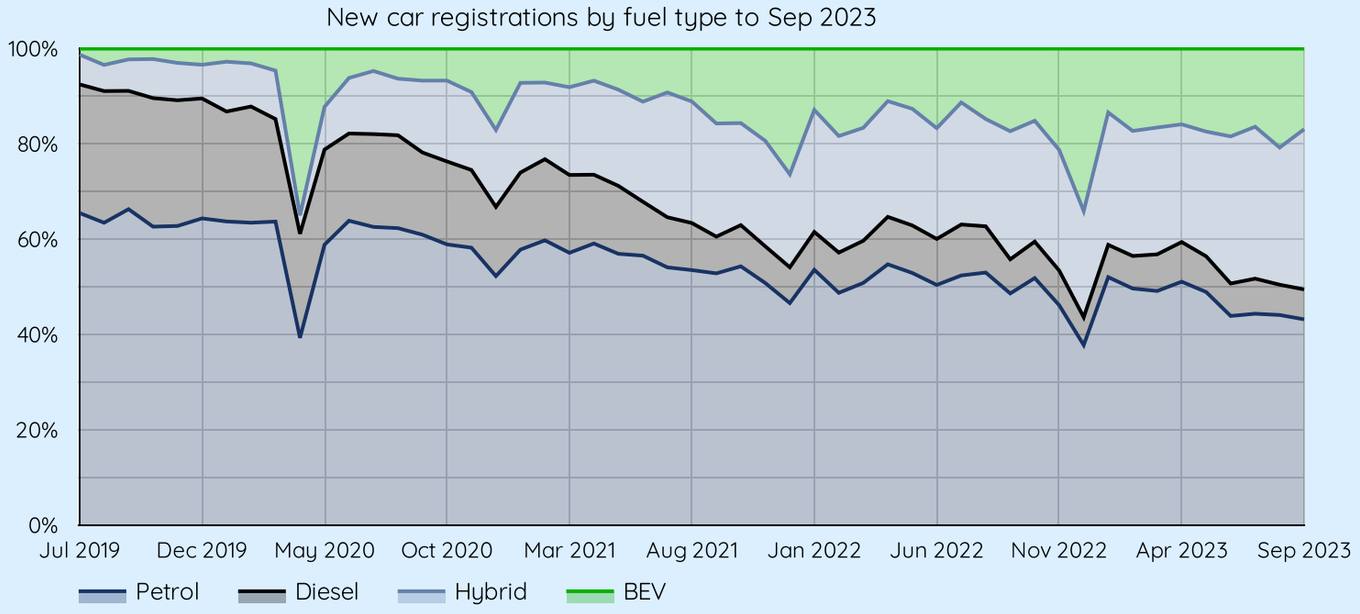
NEW AUTOMOTIVE

Sep 2023

Consumers embrace electric cars despite 2030 delay



Electric Cars
42,287
16.8%

Electric Vans
2,967
72.9%

Electric Motorbikes
381
-27.2%

Electric HGVs
9
350.0%

The government may have stepped back from its electric car ambitions but consumers and businesses have not followed; sales of electric cars and vans enjoyed their second biggest and biggest ever month on record, respectively.

Nearly 3,000 new electric vans joined the UK's roads in September, driven by a steady increase in available models and running cost advantages. Sales were led by Vauxhall, whose electric vans went into production at Ellesmere Port at the start of September.

Sales of petrol and diesel cars continued to fall - confirming the long term trend away from fossil fuels in the new car market. Sales of electric cars showed strong growth despite significant headwinds and issues relating to market-leader Tesla's production plants. All other leading brands saw significant growth in registrations of their electric models as car manufacturers race to seize a share of the growing market for electric cars.

