

Tesla's woes weigh on UK EV market

New car registrations by fuel type to Mar 2024

Electric Cars

44,314

↑ 0.2%

Electric Vans

2,727

↑ 1.0%

Electric Motorbikes

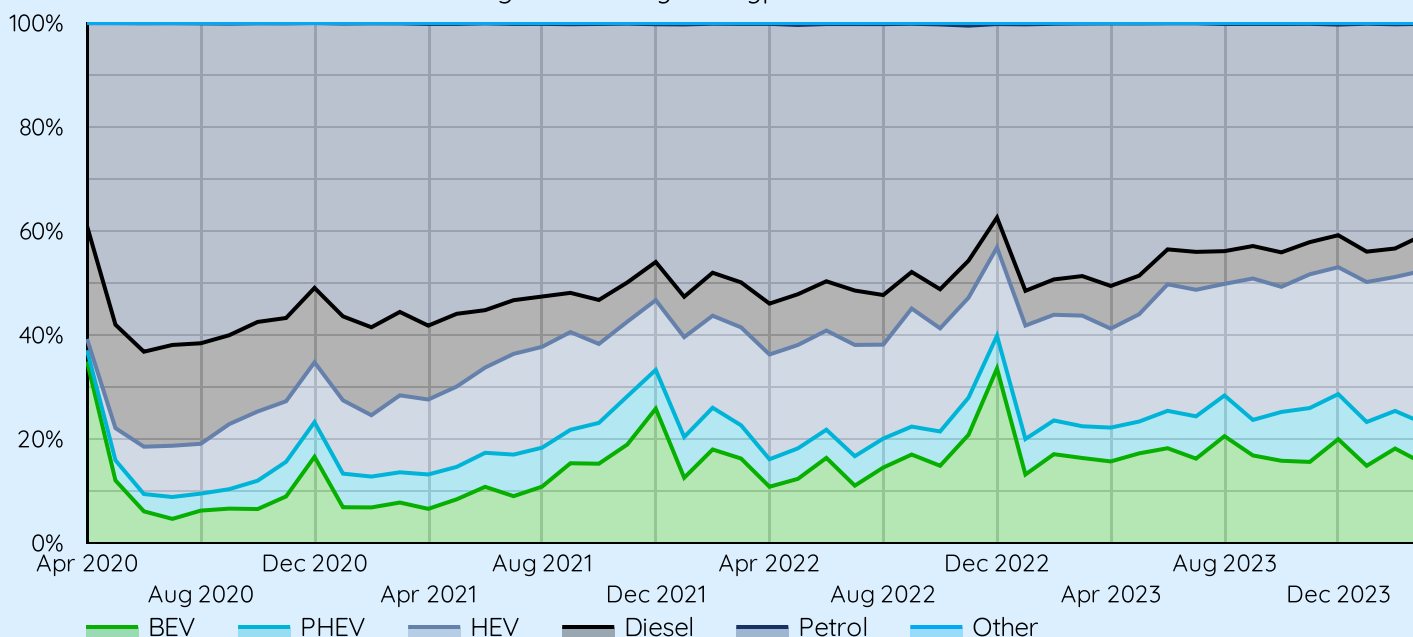
331

↑ 13.7%

Electric HGVs

16

↑ 6.7%



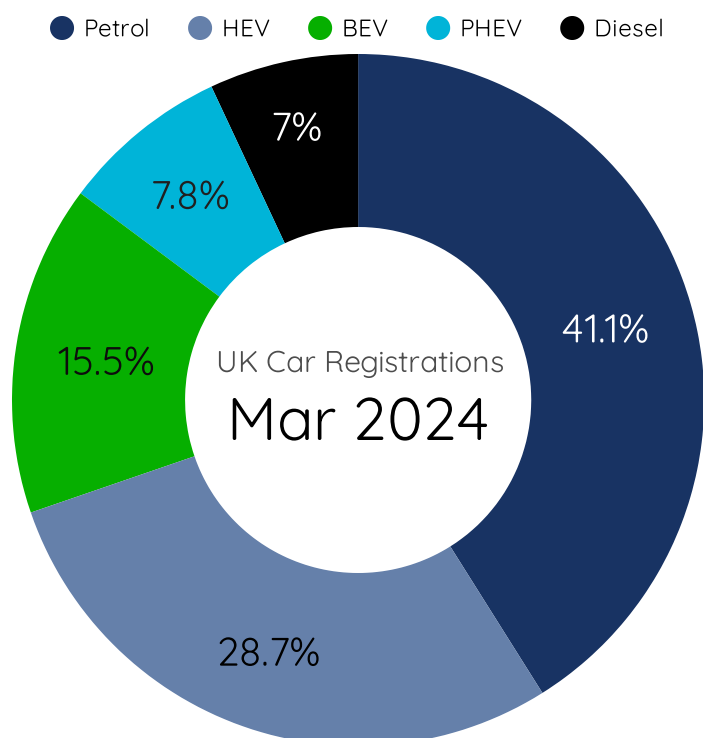
Key points

- Tesla's UK sales firmly in decline, driving plateau in UK car sales
- UK on track for 1.9m car sales in 2024, of which 360,000 are likely to be fully electric
- Car manufacturers are behind on their ZEV mandate targets, with electric car sales accounting for 16% of the market in the first three months of 2024
- Electric car sales are likely to average 19% over the remaining 9 months of the year
- Electric van sales in the 12 months to the end of March were up 20%, averaging 6.5% of the market
- Electric HGV sales continued to edge upwards, with 289 registered in the last 12 months

Contents

1. Snapshot
2. Cars
3. ZEV mandate tracker
4. Car average CO2 monitor
5. Vans
6. HGVs & Motorbikes
7. About & methodology

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



Ben Nelmes, CEO of New AutoMotive, said:

"It's great to see another 44,000 people opting for cleaner, cheaper transport by switching to an electric car.

"With electricity prices falling, the potential running cost savings of going electric are only going to get bigger and bigger. That will make going electric more and more attractive for people who do the most miles.

"The fact that companies are a little behind on their targets means we are likely to see improved marketing of electric cars, and growing discounts on some brands. Ministers should work with manufacturers to combat misinformation about electric cars to turn those targets into reality."

Cars summary

Tesla's position in the UK market continues to wane, from its historic dominance. In the 12 months to the end of March, the US carmaker shed 4 percentage points of its share of the UK's electric car market. Despite that, Tesla remains the most popular brand of electric car

German manufacturers dominate the list of companies that are growing their share of the electric car market in the UK, though Chinese-owned Geely also saw significant improvement in its position.

Sales of full hybrids (non-plug-in) continued to grow in significant number, accounting for almost a third of new cars in March. This could reflect the benefits available under the ZEV mandate for manufacturers who improve the average fuel efficiency of new cars sold in 2024. Manufacturers who sell more efficient ICE cars in 2024 can reduce their implied ZEV mandate targets. However, this is likely to be a blip in the long-term trend; with this option only available in a significant form in 2024.

The market overall continues to grow, with 1.8m car sales in the last 12 months, and a projected 1.9m car sales in 2024 overall. Sales of petrol cars, which had driven this growth, are losing significant chunks of market share - growth is now coming from parts of the market involving (at least in part) electric drivetrains.

