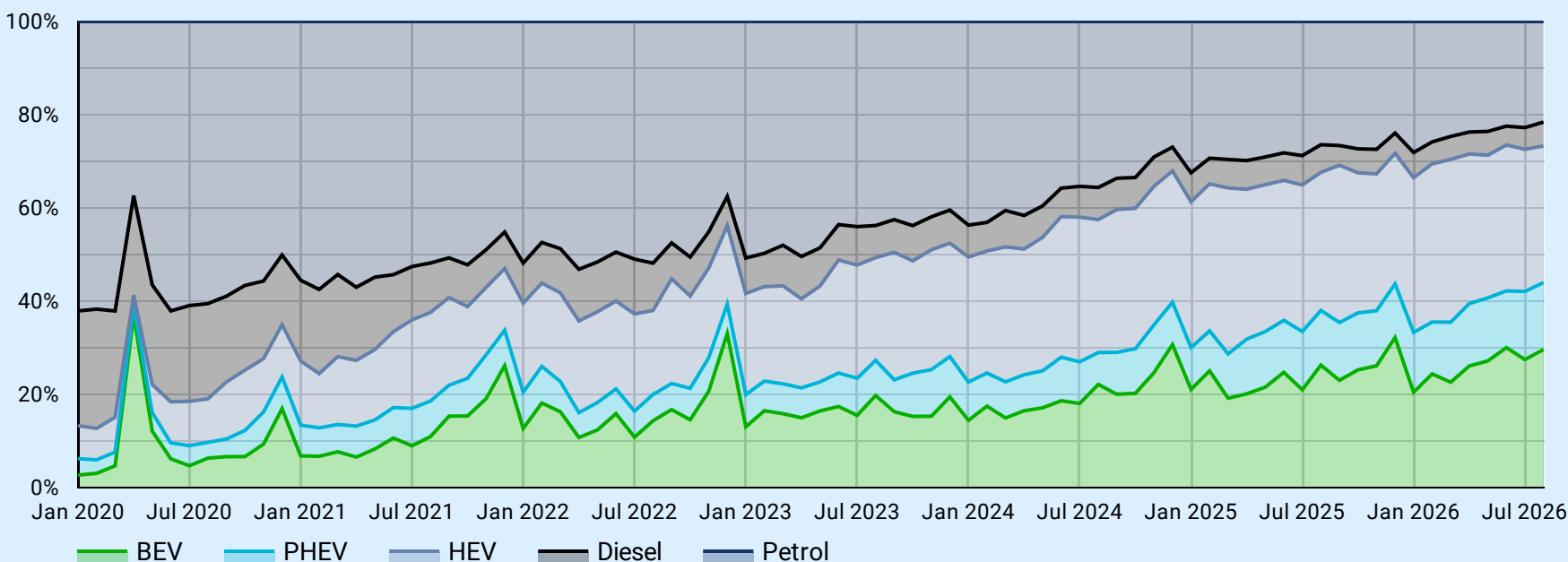


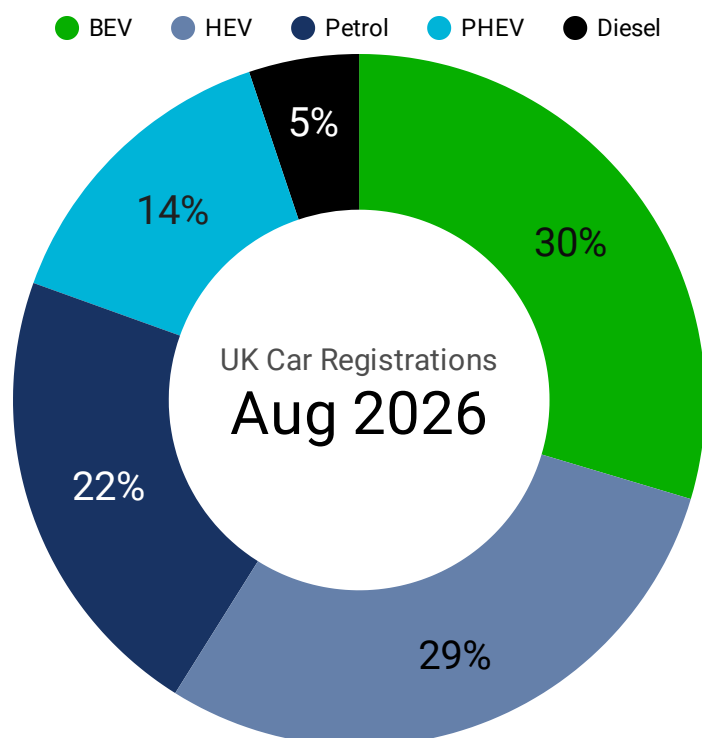
Electric Vehicles Surge to 30% Market Share as UK ZEV Mandate Surplus Grows



