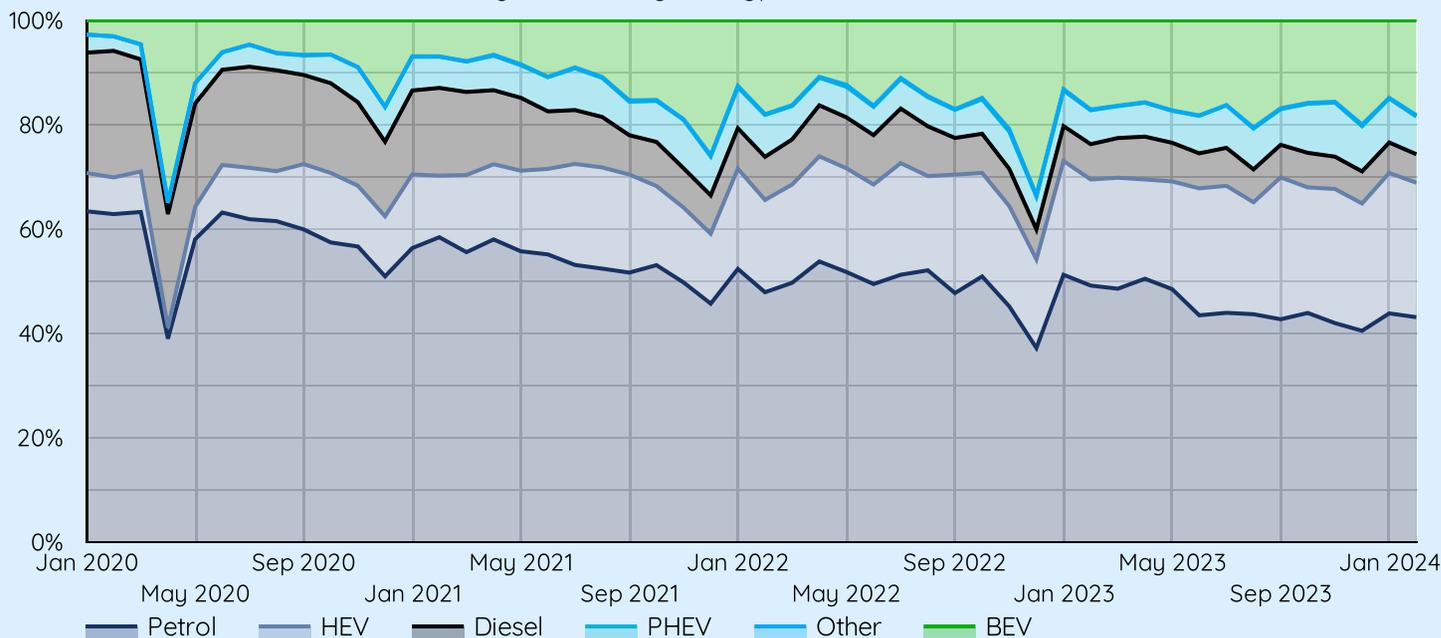


Electric car & van sales boosted by ZEV mandate

New car registrations by fuel type to Feb 2024



Electric Cars

14,079

↑ 27.7%

Electric Vans

889

↑ 14.4%

Electric Motorbikes

129

↓ -34.8%

Electric HGVs

16

↑ 100.0%

February saw record electric car and van sales, as the effect of the UK's Zero Emissions Vehicle mandate started to impact on vehicle supply and prices.

Electric car sales grew by 27% in February 2024 compared with February 2023, with an extra 3,000 electric cars sold. EV sales have had their strongest ever start to the year, with 33,000 registered so far in 2024, a 40% increase on the same period in 2023.

Electric vans also had a strong month, growing by 14% to just under 900, representing 5% of the UK van market.

Electric HGVs, while still small in number, continued to grow, as this early stage technology starts to progress from proof-of-concept to deployment.