BEV market share, last 12 months vs previous

Marque	BEV Regs ▼	Δ	% of UK BEVs	Δ
TESLA	46,022	-4,846 ↓	15%	-4% ↓
BMW	30,401	10,424 ↑	10%	2% ↑
MG	28,010	8,249 ↑	9%	2% ↑
AUDI	22,955	7,743 ↑	8%	2% ↑
MERCEDES-BENZ	21,415	8,458 ↑	7%	2% ↑
VOLKSWAGEN	20,284	-195 ↓	7%	-1% ↓
KIA	15,988	1,255 ↑	5%	-0% ↓
HYUNDAI	13,008	-360 ↓	4%	-1% ↓
VAUXHALL	12,241	916 ↑	4%	-0% ↓
VOLVO	11,860	5,966 ↑	4%	2% ↑

Last 12 months sales, vs previous 12 months

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	792,342	25,168 ↑	43.52%	-5.2% ↓
HEV	457,369	136,656 ↑	25.12%	4.75% ↑
BEV	304,800	41,969 ↑	16.74%	0.05% ↑
PHEV	142,551	47,527 ↑	7.83%	1.79% ↑
Diesel	120,986	-4,516 ↓	6.64%	-1.32% ↓
Grand total	1,820,804	246,051 ↑	100%	0%

Latest month, changes vs last year

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	117,694	-13,713 ↓	40.58%	-7.99% ↓
HEV	85,141	27,578 ↑	29.35%	8.08% ↑
BEV	44,314	90 ↑	15.28%	-1.07% ↓
PHEV	22,502	5,994 ↑	7.76%	1.66% ↑
Diesel	19,912	-670 ↓	6.87%	-0.74% ↓
Grand total	290,039	19,484 ↑	100%	0%

Top car brands' electrification, last 12 months

Marque	Total ▼	BEVs	BEV %	Δ
VOLKSWAGEN	154,926	20,284	13.1%	-1.6% ↓
FORD	134,047	3,044	2.3%	-0.3% ↓
AUDI	124,812	22,955	18.4%	3.9% ↑
BMW	109,623	30,401	27.7%	6.4% ↑
VAUXHALL	102,743	12,241	11.9%	-2.2% ↓
KIA	102,519	15,988	15.6%	0.0% ↑
TOYOTA	97,604	3,425	3.5%	2.9% ↑
NISSAN	90,996	8,369	9.2%	-3.9% ↓
MERCEDES-BE...	84,842	21,415	25.2%	7.5% ↑
HYUNDAI	80,850	13,008	16.1%	-0.7% ↓
MG	80,155	28,010	34.9%	-1.2% ↓
SKODA	67,768	7,935	11.7%	0.1% ↑
PEUGEOT	66,467	6,377	9.6%	-9.8% ↓
VOLVO	48,892	11,860	24.3%	7.1% ↑
RENAULT	46,068	4,717	10.2%	-12.0% ↓
TESLA	46,021	46,021	100.0%	0.0%
LAND ROVER	44,296	0	0.0%	0.0%
MINI	40,967	5,186	12.7%	-4.1% ↓
SEAT	32,202	0	0.0%	0.0%

Car ZEV Mandate Tracker

Figures shown are based on GB car sales in the current calendar year

Parent	Car sales	Implied ZEV target*	BEV % of car sales	Under-/Over-performance
VW	103,706	18%	11%	-6.5%
STELLANTIS	61,409	21%	14%	-6.9%
HYUNDAI	50,638	16%	15%	-0.5%
BMW	43,123	22%	20%	-2.5%
NISSAN	30,075	17%	9%	-8.5%
FORD	29,985	19%	5%	-14.1%
TOYOTA	26,722	13%	14%	0.6%
MERCEDES	26,551	22%	22%	0.2%
SAIC	21,664	22%	25%	3.4%
RENAULT	20,743	17%	5%	-11.3%
TATA	19,846	11%	7%	-3.4%
TESLA	10,764	22%	100%	78.0%
HONDA	10,617	20%	16%	-4.1%
SUZUKI	6,977	22%	0%	-21.9%
MAZDA	6,627	13%	3%	-9.5%
BYD	1,219	22%	100%	78.0%
SUBARU	782	22%	26%	4.0%
GEELY	587	15%	18%	3.0%
GREAT WALL	414	22%	100%	78.0%
ASTON MARTIN	212	19%	0%	-18.5%

