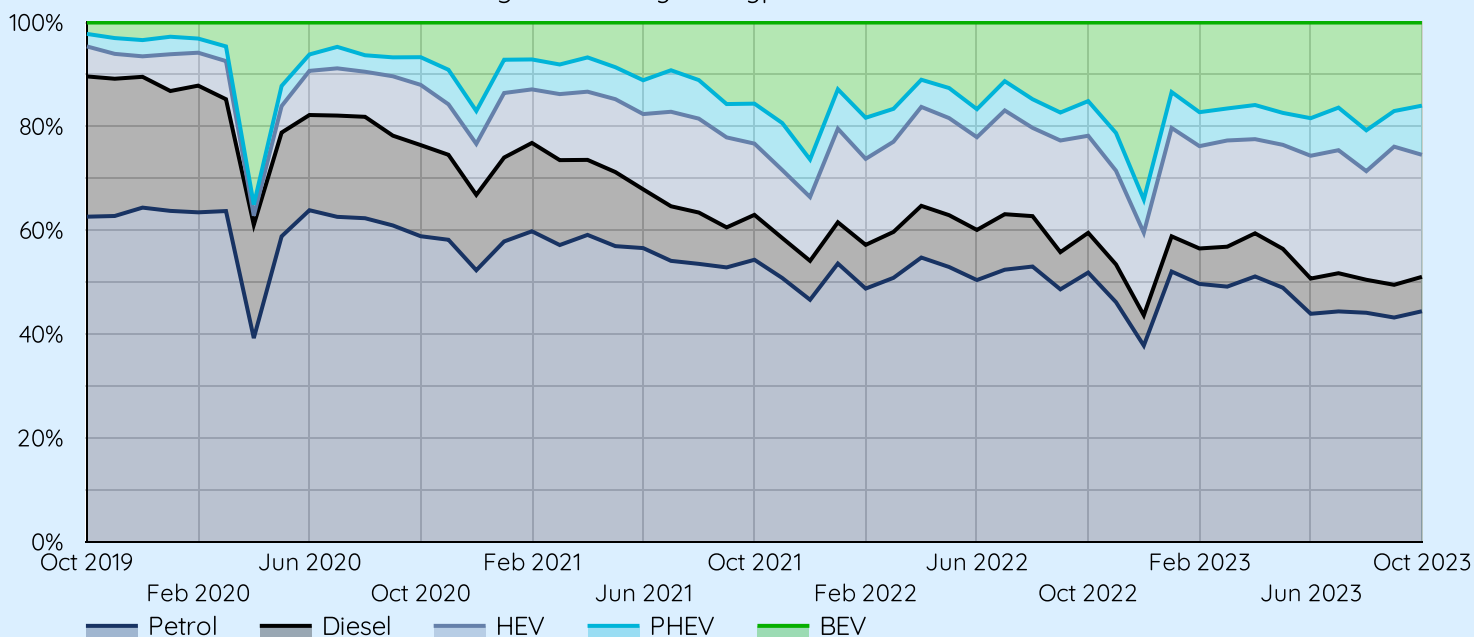


## Electric cars drive UK's return to pre-pandemic auto sales

New car registrations by fuel type to Oct 2023



Electric Cars

22,673

↑ 21.7%

Electric Vans

1,373

↓ -30.5%

Electric Motorbikes

470

↑ 28.4%

Electric HGVs

14

↑ 27.3%

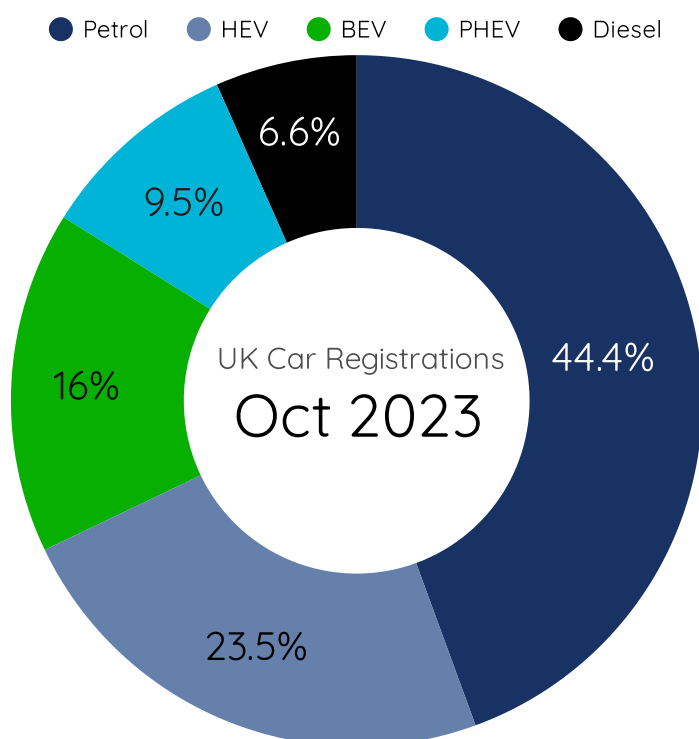
The UK car market has returned to its pre-pandemic strength, driven in large part by sales of electric and hybrid cars. Petrol and diesel are on the cusp of dropping below the 50% mark, with overall sales falling consistently over the last year. The evidence is clear that the only future for the UK car industry is to electrify as quickly as possible.

However, just a quarter of new cars in the UK have a plug, demonstrating that there is a significant way to go to phase out sales of cars whose only source of energy is fossil fuels. The decline in sales of traditional petrol and diesel cars has largely been driven by the rise in popularity of non-plug-in hybrids, some of which do not bring the fuel efficiency gains that they advertise, and some of which carry eye-wateringly high maintenance costs due to their mechanical complexity.

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3. [In-depth: Vans](#)
4. [In-depth: Motorbikes](#)
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6. [About & methodology](#)

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



### Ben Nelmes, Chief Executive of New AutoMotive said:

*"It is fantastic to see consumers and businesses continue to embrace electric cars, despite an unprecedented cost of living crisis and rising interest rates."*

*"Electrification is the only growth strategy for the UK's car industry. After the Prime Minister's decision to push back the 2030 target, motorists are now the driving force behind the UK's climate leadership as they switch to clean cars in record numbers."*

