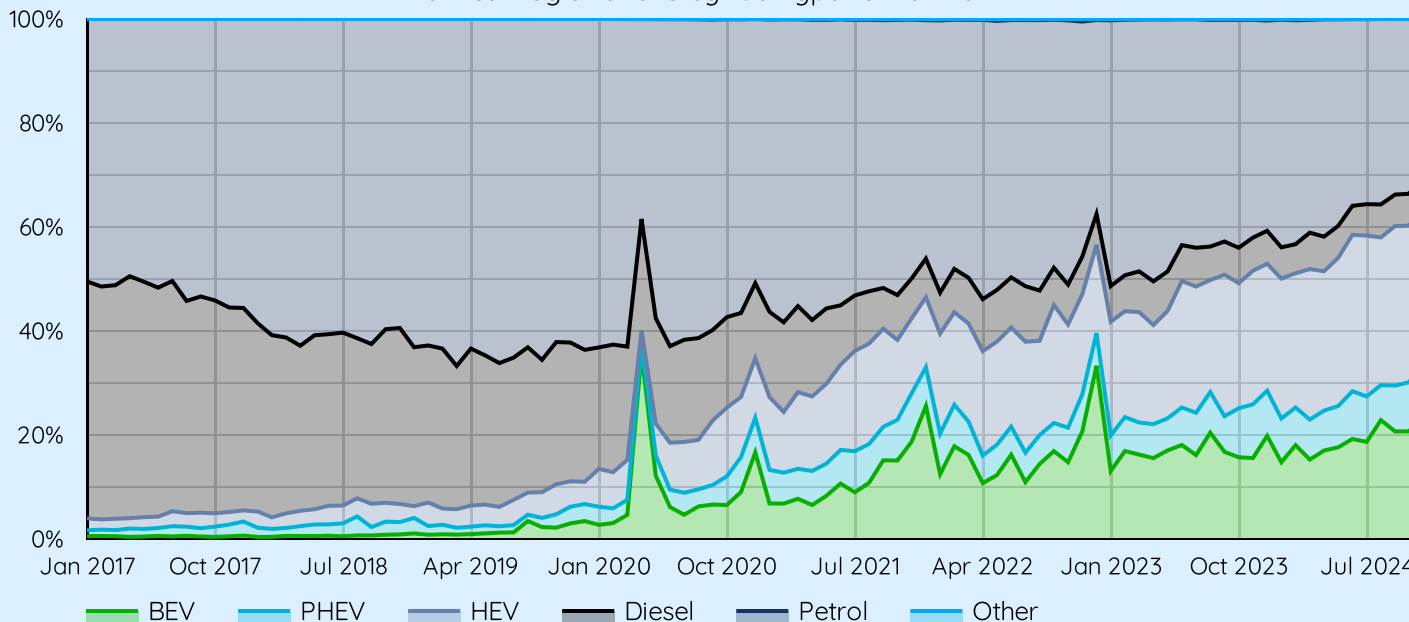


One in four new cars fully electric in November

New car registrations by fuel type to Nov 2024



Electric Cars (BEV)

35,712

↑ 51.9%

total

2,146

↑ 30.9%

Electric Motorbikes

248

↑ 11.2%

Electric HGVs (BEV)

