus of credits available across the market.

Looking at manufacturer performance this month it was KIA, Volkswagen and BYD leading monthly BEV registrations. It is important to note that this month did not benefit from a Tesla delivery surge, which typically follows a quarterly pattern. Alongside topping the monthly rankings, Kia also recorded its highest ever BEV share, with 41% of its registrations being fully electric. Renault, which ranked fourth, surpassed the halfway mark for the first time, with BEVs accounting for 53% of its sales. Suzuki also reached a new milestone, with BEVs making up 41% of its registrations.

Year-to-date figures show BYD slipping to third place, with Kia moving into second. However, the gaps between the leading manufacturers remain relatively small, meaning the rankings are likely to continue shifting over the remainder of the year.

BEV market share, YTD, vs last year

Marque	BEV re... ▾	% Δ	% of UK BEVs	Δ
TESLA	30,190	14.3% 🟢	8.97%	-0.66% 🟡
KIA	22,318	52.5% 🟢	6.63%	1.29% 🟢
BYD	21,767	61.1% 🟢	6.47%	1.54% 🟢
VOLKSWAGEN	19,779	-7.9% 🟡	5.88%	-1.96% 🟡
FORD	18,661	42.6% 🟢	5.54%	0.77% 🟢
SKODA	17,944	30.0% 🟢	5.33%	0.3% 🟢
BMW	17,915	-22.9% 🟡	5.32%	-3.15% 🟡
AUDI	16,796	-8.4% 🟡	4.99%	-1.7% 🟡
RENAULT	16,219	84.4% 🟢	4.82%	1.61% 🟢
MG	14,290	53.9% 🟢	4.25%	0.86% 🟢

YTD vs last year (provisional figures)

Fuel Type	Regs. ▾	% Δ	Mkt. Share
HEV	436,284	5.3% 🟢	32.72%
BEV	336,609	23.9% 🟢	25.24%
Petrol	324,044	-13.7% 🟡	24.3%
PHEV	172,842	29.6% 🟢	12.96%
Diesel	63,717	-16.5% 🟡	4.78%
Other	40	-72.4% 🟡	+0%
Grand total	1,333,536	4.9% 🟢	100%

Latest month vs last year (provisional figures)

Fuel Type	Regs. ▾	% Δ	Mkt. Share
HEV	48,563	11.6% 🟢	30.6%
BEV	43,547	49.0% 🟢	27.44%
Petrol	36,223	-8.2% 🟡	22.82%
PHEV	23,088	36.2% 🟢	14.55%
Diesel	7,304	-10.6% 🟡	4.6%
Other	3	-72.7% 🟡	+0%
Grand total	158,728	15.6% 🟢	100%

Top Brands' Electrification YTD vs last year

Marque	Total ▾	BEV	BEV (%)	Δ
VOLKSWAGEN	106,997	19,779	18.49%	-0.13% 🟡
BMW	72,742	17,916	24.63%	-3.01% 🟡
KIA	72,519	22,318	30.78%	11.31% 🟢
AUDI	68,933	16,796	24.37%	-2.18% 🟡
FORD	68,318	18,661	27.31%	10.11% 🟢
MERCEDES-BENZ	58,565	14,076	24.03%	3.67% 🟢
MG	57,215	14,290	24.98%	7.02% 🟢
VAUXHALL	55,875	11,937	21.36%	5.45% 🟢
SKODA	53,724	17,944	33.4%	7.38% 🟢
TOYOTA	52,779	6,030	11.42%	5.46% 🟢
HYUNDAI	51,788	10,771	20.8%	1.52% 🟢
PEUGEOT	48,242	8,167	16.93%	-4.04% 🟡
NISSAN	47,052	2,752	5.85%	1.85% 🟢
BYD	45,520	21,767	47.82%	-7.09% 🟡
RENAULT	41,873	16,219	38.73%	16% 🟢
JAECOO	41,396	6,569	15.87%	15.87% 🟢

