

# Tesla causes EV sales drop ahead of UK car market reform

New car registrations by fuel type to Nov 2023

Electric Cars

22,849

↓ -17.9%

Electric Vans

1,683

↓ -18.0%

Electric Motorbikes

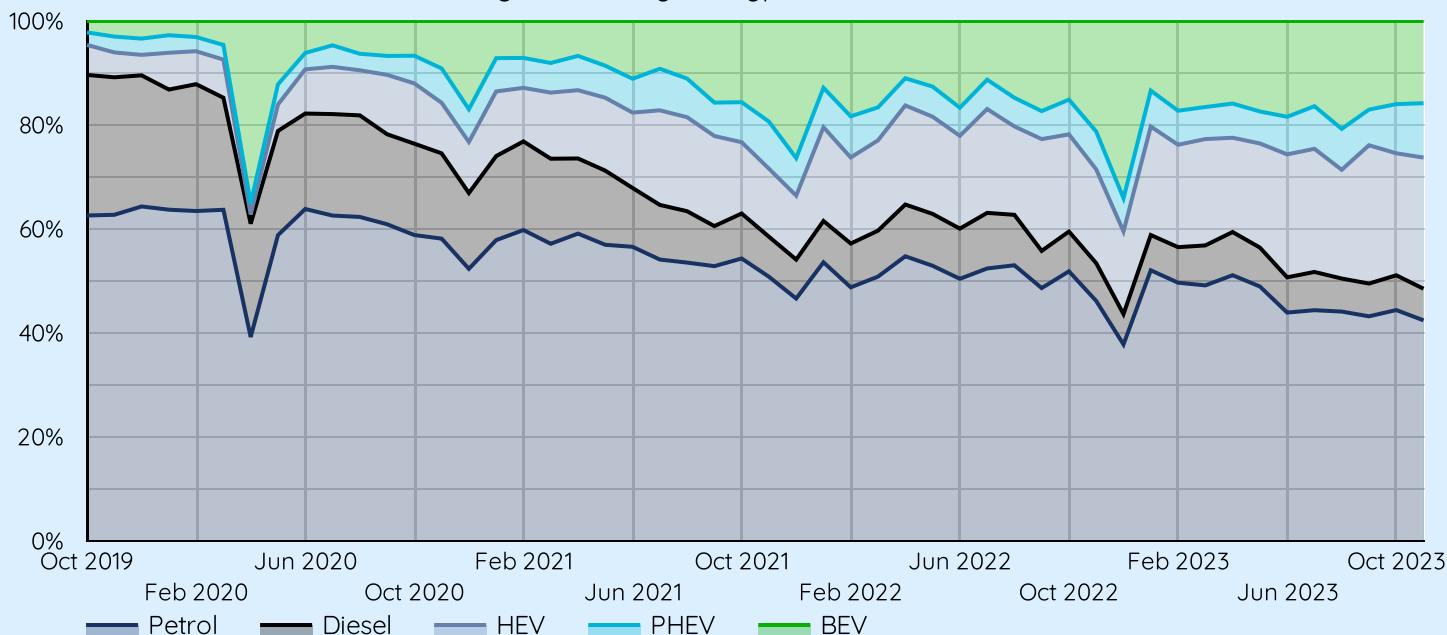
221

↓ -33.4%

Electric HGVs

19

↑ 111.1%



November saw a drop in sales of electric cars slowed, in line with our predictions and wider industry expectations. A large contributor to this is the steep drop in sales by US electric car manufacturer Tesla, which has suffered a series of setbacks in production in the second half of 2023.