26

↑ 30.0%

Key points

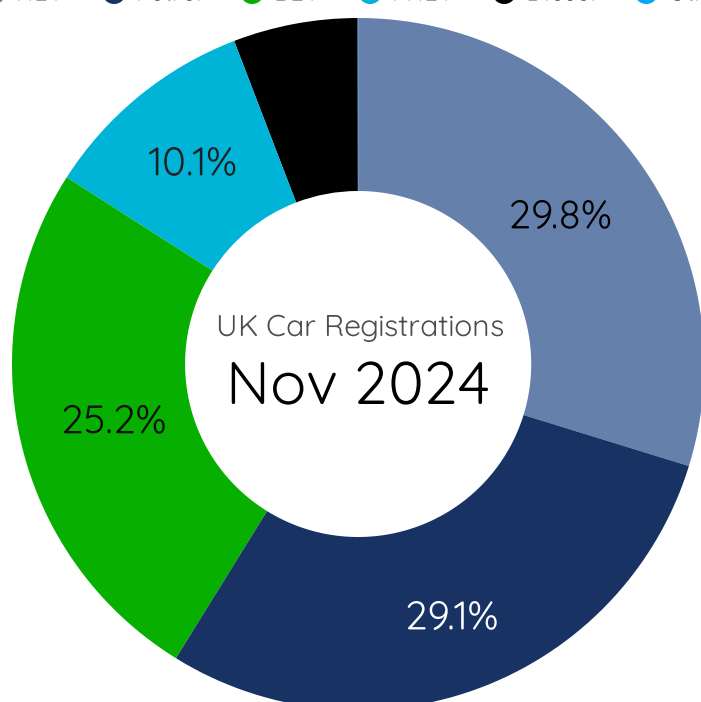
- The UK's car market took a green turn in November with a significant jump in registrations of electric cars, which grew by 51% compared with November 2023.
- Registrations of electric Minis grew by 270% compared with November 2023, with 37% of all new Mini pure electric in November '24 in a boost to BMW's plans to make Cowley its main electric Mini manufacturing site with a £600m investment
- Registrations of petrol, diesel and hybrid cars all stagnated or declined as consumers opted for cleaner, cheaper electric models, with a third of the car market in November being fitted with a plug
- Electric vans saw steady growth in November, growing by 30% to over 2,000 BEV vans registered

Please note we implemented a methodological change in November 2024 - see page 8 for details.

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

HEV Petrol BEV PHEV Diesel Other



Ben Nemes, CEO of New AutoMotive, said:

"Thanks to the investments and efforts made by carmakers, UK motorists now have more electric options at more competitive prices than ever before.

"This impressive progress is the result of the combination of ambitious and flexible EV targets and significant tax breaks for electric cars. This combination of targets and incentives is putting the UK in the fast lane to greater energy independence and cheaper cleaner motoring. This is being accompanied by billions of investment in charging infrastructure and electric vehicle manufacturing.

"As global electric car sales wax and wane, the UK's car market is heading in one direction - and fast. Ministers must not pull the rug from under this progress as they revisit UK policy on electric vehicles."

Cars summary

A new UK record: Battery electric cars accounted for 25.25% of registrations last month, the highest recorded in the whole of 2023 and 2024. November’s record breaking sales means that battery electric sales have held market share of more than 20% for a fourth consecutive month, itself a new record.

Petrol staggers and falls again: Meanwhile petrol registrations crashed to an all-time low of 29%, down by more than one-third from 44% at the beginning of the year (we use the official DVLA fuel type breakdown and do not reclassify some hybrid sales as petrol or diesel). Cars with a plug now account for more than 35% of sales.

Domestic firms leading: Leading the way in battery electric share were Mini, whose EVs - made in Oxford - accounted for more than 37% of its sales. When combined with parent firm BMW, it outsold market leader Tesla in November. Other strong performers were Jaguar and Vauxhall (each 36%), Mercedes (35%) Peugeot (29%), Renault and MG (each 27%) and Skoda (23%). Even lagging firms VW and Ford exceeded their firm-level targets (see next page), with battery electric market share of 21% and 19% respectively.

Industry has met the ZEV mandate: When out-performance against CO2 targets are taken into account, the ZEV mandate credit surplus has almost doubled - from more than 13,000 last month to 22,000 today. The industry-wide “credit mountain” means that no manufacturer will need to make buyout payments to Government to meet targets.

No sales restrictions: Total car sales for January-November are up on the same period in 2023, exposing the theory that manufacturers are turning away non-EV buyers as a myth.

