

## Petrol cars record smallest share of the market ever

New car registrations by fuel type to Jun 2024

Electric Cars

32,103

↑ 6.2%

Electric Vans

1,490

↓ -20.6%

Electric Motorbikes

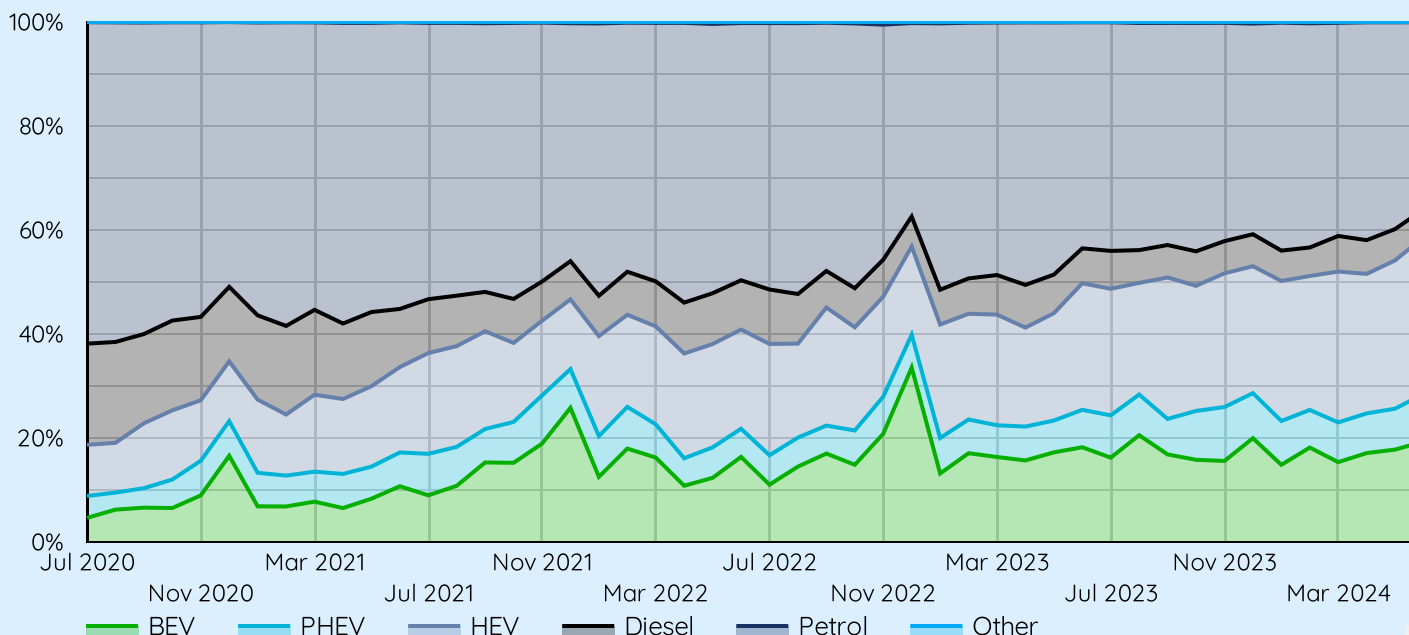
408

↓ -3.8%

Electric HGVs

30

↓ -11.8%



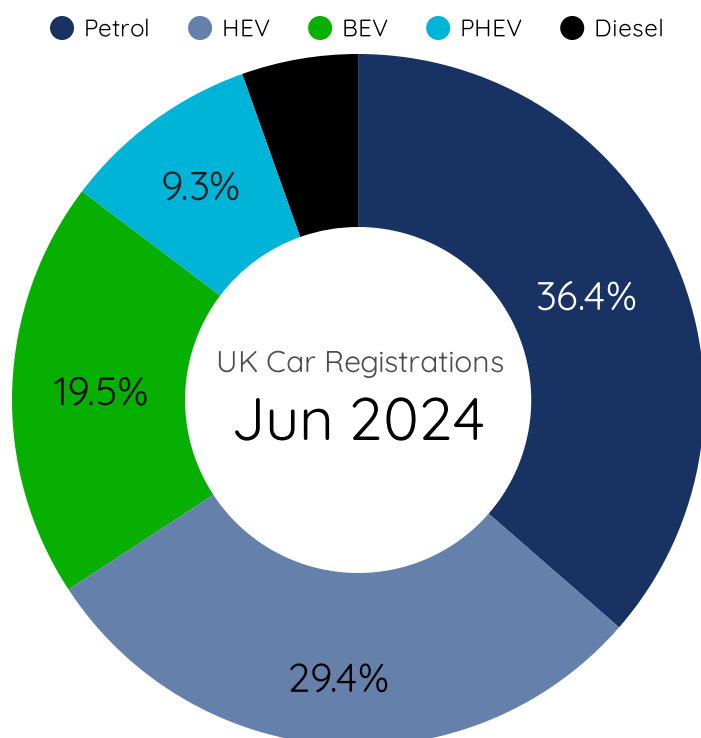
### Key points

- Manufacturers significantly reduced the gap in compliance with the UK's ZEV mandate, with strong sales of electric cars in June.
- Sales of electric cars rose by 1 percentage point to reach 19.5% of all new cars - nearly 1 in five new cars bought in June in the UK was fully electric. This is higher than the 19% of sales that is needed to meet ZEV mandate obligations.
- BMW is nipping at Tesla's heels, and looks likely to become the UK's biggest seller of electric cars.
- ZEV mandate targets are looking achievable, but would be imperilled if a new UK government follows in the footsteps of Brussels and imposes tariffs on Chinese EVs.
- EV sales are projected to strengthen in H2, and the UK will likely end the year on 18.2% market share.

### 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](mailto:data@newautomotive.org)



### Ben Nelmes, CEO of New AutoMotive, said:

"Politicians are trudging the final miles of their campaign routes as this bulletin goes to print. Whoever is in government on Friday will preside over a country with just over 1 million fully electric cars. By the time of the next general election, there will likely be 5 million on the road."

"The UK's EV transition is only set to become more important for policymakers, as it becomes more of a reality for motorists. It is great to see EV sales powering ahead in the June figures."

