NEW AUTOMOTIVE

The Death of Diesel

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About New AutoMotive

New AutoMotive is an independent think tank accelerating the clean-energy transition in road transport, one of the largest sources of greenhouse gases and air pollution. Using data to tell compelling stories, it informs the public, supports industry, and shapes evidence-based policy across the UK and Europe.

New AutoMotive led the campaign for the UK's Zero Emission Vehicle mandate, now one of the world's most ambitious clean-transport policies, and continues to provide trusted analysis on the shift to electric mobility. Each month it publishes the Global Electric Vehicle Tracker, Electric Car Count, and Electric Van Count, which together offer the most up-to-date picture of EV uptake in the UK and internationally.

In Europe, New AutoMotive runs the European Battery Tracker, a first-of-its-kind project mapping investment, capacity, and employment across the battery supply chain. It has also produced a wide range of reports on the transition to electric vehicles and the policy frameworks needed to make it happen.

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Findings at a Glance

- Diesel vehicle numbers and fuel use are consistently falling nationwide.
- The overall number of diesel cars on the roads has already fallen by 21% from its peak, and is continuing to fall.
- London and the central belt of Scotland are losing diesel vehicles the fastest.
- The numbers of electric cars on the roads overtakes the number of diesel cars in 2030.
- In just a decade, there will only be about a quarter of a million diesel cars left on the roads nationwide.
- On current trends, London will be the first diesel-free city, and Scotland will be the first British diesel-free nation.

Implications

- Some filling stations in London will stop stocking diesel fuel before the end of this decade.
- By 2035, many filling stations will have stopped selling diesel.
- Residual values for diesel vehicles have been, and will continue, falling: meaning diesel cars could become a “stranded asset” for some people.
- The reduction in diesel fuel sold will aid Britain’s energy security situation, as we become less reliant on foreign oil.
- Both for environmental and energy security reasons, the fall in diesel use is hugely beneficial.

Introduction

Diesel use is slowly dying. Absolute numbers of diesel cars are declining quickly. At its peak in Great Britain,[1] there were 12.4 million diesel cars on the road. As of June 2025 (last official statistics available) there were only 9.9 million: a 21% decrease, and this figure has almost certainly reduced further by some hundreds of thousands. By 2030, there will be just over 5 million, but by 2035 numbers will have plummeted to less than a quarter of a million. The amount of diesel fuel purchased in the UK is also declining. It won't be long before the last brand new UK-registered diesel car is bought. Interestingly, it also won't be long before a London constituency becomes diesel free: ie no diesel cars are registered and owned there. It is also true that relatively soon the first filling station will simply stop selling diesel, due to lack of demand (which will also almost certainly also happen in London).

Cars

The number of cars (of whatever type) registered to drive on UK roads is a function of two things: the number of brand new cars being bought, and the number of cars being scrapped. "Peak" new diesel car sales occurred in 2015, and now represent less than 5% of the new sales market (and that number is still falling). Peak diesel cars on the road occurred in 2018. However, at the other end the number of diesel cars being scrapped annually has been rising. Given the average age of vehicles is around 17 years, around a million diesel vehicles will be scrapped annually before the end of this decade, to be replaced by only some tens of thousands new vehicles. These statistics mean that the amount of diesel burnt in cars is also plummeting.

Vans

In direct contrast to cars, diesel van[2] numbers have been increasing in recent years. As of Q2 2025, there were 4.4 million on the roads. This is the most there has ever been, and compares to 3.4 million a decade previously. Whilst newer

1 This paper's analysis therefore excludes Northern Ireland.

2Defined as "Light Goods Vehicles" in these statistics.

vans are more fuel efficient than older vans, the absolute increase in numbers means that vans now burn more diesel than ever.

HGVs

HGV numbers have barely changed over the past decade. As of the end of Q2 2025 there were 506,000 on the roads. This compares to 474,000 a decade previously, and a ‘high’ of 511,000 in Q2 2023. The amount of fuel cumulatively burnt in these vehicles annually has also barely changed over the past decade.

Fuel

This has an obvious knock-on effect. Whilst heavier vehicles are still predominantly diesel-driven and van numbers have increased over the past decade, if you layer on the fact that all new vehicles are more fuel-efficient than those they replace, and the speed of the decline of diesel cars, then it’s easy to see why the amount of diesel fuel being bought for use is declining - and for use in cars is plummeting. Again, the stats are stark: peak diesel fuel sales[3] occurred in 2019.

However, these topline figures mask some interesting statistics. We’ve divided the nation into areas and mapped the data against those. The statistics show some broad trends:

- There is a clear trend of diesel cars moving over time from urban to rural areas.
- London is the outright leader in getting rid of both diesel cars and vans, followed by the central belt of Scotland.
- Scotland is outperforming the other British nations in reducing the number of diesel cars in the country.
- Diesel fuel sales have fallen in every region, but in London have plummeted.