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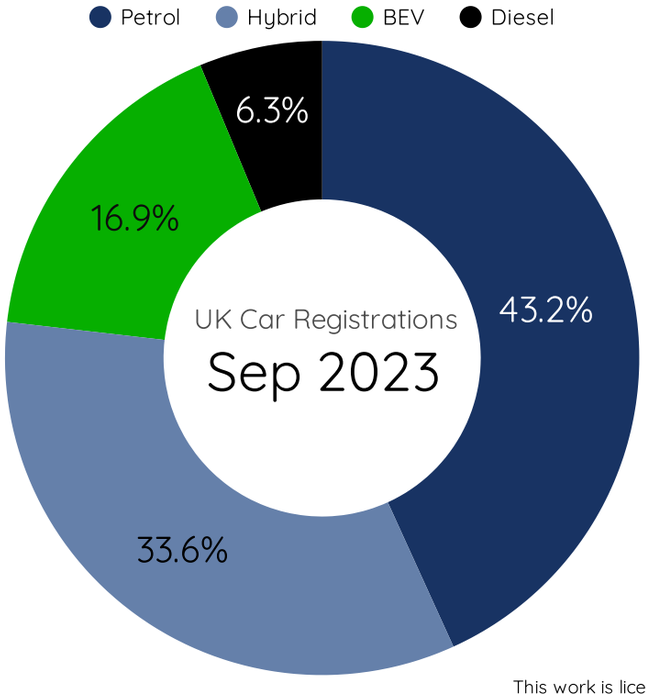
Suggestions, feedback or requests for data? We'd love to hear from you: data@newautomotive.org



Ben Nelmes, Chief Executive of New AutoMotive said:
"It's great to see tens of thousands of people make the switch to cheaper, cleaner motoring despite the government's short-sighted decision to delay the deadline to end petrol and diesel car sales.

"Delaying the end of petrol and diesel cars to 2035 will make the UK more reliant on expensive imported fuels, which will hit motorists in the pockets, and make it harder for ordinary motorists to get an electric car. It is the wrong decision for the country, let alone the environment.

"It is not too late to get back on track for 2030. Ministers should focus on making it cheaper and quicker to get an electric car, as well as making sure that there are charge points when and where people need them."

NEW AUTOMOTIVE

Sep 2023

Cars: Tesla delivery issues dragging electric car growth

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The UK's electric car registrations were 17% higher in September 2023 than in September 2022. That is welcome growth, and the figure of 42,000 new electric cars represents the second biggest month ever for battery-powered cars. But it follows a month where sales grew by 70%, so we have seen a fairly sharp slow down in growth.

One explanation is that when Tesla sneezes, UK electric car sales catch a cold. In September 2023, Tesla delivered 3,700 fewer electric cars than in fewer months. The *Financial Times* reported recently that Tesla's Q3 deliveries fell short of the company's hopes, and this could be feeding through to UK registrations data. It is a mark of the dominant position of Tesla in the UK market that when Tesla has a bad month, UK electric car registrations appear to be weakening.

The outlook for electric car sales for the remainder of 2023 is highly uncertain. Usually the final months of the year have strong electric car sales, but there is a possibility that manufacturers may hold back deliveries until January when a new government scheme which incentivises EV sales comes into force.

BEV market share: latest month (vs last year)

	Marque	Regs	Δ	Mkt Share	Δ
1.	TESLA	5,940	-3,761	14.05%	-12.75%
2.	MERCEDES-B...	4,728	2,762	11.18%	5.75%
3.	MG	4,293	866	10.15%	0.69%
4.	VOLKSWAGEN	3,566	1,858	8.43%	3.71%
5.	BMW	3,438	679	8.13%	0.51%
6.	AUDI	3,213	1,980	7.6%	4.19%
7.	KIA	2,824	652	6.68%	0.68%
8.	HYUNDAI	1,674	74	3.96%	-0.46%
9.	NISSAN	1,302	-569	3.08%	-2.09%
10.	CUPRA	1,276	507	3.02%	0.89%
11.	POLESTAR	1,123	350	2.66%	0.52%

2023 YTD vs previous year

Fuel Type	Regs.	Δ	Mkt. Share	Δ
Petrol	628,108	-2,248	47.03%	-4.42%
Hybrid	386,854	83,326	28.97%	4.19%
BEV	225,301	42,174	16.87%	1.92%
Diesel	95,178	-13,005	7.13%	-1.7%
Grand total	**1,335,441**	**110,247...**	**100%**	**0%**