"One of the big questions facing Ministers is whether to follow in Brussels' footsteps and impose tariffs on Chinese EVs. Doing so would be bad for consumers, the environment, and disruptive to our own car industry."

## Cars summary

Battery EVs' best ever start to the year continues, growing by 9.6% above last year's sales. Unlike in previous years, growth is coming from non-electric brands, as Tesla's sales fall and others increase. BMW are still nipping at the heels of Tesla, growing their share of the UK's electric car market by 3 percentage points while the American carmaker fell by 6 points.

The trend away from pure petrol/diesel vehicles to vehicles with a battery is becoming more pronounced with every month, with just over a third of new cars being petrol - a trend that looks set to accelerate.

Thanks to the ZEV mandate's flexibilities, which include credits for outperformance on the emissions of ICE vehicle sales, **industry only needs 19% EV market share over the rest of the year - rather than the headline 22% - to meet their target.** They've already reached 16.9%, meaning that manufacturers only need to sell a total of an additional 1,800 EVs a month to meet the mandate. Discounts, promotions and mythbusting are working.

Imperilling this rosy picture is the risk that a new UK government imposes tariffs on Chinese EVs. A significant volume of the electric cars featuring in this data originate from China. Tesla, for example, has made a significant number of right hand drive models in Shanghai. Tariffs would significantly hit UK EV sales, making ZEV mandate targets harder to reach.

