

Summer surge in EV sales heralds cheaper driving for UK motorists

New car registrations by fuel type to Aug 2024

Electric Cars

17,786

↑ 9.7%

Electric Vans

903

↓ -30.1%

Electric Motorbikes

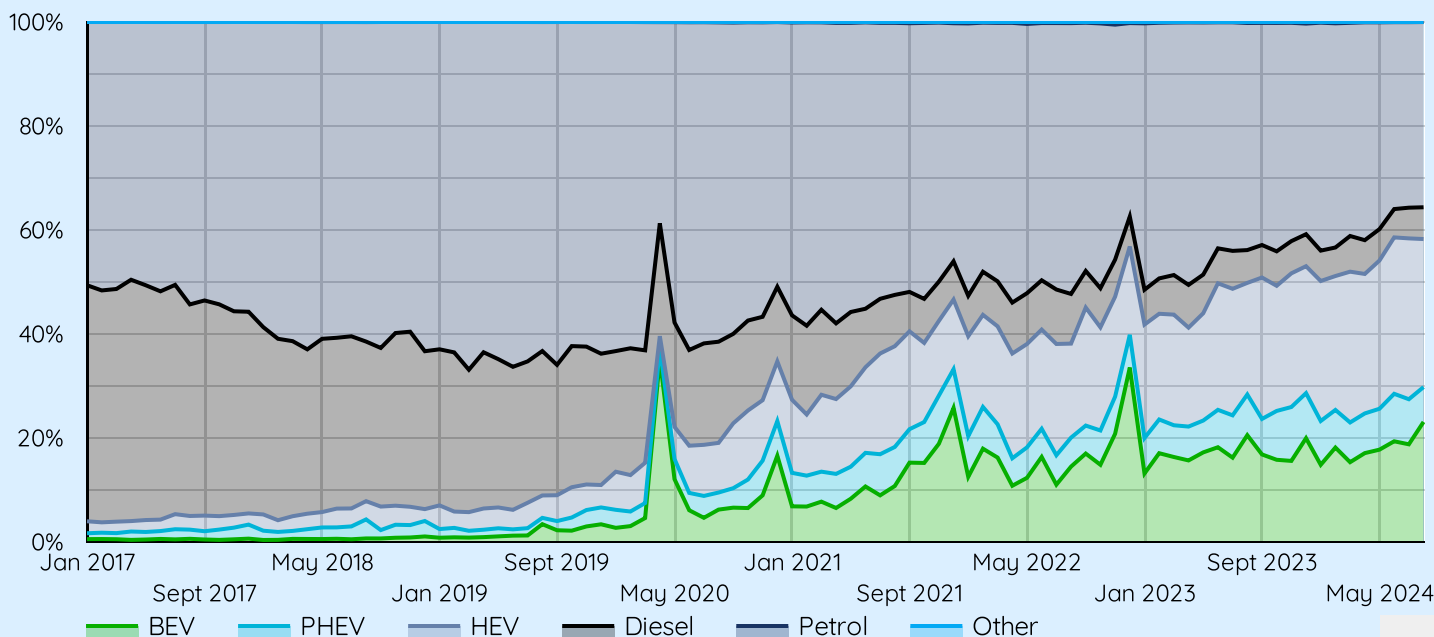
318

↑ 1.3%

Electric HGVs

21

↓ -58.8%

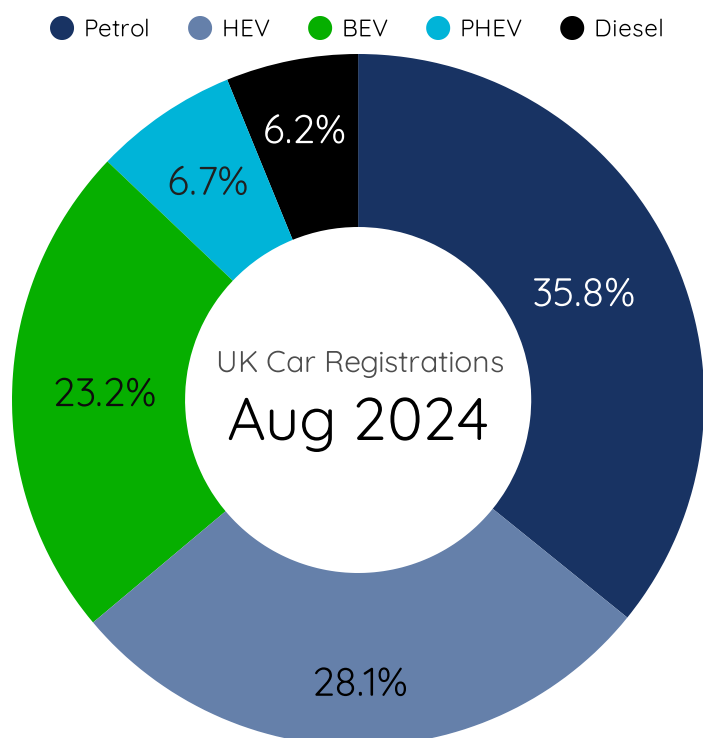


Key points

- UK electric car sales grew 10% in August, beating legal 22% targets and bucking European trends.
- Chinese brands saw a fall in BEV sales in August, defying expectations of a flood of vehicles from China following the introduction of EU tariffs.
- The UK car ZEV mandate is approaching credit surplus when CO2 flexibilities are taken into account, which is putting manufacturers comfortably on course to comply with the new regulations.
- The market share of electric vans held steady at 6%, but estimated real targets published for the first time in this data release show that .4 or 5 of the 8 largest van makers are likely to exceed their ZEV mandate targets, in 2024 - for others this will be more of a stretch.
- Electric HGVs and motorbikes continue to tread water, awaiting policy action from the new government.

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



Ben Nemes, CEO of New AutoMotive, said:

"It is great to see continued growth in the number of people opting for an electric car. Electric cars are much cheaper to run, nicer to drive and they are key to hitting net zero, so it is great to see more and more people discovering the benefits of going electric."

"The data also show a significant fall in sales of purely petrol and diesel cars as consumers shun older, polluting technologies. The government can have confidence in following through on its manifesto commitment to reintroduce the 2030 ban on sales of petrol and diesel cars."