Latest month, changes vs last year

Fuel Type	Regs.	Δ	Mkt. Share	Δ
Petrol	108,055	6,441	43.2%	-5.43%
Hybrid	84,061	27,900	33.61%	6.73%
BEV	42,287	6,087	16.91%	-0.42%
Diesel	15,701	737	6.28%	-0.88%
Grand total	**250,104**	**41,165**	**100%**	**0%**

BEV market share: YTD (vs last year)

	Marque	Regs...	Δ	Mkt Share	Δ
1.	TESLA	37,934	6,860	16.84%	-0.13%
2.	MG	22,972	11,592	10.2%	3.98%
3.	VOLKSWAGEN	19,039	5,889	8.45%	1.27%
4.	BMW	17,449	3,693	7.74%	0.23%
5.	AUDI	15,474	6,341	6.87%	1.88%
6.	MERCEDES-BE...	14,050	3,029	6.24%	0.22%
7.	KIA	13,866	151	6.15%	-1.33%
8.	VAUXHALL	10,494	1,194	4.66%	-0.42%
9.	HYUNDAI	10,281	-1,527	4.56%	-1.88%
10.	POLESTAR	10,052	5,160	4.46%	1.79%

Top ten BEV models, YTD vs last year

	Model	Regs	% Δ
1.	MODEL Y RWD	10,956	-
2.	MODEL Y LONG RANGE AWD	10,011	-47.3%
3.	4 TROPHY	6,887	3,073.7%
4.	4 SE	5,959	1,803.8%
5.	POLESTAR 2 EV FWD	4,976	251.2%
6.	MOKKA ULTIMATE EV	3,931	205.7%
7.	MODEL 3	3,883	333.9%
8.	Q4 E-TRON S LINE 40	3,433	175.1%
9.	ID3 LIFE	3,213	-3.4%
10.	I4 EDRIVE40 M SPORT	2,965	78.8%

NEW AUTOMOTIVE

Sep 2023

E-vans see best month on record

Electric vans enjoyed their best month on record in September, with just shy of 3,000 new electric vans registered.

Vauxhall has continued its dominant position in the market. Electric Vauxhalls entered production in Ellesmere Port earlier in September, so strong sales figures will be welcome in the North West.

Vauxhall will also be supported by the California-style Zero Emissions Vehicle mandate when it comes into force in January 2024, which will award a financial bonus to the biggest sellers of electric vans.

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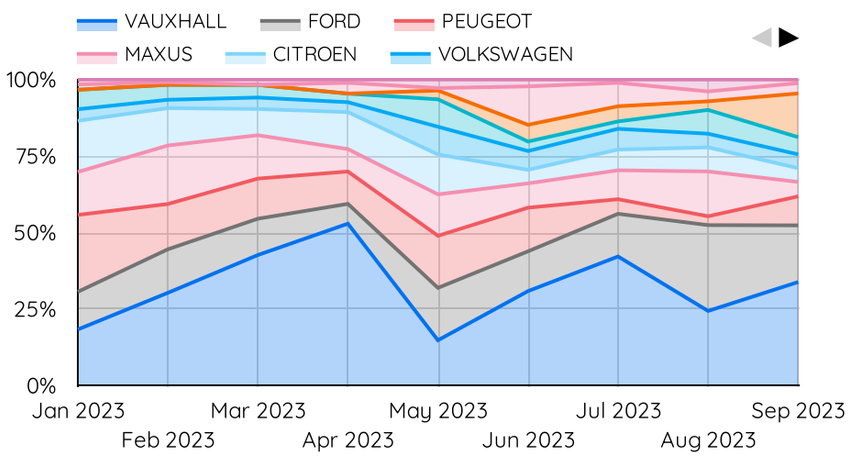
2023 YTD vs previous year