- **Strongest August for BEV registrations:** Battery Electric Vehicles (BEVs) captured 30% of all new car registrations in August 2026, with sales surging 30% year-on-year—spurred in part by shifting fuel market dynamics.
- **Record Month for Electric Vans:** BEV vans reached an all-time high 17% market share, comfortably outperforming the real-world ZEV Mandate target of 15.7%.
- **ZEV Mandate Surplus:** Strong year-to-date BEV performance (25.5% vs. the 24.6% effective target) has generated a significant system-wide surplus of compliance credits, led by brands like Tesla and BYD. Kia
- **Tops Brand Rankings:** Kia retained the top spot for monthly BEV registrations for the second consecutive month, with electric vehicles representing a record 45% of its total registrations.
- **PHEV Growth Surge:** Plug-in Hybrids (PHEVs) saw the largest percentage growth of any fuel type, surging 43.8% year-on-year to capture 14.3% of the car market, risking UK emissions savings.

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



Ben Nelmes, CEO at New AutoMotive, said:

"As policymakers and lobbyists wrangle over the fine print of the ZEV mandate, the automotive industry is busy delivering electric cars and vans to consumers who increasingly want to buy them.

"While August is a relatively modest month for car and van registrations, it fits with an emerging theme of accelerating growth in electric car and van uptake in the UK. This is a sign that the UK government's approach is working.

"After a summer of record-breaking heat, it would be profoundly mistaken for government to mess with this story of economic and environmental success."

Cars summary

August 2026 saw the UK's EV market continue its strong momentum, with BEVs accounting for 30% of all new car registrations. BEV registrations were up 30% compared with August 2025, marking another exceptionally strong month for the market. Some of the strongest performances ever have come in recent months, spurred on by the impact of the Iran war and the subsequent fuel crisis.

PHEVs have once again shown the largest growth, with registrations rising 44% compared with last year's figures. This growth is in part being supported by the ZEV Mandate, which gives manufacturers credits for selling plug-in hybrids alongside fully electric vehicles. While PHEVs can reduce emissions when used regularly in electric mode, their real world emissions are typically much higher than those of BEVs.

In the year to date, BEV registrations are now 24% higher than last year, with EVs continuing to take an increasing share of a growing market. The market is now comfortably ahead of the ZEV Mandate's implied trajectory, and if this continues, the surplus of credits will only grow. Yet this comes as the government launches a consultation on changes that could weaken the mandate, even as the market is increasingly demonstrating that it can deliver against it.

Looking at manufacturer performance this month, Kia once again topped the table for monthly BEV registrations for the second time in a row. Kia's continued performance points to steady progress rather than a one-off surge, supported by an increasingly competitive EV line-up.

As well as recording the highest monthly BEV registrations, Kia also recorded its highest share of EVs, with 45% of their cars being electric. BMW in third also saw BEVs hit a new high with 40% of their registrations electric, no doubt spurred on by the popular electric mini. Further down the list, Toyota, Volvo and Suzuki all saw BEVs account for the highest proportion of their registrations to date.

BEV market share, YTD, vs last year

Marque	BEV re... ▾	% Δ	% of UK BEVs	Δ
TESLA	32,639	8.5% 📈	8.89%	-1.2% 📉
KIA	24,664	58.3% 📈	6.71%	1.49% 📈
BYD	23,462	61.0% 📈	6.39%	1.5% 📈
VOLKSWAGEN	21,450	-8.0% 📉	5.84%	-1.98% 📉
FORD	20,056	36.8% 📈	5.46%	0.55% 📈
BMW	20,032	-19.5% 📉	5.45%	-2.88% 📉
SKODA	19,630	31.3% 📈	5.34%	0.33% 📈
AUDI	17,967	-9.5% 📉	4.89%	-1.76% 📉
RENAULT	17,548	84.5% 📈	4.78%	1.59% 📈
MG	15,851	59.1% 📈	4.32%	0.98% 📈