*"With over 50,000 public charge points now operating in the UK, it has never been easier to drive and charge an electric car. Ministers should set out a timetable to launch the Rapid Charging Fund to continue this exponential growth."*

## Electric car sales growing steadily

### Chinese brands struggling to make headway

2023 was supposed to be the year that competitively priced Chinese electric cars arrived in the UK en masse. That has failed to happen in a significant way. BYD, the world's largest seller of electric cars, sold 199 new electric cars in the UK in October and Ora 208 since starting to sell in the UK market in the first half of this year. Contrast that with sales of MG, which are going from strength to strength in the UK.

### Counting down to ZEV mandate introduction

It is striking how much better prepared some manufacturers are than others when looking ahead to ZEV mandate introduction. Carmakers that sell more than 2,500 will have to ensure that 22% of the cars they sell across 2024 are zero emissions (BEVs). The obvious beneficiaries of this will be the brands who only sell electric cars in sufficient volume to participate: Tesla and Polestar. If other all-electric brands like Smart, Ora and BYD can get their sales above 1000/year then they can earn credits in the scheme.

When we look at the volume manufacturers, we see evidence of the different approaches to electrification are likely to produce some winners and losers. The first year target looks eminently achievable for VW and Hyundai's brands, whereas brands that comprise Stellantis as well as Ford and Toyota are set to be more likely to make use of the generous flexibilities available in the first three years of the scheme's operation.