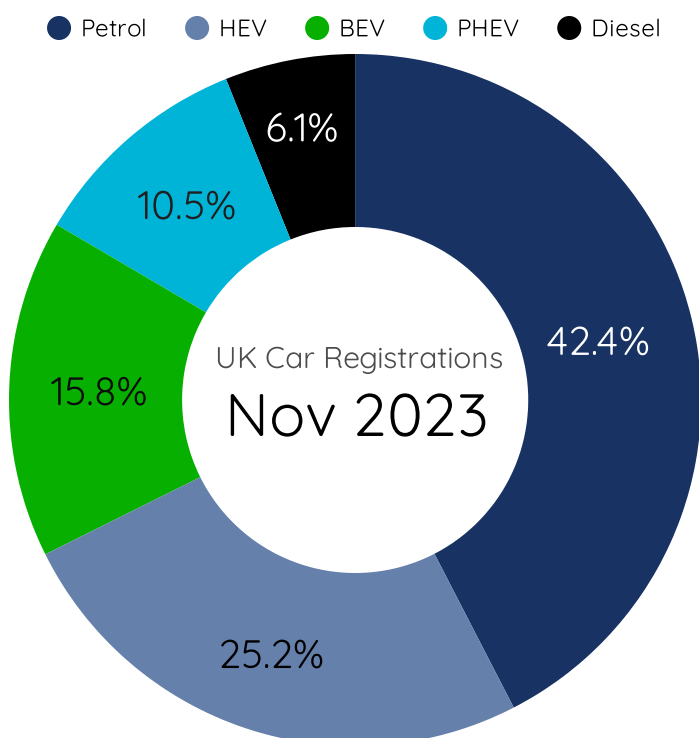
Despite the one-month drop, electric car sales have increased year on year, with 2023 figures overtaking that of 2022. To continue this growth, Parliaments across Great Britain have recently passed a major package of reforms that will boost sales from 2024.

The new law - the first of its kind in the UK - introduces a series of rewards for car makers to sell more electric cars and will promote increased electric vehicle production in the UK. The rewards become available from 1st January, meaning that car companies are focusing on ramping up deliveries of electric cars from that date.

### Contents

1. Snapshot
2. [In-depth: Cars](#)
3. [In-depth: Vans](#)
4. [In-depth: Motorbikes](#)
5. [In-depth: HGVs](#)
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:

*"Monthly car sales are highly volatile. This well-anticipated slowdown in sales of electric cars demonstrates the need for the government to make it cheaper and easier for people to access the benefits of going electric."*

*"We welcome the House of Commons decision to pass the California-style Zero Emissions Vehicle Mandate - legislation we've been calling for for over two years."*

*"The benefits of boosting electric car uptake will be felt not just by future generations as they face climate instability but by working people who increasingly have to choose between an empty tank or an empty wallet. That is the very definition of a win-win."*

## Stagnation in ICE Registrations

For the sixth consecutive month the market share between electric & hybrid cars and the more traditional ICE petrol & diesel cars has sat at a near 50:50 split. The increasing dominance of wholly and partially electrified cars (52%) is an encouraging sign that mirrors the recent passing of the ZEV Mandate into law - the UK public are voting with their wallets for the transition to electric cars.

In a month where this years manufacturing issues likely punished Tesla in terms of market share, and subsequently dampened the market share of electric cars overall, four of the leading five manufacturers for BEVs this month saw notable rises in units sold compared to this time last year - with a near 100% increase in sales by Audi, taking electric cars to 30% of their new registrations for this month.

Even with the anticipated slowdown of sales of pure electric cars this month, the significant growth in the market (up 9% on this month last year) has been driven by the turn away from petrol and diesel cars - with a 50% increase in registrations of hybrid vehicles compared to November 2022. This will be of comfort to the likes of Nissan who this month confirmed they would be investing in not just one, but three gigafactories in Sunderland to build their fully electric vehicles. The combination of this and the introduction of the ZEV Mandate should help to reduce the volatility of the electric car market as well as make electric vehicles increasingly accessible to the UK public going forward.

### 2023 YTD vs previous year

[Back to home page](#)

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	755,138	19,524 ↑	46.36%	-3.52% ↓
HEV	366,437	94,319 ↑	22.5%	4.05% ↑
BEV	272,538	21,188 ↑	16.73%	-0.31% ↓
PHEV	120,763	29,762 ↑	7.41%	1.24% ↑
Diesel	113,837	-10,775 ↓	6.99%	-1.46% ↓
<b>Grand total</b>	<b>1,628,713</b>	<b>154,018 ↑</b>	<b>100%</b>	<b>0%</b>