YTD vs last year (provisional figures)

Fuel Type	Regs. ▾	% Δ	Mkt. Share
HEV	466,717	5.3% 📈	32.45%
BEV	367,375	23.9% 📈	25.55%
Petrol	346,776	-13.8% 📉	24.11%
PHEV	187,966	29.5% 📈	13.07%
Diesel	69,262	-16.3% 📉	4.82%
Grand total	1,438,096	5.0% 📈	100%

Latest month vs last year (provisional figures)

Fuel Type	Regs. ▾	% Δ	Mkt. Share
BEV	28,339	32.4% 📈	29.62%
HEV	28,029	19.4% 📈	29.3%
Petrol	20,641	-2.7% 📉	21.57%
PHEV	13,736	47.1% 📈	14.36%
Diesel	4,929	8.4% 📈	5.15%
Grand total	95,674	19.6% 📈	100%

Top Brands' Electrification YTD vs last year

Marque	Total ▾	BEV	BEV (%)	Δ
VOLKSWAGEN	115,438	21,450	18.58%	-0.22% 📉
BMW	78,388	20,033	25.56%	-2.04% 📉
KIA	77,817	24,664	31.69%	12.12% 📈
FORD	74,994	20,056	26.74%	8.95% 📈
AUDI	74,149	17,967	24.23%	-2.39% 📉
MERCEDES-BENZ	63,813	15,549	24.37%	3.9% 📈
MG	62,611	15,851	25.32%	7.07% 📈
VAUXHALL	59,640	12,964	21.74%	5.92% 📈
SKODA	58,277	19,630	33.68%	7.45% 📈
TOYOTA	57,048	6,989	12.25%	6.36% 📈
HYUNDAI	54,726	11,624	21.24%	1.12% 📈
PEUGEOT	51,395	8,958	17.43%	-3.04% 📉
BYD	49,767	23,462	47.14%	-7.61% 📉
NISSAN	49,654	3,059	6.16%	1.99% 📈
JAECOO	45,973	7,497	16.31%	16.31% 📈
RENAULT	44,997	17,548	39%	16.08% 📈

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	298,663	26.0%	23.7%	-6,993.0
STELLANTIS	157,616	30.4%	24.3%	-9,598.1
HYUNDAI	133,173	29.6%	27.7%	-2,491.6
BMW	115,437	29.3%	29.0%	-386.8
FORD	73,560	30.6%	26.9%	-2,728.7
CHERY AUTOMOBILE	71,194	10.3%	16.2%	4,192.9
TOYOTA	66,854	20.1%	12.5%	-5,050.4
RENAULT	65,698	28.1%	33.7%	3,709.4
MERCEDES	65,303	31.0%	26.1%	-3,153.9
SAIC	62,486	11.6%	25.3%	8,590.9
GEELY	54,431	30.9%	39.3%	4,547.3
BYD	49,664	6.6%	47.2%	20,147.2
NISSAN	49,628	25.1%	6.2%	-9,415.1
TATA	43,387	12.7%	0.0%	-5,518.9
TESLA	32,415	33.0%	100.0%	21,718.1
MAZDA	18,033	22.6%	1.3%	-3,838.7
SUZUKI	16,107	28.8%	17.7%	-1,791.7
HONDA	13,182	22.7%	11.7%	-1,450.2
XIAOPENG MOTORS CO.	1,160	33.0%	100.0%	777.2
SUBARU	1,055	29.9%	0.5%	-310.8

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 - 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 25.5%, placing the market 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. Tata should start to see their short fall decline as orders open up for their first ever BEV launching in the Autumn.