### BEV market share: YTD (vs last year)

	Marque	Regs. ▼	Δ	Mkt Share	Δ
1.	TESLA	40,963	3,942 ↑	16.4%	-1.15% ↓
2.	MG	25,267	11,697 ↑	10.11%	3.68% ↑
3.	VOLKSWAGEN	20,552	5,289 ↑	8.23%	0.99% ↑
4.	BMW	20,322	4,230 ↑	8.13%	0.51% ↑
5.	AUDI	18,058	7,373 ↑	7.23%	2.16% ↑
6.	MERCEDES-B...	15,781	3,481 ↑	6.32%	0.49% ↑
7.	KIA	14,836	-20 ↓	5.94%	-1.1% ↓
8.	HYUNDAI	11,292	-1,696 ↓	4.52%	-1.64% ↓
9.	VAUXHALL	11,237	708 ↑	4.5%	-0.49% ↓
10.	POLESTAR	10,861	4,748 ↑	4.35%	1.45% ↑

### 2023 YTD vs previous year

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Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	693,332	2,538 ↑	46.73%	-4.21% ↓
HEV	329,745	76,478 ↑	22.23%	3.55% ↑
BEV	249,843	38,877 ↑	16.84%	1.28% ↑
PHEV	105,735	22,318 ↑	7.13%	0.98% ↑
Diesel	104,941	-12,729 ↓	7.07%	-1.6% ↓
<b>Grand total</b>	<b>1,483,596</b>	<b>127,482...</b>	<b>100%</b>	<b>0%</b>

### Latest month, changes vs last year

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	62,931	-942 ↓	44.42%	-7.44% ↓
HEV	33,278	10,262 ↑	23.49%	4.8% ↑
BEV	22,673	4,045 ↑	16%	0.88% ↑
PHEV	13,416	5,194 ↑	9.47%	2.79% ↑
Diesel	9,388	-36 ↓	6.63%	-1.03% ↓
<b>Grand total</b>	<b>141,686</b>	<b>18,523 ↑</b>	<b>100%</b>	<b>0%</b>

### Top car sellers' BEV sales

	Marque	Total New Cars...	of which % BEVs
1.	VOLKSWAGEN	12,409	11.1%
2.	AUDI	11,533	22%
3.	FORD	11,516	2%
4.	BMW	10,061	27.2%
5.	VAUXHALL	9,046	5.3%
6.	TOYOTA	8,039	0.2%
7.	PEUGEOT	6,915	3.2%
8.	KIA	6,440	14.2%
9.	MG	5,888	36.6%
10.	HYUNDAI	5,820	16.8%
11.	MERCEDES-BENZ	5,336	30.2%
12.	SKODA	5,230	10.6%
13.	NISSAN	4,789	12.3%
14.	VOLVO	4,225	30.3%
15.	RENAULT	4,095	9.5%
16.	MINI	3,836	16.9%
17.	LAND ROVER	3,594	0%
18.	TESLA	2,613	100%
19.	CUPRA	2,470	24%