BEV market share, last 12 months vs previous

Marque	BEV reg.s ▾	Δ	% of UK BEVs	Δ
TESLA	46,430	-13,265 ↓	13%	-6% ↓
BMW	33,208	6,253 ↑	9%	1% ↑
MERCEDES-BE...	24,097	4,932 ↑	7%	1% ↑
AUDI	22,378	-1,200 ↓	6%	-1% ↓
MG	21,005	-8,873 ↓	6%	-3% ↓
VOLKSWAGEN	20,814	-4,987 ↓	6%	-2% ↓
VOLVO	16,910	6,685 ↑	5%	2% ↑
HYUNDAI	16,484	3,301 ↑	5%	1% ↑
VAUXHALL	14,529	2,429 ↑	4%	0% ↑
KIA	14,491	-2,220 ↓	4%	-1% ↓

YTD vs last year

Fuel Type	Regs. ▾	Δ	Mkt. Share	Δ
Petrol	648,238	-127,320 ↓	37.4%	-8.41% ↓
HEV	504,648	112,073 ↑	29.11%	5.93% ↑
BEV	325,416	47,798 ↑	18.77%	2.38% ↑
PHEV	146,336	21,547 ↑	8.44%	1.07% ↑
Diesel	107,549	-12,829 ↓	6.2%	-0.91% ↓
Grand total	1,733,405	40,293 ↑	100%	0%

Latest month, changes vs last year

Fuel Type	Regs. ▾	Δ	Mkt. Share	Δ
HEV	42,100	3,282 ↑	29.76%	4.06% ↑
Petrol	41,101	-22,174 ↓	29.06%	-12.84% ↓
BEV	35,712	12,196 ↑	25.25%	9.68% ↑
PHEV	14,282	-1,298 ↓	10.1%	-0.22% ↓
Diesel	8,209	-1,403 ↓	5.8%	-0.56% ↓
Grand total	141,445	-9,589 ↓	100%	0%

Top car brands' electrification, last 12 months

Marque	Total ▾	BEVs	BEV %	Δ
VOLKSWAGEN	162,295	20,814	12.8%	-3.4% ↓
BMW	118,267	33,208	28.1%	2.2% ↑
AUDI	116,893	22,378	19.1%	0.9% ↑
FORD	108,734	7,446	6.8%	4.8% ↑
KIA	107,064	14,491	13.5%	-2.6% ↓
NISSAN	98,298	11,802	12.0%	1.3% ↑
MERCEDES-BE...	97,779	24,097	24.6%	1.2% ↑
TOYOTA	96,551	7,344	7.6%	7.0% ↑
HYUNDAI	87,912	16,484	18.8%	2.9% ↑
MG	78,488	21,005	26.8%	-13.3% ↓
VAUXHALL	77,885	14,529	18.7%	6.1% ↑
SKODA	74,002	11,187	15.1%	3.2% ↑
PEUGEOT	67,035	13,692	20.4%	9.4% ↑
VOLVO	62,241	16,910	27.2%	5.9% ↑
LAND ROVER	54,067	0	0.0%	0.0%
RENAULT	54,005	6,966	12.9%	-3.4% ↓
TESLA	46,430	46,430	100.0%	0.0%
MINI	41,221	8,108	19.7%	5.4% ↑
SEAT	37,010	0	0.0%	0.0%