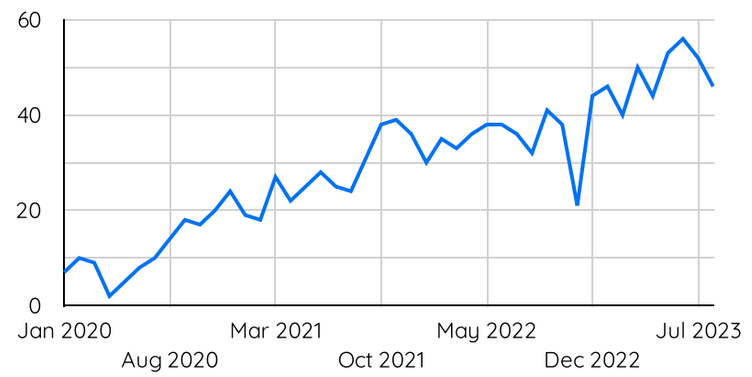
Fuel Type	Regs.	% Δ	Mkt. Share	Δ
Diesel	224,617	8.3%	91.82%	-0.31%
BEV	14,921	8.8%	6.1%	0.01%
Petrol	4,288	28.7%	1.75%	0.27%
Hybrid	798	21.3%	0.33%	0.03%
Grand total	**244,624**	**8.6%**	**100%**	**0%**

Latest month, changes vs last year

Fuel Type	Regs.	Δ	Mkt. Share	Δ
Diesel	38,262	6,578	89.87%	-3.48%
BEV	2,967	1,251	6.97%	1.91%
Petrol	1,128	707	2.65%	1.41%
Hybrid	153	67	0.36%	0.11%
Grand total	**42,574**	**8,635**	**100%**	**0%**



Number of different e-van models registered



BEV market share: YTD

	Marque	Regs	Δ	Mkt Share	% Δ
1.	VAUXHALL	4,733	841	31.72%	11.8%
2.	FORD	2,059	825	13.8%	53.4%
3.	PEUGEOT	1,604	-1,507	10.75%	-52.6%
4.	MAXUS	1,440	123	9.65%	0.5%
5.	CITROEN	1,195	495	8.01%	57.0%
6.	TOYOTA	1,005	260	6.74%	24.0%
7.	VOLKSWAGEN	671	648	4.5%	2,583.2...
8.	MERCEDES-BENZ	666	-841	4.46%	-59.4%
9.	NISSAN	636	204	4.26%	35.4%
10.	RENAULT	555	173	3.72%	33.6%
	Grand total	**14,921**	**1,201**	**100%**	**0.0%**

Most popular BEV models: YTD*

	Model	Regs	% Δ
1.	VIVARO F3100 PRIME EV	1,780	-
2.	VIVARO-E 3100 DYNAMIC	1,303	-54.1%
3.	E DELIVER 9	647	-2.0%
4.	E-TRANSIT 350 LEADER	643	3.9%
5.	PARTNER PROFESSIONAL PREM + EV	563	-
6.	PROACE CITY ICON EV	487	71.5%
7.	COMBO-E 2300 PRIME	486	-
8.	E-BERLINGO 800 ENTERPRISE ED	464	-
9.	E DELIVER 3	453	1.8%
10.	EVITO 66 PROGRESSIVE	356	-27.8%
	Grand total	**11,173**	**-3.3%**

NEW AUTOMOTIVE

Sep 2023

Motorbikes: sales slow as markets prepare for winter

Seasonality is a critical factor when it comes to motorcycle purchases, with March to May being the high season for sales. As we come to the end of the riding season, we are now seeing a decrease in new motorcycle sales - EV or otherwise.

This factor, when coupled with a general economic slowdown that inhibits discretionary purchases, is likely the reason for BEVs being hit harder than petrol motorcycles in the new market. As petrol bikes remain more expensive (especially in the higher capacity categories), riders are likely favouring cheaper bikes to tide them over this winter. This effectively leads to petrol regaining market share relative to last year.

The small capacity BEV motorcycle market remains volatile, with the G5S gaining an incredible 435% market share this year. This stems from a flood of new manufacturers fighting for market share in the scooter/ light motorcycle segment - as legacy OEMs are nowhere to be seen. For this reason, all but two of the most popular brands are legacy OEMs - with the rest being dominated by new Chinese and startup homegrown brands.