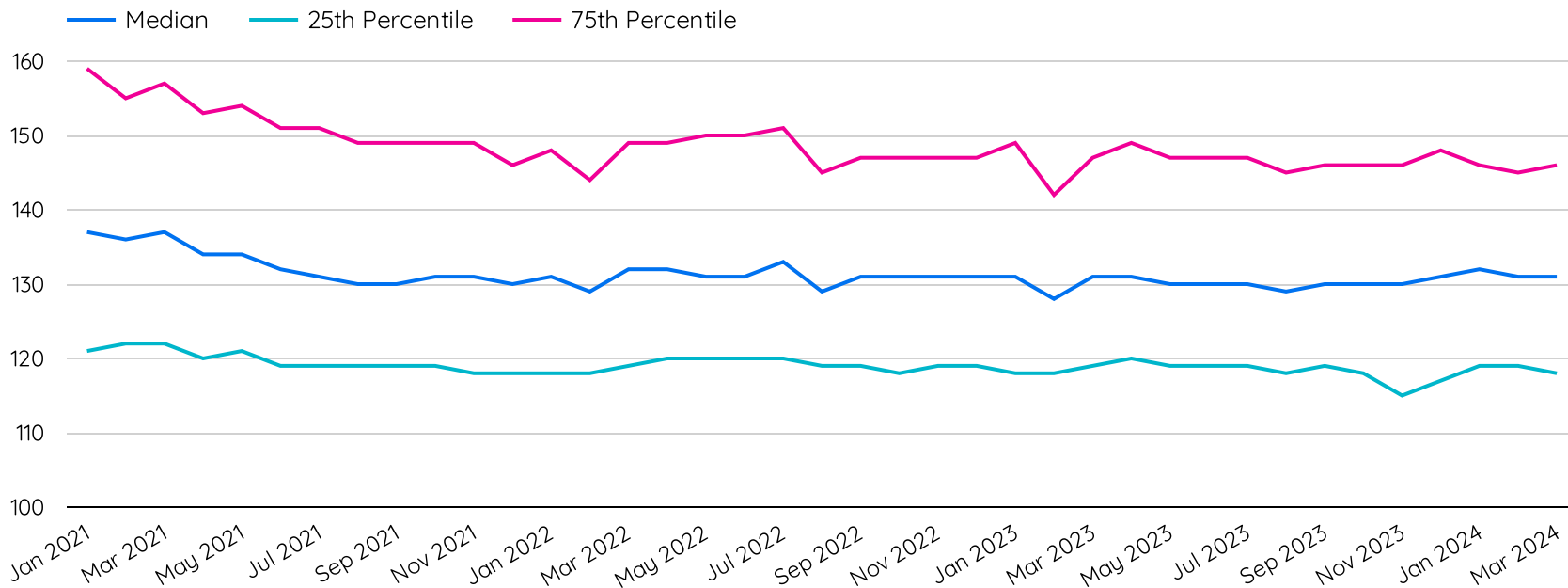
The year so far: Three months into the UK's Zero Emissions Vehicle (ZEV) mandate, we are starting to get a picture of how different manufacturers are responding. 16% of GB car sales this year were fully electric. While that appears far below the headline 22% ZEV mandate target, we estimate that only 18.5% of sales must be electric overall for manufacturers to meet compliance via trading. Given that the first three months have sales generally below the required level, BEV sales will have to average 19% of overall sales in the remaining months of the year, with projected BEV sales of 360,000 over the whole year.

The ZEV mandate requires car manufacturers to meet an increasing percentage target of electric cars (22% in 2024) by selling more electric cars as a proportion of sales, purchasing excess allowances from manufacturers who have exceeded their targets, borrowing allowances from future years or paying a "buy out" price to the Government.