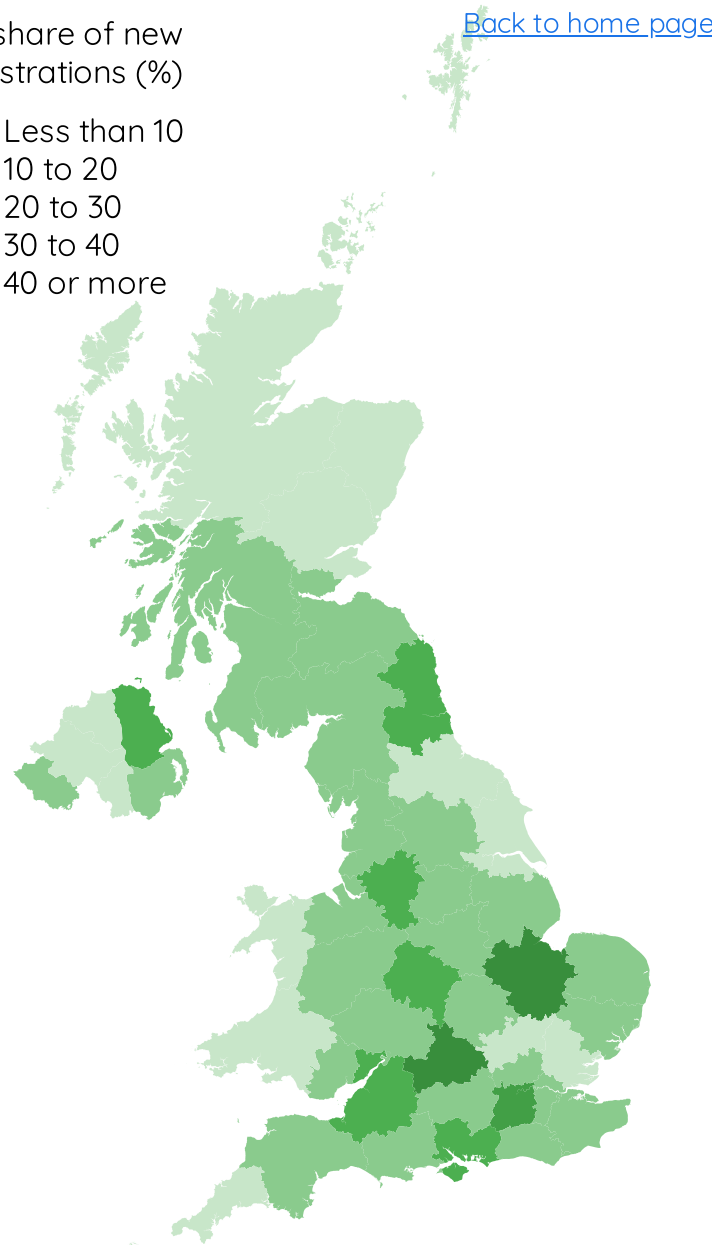
## Cars: Regional Overview

Certain regions of the UK are emerging as hotspots for new electric car registrations. Oxfordshire, Peterborough, South West London, North East England and the midlands are driving the growth of EV sales in the UK. The top ten regions for electric car registrations now register on average 8,000 of the vehicles every month.

This is likely to be down to local policies such as clean air zones and low emissions zones, as well as local preferences such as the popularity of the Nissan Leaf in the North East.

EV share of new registrations (%)