Car ZEV Mandate Tracker

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

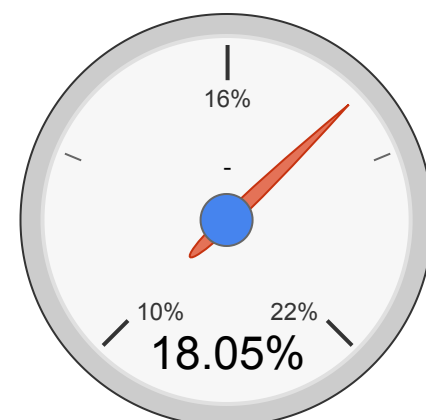
Parent	Car sales	Est real ZEV sales target	BEV % of car sales	ZEV credit shortfall/surplus
VW	402,225	18.3%	15.2%	-12,107
STELLANTIS	195,390	21.2%	20.4%	-1,514
HYUNDAI	187,503	15.6%	16.4%	1,486
BMW	145,174	22.0%	25.2%	4,579
TOYOTA	102,751	10.9%	10.0%	-947
FORD	100,174	17.3%	10.3%	-7,053
NISSAN	93,572	16.5%	12.7%	-3,571
MERCEDES	92,750	21.9%	25.8%	3,663
RENAULT	78,666	17.0%	9.5%	-5,901
SAIC	72,093	20.8%	26.6%	4,212
GEELY	68,126	18.9%	36.2%	11,755
TATA	64,748	10.9%	4.8%	-3,945
TESLA	40,942	22.0%	100.0%	31,935
HONDA	27,257	18.9%	18.2%	-198
MAZDA	24,548	11.3%	4.9%	-1,562
SUZUKI	21,413	19.4%	0.0%	-4,161
BYD	7,151	22.0%	93.8%	5,136
SUBARU	2,036	21.4%	21.8%	7
GREAT WALL	1,134	22.0%	100.0%	885
ASTON MARTIN	653	20.8%	0.0%	-136

The estimated real ZEV sales target - the ZEV mandate requires manufacturers met a 22% electric car sales target in 2024. They generate additional credits by exceeding CO2 emissions targets on their ICE vehicle sales. We calculate the real 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, using - like the rest of this bulletin - publicly available information from the DVLA.

November results - A fourth strong month in a row for battery electric sales means many manufacturers have improved their position against the mandate. Stellantis have cut their deficit by almost one third, from 2,263 to 1,514, meaning that they now only need an increase of 0.8% in EV market share to end the year in credit.

Industry out-performance means that manufacturers who fall short have a choice of 9 firms from whom to buy credits. And the glut of credits means that this is a buyer's market. For example every firm with a deficit could close it by buying from Tesla, BMW, Mercedes and Hyundai alone.