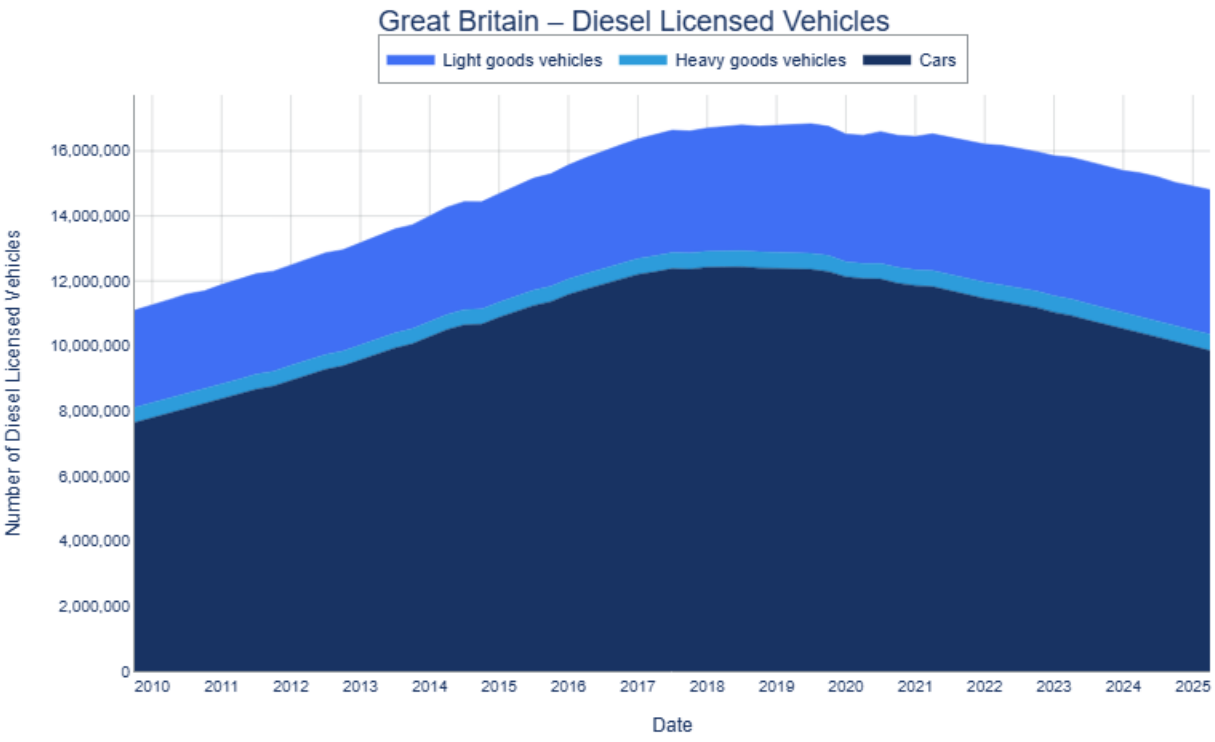
3 Buses and trains do not generally use filling stations, and so are excluded from this briefing.

Part 1: How many diesel vehicles are there in the UK?

Overall

As can be seen from the below chart, overall diesel vehicle numbers are now falling. At its peak, there were 17.5 million vehicles on the roads, but as of the end of June this year there were only 15.5 million, and that number will only continue to fall. This is predominantly being driven by the reduction in overall car numbers.

Chart 1: Licensed Diesel Vehicles in Great Britain 2010-2025[4]



4 The source of many of these statistics is the Department for Transport: https://www.gov.uk/government/statistical-data-sets/vehicle-licensing-statistics-data-tables

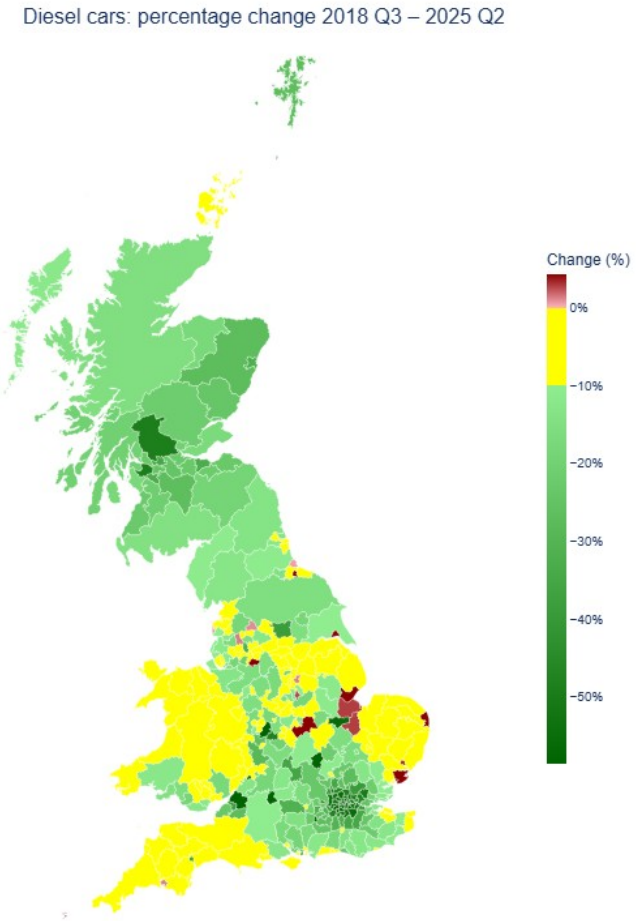
Cars

As mentioned above, absolute numbers of diesel cars peaked in Q3 2018 and are now declining rapidly: overall there are now 21% less than at their peak. At that time they made up 40% of the cars on the road, but are now just under 30% and falling. This is being caused by the near-total collapse of new sales, whilst older diesels are being scrapped at normal rates.

But those headline figures mask vast regional differences. Whilst overall car numbers are falling rapidly, the fall is not uniform across every area. The below heatmap shows the difference in car numbers between Q3 2018 (peak diesel car) and Q2 2025. It shows that London and the central belt of Scotland are emptying of diesel cars fastest. Conversely, a handful of areas actually have more diesel cars than they did at the time of peak diesel:[5] Harborough in Leicestershire is the winner of the dubious record of highest percentage increase with a 26% rise. It also shows that, broadly, many rural areas currently have around the same number of diesel cars as they did in 2018.