## BEV market share, last 12 months vs previous

Marque	BEV Regs ▼	Δ	% of UK BEVs	Δ
TESLA	44,860	-12,874 ↓	14%	-6% ↓
BMW	34,339	12,268 ↑	11%	3% ↑
MG	24,827	373 ↑	8%	-1% ↓
AUDI	24,288	7,398 ↑	8%	2% ↑
MERCEDES-BENZ	22,794	8,831 ↑	7%	2% ↑
VOLKSWAGEN	17,892	-5,888 ↓	6%	-3% ↓
KIA	15,896	1,595 ↑	5%	0% ↑
HYUNDAI	13,990	383 ↑	4%	-0% ↓
VOLVO	13,943	5,947 ↑	4%	2% ↑
VAUXHALL	10,664	-2,618 ↓	3%	-1% ↓

## Last 12 months sales, vs previous 12 months

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	765,349	-18,023 ↓	41.65%	-6.03% ↓
HEV	491,244	148,806 ↑	26.73%	5.89% ↑
BEV	312,000	23,779 ↑	16.98%	-0.56% ↓
PHEV	150,570	46,930 ↑	8.19%	1.89% ↑
Others	118,452	-3,948 ↓	100%	92.55% ↑
<b>Grand total</b>	<b>1,837,615</b>	<b>194,604 ↑</b>	<b>100%</b>	<b>0%</b>

## Latest month, changes vs last year

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	59,869	-12,245 ↓	36%	-7.47% ↓
HEV	50,124	9,744 ↑	30.14%	5.8% ↑
BEV	32,103	1,868 ↑	19.3%	1.08% ↑
PHEV	15,245	3,315 ↑	9.17%	1.98% ↑
Others	8,962	-2,187 ↓	100%	93.28% ↑
<b>Grand total</b>	<b>166,303</b>	<b>395 ↑</b>	<b>100%</b>	<b>0%</b>

## Top car brands' electrification, last 12 months

Marque	Total ▼	BEVs	BEV %	Δ
VOLKSWAGEN	158,890	17,892	11.3%	-4.7% ↓
FORD	123,510	3,605	2.9%	0.6% ↑
AUDI	122,963	24,288	19.8%	4.8% ↑
BMW	116,196	34,339	29.6%	6.2% ↑
KIA	103,568	15,896	15.3%	0.4% ↑
TOYOTA	98,184	4,736	4.8%	4.2% ↑
NISSAN	94,428	9,832	10.4%	-2.7% ↓
VAUXHALL	93,953	10,664	11.4%	-4.7% ↓
MERCEDES-BE...	88,938	22,794	25.6%	6.1% ↑
HYUNDAI	82,353	13,990	17.0%	0.2% ↑
MG	82,228	24,827	30.2%	-9.1% ↓
SKODA	69,811	8,286	11.9%	-0.6% ↓
PEUGEOT	65,215	7,053	10.8%	-7.4% ↓
VOLVO	52,488	13,943	26.6%	6.1% ↑
RENAULT	51,089	4,531	8.9%	-11.9% ↓
LAND ROVER	45,886	0	0.0%	0.0%
TESLA	44,859	44,859	100.0%	0.0%
MINI	39,237	5,643	14.4%	-2.0% ↓
SEAT	36,192	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	ZEV credit shortfall/surplus
VW	210,361	18.1%	12.3%	-12,295
STELLANTIS	106,620	21.4%	16.8%	-4,941
HYUNDAI	98,108	15.4%	16.5%	1,061
BMW	79,946	22.0%	24.3%	1,852
FORD	53,420	19.3%	6.9%	-6,647
TOYOTA	52,653	10.8%	11.1%	124
NISSAN	51,355	16.5%	11.7%	-2,469
MERCEDES	48,241	22.0%	23.6%	793
SAIC	41,566	22.0%	23.7%	721
RENAULT	40,983	16.9%	4.9%	-4,941
TATA	34,085	10.8%	6.0%	-1,652
TESLA	21,978	22.0%	100.0%	17,143
HONDA	15,631	19.4%	13.2%	-967
MAZDA	12,670	11.7%	5.0%	-842
SUZUKI	12,444	20.6%	0.0%	-2,561
BYD	2,712	22.0%	100.0%	2,115
SUBARU	1,238	21.6%	29.8%	102
GEELY	1,001	15.7%	25.4%	96
GREAT WALL	874	22.0%	100.0%	682
ASTON MARTIN	333	18.7%	0.0%	-62