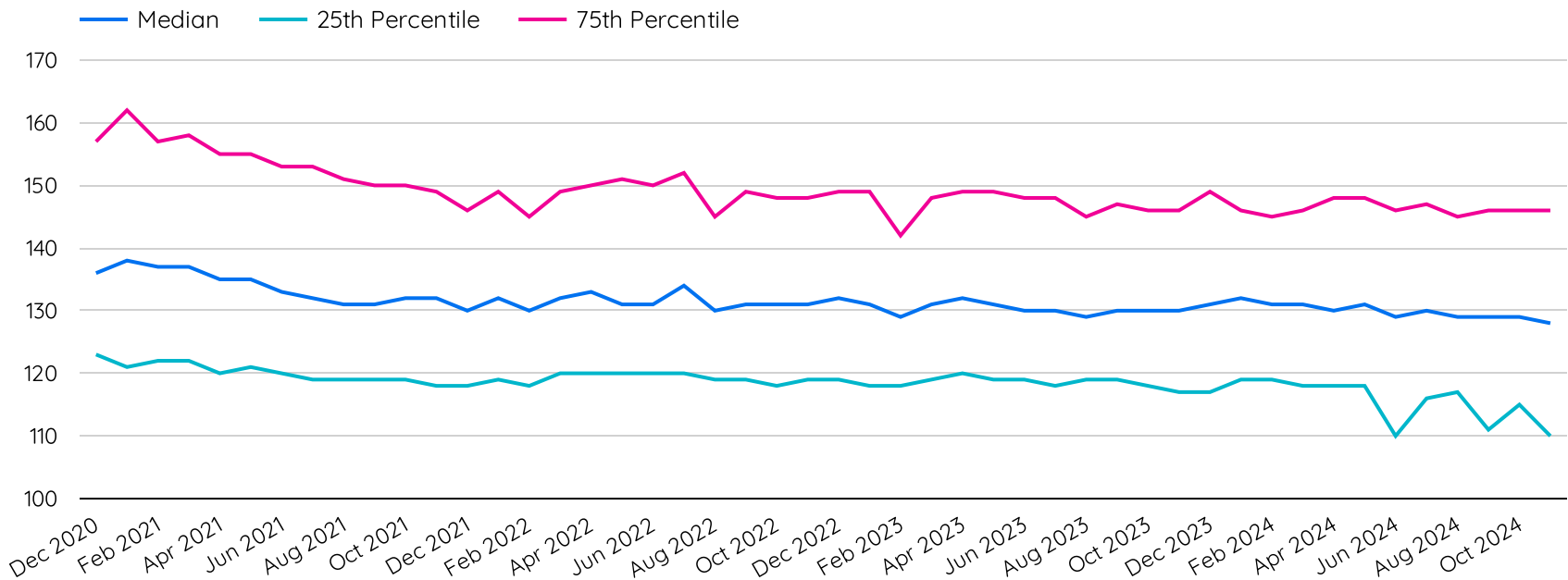
Est. real market-wide ZEV target



The real market-wide ZEV target represents the percentage of GB car sales that need to be fully electric for carmakers to meet their mandated EV sales targets.

ICE Car CO2 Emissions Ratings

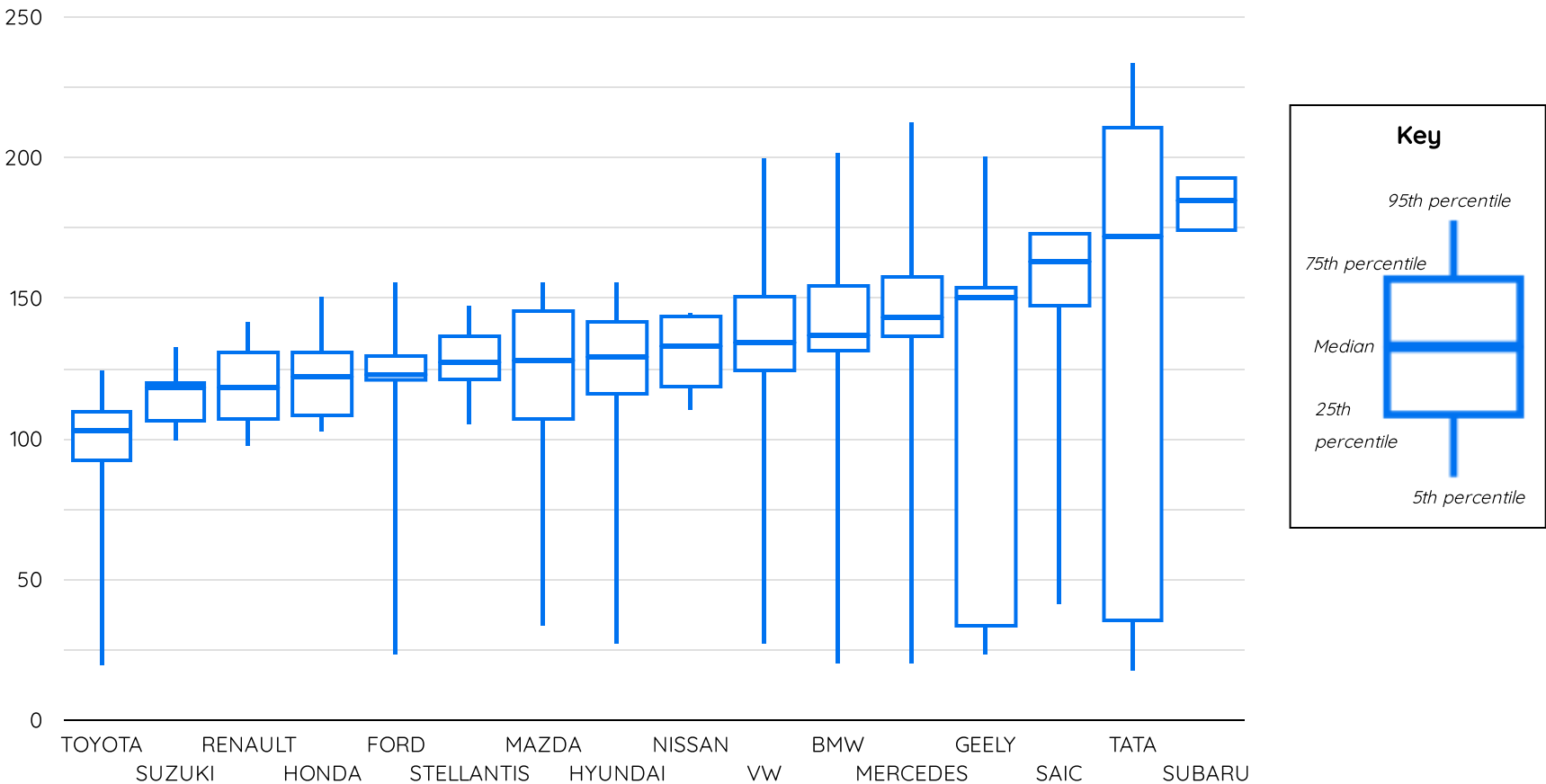
Average CO2 ratings of newly registered internal combustion engine cars by month of registration, gCO2/km