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	277,711	26.0%	23.7%	-6,385.3
STELLANTIS	147,207	30.4%	23.7%	-9,826.9
HYUNDAI	125,034	29.5%	27.0%	-3,185.4
BMW	107,551	29.2%	28.3%	-906.7
FORD	68,319	30.5%	27.3%	-2,185.0
CHERY AUTOMOBILE	64,344	10.6%	15.6%	3,247.0
TOYOTA	62,067	20.0%	11.8%	-5,083.2
RENAULT	61,304	28.0%	33.4%	3,334.9
MERCEDES	60,013	30.9%	25.8%	-3,058.2
SAIC	57,215	11.3%	25.0%	7,813.3
GEELY	51,642	30.8%	38.5%	3,987.7
NISSAN	47,052	25.1%	5.8%	-9,036.4
BYD	45,520	6.6%	47.8%	18,762.7
TATA	40,744	12.8%	0.0%	-5,206.7
TESLA	30,190	33.0%	100.0%	20,227.3
MAZDA	16,658	22.5%	1.0%	-3,581.6
SUZUKI	15,090	28.6%	15.9%	-1,903.6
HONDA	12,308	22.7%	12.4%	-1,265.1
SUBARU	1,013	30.0%	0.5%	-298.4
XIAOPENG MOTORS CO.	974	33.0%	100.0%	652.6

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.

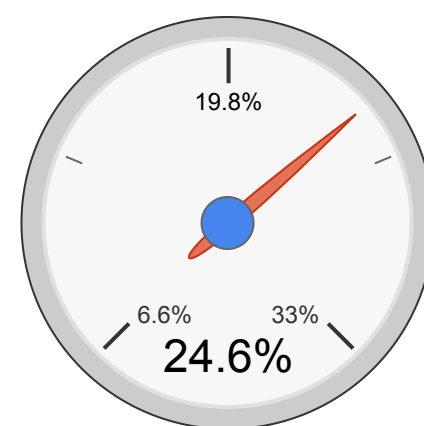
The year so far - At the halfway stage of 2026, the estimated real ZEV mandate target stands at 24.6%, after accounting for the flexibilities available under the scheme. Year-to-date BEV market share is currently 25.3%, placing the market marginally above the effective compliance threshold. In other words, there are now more ZEV credits in the system than are required for overall compliance.

While the market is balanced overall, the distribution of credits remains highly uneven. Manufacturers generating significant surpluses include Tesla, BYD, Geely, SAIC, Renault, Chery and Xiaopeng Motors, all of which are outperforming their implied targets.

At the other end of the spectrum, Volkswagen, Stellantis, Toyota, Nissan, Tata, Mercedes, Hyundai, Mazda and Ford are currently running deficits against their estimated targets. Stellantis, and Toyota face some of the largest shortfalls in absolute terms.

However, many manufacturers are already within striking distance of compliance. BMW, Honda, Suzuki, Subaru, and Aston Martin are all estimated to be fewer than 2,000 credits below their implied targets, meaning relatively modest increases in BEV sales, or access to the credit market, would be sufficient to close the gap.