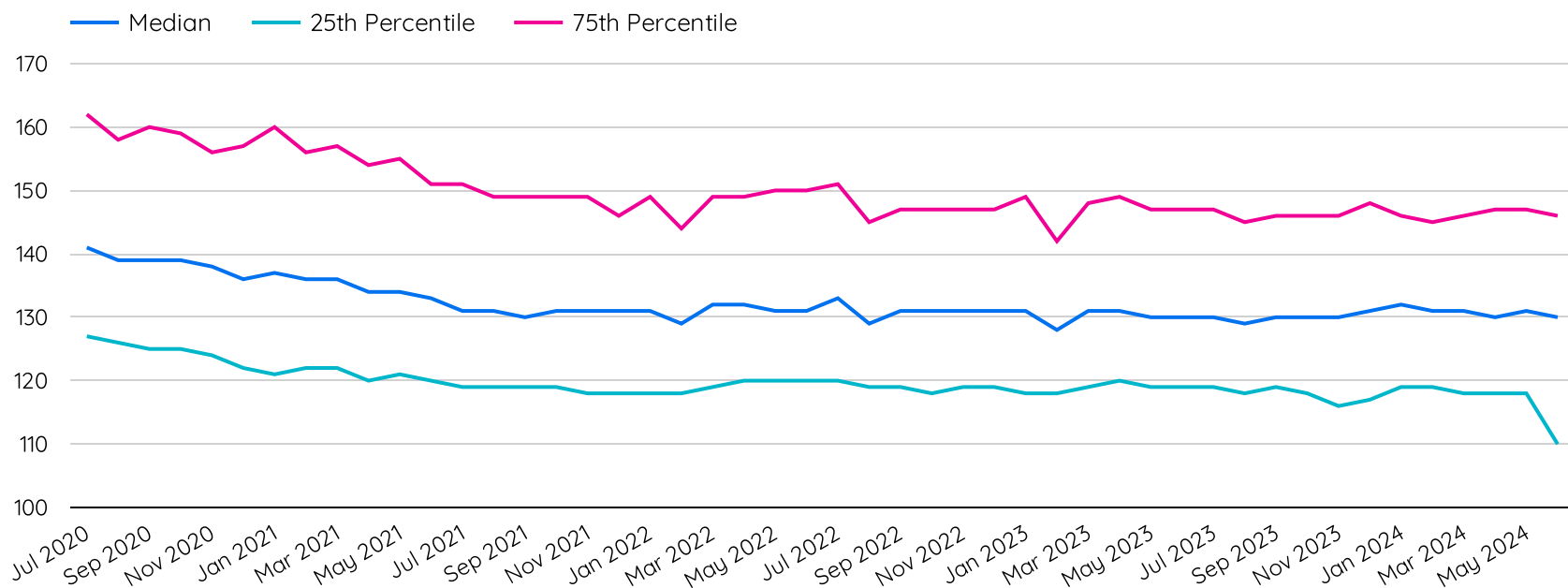
**H1:** The score at half time sees roughly half of the major manufacturers ahead of their targets with modest surpluses. Others have accrued a deficit from a slow start to the year, which is slowly being recouped. 16.8% of GB car sales this year were fully electric. While that appears far below the headline 22% ZEV mandate target, **we estimate that only 19% of sales over the rest of the year must be electric for manufacturers to meet compliance via the flexibilities that are available, leaving the UK on 18.2% overall.**

The top 7 car manufacturers by volume all gained on or further exceeded their targets in June, helped by discounting: the share of BEVs sold by Vauxhall and Peugeot, members of the Stellantis group, reached 20% and 21% respectively in May - all without reducing sales of ICE cars. 18% of Nissans were EVs too, their best result since December 2022. Further down the list, MG and Mercedes, which have avoided discounting, lost market share but remain on track. In the top 12, only Renault and Tata (owners of Jaguar Land Rover) are behind and going backwards.

