

EV sales record best ever start to the year, as public appetite stays strong

New car registrations by fuel type to Apr 2024

Electric Cars

21,601

↑ 10.3%

Electric Vans

889

↓ -42.3%

Electric Motorbikes

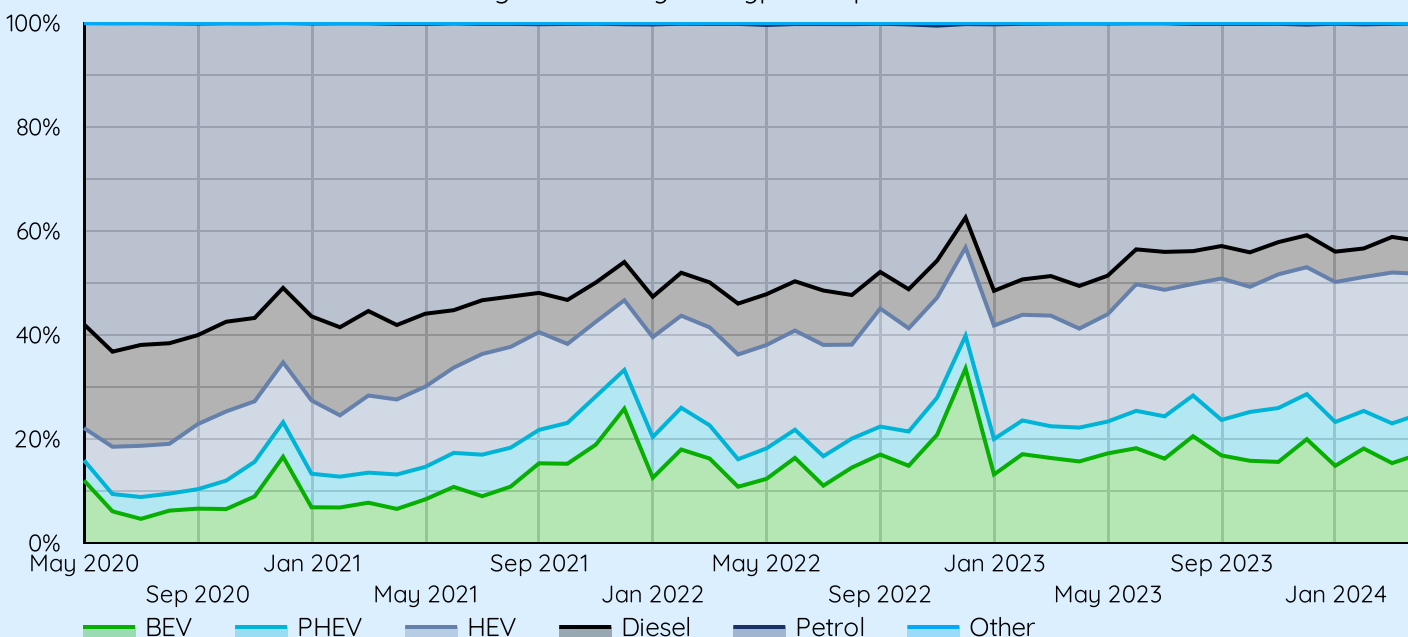
362

↑ 18.7%

Electric HGVs

18

↑ 38.5%



Key points

- Battery EVs recorded their best ever start to the year, as sales rose more than 10% on April 2023, whilst market share of BEVs in new car sales reached 17.2%.

- UK on track for 1.9m car sales in 2024, of which more than 300,000 are likely to be fully electric

- Strong sales across the board show people recognise that EVs aren't just great to drive but save them money too - £1000 a year on an average mileage in running costs - whilst the Zero Emissions Vehicle mandate is driving down the offer price of new EVs, with price parity within reach.

- Electric van sales in the year to date stayed at 5.25%, with Ford accounting for most of the shortfall on the 10% ZEV mandate target. Most other firms are close to their targets or have exceeded them.