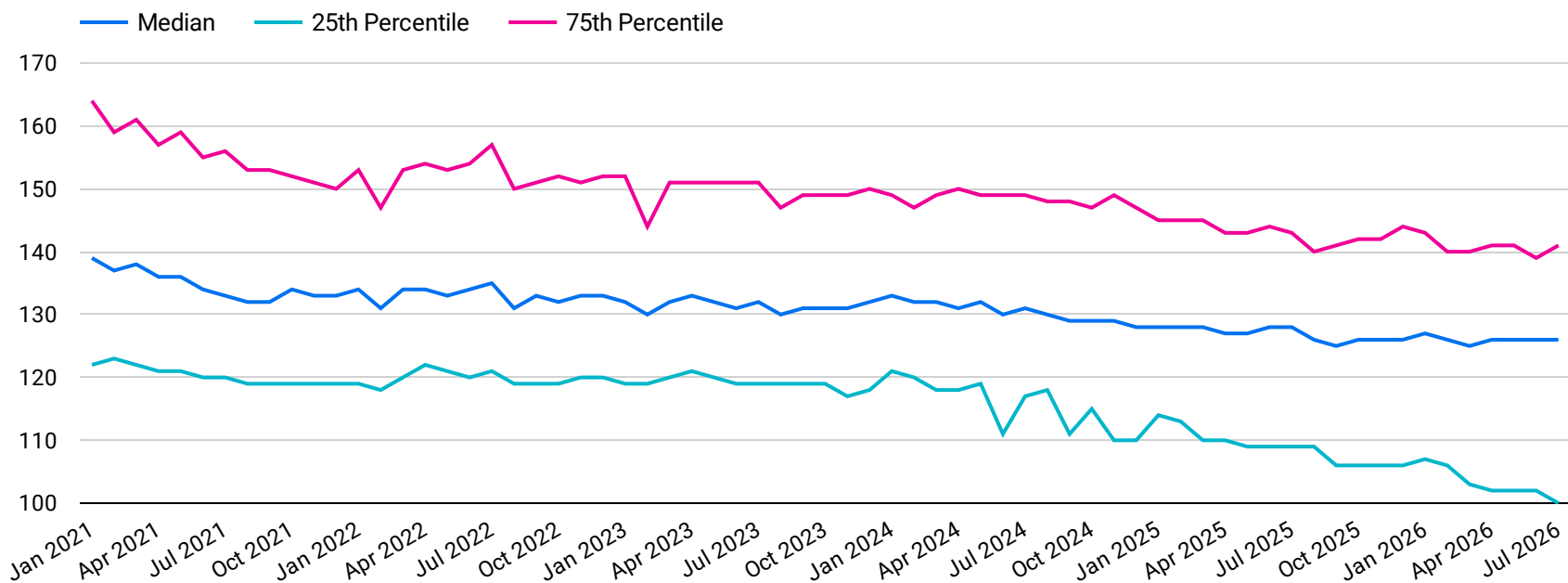
Est. Real Market-Wide ZEV Target



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

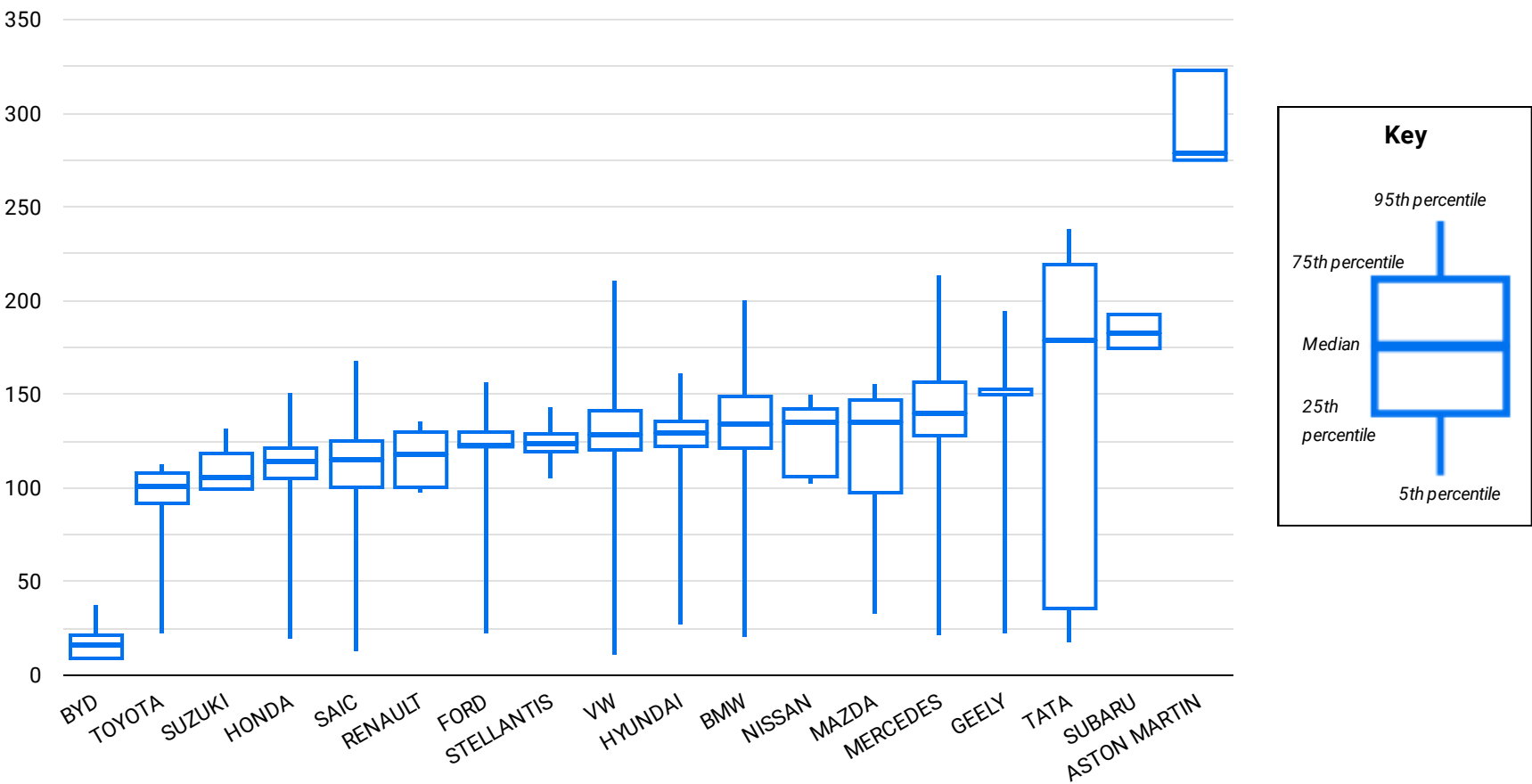
Average CO₂ ratings of newly registered internal combustion engine cars by month of registration, gCO₂/km