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

November saw a resilient market for battery electric vans - hitting a 7.8% market share. This high market share highlights a growth in the overall van market against 12 months previous, led by the growth in demand for electric vans. With the aforementioned ZEV Mandate heavily in the minds of many in the final quarter of 2024, the 31% growth in sales against November 2023 should show that the growth required in the van market is within arms reach.

November saw stand-out performances in new BEV registrations for Vauxhall, Peugeot, and Nissan - all three of which broke past the 10% target - with Peugeot registering battery electric vans at a rate of 1 in 5 new registrations.

Ford managed to reach an all time high of 644 new battery electric van registrations in a single month, showing a growing ability to adjust to the ZEV Mandate and increasing demand for BEVs, but struggling to keep up with their increasingly confident competitors.

BEV market share (YTD)

	Marque	BEVs ▼	Share of UK BEV vans (%)
1.	PEUGEOT	3,851	21.9%
2.	VAUXHALL	2,406	13.7%
3.	VOLKSWAGEN	2,371	13.5%
4.	FORD	1,921	10.9%
5.	RENAULT	1,372	7.8%
6.	TOYOTA	1,179	6.7%
7.	MERCEDES-BENZ	1,056	6.0%
8.	CITROEN	982	5.6%
9.	NISSAN	881	5.0%
10.	MAXUS	646	3.7%
11.	DFSK	333	1.9%
12.	BYD	197	1.1%
13.	FIAT	170	1.0%
14.	RENAULT TRUCKS	117	0.7%
15.	GOUPIL	39	0.2%
16.	SKODA	19	0.1%

Sales by fuel type, YTD vs last year

Fuel	Regs.	% Δ	Mkt. Share	Δ
Diesel	282,619	2.7% ↑	91.39%	-0.42% ↓
BEV	17,237	-0.3% ↓	5.57%	-0.19% ↓
Petrol	6,060	11.3% ↑	1.96%	0.14% ↑
HEV	3,344	80.8% ↑	1.08%	0.46% ↑
Grand t...	309,262	3.1% ↑	100%	0%

Total sales by fuel type, latest month vs last year

Fuel	Regs.	Δ	Mkt. Share	Δ
Diesel	23,886	-287 ↓	87.51%	-3.19% ↓
BEV	2,146	506 ↑	7.86%	1.71% ↑
Petrol	604	-20 ↓	2.21%	-0.13% ↓
HEV	659	446 ↑	2.41%	1.62% ↑
Grand t...	27,295	645 ↑	100%	0%

Top van sellers' sales: BEV vs non-BEV (YTD)