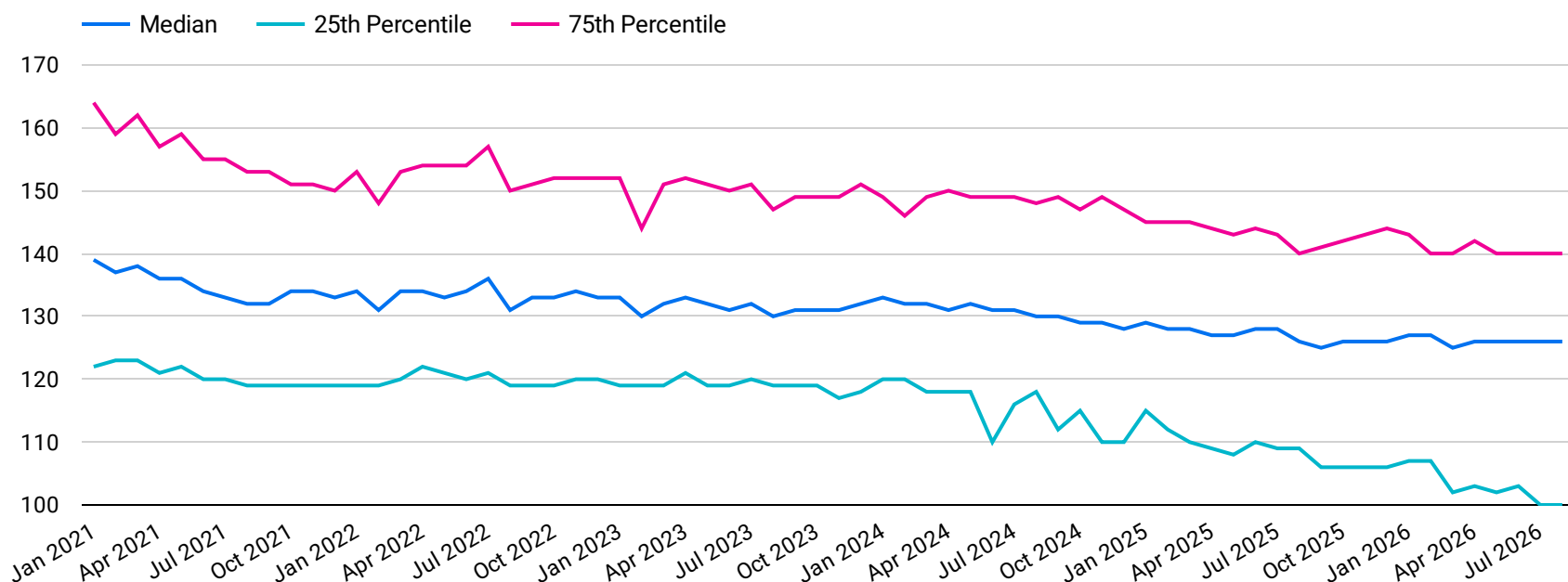
However, many manufacturers are already within striking distance of compliance. BMW, Honda, Suzuki, Subaru, KGM and Aston Martin are all estimated to be fewer than 2,000 credits below their implied targets, meaning relatively modest increases in BEV sales, or access to the credit market, would be sufficient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