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

July 2026 marked the third strongest month on record for BEV registrations with a 70% growth in registrations taking it well past the often elusive 4k mark. The van market also saw significant growth at 19%, driven largely by a strong month of BEV registrations and a near doubling in PHEV registrations. This marks the strongest BEV performance outside of the bumper registration plate change months of March and September.

January to July figures show a growing van market for the year to date, with diesel, petrol, and HEV vans down on this time last year the growth has been driven solely for the increasingly in demand plug-in vans. This growth in PHEVs (up 80% on this time last year) is best explained as a strategy by manufacturer to bring down their ZEV Mandate target down from this years headline target of 24% towards this years "floor" which sits at 4.8% thanks to very generous flexibilities added only last year.

July marked Kia's most registrations of any month - marking a key signifier of strong demand for BEVs given they are a BEV only manufacturer in the UK. Volkswagen also marked their strongest ever monthly BEV share at 30%. This has further cemented their lead 7 months into the year for BEV registrations, a significant feat given the dominance of their closest competitor, Ford, on the UK market as a whole.

BEV Van Market Shares (YTD)

Make	BEVs ▾	BEVs
VOLKSWAGEN	5,495	28.56%
FORD	4,087	21.24%
KIA	3,256	16.92%
TOYOTA	1,338	6.96%
MERCEDES-BENZ	1,188	6.18%
MAXUS	943	4.9%
RENAULT	719	3.74%
VAUXHALL	522	2.71%
PEUGEOT	401	2.08%
CITROEN	236	1.23%
RENAULT TRUCKS	222	1.15%
NISSAN	179	0.93%
IVECO	147	0.76%
FIAT	128	0.67%
SKODA	123	0.64%

Sales by fuel type, YTD vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	20,290	3,985 ↑	10.79%
Diesel	152,978	-2,200 ↓	81.32%
Petrol	2,281	-2,172 ↓	1.21%
PHEV	8,942	3,986 ↑	4.75%
HEV	3,617	-1,495 ↓	1.92%
Grand total	188,108	2,104 ↑	100%

Sales by fuel type, latest month vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	4,260	1,753 ↑	15.09%
Diesel	22,037	2,518 ↑	78.04%
Petrol	310	-276 ↓	1.1%
PHEV	1,348	655 ↑	4.77%
HEV	282	-220 ↓	1%
Grand total	28,237	4,430 ↑	100%