Marque	Total ▼	BEVs	BEV %	Δ
FORD	101,302	1,921	1.9%	0.2% ↑
VAUXHALL	32,816	2,406	7.3%	-11.1% ↓
VOLKSWAGEN	30,828	2,371	7.7%	4.4% ↑
RENAULT	25,199	1,372	5.4%	2.7% ↑
PEUGEOT	23,488	3,851	16.4%	7.6% ↑
MERCEDES-BE...	21,587	1,056	4.9%	-1.1% ↓
CITROEN	20,931	982	4.7%	-0.9% ↓
TOYOTA	13,404	1,179	8.8%	1.2% ↑
NISSAN	6,426	881	13.7%	1.9% ↑
IVECO	6,021	10	0.2%	0.1% ↑
MAXUS	5,495	646	11.8%	-19.6% ↓
LAND ROVER	4,854	0	0.0%	0.0%
ISUZU	4,652	0	0.0%	0.0%
FIAT	4,156	170	4.1%	-1.5% ↓
RENAULT TRUC...	2,537	117	4.6%	2.9% ↑
MAN	2,336	0	0.0%	-0.0% ↓
KGM	1,534	0	0.0%	-
ISUZU TRUCKS	1,189	0	0.0%	0.0%
SUZUKI	920	0	0.0%	0.0%
INEOS	336	0	0.0%	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	98,555	10%	1.93%	-7,957
STELLANTIS	79,834	4.15%	9.23%	4,053
VOLKSWAGEN	31,487	10%	7.43%	-811
RENAULT	24,914	5.44%	5.47%	7
MERCEDES-BENZ	18,618	9.02%	5.56%	-644
TOYOTA	12,857	4.15%	9.12%	638
NISSAN	6,007	4.15%	14.63%	630
SAIC	5,171	10%	12.4%	124
JLR	4,388	4.15%	0%	-182
ISUZU	4,376	4.15%	0%	-182
GEELY	946	4.15%	12.26%	77
SUZUKI	877	4.15%	0%	-36
IVECO SPA	730	4.15%	1.37%	-20
INEOS	320	9.87%	0%	-32
BYD	195	10%	100%	176

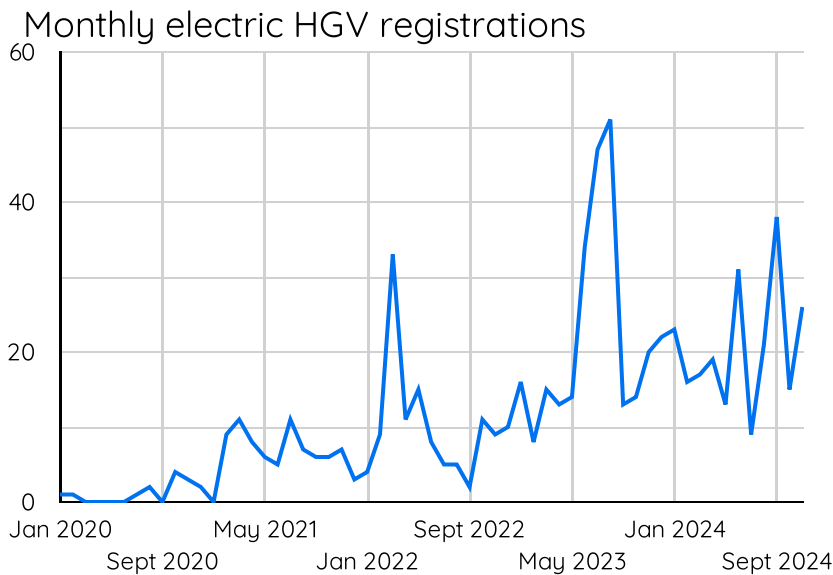
As we come towards the end of the first year of the ZEV Mandate we increasingly see manufacturers either reaching the 10% headline target - or pushing past it. Following another strong month Nissan now see themselves closing in on hitting the 2025 headline target of 16% a year early (currently sitting at 14.6%).

Close behind Nissan we see both SAIC and GEELY significantly above the headline target at 12.4% and 12.3% respectively. We also see the likes of Stellantis closing in on the target at 9.2% with Toyota not far behind them at 9.1%.