"Ministers should also be reassured that the predicted flood of Chinese electric cars is still barely a trickle, and the strong sales data are largely the result of action by European manufacturers."

Cars summary

Growth accelerating: Sales of battery electric cars grew 10% in August, and took a higher market share than at any point since December 2022. Undoubtedly, the source of this growth is the UK's EV targets, which are effectively redirecting the automotive industry towards electrification. You can find more about the effect of these targets on the market on the next page.

Not driven by Chinese brands, or Tesla: In previous years, the UK's electric car sales have been heavily dependent on Tesla, which was the dominant brand in the electric segment. In every monthly bulletin for the last year, we have seen Tesla shed its share of the market. Growth in EV sales has not come from Chinese brands, either, many of which recorded a significant fall in EV sales in August.

More electric brands, more choice: Growth in EV sales is coming from a broad range of brands, notably led by BMW, Mercedes and the Stellantis-owned brands. Almost a third of BMWs sold in the last 12 months are battery electric, and a quarter of new Mercedes cars have no tailpipe. Motorists have a greater choice of battery electric models than ever before.

Dwindling ICE sales: Petrol remains at a very low level, with just over a third of new cars running solely on the fuel, while just 6% of new cars in the last 12 months were diesels. This makes the new government's plan to end sales of these vehicles in 2030 look highly achievable.