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

Make	Total	BEVs	BEV %
FORD	54,359	4,087	7.52%
VOLKSWAGEN	21,764	5,495	25.25%
PEUGEOT	16,658	401	2.41%
RENAULT	15,688	719	4.58%
VAUXHALL	15,023	522	3.47%
MERCEDES-BE...	12,875	1,188	9.23%
CITROEN	10,970	236	2.15%
TOYOTA	8,087	1,338	16.55%
LAND ROVER	6,646	1	0.02%
NISSAN	5,774	179	3.1%
MAXUS	4,273	943	22.07%
KIA	3,256	3,256	100%
FIAT	2,394	128	5.35%
RENAULT TRU...	2,046	222	10.85%
IVECO	2,011	147	7.31%
MAN	1,981	4	0.2%
	1,295	1,279	98.76%
KGM	872	37	4.24%

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	53,951	15.2%	7.6%	-4,123
STELLANTIS	44,884	7.3%	2.5%	-2,169
VOLKSWAGEN	23,471	22.9%	23.4%	115
RENAULT	15,793	18.6%	5.3%	-2,096
MERCEDES-BENZ	11,699	19.9%	10.1%	-1,153
TOYOTA	8,053	17.1%	16.2%	-73
JLR	6,645	18.3%	0.0%	-1,214
NISSAN	5,626	8.5%	3.2%	-298
SAIC	4,273	24.0%	22.1%	-83
KIA MOTORS CORPORATION	3,256	24.0%	100.0%	2,475
ISUZU	1,152	18.2%	4.5%	-157
GEELY	795	4.8%	27.8%	183
INEOS	257	8.7%	0.0%	-22
IVECO SPA	158	21.1%	88.6%	107

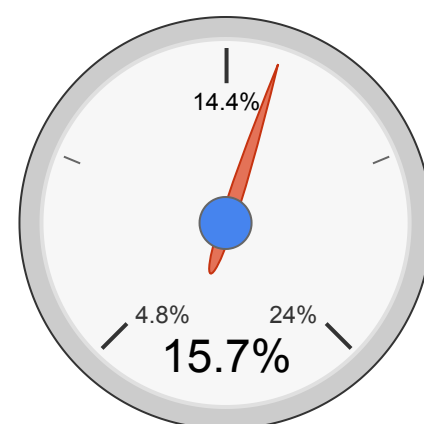
The estimated real ZEV registrations target - the ZEV Mandate requires manufacturers to meet an increasing percentage target of electric vans (24% in 2026) by selling more electric vans as a proportion of sales. They can also generate additional credits by exceeding easy-to-meet CO₂ emissions targets 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: July saw the market wide target for ZEV Mandate compliance remain steady at 15.7%, 8.3% below the headline target of 24% - highlighting the significant flexibility of the scheme, especially in a month where Geely, for example, further cement their target at the years “floor” or 4.8%.

Volkswagen now have a surplus of credits putting them on good footing as we start rolling through the second half of the year. IVECO, Geely, and Toyota have all seen minor gains against their Mandate requirements with all having increasing surpluses or at least shrinking deficits. Kia have made the greatest gains, to little surprise, seeing a 33% increase in its credit surplus.