- Less than 10
- 10 to 20
- 20 to 30
- 30 to 40
- 40 or more

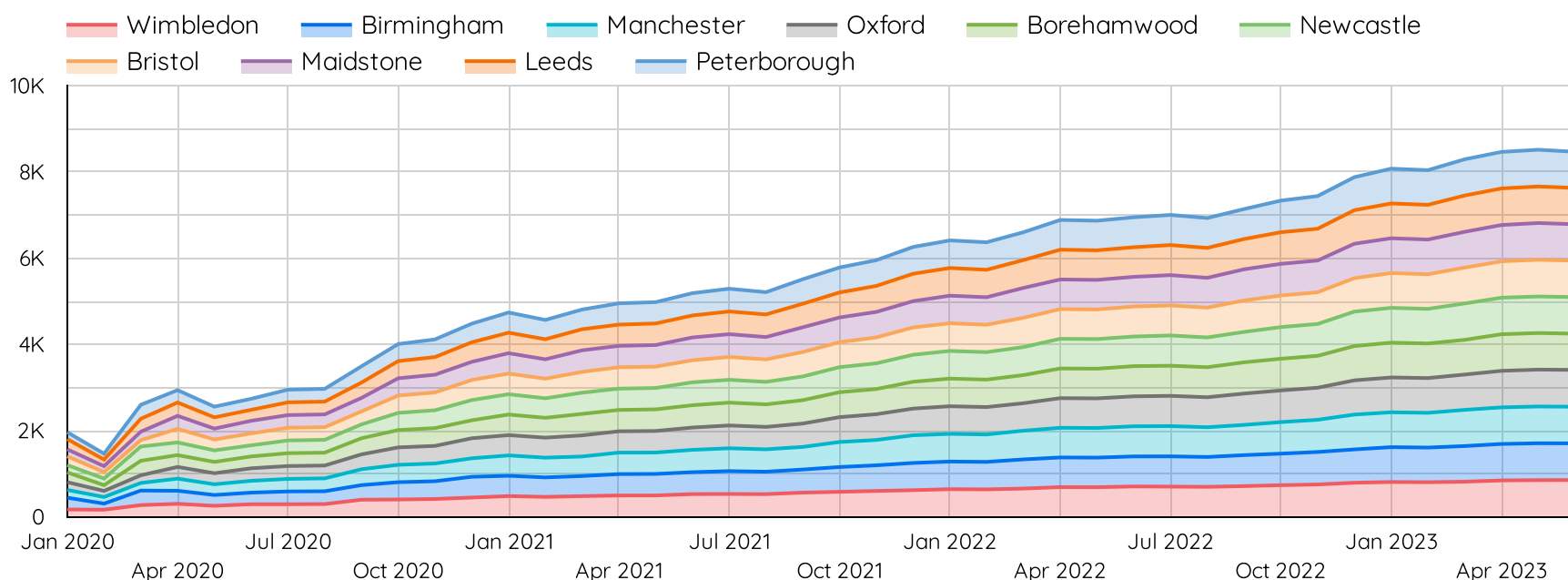


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### Places with the highest share of EV (Cars) sales

DVLA Area	Electric Car Market Share (%) ▾
Peterborough	51.87
Oxford	48.17
Wimbledon	37.86
Newcastle	27.45
Bristol	26.73
Birmingham	21.48
Manchester	21
Portsmouth	20.86
Antrim	20.38
Chester	19.44

### Average monthly electric car (M1) sales in the top regions for total sales



**Please note:** this data is derived from the location at which vehicles are first registered, and is not intended to show where vehicles are subsequently used. The location of subsequent owners or users of the vehicles can be different from the location of first registration.

## Electric vans face difficult Q4

Like the UK car market, van manufacturers are preparing for the introduction of binding targets to ensure that 10% of the vehicles they sell are electric in 2022 under the UK's new Zero Emissions Vehicle (ZEV) mandate.

The introduction of the scheme from 1st January is likely to have a cooling effect on electric van sales between now and then, as there is a greater incentive to register new vehicles from 1st January than in the final months of 2023.

The biggest beneficiaries of the ZEV mandate for vans is likely to be Vauxhall, whose Ellesmere-port manufactured vans are the most popular sellers in the UK.

### 2023 YTD vs previous year

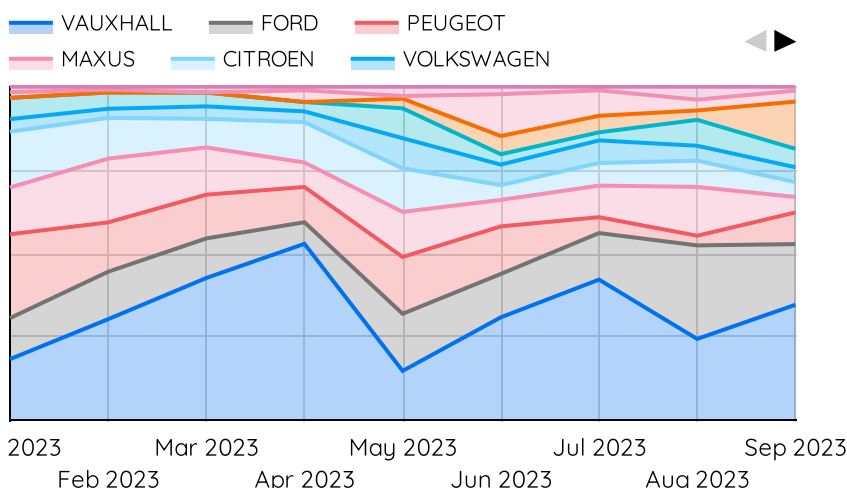
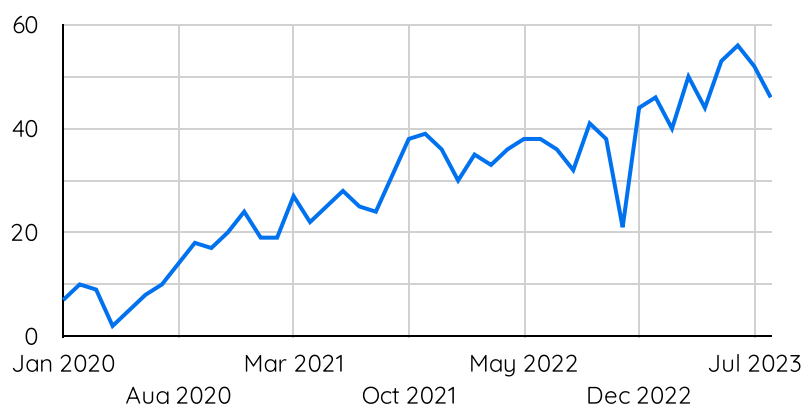
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Fuel	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	248,755	9.0% ↑	91.87%	0.01% ↑
BEV	16,377	3.8% ↑	6.05%	-0.3% ↓
Petrol	4,736	33.3% ↑	1.75%	0.32% ↑
Hybrid	888	0.2% ↑	0.33%	-0.03% ↓
<b>Grand total</b>	<b>270,756</b>	<b>8.9% ↑</b>	<b>100%</b>	<b>0%</b>