**The implied ZEV target** - the ZEV mandate requires manufacturers to meet an increasing percentage target of electric cars (22% in 2024) by selling more electric cars as a proportion of sales. They can also generate additional 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.

## ICE Car CO2 Emissions Ratings

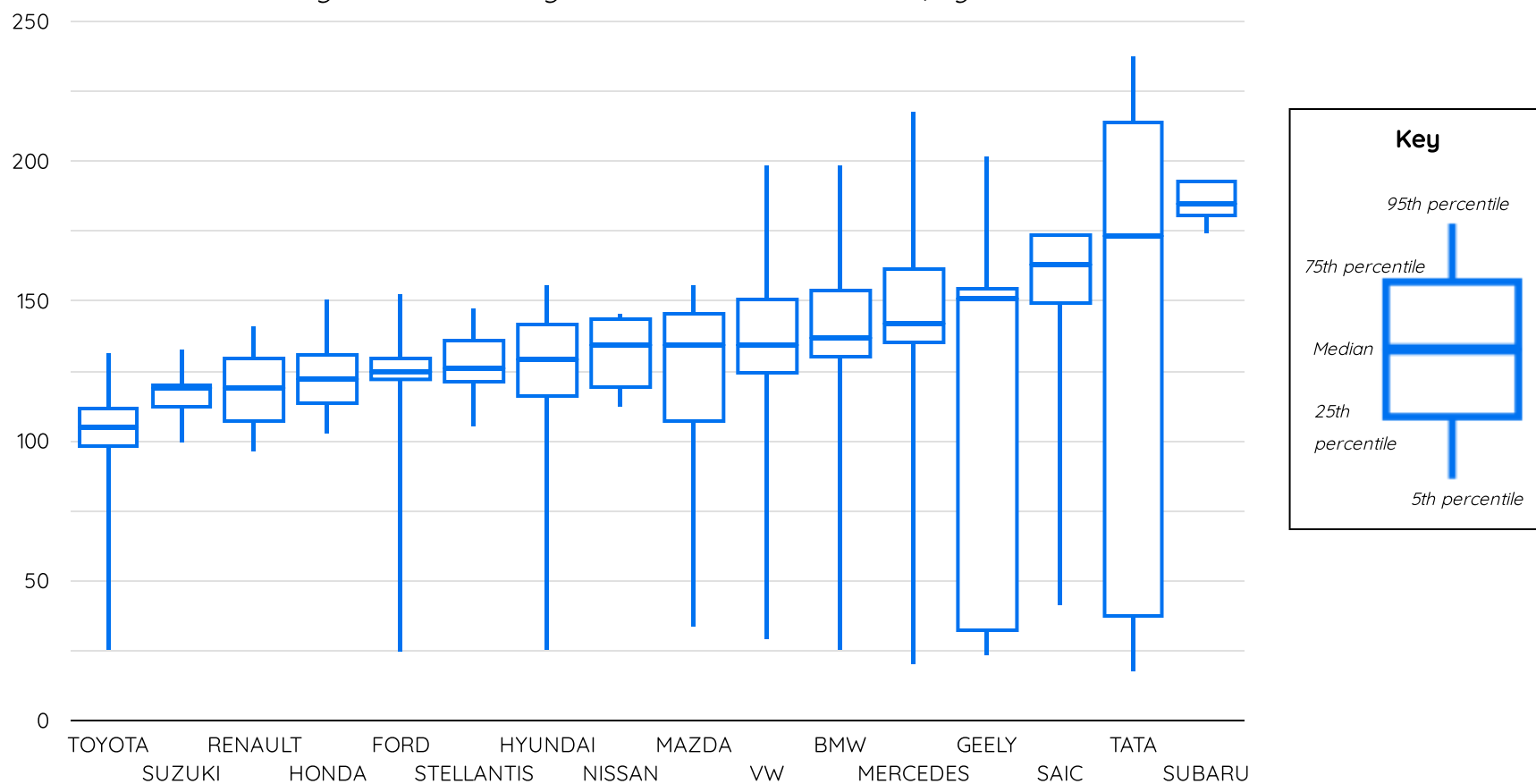
Average CO2 ratings of newly registered internal combustion engine cars by month of registration, gCO2/km



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

Progress for battery electric in van-land remains more challenging. In respect of manufacturers' EV progress, this is a much more polarised market than for cars.