5 The full list is: Harborough, Stockport, Kingston upon Hull, Middlesbrough, Boston, Isles of Scilly, Tendring, Great Yarmouth, Ipswich, South Holland, Fenland, Nottingham, Blackburn with Darwen, Plymouth, Mansfield, Pendle, Blackpool, and Hartlepool.

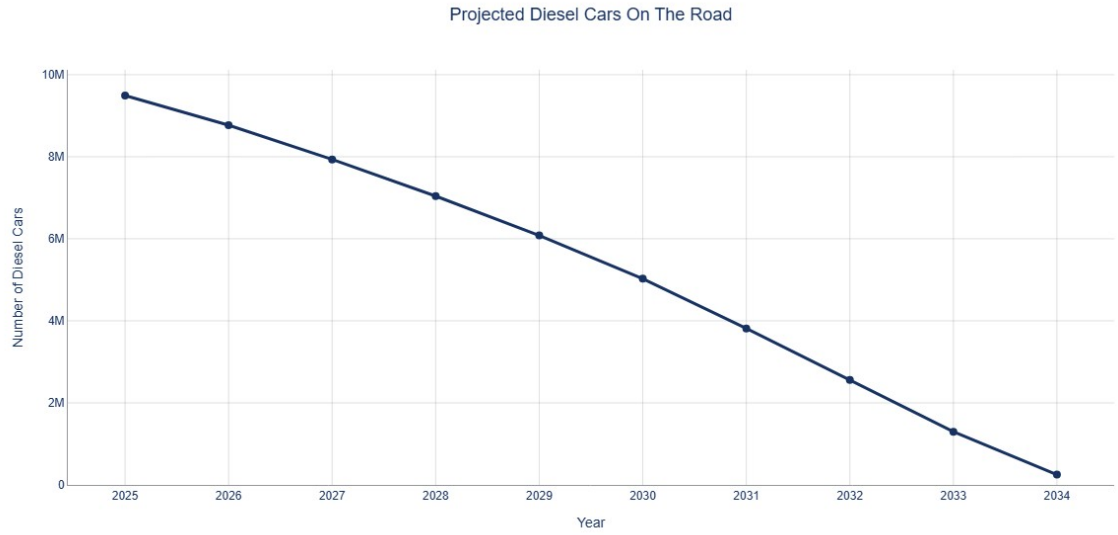
Chart 2: Percentage change in diesel cars (2018-2025)



Nevertheless, the ongoing plunge in new diesel numbers will feed through to scrappage rates relatively soon. Cars are scrapped at an average age of 17 years, which means that the cars bought in the peak years (2008-2015) are also the ones entering their scrappage years now.

Should new diesels continue entering the market at the current declining rate, then overall diesel car numbers plummet over the next 10 years, as the chart below demonstrates:

Chart 3: Projected future diesel car numbers



Incredibly, the number of cars on the roads will fall by a further 47% by the end of the decade, to just over 5 million. Furthermore, after 2030, due to a) virtually no new cars entering the fleet, and b) the bulk of cars bought in the years up to peak new diesel sales (2010-2015) being scrapped, numbers fall substantially to less than a quarter of a million by 2035.[6] In a sign of just how quickly the UK's car fleet is changing, the number of electric cars overtakes the number of diesel cars in 2030.

London is clearly ridding itself of diesels fastest. In just 7 years diesel numbers have over halved, and, broadly, this is uniform across all of London's areas. As can be seen below, Camden is performing best on this metric

6 We have presumed that there will be 9.42 million cars on the road at the end of 2025. We presume that new cars enter the fleet at a declining rate of 15% per year till 2030, and that no new cars are delivered after that. We further presume that vehicles are scrapped after 17 years.

Table 1: Top Performing London areas by percentage fall

Area	Percentage Change in Diesel Numbers
Camden	-64.6
Wandsworth	-58.6
City of London	-58.6
Merton	-58.4
Lambeth	-58.1

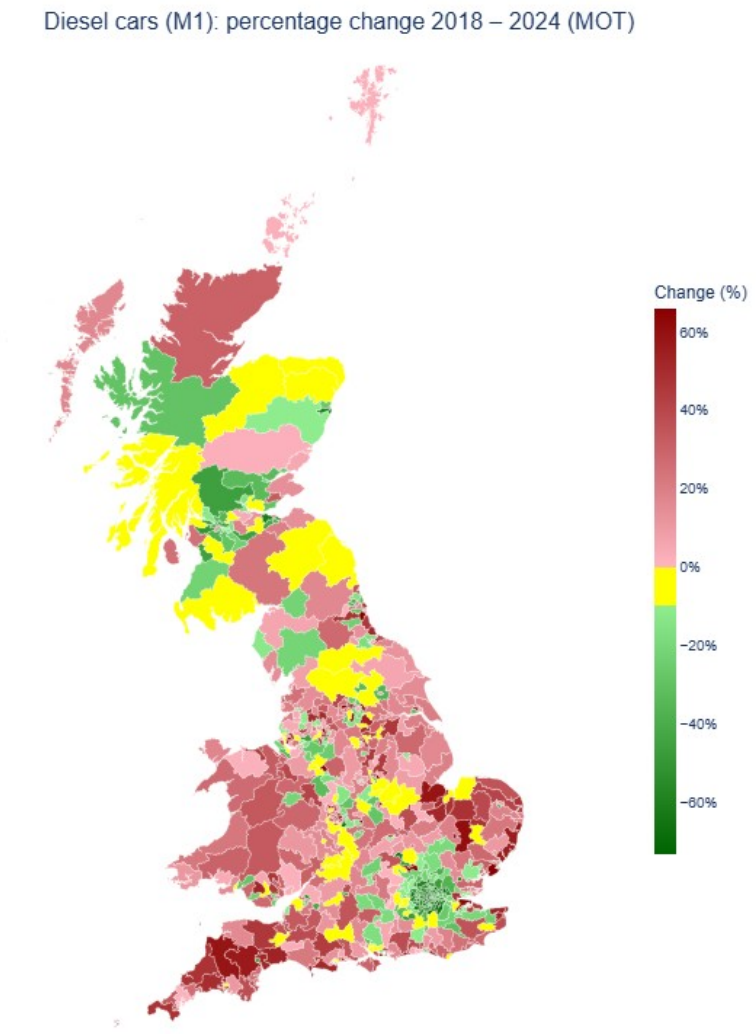
The other notable area is the central belt of Scotland. Stirling and Renfrewshire have almost halved the number of diesel cars they have over the last 7 years, whilst East Dunbartonshire, the City of Edinburgh, East Renfrewshire and notably Aberdeen - the supposed oil capital of the UK - have all lost around a third. Scotland as a whole has lost a quarter. In direct contrast to both England and Wales, there is no Scottish area that has seen an increase in numbers.