### Latest month, changes vs last year

Fuel	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	23,151	3,951 ↑	92.3%	2.75% ↑
BEV	1,373	-603 ↓	5.47%	-3.74% ↓
Petrol	419	286 ↑	1.67%	1.05% ↑
Hybrid	138	8 ↑	0.55%	-0.06% ↓
<b>Grand total</b>	<b>25,081</b>	<b>3,642 ↑</b>	<b>100%</b>	<b>0%</b>

### Number of different e-van models registered



### BEV market share: YTD

### Most popular BEV models: YTD\*

	Marque	Regs ▼	Δ	Mkt Share	% Δ
1.	VAUXHALL	5,178	732 ↑	31.62%	12.2% ↑
2.	FORD	2,177	544 ↑	13.29%	28.4% ↑
3.	PEUGEOT	1,668	-1,763 ↓	10.18%	-53.2% ↓
4.	MAXUS	1,544	-200 ↓	9.43%	-14.7% ↓
5.	CITROEN	1,257	498 ↑	7.68%	59.5% ↑
6.	TOYOTA	1,120	313 ↑	6.84%	33.7% ↑
7.	MERCEDES-BENZ	964	-696 ↓	5.89%	-44.1% ↓
8.	VOLKSWAGEN	813	761 ↑	4.96%	1,405.7%...
9.	NISSAN	685	253 ↑	4.18%	52.7% ↑
10.	RENAULT	584	202 ↑	3.57%	47.2% ↑
	<b>Grand total</b>	<b>16,377</b>	<b>604 ↑</b>	<b>100%</b>	<b>0.0%</b>

	Model	Regs ▼	% Δ
1.	VIVARO F3100 PRIME EV	2,536	-
2.	VIVARO-E 3100 DYNAMIC	1,383	-52.3% ↓
3.	E-TRANSIT 350 LEADER	1,021	28.9% ↑
4.	E DELIVER 9	714	-0.1% ↓
5.	PARTNER PROFESSIONAL PREM + EV	642	-
6.	PROACE CITY ICON EV	576	73.0% ↑
7.	COMBO-E 2300 PRIME	564	-
8.	E-BERLINGO 800 ENTERPRISE ED	512	-
9.	EVITO 66 PROGRESSIVE	490	-10.3% ↓
10.	E DELIVER 3	479	-17.4% ↓
	<b>Grand total</b>	<b>14,003</b>	<b>6.6% ↑</b>



## Motorbikes: sales slow as markets prepare for winter

September saw a slight uptick in Petrol motorcycle purchases, but a decrease in market share. This market share was taken up by EV motorcycles, which increased sales by 28.4%, predominantly due to the popularity of the Maeving RM1 - with the model showing a staggering 1,060% growth this year.