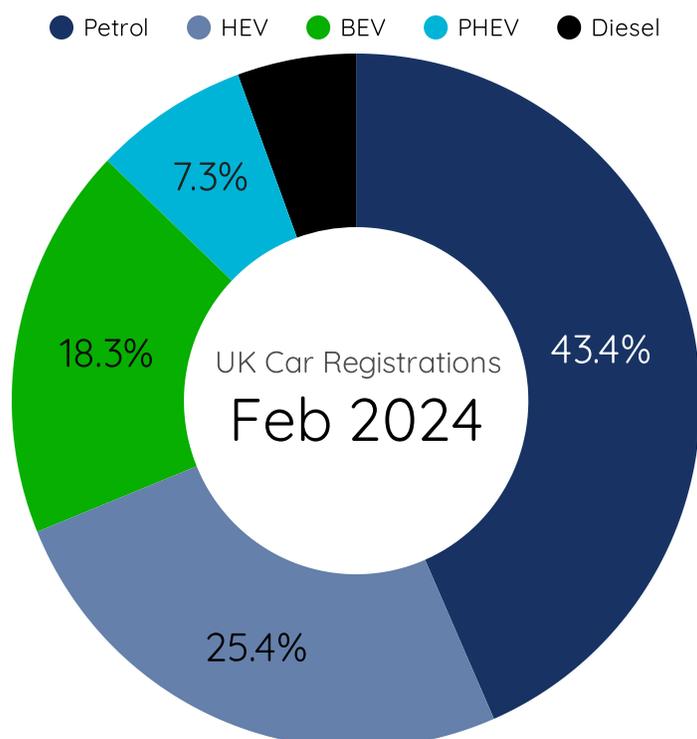
Electric motorbikes continued to struggle, in the absence of supportive policy from the UK government.

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

data@newautomotive.org



Ben Nelmes, CEO of New AutoMotive, said:

“These figures show that Britain is pulling into the fast lane on the road to cheaper, cleaner transport. This is being driven by strong demand for electric cars as well as Britain’s world-leading Zero Emissions Vehicle mandate.

“More electric cars on the road mean more energy security, cleaner air and help millions of motorists who are increasingly having to choose between an empty tank or an empty wallet.

“Ministers now need to focus on making sure that as many people as possible are able to go electric by improving charging infrastructure and taking action to reduce the cost of electricity.”

Cars summary

Beneath the headlines, the impact of the Zero Emissions Vehicle mandate, which came into force on 1st January 2024 and sets a target for car manufacturers to increase sales of zero emissions cars to 22% of their total sales over the year, is clear.

The mandate applies targets to each manufacturer - if they fail to meet it, they must make up for it by selling even more electric cars in future years, or paying a buy-out fee to the Department for Transport, or by buying credits from a manufacturer who has sold even more electric cars than the target requires.

Besides the small volume or fully electric manufacturers, BMW and Mercedes have made the strongest start towards meeting their targets and are comfortably meeting their targets. Hyundai, Volkswagen and Tata (Jaguar and Land Rover), are performing fairly well against their targets. Toyota previously sold almost no electric cars in the UK, but now looks set to be able to meet its targets following a rapid growth in EV sales in the UK this year.

Stellantis, Renault, Nissan and Ford will have to increase sales of electric cars over the next 10 months to approach compliance, either through discounts or boosting EV supply.

BEV market share: YTD (vs last year)

Marque	BEV Regs ▼	Δ	% of UK BEVs	Δ
TESLA	4,602	2,059 ↑	14%	4% ↑
BMW	3,454	1,492 ↑	10%	3% ↑
MG	2,791	1,258 ↑	8%	3% ↑
MERCEDES-BENZ	2,303	909 ↑	7%	2% ↑
AUDI	2,276	-298 ↓	7%	-3% ↓
KIA	2,060	-33 ↓	6%	-2% ↓
VAUXHALL	1,633	543 ↑	5%	1% ↑
VOLVO	1,545	337 ↑	5%	0% ↑
TOYOTA	1,515	1,431 ↑	4%	4% ↑
HYUNDAI	1,319	-175 ↓	4%	-2% ↓