Ranked by total van sales in June, second, third, fifth and seventh place VW, Vauxhall, Peugeot and Citroen (the latter 3 all part of the Stellantis group) are all in striking distance of their targets or exceeding them.

Meanwhile first-placed Ford remain miles off, whilst sixth-placed Mercedes are not far ahead. They were joined by Renault which had a bad month but should meet the target.

We anticipate that manufacturers' efforts are focused on the car market in 2024, unsurprising given the lower volumes of vans and the flexibility that allows them to borrow to meet up to to 90% of their allowances in 2024.

In the coming weeks we plan to publish a summary of where each manufacturer is in respect of their Zero Emission Van mandate obligations.

## BEV market share (YTD)

	Marque	BEVs ▼	Share of UK BEV vans (%)
1.	VAUXHALL	1,428	16.6%
2.	PEUGEOT	1,398	16.2%
3.	VOLKSWAGEN	1,128	13.1%
4.	RENAULT	825	9.6%
5.	CITROEN	703	8.2%
6.	FORD	691	8.0%
7.	TOYOTA	572	6.6%
8.	MERCEDES-BENZ	448	5.2%
9.	MAXUS	440	5.1%
10.	NISSAN	411	4.8%
11.	DFSK	313	3.6%
12.	FIAT	135	1.6%
13.	RENAULT TRUCKS	57	0.7%
14.	BYD	29	0.3%
15.	GOUPIL	13	0.2%
16.	IVECO	7	0.1%

## Sales by fuel type, last 12 months vs previous

Fuel	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	304,195	13.4% ↑	91.08%	-0.57%...
BEV	20,972	13.4% ↑	6.28%	-0.03%...
Petrol	6,672	71.9% ↑	2%	0.67% ↑
Hybrid	2,135	2.6% ↑	0.64%	-0.07%...
<b>Grand total</b>	<b>333,975</b>	<b>14.1% ↑</b>	<b>100%</b>	<b>0%</b>

## Total sales by fuel type, latest month vs last year

Fuel	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	28,385	-2,576 ↓	92.65%	0.34% ↑
BEV	1,490	-386 ↓	4.86%	-0.73% ↓
Petrol	596	56 ↑	1.95%	0.34% ↑
Hybrid	166	2 ↑	0.54%	0.05% ↑
<b>Grand total</b>	<b>30,637</b>	<b>-2,904 ↓</b>	<b>100%</b>	<b>0%</b>

## Top van sellers' BEV sales (YTD)

Marque	Total ▼	BEVs	BEV %	Δ
FORD	54,459	691	1.3%	0.1% ↑
VAUXHALL	16,514	1,428	8.6%	-10.2% ↓
VOLKSWAGEN	15,963	1,128	7.1%	4.3% ↑
RENAULT	13,316	825	6.2%	4.0% ↑
CITROEN	12,553	703	5.6%	-0.4% ↓
PEUGEOT	11,726	1,398	11.9%	1.7% ↑
MERCEDES-BE...	11,529	448	3.9%	0.1% ↑
TOYOTA	8,760	572	6.5%	-1.3% ↓
NISSAN	3,701	411	11.1%	7.0% ↑
MAXUS	3,681	440	12.0%	-39.1% ↓
IVECO	3,432	7	0.2%	0.2% ↑
FIAT	2,712	135	5.0%	0.3% ↑
LAND ROVER	2,561	0	0.0%	0.0%
ISUZU	1,980	0	0.0%	0.0%
RENAULT TRUC...	1,464	57	3.9%	2.1% ↑
MAN	1,215	0	0.0%	-0.1% ↓
SUZUKI	746	0	0.0%	0.0%
KGM	718	0	0.0%	-
ISUZU TRUCKS	710	0	0.0%	0.0%
DFSK	313	313	100.0%	0.0%