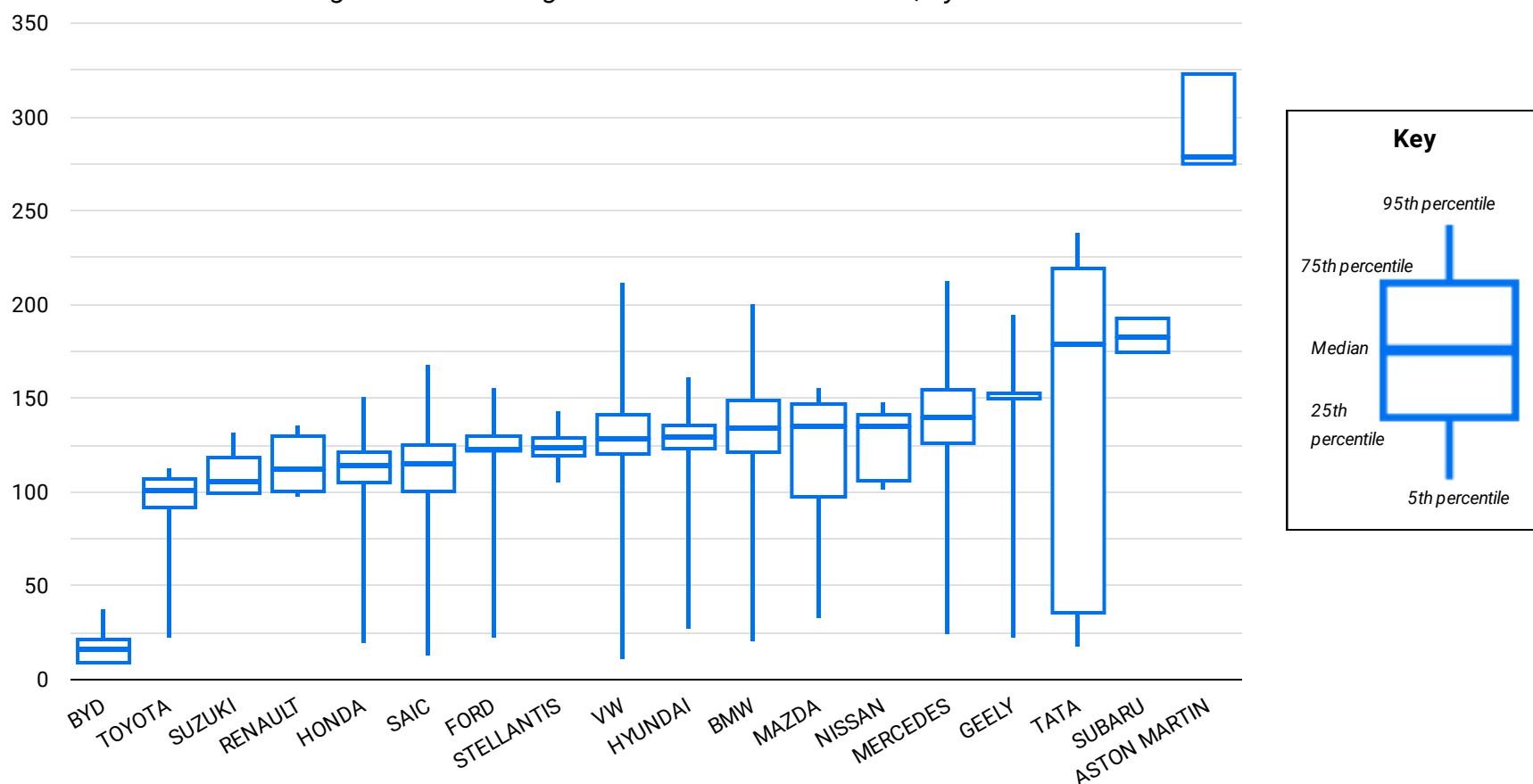
Average CO₂ ratings of newly registered internal combustion engine cars by month of registration, gCO₂/km



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. Notably, the cleanest quarter of the market is on the threshold of averaging less than 100gCO₂/km.

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



Vans Summary

BEV market share reached an all time high in August reaching 17.1%, marking two consecutive months of record BEV share in the van market. This marks a significant over-performance against the real-world ZEV Mandate target which sits at 15.7%, as well as the scheme's floor for 2026 which sits at 4.8%. While there was good growth in the plug-in section of the market, with BEVs up 21.8% and PHEVs up 58.2%, receding registrations in diesel registrations saw the market decline very slightly this month year-on-year, however the van market still remains notably up year-to-date.

Volkswagen saw their best ever monthly BEV share for vans with 4 in 10 vans being electric this month (38.8%). Citroen also managed to set a new record for their monthly BEV share, reaching 13.2%. In a month that usually represents a slump in the year before a plate change month in September, the resilience of BEV registrations highlight the strength of underlying demand for these vehicles.

This month's strong BEV performance is a clear consequence of the introduction of increasingly compelling models that have been entering the van market since the start of the year. As we have seen in the car market, especially with the likes of Renault, creating electric vehicles that meet the needs of those who are increasingly ready to switch is an increasingly sure-fire way of driving registration growth. The issues slowing electric van up-take continue to lie outside of the ZEV Mandate's jurisdiction, with the Government needing to do more to make the infrastructure upgrades required to allow SME's across the country to benefit from the perks of over-night charging.

BEV Van Market Shares (YTD)

Make	BEVs ▾	BEVs
VOLKSWAGEN	6,200	26.94%
FORD	5,387	23.41%
KIA	3,856	16.75%
MERCEDES-BENZ	1,513	6.57%
TOYOTA	1,364	5.93%
MAXUS	1,081	4.7%
RENAULT	825	3.58%
VAUXHALL	559	2.43%
PEUGEOT	460	2%
FARIZON	328	1.43%
CITROEN	310	1.35%
RENAULT TRUCKS	235	1.02%
NISSAN	190	0.83%
IVECO	160	0.7%
FIAT	138	0.6%

Sales by fuel type, YTD vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	22,761	4,475 ↑	11.2%
Diesel	164,439	-2,705 ↓	80.94%
Petrol	2,477	-2,211 ↓	1.22%
PHEV	9,657	4,272 ↑	4.75%
HEV	3,816	-1,587 ↓	1.88%
Grand total	203,150	2,244 ↑	100%