This is not unprecedented, due the relatively small size of the market and the constant development of new motorcycles - often from new OEMs. It must be noted that the development and production of new motorcycles is also cheaper and easier than that of new cars.

In this instance, the RM1 is another bike to target the light motorcycle urban commuter segment of the market with an 80 mile range at a max speed of 45mph. The key selling point is one of aesthetics - as this bike is not a scooter. Nevertheless, it suffers from an all too common oversight of the EV MC market - it does not offer fast charging, and is thus limited to domestic (or office-based) 3 pin charging options, which limits the scope for its widespread use.

When compared to last year, motorcycle sales are still down - especially EVs. As interest rates continue to hover at their 2008 levels (5.25%), access to credit remains more difficult - including PCP and HP. With the Maeving RM1 coming in at just shy of £6,000 - it remains a difficult purchase, when compared to alternatives on the motorcycle market (especially when they outperform the RM1). This is even more true for the light MC segment - where some of the best new petrol 125cc's can be had for under £5,000.

### 2023 YTD vs previous year

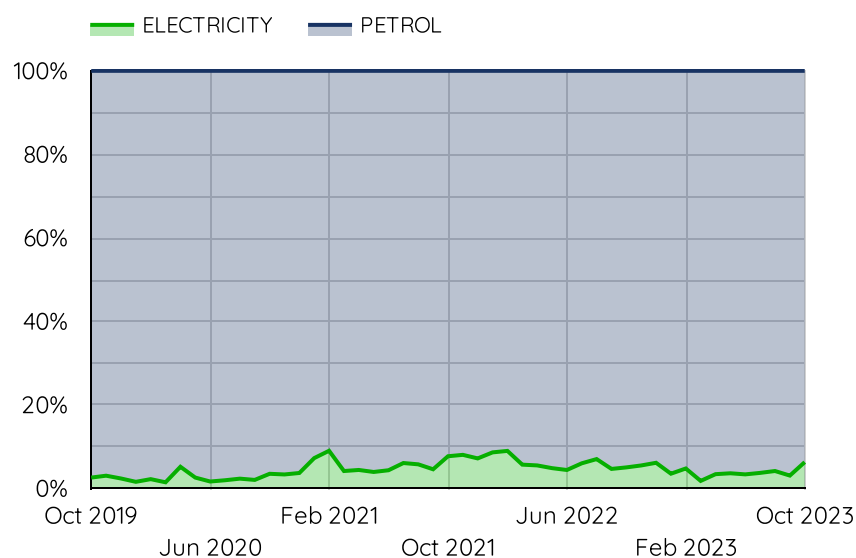
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Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	91,440	-3.6% ↓	96.51%	2.21% ↑
BEV	3,300	-42.4% ↓	3.48%	-2.21% ↓
<b>Grand total</b>	<b>94,742</b>	<b>-5.8% ↓</b>	<b>100%</b>	<b>0%</b>

### September 2023 vs September 2022

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	7,017	1.4% ↑	93.72%	-1.26% ↓
BEV	470	28.4% ↑	6.28%	1.26% ↑
<b>Grand total</b>	<b>7,487</b>	<b>2.7% ↑</b>	<b>100%</b>	<b>0%</b>

### Motorbike registrations by fuel type since 2018



### Most popular BEV brands 2023-to-September

Marque	Regs ▼	% Δ	Mkt Share	Δ
VMOTO	777	-36.4% ↓	23.55%	2.23% ↑
Sur-ron	519	121.8% ↑	15.73%	11.64% ↑
Talaria	212	45.2% ↑	6.42%	3.88% ↑
MAEVING	185	6,066.7% ↑	5.61%	5.55% ↑
Yadea	173	-27.3% ↓	5.24%	1.09% ↑
NIU	142	-75.6% ↓	4.3%	-5.86% ↓
PIAGGIO	128	-52.9% ↓	3.88%	-0.87% ↓
Horwin	102	-39.6% ↓	3.09%	0.14% ↑
E-Max	101	-71.9% ↓	3.06%	-3.22% ↓
BMW	70	-22.2% ↓	2.12%	0.55% ↑
<b>Grand total</b>	<b>3,300</b>	<b>-42.4% ↓</b>	<b>100%</b>	<b>0%</b>