The implied ZEV target - manufacturers can also generate additional ZEV mandate credits by exceeding easy-to-meet CO2 emissions targets on their ICE vehicle sales. 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 ICE cars in 2024. There is a cap on ZEV credits which means that no firm can reduce its target for EV sales to below 10.85% in 2024. The cap is tightened in subsequent years, with no further ZEV credits for CO2 overperformance after 2026.

ICE Car CO2 Emissions Ratings

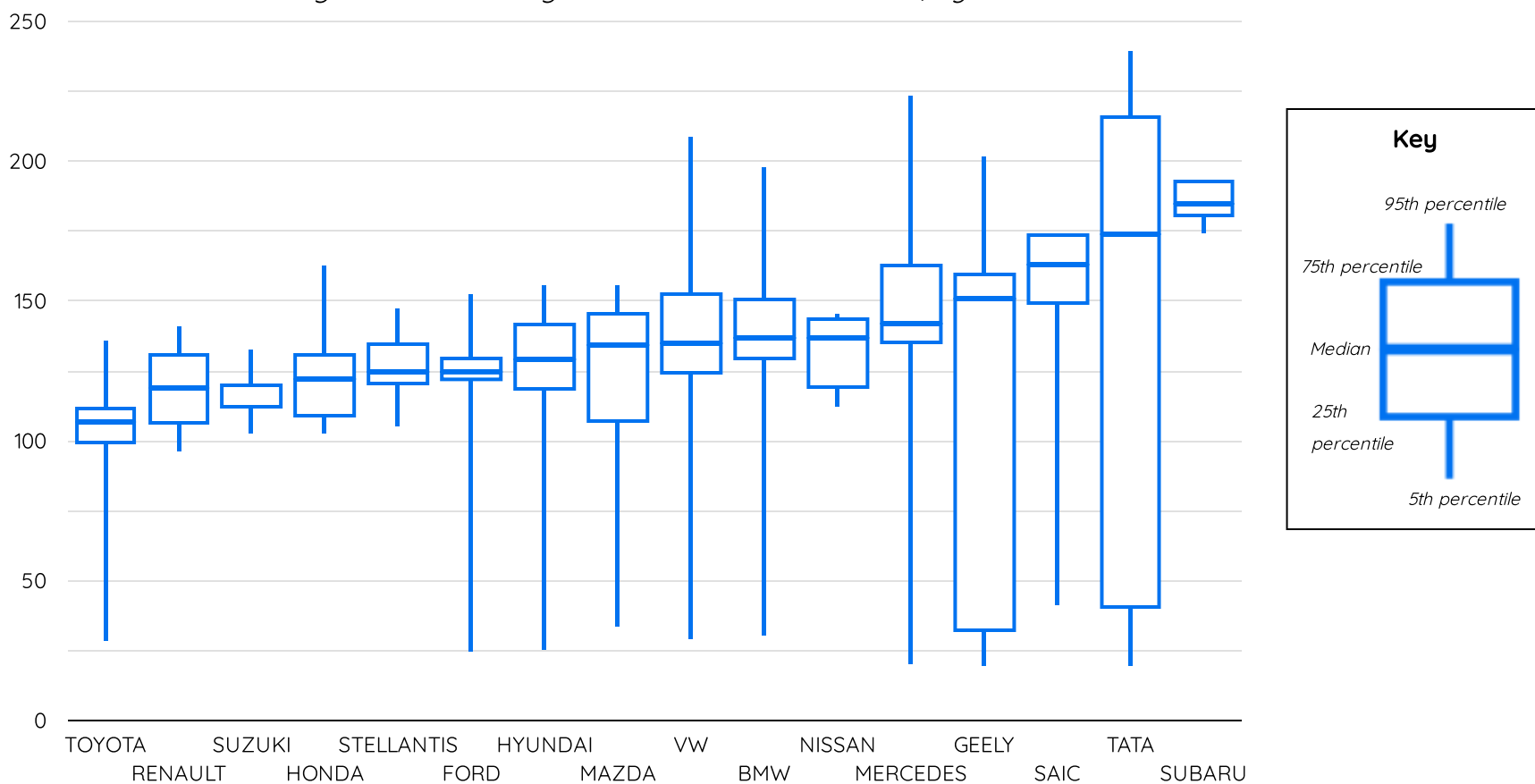
Average CO2 ratings of newly registered internal combustion engine cars by month of registration, gCO2/km



This is a new section of our monthly update that will track the CO2 performance of newly registered **non zero emission UK cars**. 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.