### Latest month, changes vs last year

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	61,310	912 ↑	42.43%	-3.73% ↓
HEV	36,444	12,847 ↑	25.22%	7.19% ↑
BEV	22,849	-4,975 ↓	15.81%	-5.45% ↓
PHEV	15,113	5,589 ↑	10.46%	3.18% ↑
Diesel	8,793	-718 ↓	6.08%	-1.18% ↓
<b>Grand total</b>	<b>144,509</b>	<b>13,655 ↑</b>	<b>100%</b>	<b>0%</b>

### Top car sellers' BEV sales (YTD)

	Marque	Total New Cars...	of which % BEVs
1.	VOLKSWAGEN	12,835	11.2%
2.	FORD	10,922	1.3%
3.	BMW	10,674	27.2%
4.	AUDI	10,309	29.6%
5.	VAUXHALL	8,902	4.2%
6.	TOYOTA	8,036	0.1%
7.	KIA	7,017	15.6%
8.	MERCEDES-BENZ	7,014	28.8%
9.	NISSAN	6,795	7.3%
10.	MG	6,417	35%
11.	HYUNDAI	6,056	15.4%
12.	PEUGEOT	5,642	5.3%
13.	SKODA	5,499	9%
14.	RENAULT	4,661	7.2%
15.	VOLVO	4,090	31.9%
16.	MINI	4,039	14.7%
17.	LAND ROVER	3,696	0%
18.	CITROEN	2,513	4.9%
19.	CUPRA	2,139	27.3%

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

	Marque	Regs ▼	Δ	Mkt Share	Δ
1.	TESLA	42,415	-10,612 ↓	15.56%	-5.53% ↓
2.	MG	27,505	11,763 ↑	10.09%	3.83% ↑
3.	BMW	23,247	4,185 ↑	8.53%	0.95% ↑
4.	VOLKSWAGEN	21,942	3,116 ↑	8.05%	0.56% ↑
5.	AUDI	21,099	8,588 ↑	7.74%	2.76% ↑
6.	MERCEDES-B...	17,762	4,550 ↑	6.52%	1.26% ↑
7.	KIA	15,939	523 ↑	5.85%	-0.28% ↓
8.	HYUNDAI	12,237	-1,536 ↓	4.49%	-0.99% ↓
9.	VAUXHALL	11,609	742 ↑	4.26%	-0.06% ↓
10.	POLESTAR	11,373	4,175 ↑	4.17%	1.31% ↑

## Sales cool ahead of ZEV Mandate

As anticipated, the last few months prior to the introduction of the UK Zero Emissions Vehicle (ZEV) mandate on 1st January 2024 have had a cooling effect on electric van sales. Whilst new electric vans sold from 1 January 2024 will count towards meeting stretching new manufacturer targets for pure electric vans to make up 10% of sales, vans sold up to 31 December 2023 are disregarded. This gives an incentive to pause sales in 2023 which can instead be booked in 2024.

Stellantis brands, including Vauxhall, Peugeot, Fiat and Citroen are still dominant despite a slight dip in sales and comfortably meet the 10% target at a group level. Nissan have come from no electric van sales at all in November 2022 to more than 10% last month, showing how quickly firms with a strategy can pick up pace.