With many manufacturers likely able to hit the 2024 target either by having sold beyond the headline target outright or by using the generous flexibilities in the ZEV Mandate, Ford, VW, and Mercedes-Benz look as though they may be pushed into borrowing against future years or by paying out to either their competitors or the treasury.

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



HGVs by fuel type, last 12 months vs previous

Fuel Type	Regs. ▾	Δ	Mkt. Share	Δ
Diesel	43,053	616 ▲	99.42%	0.02% ▲
BEV	250	-5 ▼	0.58%	-0.02% ▼
Grand total	43,303	611 ▲	100%	0%

HGVs latest month vs last year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Diesel	3,698	-6.9% ▼	99.3%	-0.2% ▼
BEV	26	30.0% ▲	0.7%	0.2% ▲
Grand total	3,724	-6.7% ▼	100%	0%

Whilst 26 battery electric HGVs were sold in November 2024, market share remains stubbornly low. The new Government has still not committed to the timing of its zero emission HGV and coach infrastructure strategy, which was promised by the end of 2024 by the Conservatives. This leaves us falling well short of the 2040 goal for full electrification, with no roadmap in place.

Motorbikes

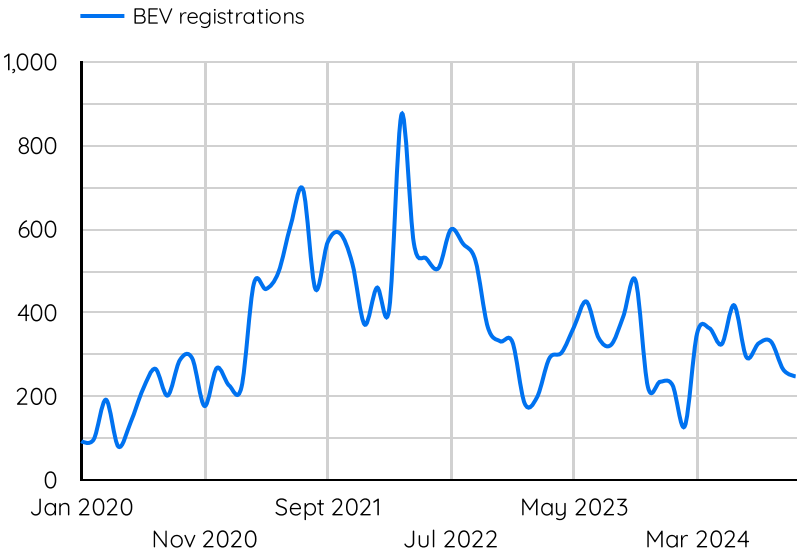
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	99,514	-3.0% ▼	96.59%	0.21% ▲
BEV	3,512	-8.6% ▼	3.41%	-0.2% ▼
Diesel	4	33.3% ▲	+0%	+0% ▲
Grand total	103,030	-3.2% ▼	100%	0%

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▾	% Δ	Mkt. Share	Δ
Petrol	5,344	5.3% ▲	95.91%	-0.61% ▼
BEV	227	24.0% ▲	4.07%	0.59% ▲
Diesel	1	-	0.02%	-
Grand total	5,572	6.0% ▲	100%	0%

Monthly electric motorbike registrations



Whilst motorbikes are prime for electrification, the pace of change here is similarly slow, with little market share change from last year. 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 3-4% but Government action looks necessary to break out of this holding pattern.

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 of vehicles. We also obtain some information from the DVSA's MOT database.

November 2024 methodological change: From November 2024 we have changed our approach to obtaining the snapshot of the UK car market, as part of our efforts to improve the quality of our data. This has boosted the volume of registrations in our historical dataset, which is used for comparisons with past periods. This will mean that the numbers in bulletins from December 2024 may not entirely accord with bulletins published prior to this point.

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.

PHEV - these are hybrids as above, but they have a plug to take external charge.

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'.