BEV market share, last 12 months vs previous

Marque	BEV Regs	Δ	% of UK BEVs	Δ
TESLA	43,333	-20,349...	14%	-7% ↓
BMW	34,785	10,426 ↑	11%	3% ↑
AUDI	24,468	6,531 ↑	8%	2% ↑
MERCEDES-BENZ	23,495	8,803 ↑	7%	3% ↑
MG	22,585	-5,285 ↓	7%	-2% ↓
VOLKSWAGEN	17,809	-6,979 ↓	6%	-3% ↓
VOLVO	15,816	7,214 ↑	5%	2% ↑
KIA	15,234	-298 ↓	5%	-0% ↓
HYUNDAI	14,532	1,376 ↑	5%	0% ↑
VAUXHALL	11,304	-2,492 ↓	4%	-1% ↓

Last 12 months sales, vs previous 12 months

Fuel Type	Regs.	Δ	Mkt. Share	Δ
Petrol	749,355	-41,560 ↓	40.69%	-6.12% ↓
HEV	506,772	148,287 ↑	27.52%	6.3% ↑
BEV	318,188	12,529 ↑	17.28%	-0.81% ↓
PHEV	150,742	39,368 ↑	8.18%	1.59% ↑
Diesel	114,257	-6,072 ↓	6.2%	-0.92% ↓
Grand total	1,841,790	152,202 ↑	100%	0%

Latest month, changes vs last year

Fuel Type	Regs.	Δ	Mkt. Share	Δ
Petrol	27,440	-7,046 ↓	35.62%	-8.05% ↓
HEV	21,930	4,979 ↑	28.47%	7% ↑
BEV	17,786	1,566 ↑	23.09%	2.55% ↑
PHEV	5,162	-1,018 ↓	6.7%	-11.2% ↓
Diesel	4,707	-275 ↓	6.11%	-0.2% ↓
Grand total	77,031	-1,942 ↓	100%	0%

Top car brands' electrification, last 12 months

Marque	Total	BEVs	BEV %	Δ
VOLKSWAGEN	159,633	17,809	11.2%	-5.1% ↓
AUDI	121,653	24,468	20.1%	4.7% ↑
FORD	118,393	4,116	3.5%	1.4% ↑
BMW	117,229	34,785	29.7%	4.2% ↑
KIA	103,928	15,234	14.7%	-1.0% ↓
TOYOTA	97,218	5,499	5.7%	5.0% ↑
NISSAN	96,810	10,443	10.8%	-1.8% ↓
MERCEDES-BE...	90,912	23,495	25.8%	5.3% ↑
VAUXHALL	89,850	11,304	12.6%	-3.2% ↓
HYUNDAI	83,117	14,532	17.5%	1.2% ↑
MG	82,001	22,585	27.5%	-14.0% ↓
SKODA	68,844	8,779	12.8%	0.5% ↑
PEUGEOT	66,315	8,712	13.1%	-3.4% ↓
VOLVO	55,860	15,816	28.3%	7.6% ↑
RENAULT	52,847	4,597	8.7%	-11.7% ↓
LAND ROVER	47,148	0	0.0%	0.0%
TESLA	43,333	43,333	100.0%	0.0%
MINI	38,739	6,289	16.2%	0.1% ↑
SEAT	37,326	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	Est real ZEV sales target	BEV % of car sales	ZEV credit shortfall/surplus
VW	263,478	18.2%	13.1%	-13,362
STELLANTIS	129,468	21.4%	18.4%	-3,901
HYUNDAI	121,676	15.3%	16.6%	1,526
BMW	95,801	22.0%	26.0%	3,795
FORD	65,780	18.7%	7.6%	-7,345
TOYOTA	64,082	10.8%	10.7%	-120
NISSAN	61,433	16.4%	11.8%	-2,805
MERCEDES	59,038	22.0%	23.9%	1,151
SAIC	50,227	22.0%	23.6%	787
RENAULT	49,900	17.2%	5.8%	-5,702
GEELY	41,921	18.2%	36.8%	7,772
TATA	40,880	10.8%	5.5%	-2,188
TESLA	27,275	22.0%	100.0%	21,275
HONDA	19,143	19.1%	15.1%	-777
SUZUKI	15,507	20.3%	0.0%	-3,141
MAZDA	15,125	11.1%	5.4%	-866
BYD	3,829	22.0%	100.0%	2,987
SUBARU	1,395	21.5%	29.1%	105
GREAT WALL	938	22.0%	100.0%	732
ASTON MARTIN	366	20.0%	0.0%	-73