YTD vs previous year

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Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	91,524	-2,349 ↓	43.57%	-6.95%..
HEV	55,649	16,073 ↑	26.49%	5.19% ↑
BEV	33,761	6,760 ↑	16.07%	1.54% ↑
PHEV	16,765	4,305 ↑	7.98%	1.28% ↑
Diesel	11,968	-507 ↓	5.7%	-1.02% ↓
Grand total	210,040	24,240 ↑	100%	0%

Latest month, changes vs last year

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	33,403	1,661 ↑	43.12%	-6.06% ↓
HEV	19,961	6,842 ↑	25.77%	5.44% ↑
BEV	14,079	3,055 ↑	18.17%	1.09% ↑
PHEV	5,598	1,411 ↑	7.23%	0.74% ↑
Diesel	4,229	-148 ↓	5.46%	-1.32% ↓
Grand total	77,468	12,922 ↑	100%	0%

Top car sellers' electrification progress (YTD)

Marque	Total Cars	BEVs	Δ	BEV %
VOLKSWAGEN	18,032	1,186	-1,423 ↓	7%
BMW	14,742	3,454	1,492 ↑	23%
FORD	14,510	371	102 ↑	3%
KIA	13,671	2,060	-33 ↓	15%
VAUXHALL	12,746	1,633	543 ↑	13%
AUDI	12,558	2,276	-298 ↓	18%
NISSAN	12,155	1,028	546 ↑	8%
MG	9,722	2,791	1,258 ↑	29%
HYUNDAI	9,245	1,319	-175 ↓	14%
PEUGEOT	9,118	1,145	146 ↑	13%
TOYOTA	8,610	1,515	1,431 ↑	18%
MERCEDES-BE...	7,755	2,303	909 ↑	30%
SKODA	7,711	934	-176 ↓	12%
VOLVO	5,799	1,545	337 ↑	27%
RENAULT	5,551	678	245 ↑	12%
MINI	5,064	295	-280 ↓	6%
SEAT	4,898	0	0	0%
TESLA	4,602	4,602	2,059 ↑	100%
LAND ROVER	4,531	0	0	0%

Vans summary

Following a dominant year of topping the battery electric van sales in 2023, Vauxhall has reclaimed the top spot in February after an initial drop in market share of battery electric vans in the first month of 2024 to Volkswagen.

With only Nissan meeting the 10% sales share target for battery electric vans this month it is clear there is still a ways to go within the van market for brands to consistently reach the needed sales figures. However, with multiple key players in the market edging closer to that 10% marker - such as Vauxhall, Toyota, and Volkswagen - it is clear that reaching the ZEV Mandate targets are well within reach.

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	BEV sales ▼	Share of BEV m...
1.	VOLKSWAGEN	359	16%
2.	FORD	303	14%
3.	VAUXHALL	271	12%
4.	PEUGEOT	257	12%
5.	TOYOTA	254	12%
6.	RENAULT	223	10%
7.	CITROEN	205	9%
8.	MERCEDES-BENZ	117	5%
9.	NISSAN	62	3%
10.	FIAT	62	3%
11.	MAXUS	39	2%
12.	RENAULT TRUCKS	6	0%
13.	DFSK	5	0%
14.	GOUPIL	5	0%
15.	BYD	4	0%
	Grand total	2,177	100%

Total sales by fuel type, YTD vs last year

Fuel	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	36,928	12.0% ↑	92.14%	-0.7% ↓
BEV	2,177	21.6% ↑	5.43%	0.39% ↑
Petrol	623	57.3% ↑	1.55%	0.44% ↑
Hybrid	348	-2.0% ↓	0.87%	-0.13% ↓
Grand total	40,077	12.8% ↑	100%	0%