Good news! There has been no deterioration in car fuel efficiency for the last three years.

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



Vans summary

With 21,000 electric vans sold in the last 12 months, sales in this segment continue to grow steadily, now boosted by the ZEV mandate targets for vans.

Vauxhall and Volkswagen continue to battle it out for dominance of the UK's electric van market. Several brands are within touching distance of the top spot, signalling the growing range of electric vans that are on offer.

Several brands are close to or meeting the 10% sales share target for battery electric vans so far this year, demonstrating the impact of the ZEV mandate for vans on this segment of the market.

As with cars, Toyota has stepped up on vans - an impressive 9% of its sales were BEVs. Meanwhile Ford, which has consistently held around one-third of the diesel van market but whose sales have rarely included more than 3% BEVs - as well as Nissan, which had more than 50% market share of battery electric vans until mid-2020 - are drifting.

BEV market share (YTD)

	Marque	BEVs ▼	Share of UK BEV vans (%)
1.	VOLKSWAGEN	682	14.5%
2.	VAUXHALL	629	13.4%
3.	RENAULT	580	12.3%
4.	PEUGEOT	538	11.4%
5.	TOYOTA	419	8.9%
6.	CITROEN	417	8.9%
7.	FORD	397	8.4%
8.	DFSK	310	6.6%
9.	MERCEDES-BENZ	248	5.3%
10.	MAXUS	201	4.3%
11.	NISSAN	157	3.3%
12.	FIAT	92	2.0%
13.	RENAULT TRUCKS	16	0.3%
14.	GOUPIL	6	0.1%
15.	BYD	4	0.1%
16.	ETESIA	3	0.1%

Sales by fuel type, last 12 months vs previous

Fuel	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	303,418	18.2% ↑	91.04%	-0.57%...
BEV	21,410	20.0% ↑	6.42%	0.06% ↑
Petrol	6,423	74.7% ↑	1.93%	0.62% ↑
Hybrid	2,014	1.5% ↑	0.6%	-0.1% ↓
Grand total	333,266	18.9% ↑	100%	0%

Total sales by fuel type, latest month vs last year

Fuel	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	44,547	2,444 ↑	91.65%	-0.53% ↓
BEV	2,727	26 ↑	5.61%	-0.3% ↓
Petrol	1,049	446 ↑	2.16%	0.84% ↑
Hybrid	285	17 ↑	0.59%	-0% ↓
Grand total	48,608	2,933 ↑	100%	0%

Top van sellers' BEV sales (YTD)

Marque	Total ▼	BEVs	BEV %	Δ
FORD	28,414	397	1.4%	0.4% ↑
VOLKSWAGEN	8,904	682	7.7%	5.8% ↑
VAUXHALL	7,979	629	7.9%	-12.1% ↓
CITROEN	7,348	417	5.7%	-1.6% ↓
RENAULT	6,107	580	9.5%	9.1% ↑
TOYOTA	5,979	419	7.0%	0.2% ↑
MERCEDES-BE...	5,725	248	4.3%	0.6% ↑
PEUGEOT	5,377	538	10.0%	-2.7% ↓
FIAT	1,982	92	4.6%	0.4% ↑
NISSAN	1,929	157	8.1%	8.1% ↑
MAXUS	1,902	201	10.6%	-61.4% ↓
IVECO	1,537	3	0.2%	0.2% ↑
LAND ROVER	1,506	0	0.0%	0.0%
ISUZU	788	0	0.0%	0.0%
RENAULT TRUC...	737	16	2.2%	0.7% ↑
MAN	539	0	0.0%	-0.1% ↓
SUZUKI	474	0	0.0%	0.0%
ISUZU TRUCKS	375	0	0.0%	0.0%
DFSK	310	310	100.0%	0.0%
KGM	301	0	0.0%	-