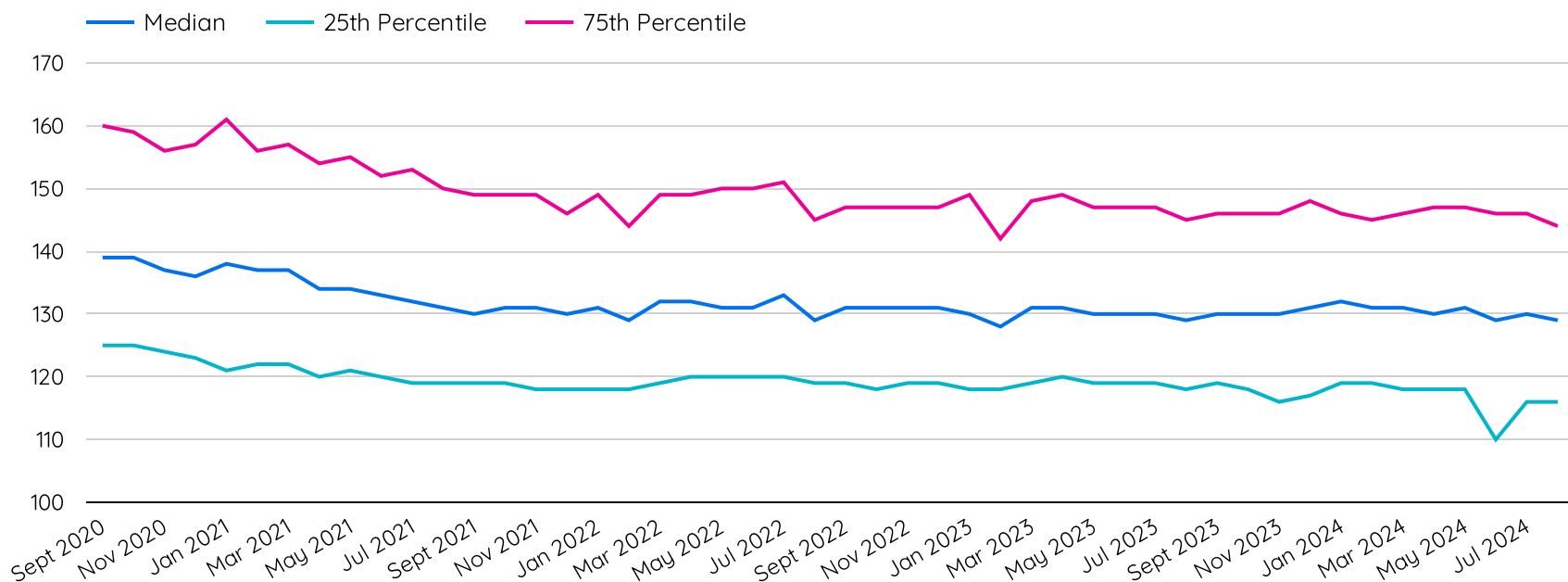
August and July have seen manufacturers make significant progress towards their ZEV mandate obligations. Our estimates are that the market as a whole stands with a rough balance of supply and demand for ZEV mandate credits. Carmakers are overwhelmingly earning credits from ZEV sales, but a significant amount are likely to be earned from the improvement in the average CO2 ratings of newly registered vehicles, visible in the DVLA data on which this bulletin is based every month. This is the CO2 flexibility in action, providing manufacturers who have focused more on fuel efficiency improvements or hybrid technologies with time to adapt to the UK's new ZEV-focused approach to decarbonising transport.

August's sales were so strong that there need not be any additional overall growth in BEV share of sales in the remaining months of the year for the market to comply with ZEV mandate targets. Those manufacturers who are still behind on their targets, and who have new BEV models coming to market in future years, are likely to make use of the borrowing facility, betting on the success of their new products.