Older Diesel Cars

What's perhaps more interesting is how cars have moved about. In general, they are moving from urban areas to rural areas. The below heatmap shows how cars that undertook an MOT in 2018 and were still on the road in 2024 have moved. Whilst this is not exact, it can be used as a proxy for Euro 5 diesels.[7] Since the MOT data is more granular, we have been able to break this down by constituency. The redder the constituency, the more cars there were compared to 2018 numbers. Conversely, the greener the constituency, the lower the number.

7 Euro 6 diesels became mandatory for new vehicle sales from September 2015.

Chart 4: Older Diesel Cars Movement By Constituency



As can be seen, older diesel cars have almost vanished from London, but there has also been a marked shift away from older diesel cars in areas surrounding London and the central belt of Scotland too. There are also many other town / city areas that have also markedly reduced. Conversely, numbers in rural areas are often broadly comparable with how many there were during 2018. This proves that the majority of London and central Scotland's diesel cars were sold on to people living in more rural areas.

The London Spillover

In both percentage declines and absolute numbers, London is leading the way. All of the ten largest percentage declines nationwide came from London constituencies. Peckham led the way, with an 86% decline in 2018-registered vehicles. This is almost certainly due to London's suite of air pollution policies, of which some will be discussed further below. Should current trends continue, then it is almost certain that many of London's constituencies will not have any older diesels registered in them by the end of this decade.

Table 2: Largest Declines in 2018-registered diesel vehicles

Area	2018 Vehicles	Vehicles remaining from 2018	Percentage change
Peckham	4448	687	-86
Queen's Park and Maida vale	1893	333	-82
Eltham and Chislehurst	2717	504	-81
Vauxhall and Camberwell Green	1430	275	-81
Putney	7267	1412	-81

However, there is also a distinct "London Spillover". Not only has older diesel ownership reduced in every London constituency that has part of the ULEZ in it, it's also reduced in every constituency adjacent to those. In fact, this effect goes way beyond London. Constituencies such as Tunbridge Wells, Hertford and Guildford have recorded huge falls in older diesel car ownership. This could simply be because residents in these areas may have need to occasionally drive into London, and so ULEZ has an effect on purchase decisions across the whole of the south east. Regardless, it is almost certainly true to say that London's satellite towns have cleaner air than previously because of their proximity to London and its air pollution policies.

Scotland's success story

In common with the stats on all diesels, outside of London the central belt of Scotland is ridding itself of older diesels fastest. But Aberdeen South holds the Scottish crown for the largest percentage reduction. Again, this is almost certainly due to the air pollution policies in place in the major Scottish cities.

Table 3: Largest Declines in 2018-registered diesel vehicles by Scottish Constituencies

Area	2018 Vehicles	Vehicles remaining from 2018	Percentage change
Aberdeen South	21,881	8853	-60
Edinburgh West	10,195	4254	-58
Edinburgh East and Musselburgh	15,425	7327	-53
Paisley and Renfrewshire South	13,962	7478	-46
Glasgow North	9,826	5465	-44

Vans

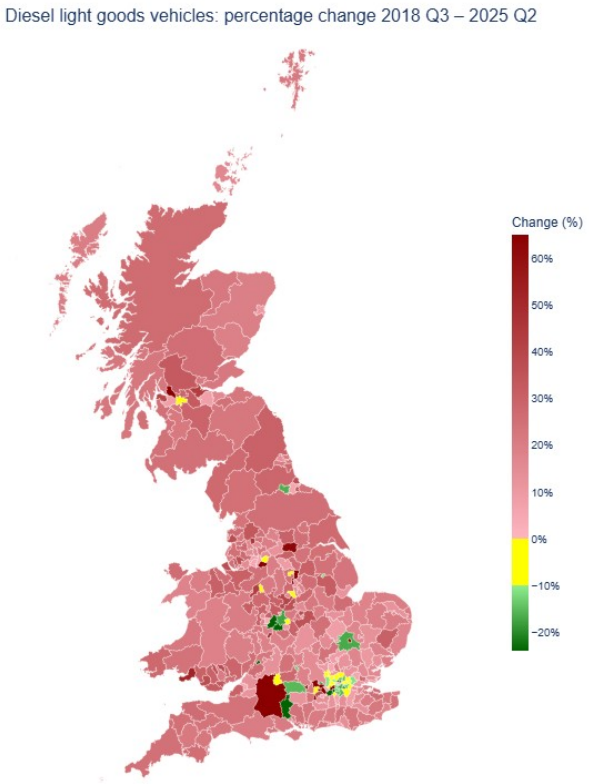
In direct contrast to cars, diesel vans have been increasing in number over the past decade. As of the end of Q2 2025 there were 4.4 million in Great Britain.[8] This is a full million more than on the roads a decade previously. Vans have historically been overwhelmingly diesel-powered, and that is still the case. But fully electric vans are now being introduced in increasingly larger numbers (partly driven by policy and partly by the vastly lower operating costs electric vans provide). Current policy (the ZEV mandate) means that the last diesel van will be sold in 2034 at the latest.