### 2023 YTD vs previous year

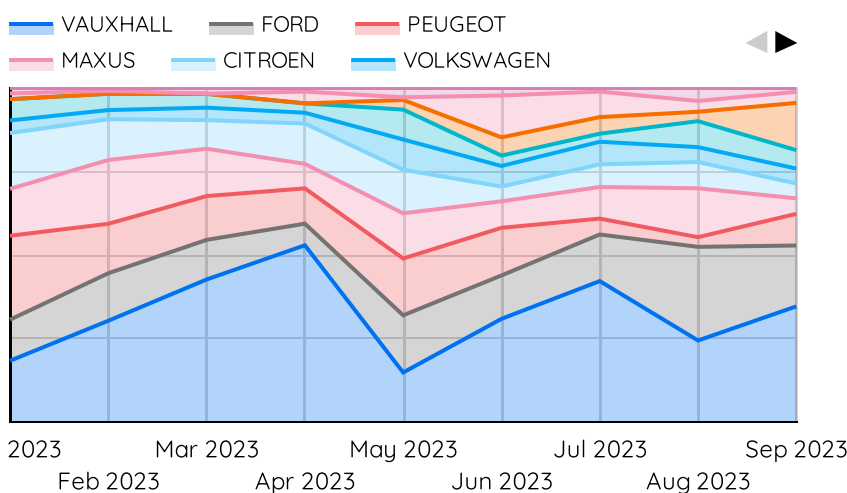
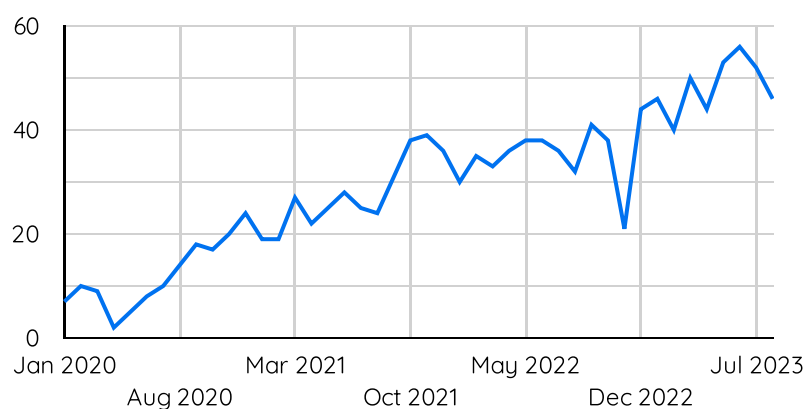
[Back to home page](#)

Fuel	Regs. ▾	% Δ	Mkt. Share	Δ
Diesel	272,355	10.3% ↑	91.74%	-0% ↓
BEV	18,130	3.5% ↑	6.11%	-0.4% ↓
Petrol	5,329	43.7% ↑	1.8%	0.42% ↑
Hybrid	1,049	6.3% ↑	0.35%	-0.01% ↓
<b>Grand total</b>	<b>296,863</b>	<b>10.3% ↑</b>	<b>100%</b>	<b>0%</b>

### Latest month, changes vs last year

Fuel	Regs. ▾	Δ	Mkt. Share	Δ
Diesel	23,614	2,791 ↑	90.43%	1.48% ↑
BEV	1,683	-369 ↓	6.45%	-2.32% ↓
Petrol	603	381 ↑	2.31%	1.36% ↑
Hybrid	213	-100 ↓	0.82%	-0.52% ↓
<b>Grand total</b>	<b>26,113</b>	<b>2,703 ↑</b>	<b>100%</b>	<b>0%</b>

### Number of different e-van models registered



### BEV market share: YTD

Marque	Regs ▾	Δ	Mkt Share	% Δ
1. VAUXHALL	5,635	618 ↑	31.08%	8.5% ↑
2. FORD	2,246	500 ↑	12.39%	24.3% ↑
3. PEUGEOT	1,959	-1,801 ↓	10.81%	-49.7% ↓
4. MAXUS	1,637	-246 ↓	9.03%	-16.0% ↓
5. CITROEN	1,397	610 ↑	7.71%	71.5% ↑
6. TOYOTA	1,286	361 ↑	7.09%	34.3% ↑
7. MERCEDES-BENZ	1,164	-715 ↓	6.42%	-40.2% ↓
8. VOLKSWAGEN	971	770 ↑	5.36%	366.6% ↑
9. NISSAN	762	330 ↑	4.2%	70.4% ↑
10. RENAULT	653	270 ↑	3.6%	64.7% ↑
<b>Grand total</b>	<b>18,130</b>	<b>618 ↑</b>	<b>100%</b>	<b>0.0%</b>

### Most popular BEV models: YTD\*

Model	Regs ▾	% Δ
1. VIVARO F3100 PRIME EV	2,865	-
2. VIVARO-E 3100 DYNAMIC	1,414	-53.2% ↓
3. E-TRANSIT 350 LEADER	1,110	40.0% ↑
4. EVITO 66 PROGRESSIVE	758	29.6% ↑
5. E DELIVER 9	730	-1.9% ↓
6. PARTNER PROFESSIONAL PREM + EV	674	-
7. COMBO-E 2300 PRIME	642	-
8. PROACE CITY ICON EV	608	76.2% ↑
9. E-BERLINGO 800 ENTERPRISE ED	548	54,700.0% ↑
10. E DELIVER 3	538	-21.5% ↓
<b>Grand total</b>	<b>15,468</b>	<b>13.6% ↑</b>

## E-HGVs continue their rise

November saw electric HGVs continue their rise, but it is a bumpy journey.