Estimated real ZEV sales 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 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

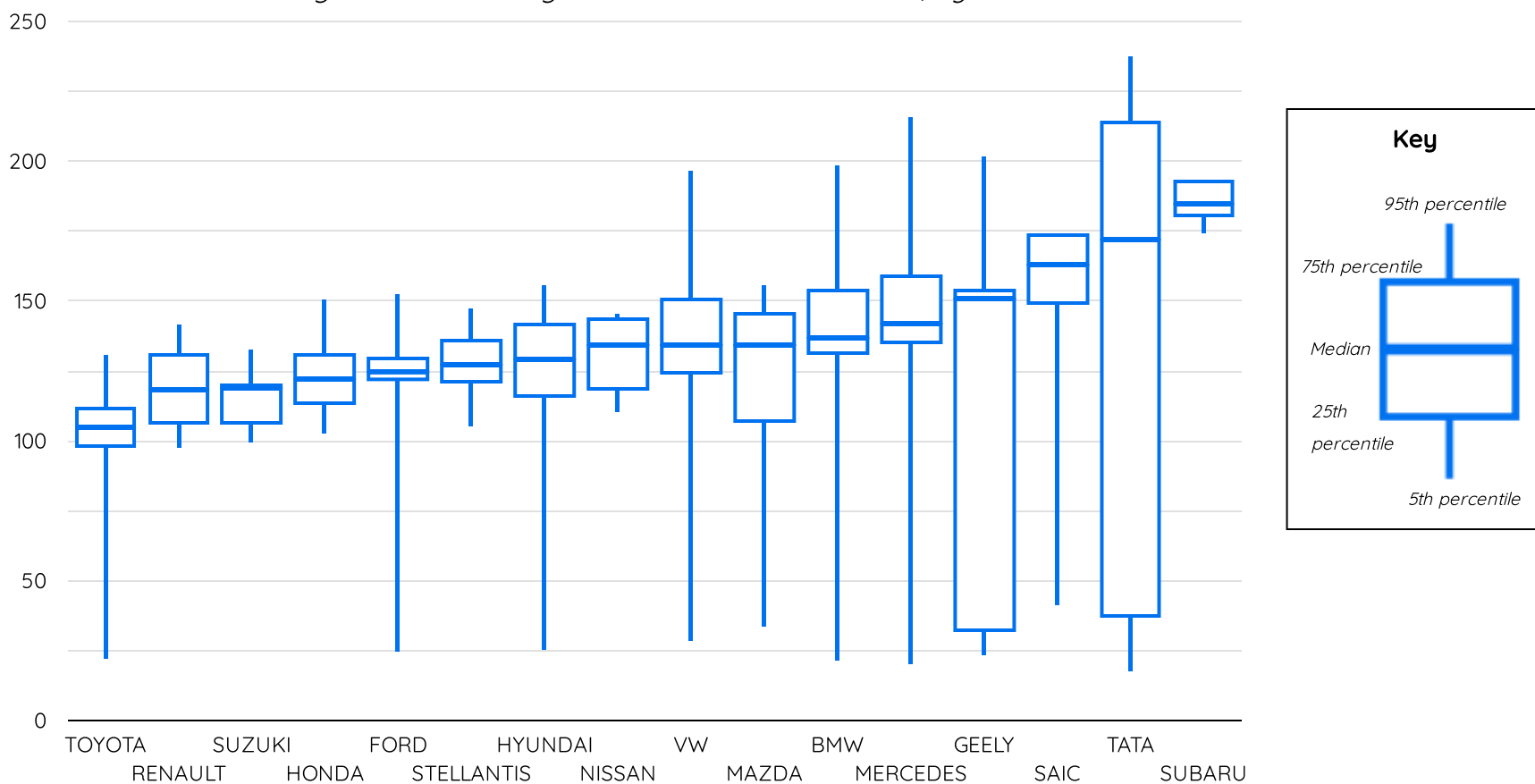
Average CO2 ratings of newly registered internal combustion engine cars by month of registration, gCO2/km



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.