Sales by fuel type, latest month vs last year

Fuel Type	Regs.	Δ	Mkt. Share
BEV	2,384	431 ↑	16.83%
Diesel	10,778	-925 ↓	76.08%
Petrol	187	-33 ↓	1.32%
HEV	171	-106 ↓	1.21%
PHEV	647	240 ↑	4.57%
Grand total	14,167	-393 ↓	100%

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

Make	Total	BEVs	BEV %
FORD	58,816	5,387	9.16%
VOLKSWAGEN	23,629	6,200	26.24%
PEUGEOT	17,590	460	2.62%
RENAULT	16,976	825	4.86%
VAUXHALL	16,392	559	3.41%
MERCEDES-BE...	14,632	1,513	10.34%
CITROEN	11,551	310	2.68%
TOYOTA	8,678	1,364	15.72%
LAND ROVER	7,252	1	0.01%
NISSAN	6,170	190	3.08%
MAXUS	4,804	1,081	22.5%
KIA	3,856	3,856	100%
FIAT	2,492	138	5.54%
RENAULT TRU...	2,310	235	10.17%
IVECO	2,246	160	7.12%
MAN	2,156	4	0.19%
KGM	898	44	4.9%
ISUZU	723	57	7.88%

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	57,224	14.9%	7.4%	-4,285
STELLANTIS	47,674	7.6%	2.7%	-2,337
VOLKSWAGEN	25,606	23.0%	24.7%	452
RENAULT	17,063	18.9%	5.6%	-2,278
MERCEDES-BENZ	13,251	20.0%	11.3%	-1,146
TOYOTA	8,639	16.6%	15.4%	-102
JLR	7,235	18.3%	0.0%	-1,322
NISSAN	6,006	8.6%	3.1%	-329
SAIC	4,795	24.0%	22.5%	-70
KIA MOTORS CORPORATION	3,851	24.0%	100.0%	2,927
ISUZU	1,266	17.9%	4.5%	-169
GEELY	889	4.8%	26.3%	191
INEOS	277	8.8%	0.0%	-24
IVECO SPA	173	20.9%	88.4%	117

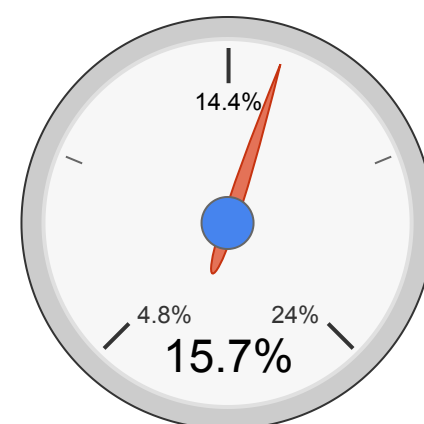
The estimated real ZEV registrations target - the ZEV Mandate requires manufacturers to meet an increasing percentage target of electric vans (24% in 2026) by selling more electric vans as a proportion of sales. They can also generate additional credits by exceeding easy-to-meet CO₂ emissions targets 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: The real-world target for 2026 remains planted at 15.7% following August's registrations. This means that credits generated through the CO₂ flexibility alone have lowered the market-wide target by more than 34% in 2026 relative to the headline target. With many key players still underperforming this only goes to highlight how generous the flexibilities are.

Volkswagen continue to boast a surplus of credits, a feat which has been achieved while lowering their ZEV Mandate target by only 1% to 23%. Elsewhere in the market Kia remain on track for a huge surplus in credits, with the manufacturer pocketing 3 surplus credits for every 4 registrations. Kia may look to sell their surplus to some of the underperforming manufacturers at this scheme years end, or they may look to benefit from the Van to Car exchange mechanism introduced only last year as part of the infamous wave of sweeping flexibility enhancement and additions following the early consultation which was called under pressure from industry lobby groups.