The small size of the motorcycle market is likely to lead to more volatility as EV motorcycles gain popularity and we see sudden (100%'s) spikes in model popularity. This would be especially true once we get to Spring, and sales increase.

EV motorcycles are a much younger market than EV cars - and we are going to see continued innovation - especially as batteries become lighter and more energy dense.

2023 YTD vs previous year

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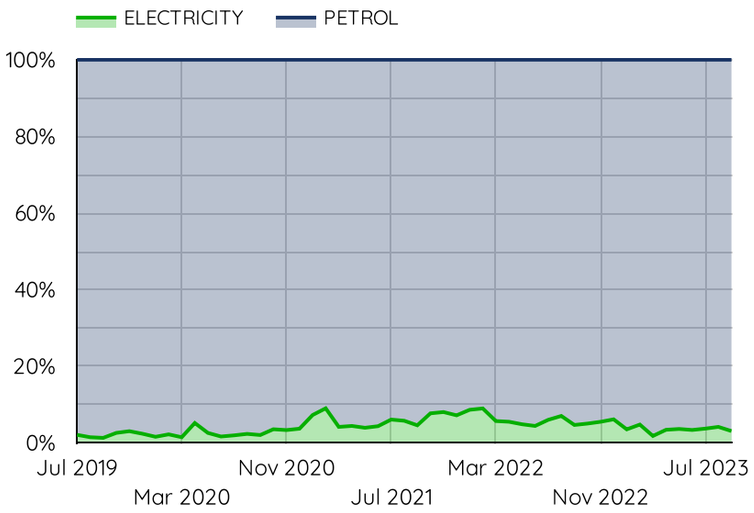
Fuel Type	Regs.	% Δ	Mkt. Share	Δ
Petrol	83,977	-5.8%	96.76%	2.47%
BEV	2,812	-47.9%	3.24%	-2.47%
Grand total	**86,790**	**-8.2%**	**100%**	**0%**

September 2023 vs September 2022

Fuel Type	Regs.	% Δ	Mkt. Share	Δ
Petrol	12,039	12.4%	96.93%	1.59%
BEV	381	-27.2%	3.07%	-1.59%
Grand total	**12,420**	**10.6%**	**100%**	**0%**

Motorbike registrations by fuel type since 2018



Most popular BEV brands 2023-to-September

Marque	Regs	% Δ	Mkt Share	Δ
VMOTO	571	-51.5%	20.31%	-1.52%
Sur-ron	473	133.0%	16.82%	13.06%
Talaria	177	29.2%	6.29%	3.76%
MAEVING	176	-	6.26%	-
NIU	127	-77.3%	4.52%	-5.86%
Yadea	118	-48.9%	4.2%	-0.08%
PIAGGIO	111	-56.1%	3.95%	-0.74%
E-Max	101	-69.5%	3.59%	-2.54%
Horwin	86	-45.6%	3.06%	0.13%
BMW	70	-20.5%	2.49%	0.86%
Grand total	**2,812**	**-47.9%**	**100%**	**0%**

Most popular BEV models 2023-to-September

	Model	Regs	% Δ
1.	Model not recorded	220	-65.5%
2.	ULTRA BEE	195	-
3.	LIGHT BEE	190	-50.0%
4.	CPA	155	-74.2%
5.	RM1	154	-
6.	CUX	96	0.0%
7.	TCM	94	-63.6%
8.	G5S	91	435.3%
9.	VSA	84	265.2%
10.	PIAGGIO ONE	65	-68.6%
	Grand total	**2,404**	**-52.5%**

NEW AUTOMOTIVE

Sep 2023

HGVs: August sets new e-HGV record

September saw a relatively weak set of sales figures for electric trucks, reflecting the nascent status of this technology and market.