HGVs

Monthly electric HGV registrations



HGVs by fuel type, last 12 months vs previous

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	42,999	3,598 📈	99.35%	-0.36% 📉
BEV	283	168 📈	0.65%	0.36% 📈
Grand total	43,282	3,766 📈	100%	0%

HGVs latest month vs last year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	4,351	-12.8% 📉	99.63%	-0.07% 📉
BEV	16	6.7% 📈	0.37%	0.07% 📈
Grand total	4,367	-12.7% 📉	100%	0%

16 battery electric HGVs were sold in February 2024, an increase of 100% against the same time last year. However, with market share floating around 0.5%, the market needs government incentives in order to pick up pace so we do not fall behind in meeting the UK Government's target of ending sales of fossil fuel HGVs by 2040. With EU legislation already in place to reduce HGV emissions on 2019 levels by 90% by 2040, with interim targets of 45% by 2030 and 65% by 2035, the UK risks domestic manufacture falling behind international competitors. The zero emission HGV and coach infrastructure strategy promised for 2024 cannot come quickly enough.

Motorbikes

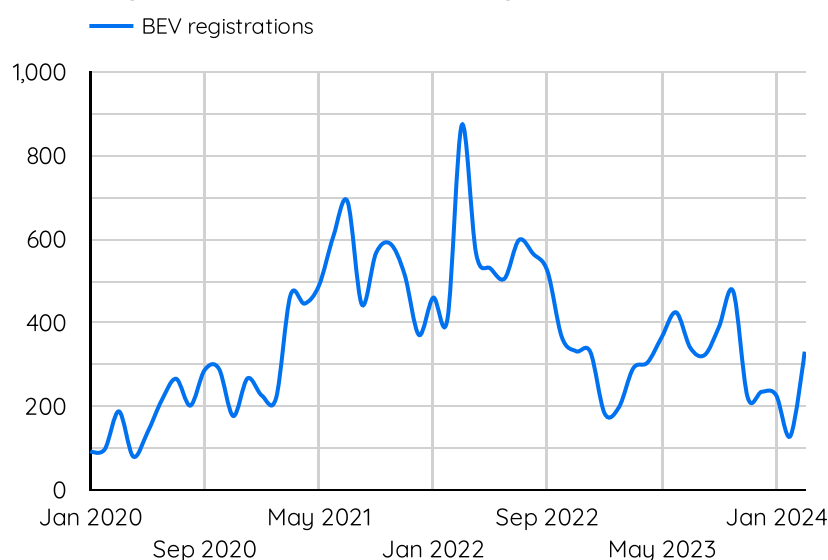
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	100,739	-0.7% 📉	96.39%	1.08% 📈
BEV	3,759	-24.6% 📉	3.6%	-1.09% 📉
Grand total	104,512	-1.8% 📉	100%	0%

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	5,314	5.6% 📈	95.89%	-0.61% 📉
BEV	227	24.0% 📈	4.1%	0.59% 📈
Grand total	5,542	6.3% 📈	100%	0%

Monthly electric motorbike registrations



Electric motorbikes have lost some market share as the market remains in seasonal hibernation. This will likely change as we head into the warmer part of the year, but the fundamental issues with the market remain - the smaller CC segments are undercut by e-bikes, and larger CC segments lack robust competition within the market. Although it is generally favourable that riders substitute mopeds for much more environmentally friendly e-bikes - the lack of direction within larger capacity segments is frustrating for both riders, and those that cater to them.

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. 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'.