The heatmap below does throw up some interesting statistics. Comparing the latest quarter to the same quarter as peak diesel car (Q3 2018) reveals that the

8 Again, this figure therefore excludes Northern Ireland.

rise in vans is not uniform across the nation. Indeed, again, London's policies have had a clear effect, and the London Spillover is again evident.

Chart 5: Percentage change in diesel light goods vehicles (2018-2025)



One notable feature is that, in direct contrast to the car statistics, the top four declines are all outside London.

Table 3: Highest declines in overall LGV Numbers (2018-2025)

Area	**Percentage change: 2018-2025**
Birmingham	-70
Gloucester	-56
Test Valley (Hampshire)	-48

Solihull	-44
Camden	-41

Birmingham has a Clean Air Zone that charges older vans £8 per day to enter, and Solihull is close to enough to Birmingham for the clean air zone to have an effect on it. However, it is not immediately obvious why Gloucester and the Test Valley would have had such large falls. One potential explanation is that vans are almost all owned and operated by businesses (of all sizes, including one-man companies), and so some of these ownership statistics simply reflect where a business is headquartered, instead of where the van operates. Should a medium-large businesses move, there would be a corresponding change in numbers.

It seems like the nation's vans are following in the footsteps of the nation's cars. Whilst across the country diesel van numbers have been rising, the ongoing emergence of electric vans into new van sales means that 'peak new diesel van sales' has probably already happened. Van sales were historically high between 2015 and 2019, and have been lower ever since.[9] The ZEV mandate and the continuing fall in electric van purchase prices means that an increasing number of them will annually be sold until 2035: this inevitably means a corresponding decrease will also happen with new diesel vans. At the same time, older vans will be scrapped in increasingly larger numbers.

Air pollution policies mean that there are already many areas where van numbers are falling. As can be seen in the table below, and in direct contradiction to the national trend, the vast majority of London's areas already have less diesel vans than they previously did, with Camden again taking the number one position. On current trends, London will empty of diesel vans first, followed by other towns and cities. Those vans won't be scrapped though: instead, as has happened with cars, they will be sold to individuals in other, more rural areas.

9 Van sales fell dramatically in 2020, although this was caused by the pandemic. Sales rose in 2021, but in the following years since have never reached the same levels as 2021 again. 2025 sales will almost certainly be lower than 2024 sales.

Table 4: Top 10 London Areas By Percentage Falls

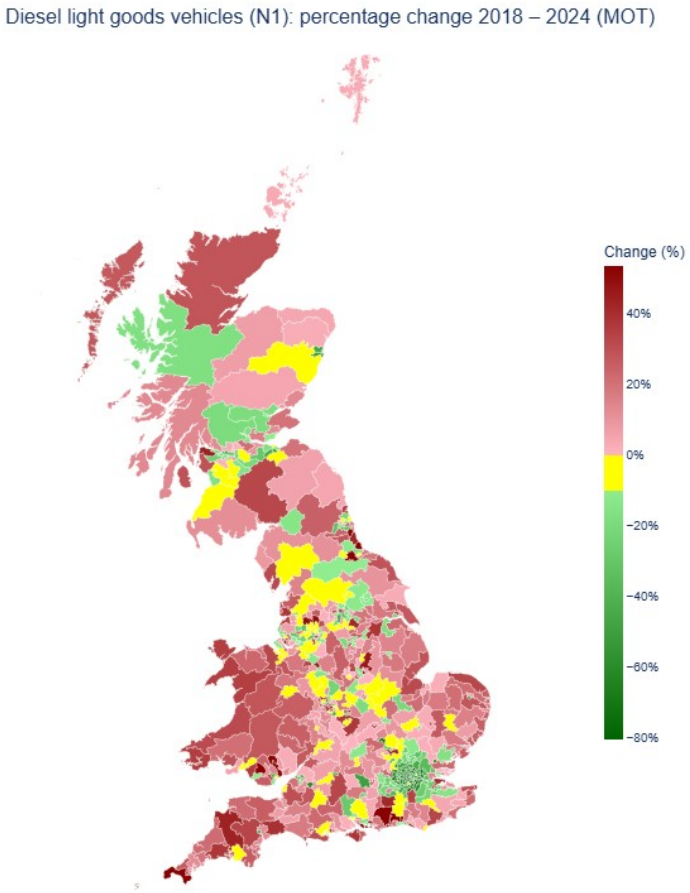
Area of London	Percentage Change: 2018-2025
Camden	-41
Kingston upon Thames	-25
Lambeth	-24
Islington	-19
Lewisham	-19
Southwark	-16
Haringey	-16
Waltham Forest	-15
Croydon	-15
Sutton	-14

Older Diesel Vans

In a similar fashion to cars, there is a clear trend of older diesel vans moving away from London and the central belt of Scotland, towards more rural areas. The below heatmap shows how N1-registered vans that undertook an MOT in 2018 and were still on the road in 2024 have moved.[10] As can be seen, in most parts of the country absolute numbers have risen, but all of London's constituencies, and all the areas around London have seen falls.