The 0.6% market share in the year to date was reached by battery electric cars in 2018, a full 17 years ahead of the ban on cars using petrol and diesel. So the long-term pace of growth needs to pick up to meet the UK's target to end sales of lighter (<26 tonnes) non-zero HGVs, by 2035, with remaining new HGV sales being zero emissions from 2040.

However, the UK Government has now publicly committed in Parliament to a zero emission HGV and coach infrastructure strategy in 2024. It is likely that they will also look closely at other measures to grow take-up - learning from the experience of a zero emissions vehicle mandate scheme for passenger cars and vans as well as proposals brought forward by the European Commission to drive forward electric HGV adoption in the EU.

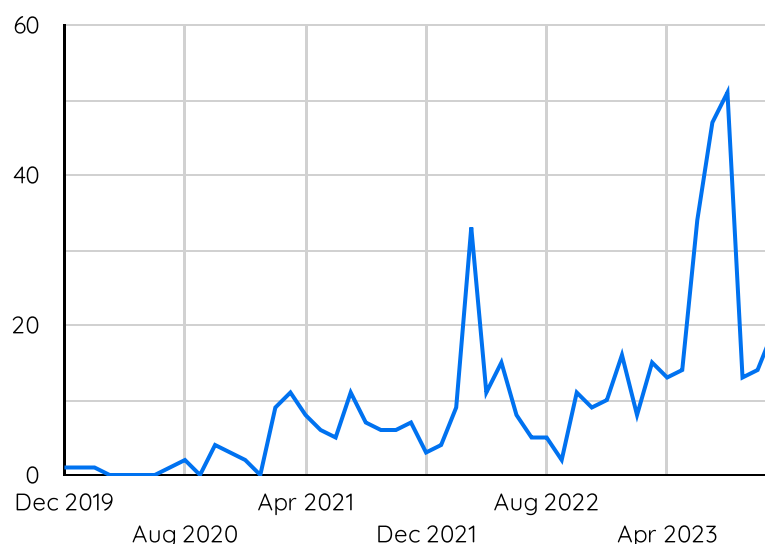
HGVs 2023 YTD vs previous year [Back to home page](#)

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	40,180	2,111 ↑	99.38%	-0.3% ↓
BEV	250	128 ↑	0.62%	0.3% ↑
<b>Grand total</b>	<b>40,430</b>	<b>2,239 ↑</b>	<b>100%</b>	<b>0%</b>

HGVs latest month vs last year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	3,937	-0.5% ↓	99.52%	-0.25% ↓
BEV	19	111.1% ↑	0.48%	0.25% ↑
<b>Grand total</b>	<b>3,956</b>	<b>-0.3% ↓</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	91	49 ↑	36.4%	1.97% ↑
VOLVO	46	40 ↑	18.4%	13.48% ↑
RENAULT TRUCKS	46	35 ↑	18.4%	9.38% ↑
IVECO	23	17 ↑	9.2%	4.28% ↑
MERCEDES-BENZ	7	-	2.8%	-
DAF	7	-28 ↓	2.8%	-25.89% ↓
MITSUBISHI FUSO	6	2 ↑	2.4%	-0.88% ↓
ELECTRA E-STAR	6	1 ↑	2.4%	-1.7% ↓
VOLTA TRUCKS	5	-	2%	-
SCANIA	4	2 ↑	1.6%	-0.04% ↓



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

**Grand total**                      **250**      **128 ↑**                      **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)

### Terms of Use

We make all the data and content in this bulletin available under a Creative Commons [Attribution-NonCommercial-ShareAlike 4.0 International](#) (CC BY-NC-SA 4.0) License. That means that you are welcome to use our data or analysis for any non-commercial purpose, so long as any product or output is made available under the same license and making sure to attribute New AutoMotive as the source. **You may not use our data or intellectual property for commercial or private applications without purchasing a license from New AutoMotive.** This can be done by emailing [data@newautomotive.org](mailto:data@newautomotive.org).

### 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'.