### Most popular BEV models 2023-to-September

Model	Regs ▼	% Δ
1. ULTRA BEE	235	-
2. Model not recorded	235	-63.6% ↓
3. LIGHT BEE	207	-47.9% ↓
4. CPA	186	-70.8% ↓
5. RM1	174	1,060.0% ↑
6. TCM	113	-58.8% ↓
7. CUX	108	1.9% ↑
8. G5S	92	411.1% ↑
9. VSA	86	273.9% ↑
10. PIAGGIO ONE	75	-65.4% ↓
<b>Grand total</b>	<b>2,788</b>	<b>-47.8% ↓</b>

## E-HGVs double in first 3 quarters

October saw relatively few electric HGVs registered - far fewer than in recent months. This is to be expected as both orders for, production and delivery of the new vehicles scales up.

### 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.

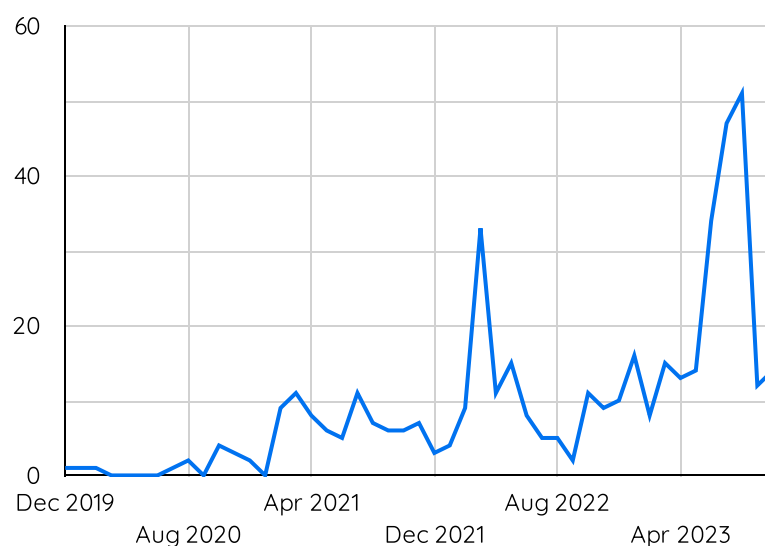
HGVs 2023 YTD vs previous year [Back to home page](#)

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	36,175	910 📈	99.38%	-0.3% 📉
BEV	226	114 📈	0.62%	0.3% 📈
<b>Grand total</b>	<b>36,401</b>	<b>1,024 📈</b>	<b>100%</b>	<b>0%</b>

HGVs latest month vs last year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	4,017	5.5% 📈	99.65%	-0.06% 📉
BEV	14	27.3% 📈	0.35%	0.06% 📈
<b>Grand total</b>	<b>4,031</b>	<b>5.6% 📈</b>	<b>100%</b>	<b>0%</b>

Monthly electric HGV registrations



## Most popular BEV brands, HGVs 2023 YTD

Marque	Regs ▼	Δ	Mkt Share	Δ
DENNIS	90	54 📈	39.82%	7.68% 📈
RENAULT TRUCKS	41	33 📈	18.14%	11% 📈
VOLVO	33	28 📈	14.6%	10.14% 📈
IVECO	20	14 📈	8.85%	3.49% 📈
DAF	7	-28 📉	3.1%	-28.15% 📉
MITSUBISHI FUSO	6	2 📈	2.65%	-0.92% 📉
MERCEDES-BENZ	6	-	2.65%	-
ELECTRA E-STAR	6	1 📈	2.65%	-1.81% 📉
VOLTA TRUCKS	5	-	2.21%	-
SCANIA	4	2 📈	1.77%	-0.02% 📉



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

**Grand total** 226 114 📈 100% 0%

## 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](http://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. 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' 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'.