There has been a steady trend of improvements in WLTP emissions ratings. This is likely to be driven by the flexibilities in the ZEV mandate, which rewards car makers who sell more fuel efficient/lower emission vehicles.

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



Vans summary

Vans had a fairly typical month, with battery electric again accounting for 6% market share, driven by widely divergent manufacturer performance.

Peugeot were responsible for more than one-third of electric van sales in August, and one-third of their van sales were electric - way in excess of the headline 10% target. Nissan, Toyota and Maxus also achieved well over 10% battery electric market share.

However the biggest seller, Ford, continues to struggle, with less than 1% of their vans electric this month. Nevertheless Ford reports a strong order book for the new electric E-Transit Custom, an electric version of the Transit Courier in early 2025, and an upcoming extended-range E-Transit, said to be good for 249 miles.

Nevertheless the picture is considerably more rosy than the headline suggests, thanks to large volumes of transferable surplus credits from the easy-to-meet CO2 trading scheme for diesel vans. We will publish estimated real targets for van makers in respect of their Zero Emission mandate obligations next month.

BEV market share (YTD)

	Marque	BEVs ▼	Share of UK BEV vans (%)
1.	PEUGEOT	1,976	18.1%
2.	VAUXHALL	1,806	16.5%
3.	VOLKSWAGEN	1,400	12.8%
4.	RENAULT	954	8.7%
5.	CITROEN	819	7.5%
6.	FORD	803	7.4%
7.	TOYOTA	728	6.7%
8.	MERCEDES-BENZ	678	6.2%
9.	NISSAN	601	5.5%
10.	MAXUS	506	4.6%
11.	DFSK	318	2.9%
12.	FIAT	159	1.5%
13.	RENAULT TRUCKS	69	0.6%
14.	BYD	40	0.4%
15.	GOUPIL	23	0.2%
16.	IVECO	9	0.1%

Sales by fuel type, last 12 months vs previous

Fuel	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	302,863	9.6% ↑	91.16%	-0.37%...
BEV	20,396	5.0% ↑	6.14%	-0.3% ↓
Petrol	6,732	64.6% ↑	2.03%	0.67% ↑
Hybrid	2,242	9.5% ↑	0.67%	-0% ↓
Grand total	332,235	10.1% ↑	100%	0%

Total sales by fuel type, latest month vs last year

Fuel	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	13,686	-134 ↓	91.27%	2.17% ↑
BEV	903	-388 ↓	6.02%	-2.3% ↓
Petrol	235	-34 ↓	1.57%	-0.17% ↓
Hybrid	170	40 ↑	1.13%	0.3% ↑
Grand total	14,995	-515 ↓	100%	0%

Top van sellers' BEV sales (YTD)

Marque	Total ▼	BEVs	BEV %	Δ
FORD	66,607	803	1.2%	-0.4% ↓
VAUXHALL	21,804	1,806	8.3%	-10.0% ↓
VOLKSWAGEN	19,767	1,400	7.1%	4.1% ↑
RENAULT	16,731	954	5.7%	3.0% ↑
CITROEN	15,010	819	5.5%	-0.5% ↓
MERCEDES-BE...	14,999	678	4.5%	0.4% ↑
PEUGEOT	14,285	1,976	13.8%	5.0% ↑
TOYOTA	9,993	728	7.3%	-0.8% ↓
NISSAN	4,560	601	13.2%	7.4% ↑
IVECO	4,336	9	0.2%	0.1% ↑
MAXUS	4,054	506	12.5%	-33.4% ↓
FIAT	3,169	159	5.0%	0.0% ↑
LAND ROVER	3,137	0	0.0%	0.0%
ISUZU	2,670	0	0.0%	0.0%
RENAULT TRUC...	1,883	69	3.7%	1.9% ↑
MAN	1,481	0	0.0%	-0.1% ↓
KGM	962	0	0.0%	-
ISUZU TRUCKS	875	0	0.0%	0.0%
SUZUKI	858	0	0.0%	0.0%
DFSK	318	318	100.0%	0.0%

Van ZEV Mandate Tracker

Figures shown are based on GB van sales in current calendar year.