## HGVs

Monthly electric HGV registrations



HGVs by fuel type, last 12 months vs previous

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	43,703	3,041 ↑	99.35%	-0.3% ↓
BEV	284	142 ↑	0.65%	0.3% ↑
<b>Grand total</b>	<b>43,987</b>	<b>3,183 ↑</b>	<b>100%</b>	<b>0%</b>

HGVs latest month vs last year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	3,174	-13.8% ↓	99.06%	-0.02% ↓
BEV	30	-11.8% ↓	0.94%	0.02% ↑
<b>Grand total</b>	<b>3,204</b>	<b>-13.8% ↓</b>	<b>100%</b>	<b>0%</b>

30 battery electric HGVs were sold in June 2024. However, with market share still stuck below 1%, the market desperately needs better government incentives to pick up pace and get on track with the UK Government's target of ending sales of fossil fuel HGVs by 2040.

With EU legislation in this area now in place, the UK risks domestic manufacture falling behind international competitors. Perhaps a new government will pick up the baton and produce a zero emission HGV and coach infrastructure strategy, which was promised for 2024 but remains missing in action.

## Motorbikes

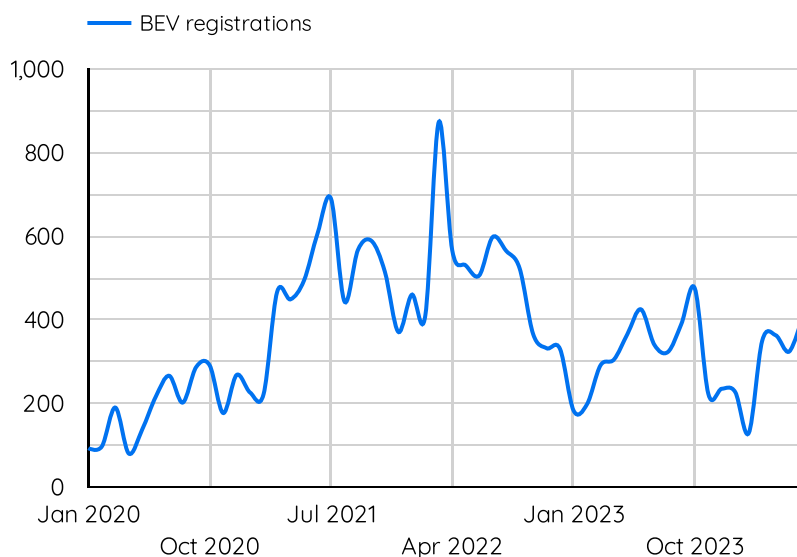
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	100,974	0.0% ↓	96.38%	0.63% ↑
BEV	3,778	-15.7% ↓	3.61%	-0.64% ↓
<b>Grand total</b>	<b>104,765</b>	<b>-0.7% ↓</b>	<b>100%</b>	<b>0%</b>

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	5,315	5.6% ↑	95.89%	-0.6% ↓
BEV	227	24.0% ↑	4.1%	0.59% ↑
<b>Grand total</b>	<b>5,543</b>	<b>6.3% ↑</b>	<b>100%</b>	<b>0%</b>

Monthly electric motorbike registrations



It is hard to draw solid conclusions about the electric motorbike market, as June sales appear lower than they were in January, and much lower than they were at their peak in April 2022. This variation could be a result of incentives withdrawn last year. At the same time, there is currently no supply-side legislation to incentivise EV motorcycle uptake (such as the ZEV Mandate). Although motorcycles account for just 5% of the vehicle market in the UK, it is important to provide a sense of direction to the market, as riders and industry could potentially be required to make the switch at a later date.



## 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'.