10 Again, this can be used as a proxy for Euro 5 vans.

Chart 6: Older Diesel Vans Movement By Constituency



HGVs

HGV numbers are different to car and van numbers. They have remained relatively constant over time. HGVs do not have the same policy impetus behind them as cars and vans have, nor are there the same (proportional) numbers of electric makes and models coming to market. Therefore it does not make sense to have similar sections as above.

However, this is a problem that needs solving quickly, as it was announced in 2021 by the (then Conservative) Government that the sale of new non-zero emission vans would be phased out by 2035 for vehicles weighing 26 tonnes or less, and by 2040 for all other HGVs.

Conclusion:

It’s clear that the overall size of the UK’s diesel fleet is shrinking. But within the figures lie vast differences. The shrinkage is being driven by the car parc shrinking rapidly, and this is only offset slightly by the rise in van numbers. Over the next few years diesel cars will be scrapped in increasing numbers, whilst there is a good chance that peak new diesel van sales has already happened. However, the changes in numbers are not uniform across the nation though. London is rapidly clearing diesels out, and will almost certainly be the first diesel car and van free city. Rural areas will be the last diesel strongholds.

Part 2: How much diesel fuel is sold?

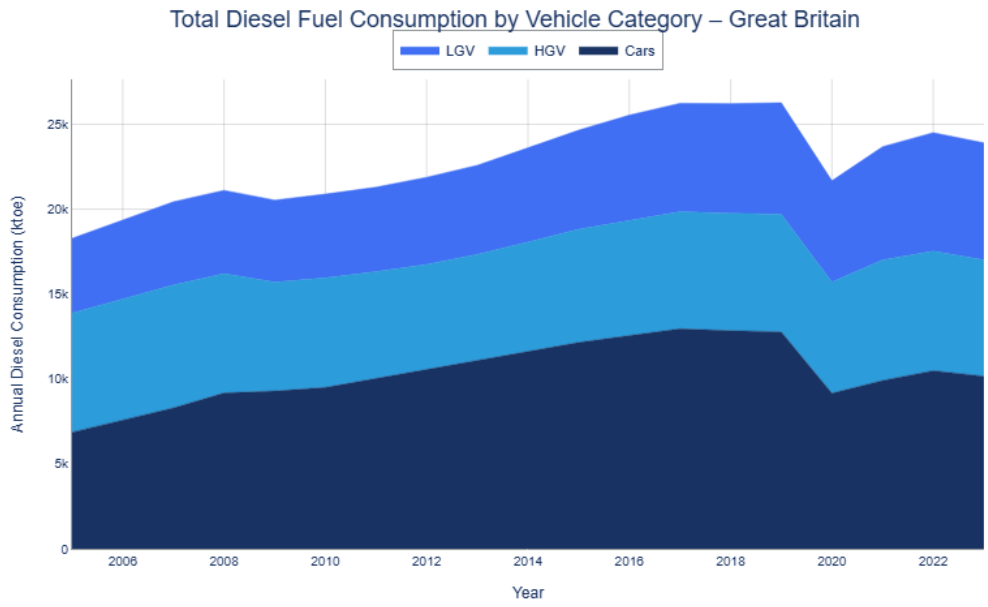
All of the above feeds into the statistics on how much diesel fuel is sold. This is important, as ultimately, it is this statistic that matters most for environmental reasons. Broadly, diesel cars have annually been driven about the same distance - just under 8,000 miles on average - for the last decade. N1-classified vans drive slightly further: around 8,250 miles annually. But as engine efficiencies of all vehicle types have been improving, on average less diesel has been used to move individual vehicles around.

Overall

There are two main sources for determining how much fuel is being burnt on the roads. Our initial statistics comes from the *Road Transport Energy Consumption* statistics that DESNZ published from 2005 to 2023. The second source is from the Average Road Fuel Sales, that started in January 2020 and is still running.

Overall, the total amount of diesel burnt for road transport annually peaked in 2019, with a notable pandemic-induced fall in 2020 and 2021. The amount burnt in 2023 was 9% lower than in the peak.

Chart 7: Total Diesel Fuel Consumption By Vehicle Category



Three distinct trends can broadly be seen. Firstly, the amount of diesel being used by LGVs has been slowly, but steadily increasing over time, although at a slower rate than the diesel van parc has grown (however, it should also be noted that 2023's overall volume was slightly lower than 2022's). In 2023, 56% more diesel was burnt than in 2005. Secondly, the amount burnt by HGVs has been consistent over time. Thirdly, the amount of diesel burnt in cars rose steadily from 2005 till 2017, but has been declining ever since: 2023's sales were 22% lower than the peak. The amount burnt by cars fell during the pandemic, whilst fuel burnt by vans and HGVs did not.