Entities	Total Registrations ▼	Est Real ZEV Sales Target	ZEV Share	Credit Balance
FORD	65,444	10%	1.22%	-5,748.4
STELLANTIS	53,098	4.15%	8.91%	2,525.43
VOLKSWAGEN	20,305	9.13%	6.85%	-464.47
RENAULT	16,626	6.05%	5.68%	-61.8
MERCEDES-BENZ	12,799	8.81%	5.23%	-457.51
TOYOTA	9,609	4.15%	7.51%	323.23
NISSAN	4,227	4.15%	14.19%	424.58
SAIC	3,849	10%	13.07%	118.1
JLR	3,069	4.15%	0%	-127.36
ISUZU	2,564	4.15%	0%	-106.41
SUZUKI	841	4.15%	0%	-34.9
GEELY	671	4.15%	10.13%	40.15
IVECO SPA	666	4.15%	1.35%	-18.64
INEOS	199	10%	0%	-19.9

Following the analysis of estimated real targets for cars shown on page 3 of this release, we have repeated the exercise for vans. The results are very encouraging.

Amongst the top 8 manufacturers, who account for more than 90% of all van sales, Nissan and SAIC (owners of Maxus) have already comfortably exceeded the 10% headline target on electric sales alone.

Furthermore, relatively easy-to-meet CO2 targets for diesel and petrol vans mean that Stellantis (makers of Peugeot, Vauxhall, Citroen and Fiat vans) and Toyota are also expecting a surplus. Meanwhile Nissan - which also massively outperformed its CO2 targets - will have more credits to sell. Renault are also very close to compliance.

For Mercedes, VW and especially Ford, reaching the target will be more of a stretch. However, each firm can comply through a combination of selling more electric vans or cleaner ICE vans in the remaining months of 2024, buying excess credits from firms such as Stellantis who are on the front foot, and - if the price isn't right - borrowing up to 90% of their allowances from future years.

The estimated real ZEV registrations target - the ZEV Mandate requires manufacturers to meet an increasing percentage target of electric vans (10% in 2024) by selling more electric vans as a proportion of sales. They can also generate additional credits by exceeding easy-to-meet CO₂ emissions targets on their ICE van registrations. 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 vans in 2024.

HGVs

Monthly electric HGV registrations



HGVs by fuel type, last 12 months vs previous

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	43,525	1,907 ↑	99.5%	0.05% ↑
BEV	217	-13 ↓	0.5%	-0.05% ↓
Grand total	43,742	1,894 ↑	100%	0%

HGVs latest month vs last year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	2,751	10.3% ↑	99.24%	1.25% ↑
BEV	21	-58.8% ↓	0.76%	-1.25% ↓
Grand total	2,772	8.9% ↑	100%	0%

21 battery electric HGVs were sold in August 2024. Market share is growing glacially, and without the publication of a zero emission HGV and coach infrastructure strategy, which was promised for 2024 but remains somewhere in between the corridors of the Department for Transport and Ministers' desks, we will be lucky to reach 100% electrification by 2400, let alone 2040.

Motorbikes

Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	100,007	-0.2% ↓	96.38%	0.21% ↑
BEV	3,747	-5.7% ↓	3.61%	-0.2% ↓
Diesel	4	300.0% ↑	+0%	+0% ↑
Grand total	103,758	-0.4% ↓	100%	0%

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	5,315	5.5% ↑	95.89%	-0.61% ↓
BEV	227	24.0% ↑	4.1%	0.59% ↑
Diesel	1	-	0.02%	-
Grand total	5,543	6.2% ↑	100%	0%

Monthly electric motorbike registrations



Whilst motorbikes are prime for electrification, the pace of change here is similarly slow. Without supply-side legislation to incentivise EV motorcycle uptake (such as the ZEV Mandate), sales have worked their way to a steady market share of 3.5-4% but Government action looks necessary to break out of this holding pattern, and avoid motorcyclists being left behind as demand for fossil fuels from motorists falls away.

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'.