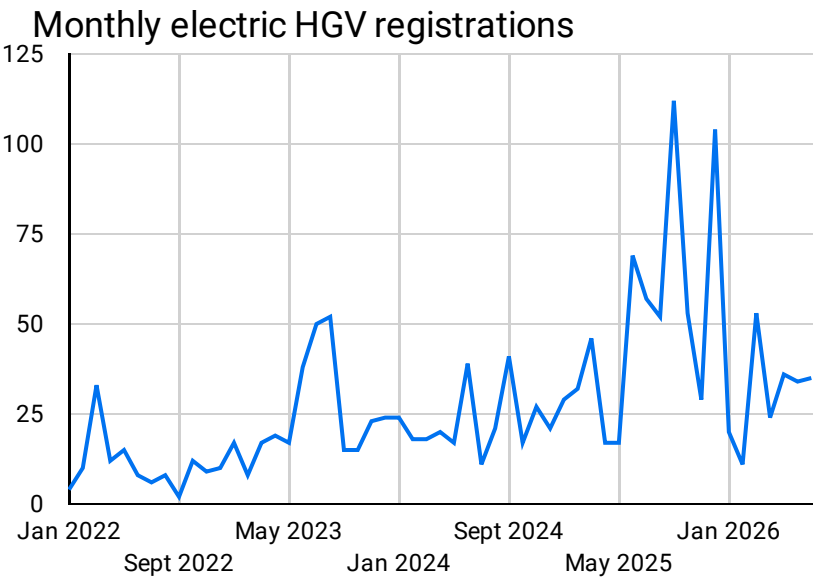
Once again it is clear that while there is ever strengthening demand for battery electric vans, the UK Government may need to do more to assist businesses in getting the grid connections they require to set up adequate charging infrastructure where their vans may be stored overnight as well as support for those who may need to charge at home but lack a driveway to do so on. As the UK's electric van fleet grows and ages, the health of the used market will become a critical factor in fleet turnover.

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



HGVs by fuel type, last 12 months vs previous

Fuel Type	Regs. ▾	Δ	Mkt. Share	Δ
Diesel	21,377	-2,002 ↓	99.01%	0.14% ↑
BEV	213	-54 ↓	0.99%	-0.14% ↓

Grand total21,590-2,056 ↓100%0%

HGVs latest month vs last year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Diesel	3,036	3.3% ↑	98.86%	0.76% ↑
BEV	35	-38.6% ↓	1.14%	-0.76% ↓
Grand total	3,071	2.5% ↑	100%	0%

35 trucks were registered in June 2026, accounting for 1.14% of the market this month. BEVs currently sit at 0.99% of the market and have struggled to make a dent in the diesel market. 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.

The sector has largely flatlined it's market share, still struggling to make it over the 1% barrier. A clear trajectory, like one a ZEV mandate would provide is clearly needed to boost this sector.

Motorbikes

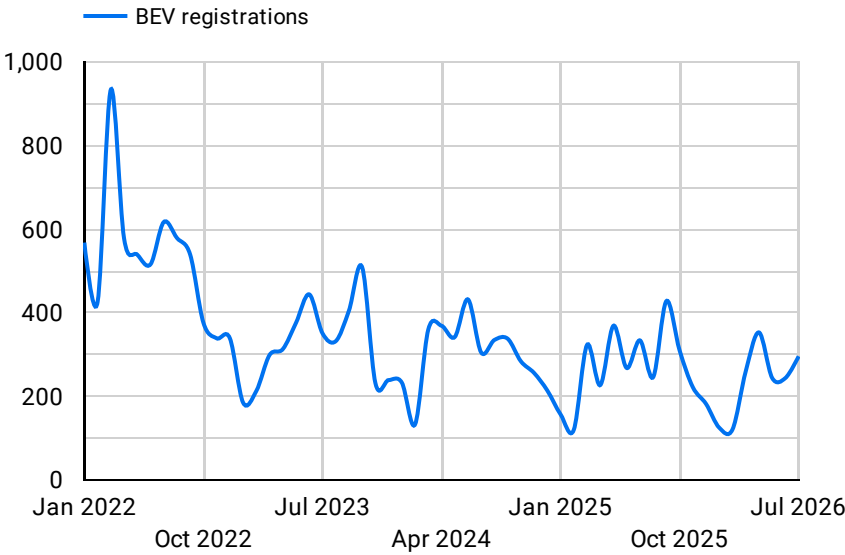
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	62,992	12.4% ↑	97.46%	0.57% ↑
BEV	1,643	-8.6% ↓	2.54%	-0.57% ↓
Grand total	64,635	11.7% ↑	100%	0%

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	9,864	15.7% ↑	97.09%	0.86% ↑
BEV	296	-11.4%...	2.91%	-0.86% ↓
Grand total	10,160	14.6% ↑	100%	0%

Monthly electric motorbike registrations



The electric motorbike market continues to underperform, with 296 BEVs registered in June, making up 2.91% 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'.