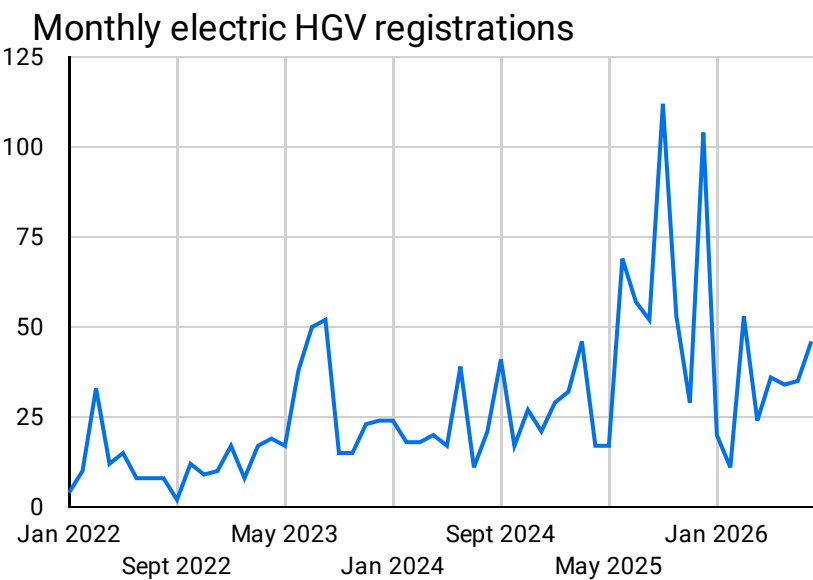
While August registrations highlight that there is ever strengthening demand for battery electric vans, the UK Government needs to do more to assist businesses in getting the grid connections they require to set up adequate charging infrastructure in the depots many vans would be stored in overnight. This must come in conjunction with cross-pavement charging solutions to support those who may need to charge at home but lack a driveway to do so on as well as lowering the cost of public charging. As the UK's electric van fleet grows and ages, the health of the used market will become a critical factor in fleet turnover and so support should also be given to those purchasing on this market.

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	23,889	-1,729 ↓	98.93%	0.16% ↑
BEV	259	-60 ↓	1.07%	-0.16% ↓

Grand total24,148-1,789 ↓100%0%

HGVs latest month vs last year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Diesel	2,450	10.3% ↑	98.16%	0.44% ↑
BEV	46	-11.5% ↓	1.84%	-0.44% ↓

Grand total2,4969.8% ↑100%0%

46 trucks were registered in August 2026, accounting for 1.86% of registrations this month. BEVs currently sit at 1.07% 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 results of the government consultation for a ZEV mandate in this area cannot come quickly enough. A clear trajectory, like one a ZEV mandate would provide is clearly needed to boost this sector.

Motorbikes

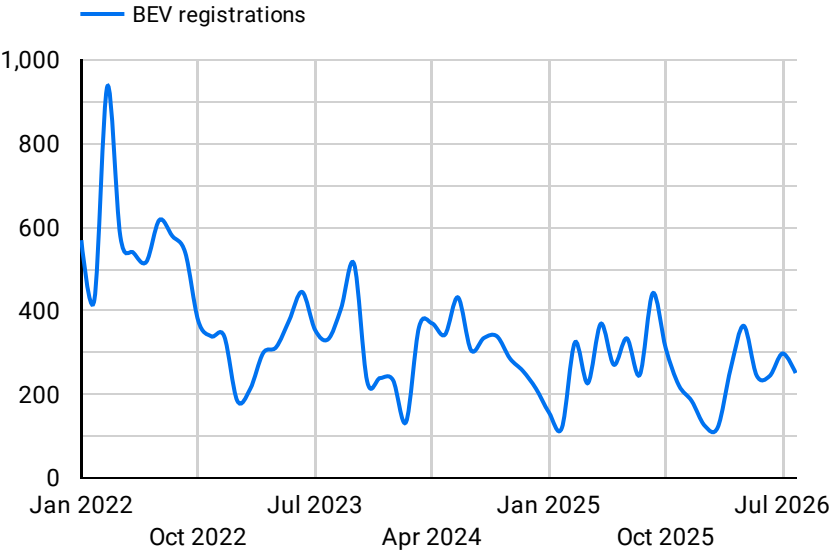
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	70,679	12.8% ↑	97.37%	0.54% ↑
BEV	1,910	-6.8% ↓	2.63%	-0.54% ↓
Grand total	72,589	12.2% ↑	100%	0%

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	7,390	14.8% ↑	96.72%	0.41% ↑
BEV	251	1.6% ↑	3.28%	-0.41% ↓
Grand total	7,641	14.3% ↑	100%	0%

Monthly electric motorbike registrations



The electric motorbike market continues to underperform, with 250 BEVs registered in August, making up 3.34% 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'.