Total sales by fuel type, latest month vs last year

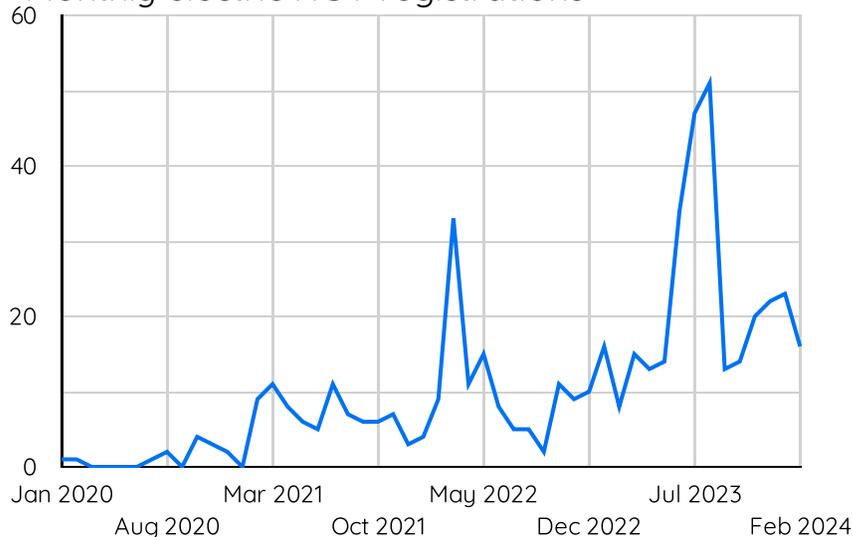
Fuel	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	15,821	2,418 ↑	92.46%	-0.24% ↓
BEV	889	112 ↑	5.2%	-0.18% ↓
Petrol	258	67 ↑	1.51%	0.19% ↑
Hybrid	143	55 ↑	0.84%	0.23% ↑
Grand total	17,112	2,653 ↑	100%	0%

Top van sellers' BEV sales YTD vs last year

Marque	Van Sales	BEVs	Δ	BEV %
FORD	11,277	303	90 ↑	2.7%
VAUXHALL	4,293	271	-110 ↓	6.3%
VOLKSWAGEN	3,895	359	305 ↑	9.2%
CITROEN	3,534	205	-40 ↓	5.8%
TOYOTA	3,232	254	109 ↑	7.9%
MERCEDES-BEN...	3,089	117	24 ↑	3.8%
PEUGEOT	2,547	257	-79 ↓	10.1%
RENAULT	2,415	223	200 ↑	9.2%
MAXUS	1,236	39	-226...	3.2%
FIAT	979	62	41 ↑	6.3%
IVECO	863	1	1 ↑	0.1%
NISSAN	736	62	62 ↑	8.4%
LAND ROVER	523	0	0	0.0%
RENAULT TRUC...	429	6	-1 ↓	1.4%
ISUZU	212	0	0	0.0%
MAN	212	0	-1 ↓	0.0%
ISUZU TRUCKS	196	0	0	0.0%
SUZUKI	193	0	0	0.0%
KGM	79	0	-	0.0%
Grand total	40,077	2,177	386 ↑	774.4%

HGVs

Monthly electric HGV registrations



HGVs by fuel type, YTD vs previous year

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	6,117	654 ↑	99.37%	-0.2% ↓
BEV	39	15 ↑	0.63%	0.2% ↑
Grand total	6,156	669 ↑	100%	0%

HGVs latest month vs last year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	2,871	27.4% ↑	99.45%	-0.2% ↓
BEV	16	100.0% ↑	0.55%	0.2% ↑
Grand total	2,887	27.7% ↑	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	9,765	8.6% ↑	96.47%	0.54% ↑
BEV	356	-6.6% ↓	3.52%	-0.55% ↓
Grand total	10,122	8.0% ↑	100%	0%

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	5,313	5.6% ↑	95.89%	-0.61% ↓
BEV	227	24.0% ↑	4.1%	0.59% ↑
Grand total	5,541	6.2% ↑	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'.