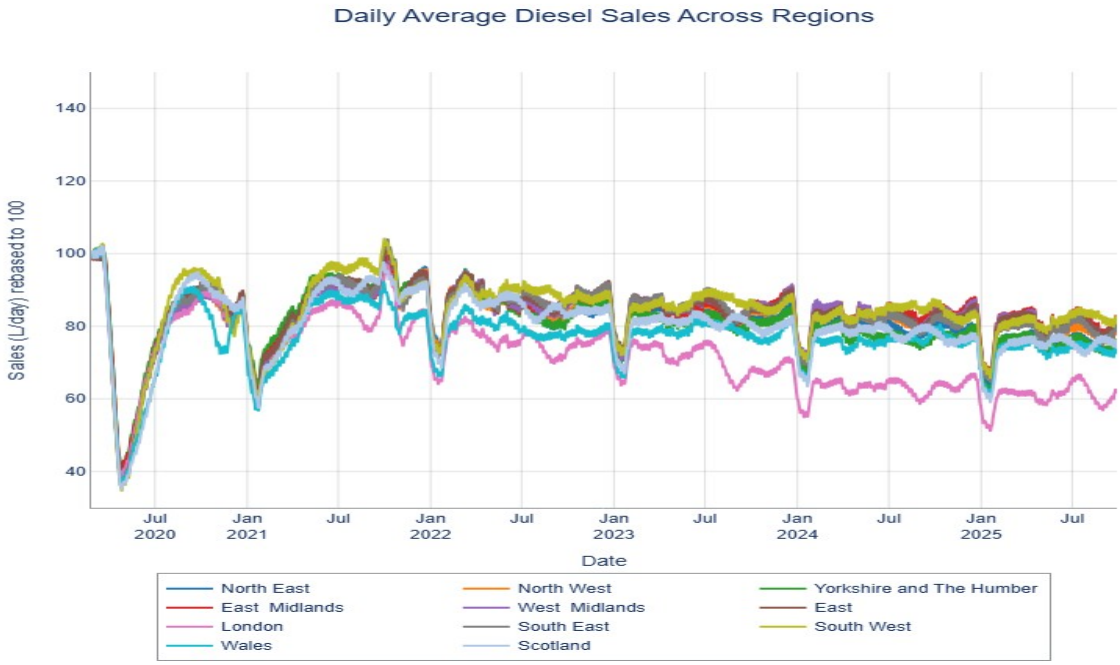
Regional

The second chart (below) shows average diesel sales per filling station, broken down by region. As can be seen, averages[11] in all regions have been trending downwards this decade. It's really clear that London's sales are substantially down compared to other regions: 39% from when this data started being collected in early 2020. Indeed, diesel sales to Londoners are now less than during 2021's pandemic-induced lockdown period. However, it should be noted

11 To ensure that the chart is not 'spiky', a rolling 30-day average was used.

that sales have been relatively flat this year, suggesting that the original rapid decline in fuel sales came about from the ULEZ-induced rush to get rid of older diesel cars and vans. Since this has now finished, and with no further diesel-focussed policy on the horizon, London's further decline in fuel sales will come from current diesel cars and vans being sold on to other areas / scrapped as normal. As London already has relatively low absolute numbers of diesel vehicles, this implies that it is likely that some, and perhaps many, filling stations in London will stop stocking diesel before the end of the decade.

Chart 8: Daily Average Diesel Sales by Region



One comment on these statistics is that we cannot isolate out HGV fuel and filling from the figures. The way the statistics are presented means that we cannot see at a granular level predominantly which stations serve which types of vehicles, but it is true that HGVs tend to get fuel along the strategic road network at "bunker sites": filling stations that are set up and specially adapted for HGVs. This means that there are a huge number of stations that serve only

cars and vans - and that means that the amount of diesel they are selling is dropping at a higher rate than the ones that cater for HGVs.

Nationwide, it is clear that diesel fuel sales are falling, and this is being driven by the reduction in car numbers. Whilst it is impossible to accurately predict when the majority of filling stations will stop stocking diesel, it is clear that that there is a distinct possibility that many will over the 2030s. Regardless, by the 2040s many, and probably the majority that do not cater to HGVs, will no longer sell diesel.

Part 3: Implications and Effects

Two things are clearly evident from the data: 1) diesel use is plunging in London and the central belt of Scotland, but 2) beyond that there are huge regional disparities. Whilst the overall amount of diesel being sold at filling stations is falling in every region, it is a lot more pronounced in London. Indeed, the fact that there are now more diesel cars in a handful of rural areas suggests that some filling stations there are probably selling more diesel now than a few years ago. Regardless, the number of cars on the roads will dramatically reduce over the next decade. All this begs the question: what implications will this have?

Changes in sales patterns

Filling stations are stores that sell products, and like all other stores, they try not to stock and (not) sell unwanted products. This suggests that some London filling stations will stop stocking diesel sometime this decade. Indeed, there are at least two examples, in Hammersmith and Fulham, where filling stations have been converted into electric vehicle charging hubs already. This is backed up by an Accenture survey result that was published in the Petrol Retailers Association Market Review 2025:

“The decline in traditional fuel demand is pushing retailers to expand value streams beyond fuel sales. Nearly all respondents to our survey (98%) still see

fuel as a core source of revenue, but only 57% believe this will be true in a decade”

There are currently just over 8000 filling stations in the UK, and an individual decision will be made about when each individual station stops stocking diesel. It is very possible that conversations about this are already taking place.

Urban to Rural

What is clearly shown by the data is that there has been a huge shift in where diesel vehicles are located, away from urban areas, with London emptying at an incredible rate.

One potential reason for this is the proliferation of clean air zones (CAZ) that have been introduced to protect residents' health. There are 9 cities[12] [13] that specifically charge older diesel cars to enter their zones. And as expected, the number of diesels in these cities now are far below 2018 numbers. London doesn’t just have a clean air zone though. In fact, there are many regulations driving down diesel use. These include stringent taxi and private hire regulations and surcharges applied to diesel car parking permits by various London boroughs. It also recently ran a scrappage scheme for older vehicles.[14]

However, the presence of a clean air zone does not fully explain some of the statistics. Exeter provides a good example of this. It does not have a CAZ, and yet diesel ownership there has plummeted 38%, whilst all its surrounding areas have broadly similar numbers to 2018.