Analysis

It is likely that the total cost of operating these vehicles is already cheaper than fossil-powered alternatives. However, electric HGVs are in urgent need of a policy framework and government strategy to support companies to purchase and operate more of them. The UK government committed at COP26 to end sales of new non-zero HGVs by 2040, with lighter (<26 tonne) HGVs being zero emissions from 2035.

In the absence of a regulation or policy, this commitment remains merely an ambition. It is likely that the UK government will look closely at proposals brought forward by the European Commission to drive forward electric HGV adoption in the EU, as well as the experience of introducing a zero emissions vehicle mandate scheme for passenger cars and light commercial vehicles.

HGVs account for around a third of UK diesel consumption, making them a significant contributor to UK emissions as well as the UK's reliance on expensive imported fuels.

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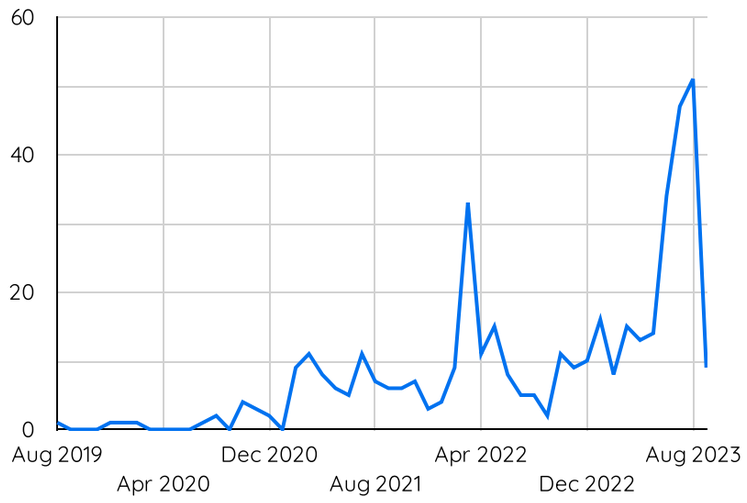
HGVs 2023 YTD vs previous year

Fuel Type	Regs.	Δ	Mkt. Share	Δ
Diesel	31,971	667	99.35%	-0.32%
BEV	210	107	0.65%	0.32%
Grand total	**32,181**	**774**	**100%**	**0%**

HGVs August 2023 vs August 2022

Fuel Type	Regs.	% Δ	Mkt. Share	Δ
Diesel	4,303	11.3%	99.79%	-0.16%
BEV	9	350.0%	0.21%	0.16%
Grand total	**4,312**	**11.5%**	**100%**	**0%**

Monthly electric HGV registrations



Most popular BEV brands, HGVs 2023 YTD

Marque	Regs	Δ	Mkt Share	Δ
DENNIS	87	55	41.43%	10.36%
RENAULT TRUCKS	38	32	18.1%	12.27%
VOLVO	29	24	13.81%	8.96%
IVECO	20	14	9.52%	3.7%
DAF	7	-28	3.33%	-30.65%
MITSUBISHI FUSO	6	2	2.86%	-1.03%
ELECTRA E-STAR	6	1	2.86%	-2%
VOLTA TRUCKS	5	-	2.38%	-
SCANIA	4	-	1.9%	-
MERCEDES-BENZ	3	-	1.43%	-
Grand total	**210**	**107**	**100%**	**0%**

Renault Trucks have a leading position in the market so far in 2023

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About this bulletin

Introduction

Electric Car Count is a monthly data series from New AutoMotive, a not-for-profit independent transport research organisation with a mission to accelerate and support the UK's transition to electric vehicles. You can find out more about New AutoMotive by visiting www.newautomotive.org/mission

Terms of Use

Data Sources & Methodology

The data we present comes from a mixture of sources. Data on vehicle registrations comes from the DVLA, and is based on a snapshot of the vehicle licensing database taken in the first few days of each month to gain a view of the last month's new registrations. We also obtain some information from the DVSA's MOT database. Data that is not about vehicles, for example, data on latest prices in the market, is taken from surveys carried out by New AutoMotive of prices advertised on a range of websites.

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. Some carry a plug, and some do not.

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', 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'.