Country Level Analysis: Clean Air Zones Count

What’s also clear is that there is an emerging discrepancy between Great Britain’s three nations.

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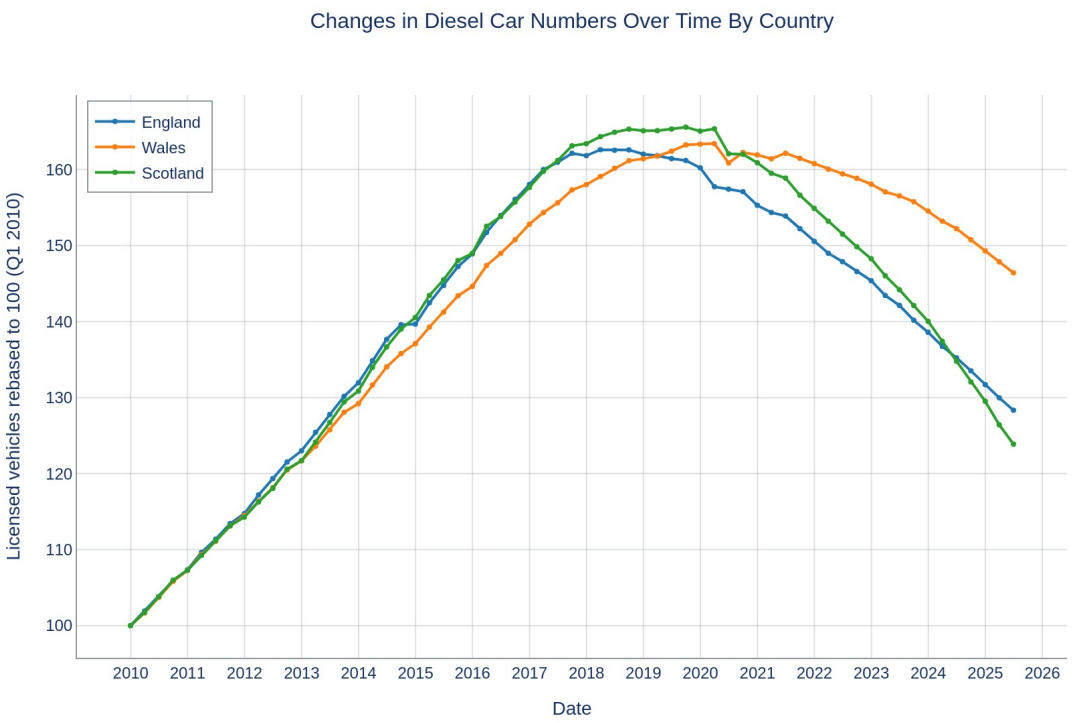
12 These are Aberdeen, Birmingham, Bristol, Dundee, Durham, Edinburgh, Glasgow, London and Oxford.

13 For more information on CAZs and other Urban Vehicle Access Regulations (UVARs) in the UK and Europe, please see https://urbanaccessregulations.eu as well as https://urbanaccessregulations.eu/stakeholders/uvar-data-available for the data in different data formats.

14 Details are available here: https://content.tfl.gov.uk/scrappage-scheme-factsheet-sep2024.pdf

Chart 9: Changes In Diesel Car Numbers Over Time By Country



As can be seen, in percentage terms the number of diesel cars registered in the nations of England, Scotland and Wales grew at similar rates until around 2018, but since then a clear pattern has emerged: England and Scotland are losing their cars at a far faster rate than Wales. This can be partially explained by the presence of clean air zones that specifically charge Euro 5 diesel vehicles a daily rate to enter the major cities of England and Scotland, and the fact that both Cardiff and Swansea have no such scheme. It does suggest that the last diesel stronghold in Britain will be somewhere in rural Wales.

Energy Security

The reduction in diesel sold is also good for the nation's energy security. The nation has been a net importer of diesel since 2006, meaning we are reliant on other nations selling us diesel to feed our thirst, and we are open to price shocks

due to events in other places. Any diesel we don't buy from abroad also means the associated money stays in the country. From an energy security perspective, the faster we stop burning diesel on the roads, the better.

Stranded Diesel Assets

As demonstrated above, the number of (initially) cars, and then vans will dwindle. And as this happens, fewer and fewer filling stations will stock the fuel. This leads to situations where a "last man standing" driver may not be able to get fuel easily, and also may not be able to sell their vehicle for the price they would want: in other words, they are left with a "stranded asset".

This may already have started happening: according to the Insurance Times, diesel vehicles are "haemorrhaging value". It's calculations suggest that diesel vehicles lost 11% of their resale value between April 2024 and April 2025.

Conclusion

It's clear that diesel use is dying. Policy ensures that the last new diesel car and van will not be sold post-2034, but the reality is that the market suggests that this date will be a lot sooner anyway. Overall car numbers are now falling rapidly, with van numbers likely to start falling in the next few years.

Perhaps the more interesting questions are what effects this will have. It is highly likely that as diesel vehicles get scarcer, filling station owners will question how much, if any, diesel fuel they should stock. At some future point, diesel simply won't be available at the majority of filling stations

For individuals, the situation is trickier. There is a real chance of some people being left with stranded assets: that is, they have a vehicle that they can't reasonably fuel (the nearest filling station is, in their opinion, too far away), and can't sell at a price they consider reasonable. This is a problem for the 2030s, but is something that Government should be aware of.

Regardless, in both environmental and energy security terms, the death of diesel is a good thing, and should be welcomed by the nation.