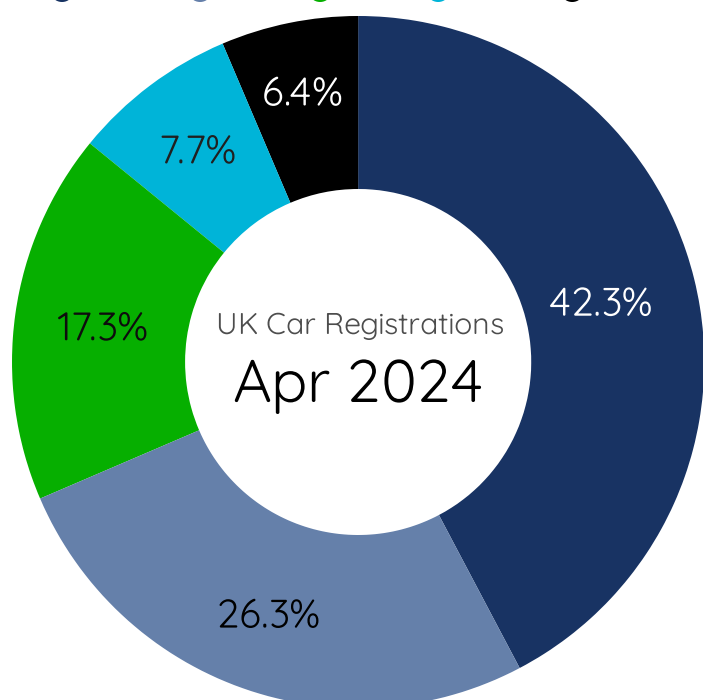
- Electric HGV sales continued to edge upwards, with 288 registered in the last 12 months - but Government intervention is urgently needed.

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

● Petrol ● HEV ● BEV ● PHEV ● Diesel



Ben Nelmes, CEO of New AutoMotive, said:

"It is great to see electric car sales growing in April. Electric cars offer an array of benefits to owners, from cheaper running costs to a better experience behind the wheel - not to mention the ability to drive without contributing to climate change or air pollution.

"It's great to see another 20,000 motorists choose to go electric. This has been made possible by the UK's California-style Zero Emissions Vehicle mandate, which encourages car manufacturers to make it easier and cheaper to choose an electric model.

"April's car sales show the mandate starting to have an impact. This is good news for households, since switching to electric cars is one of the parts of net zero that will save people money."

Cars summary

Battery EVs recorded their best ever start to the year, as sales rose more than 10% on April 2023, whilst market share of BEVs in new car sales reached 17.2%.

More than 100,000 BEVs have now been sold in the year to the end of April, the earliest in the year that this milestone has ever been reached. Sales have been strong across the board this month, with upmarket manufacturers BMW, Audi, Mercedes and Volvo in the top 10 alongside lower cost marques such as MG, Hyundai, Kia and Nissan.

This reflects the realisation that EVs aren't just great to drive but great value for consumers - £1000 a year on running costs for those on average mileage who charge at home. The UK's innovative ZEV mandate is driving down the offer price of new EVs to the point where some now match the recommended price of ICE cars, and price parity across the whole market is within reach.

Tesla had a poor month, coming in only 7th, with 6% market share - its lowest since January 2023. Whilst it remains the biggest EV manufacturer over the year to date, BMW is just 850 units behind.

Meanwhile, no-one could be more surprised than Toyota, long time champions of an anything-but-EVs strategy, to find itself in 10th place on sales, and on course to easily meet its Government target.

BEV market share, last 12 months vs previous

Marque	BEV Regs ▼	Δ	% of UK BEVs	Δ
TESLA	46,145	-6,408 ↓	15%	-4% ↓
BMW	31,995	11,583 ↑	10%	3% ↑
MG	27,732	6,460 ↑	9%	1% ↑
AUDI	23,436	7,654 ↑	8%	2% ↑
MERCEDES-BENZ	21,915	8,662 ↑	7%	2% ↑
VOLKSWAGEN	19,200	-2,465 ↓	6%	-2% ↓
KIA	16,237	1,321 ↑	5%	-0% ↓
HYUNDAI	13,163	-384 ↓	4%	-1% ↓
VOLVO	12,590	6,130 ↑	4%	2% ↑
VAUXHALL	11,904	108 ↑	4%	-1% ↓

Last 12 months sales, vs previous 12 months

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	787,768	17,280 ↑	42.98%	-5.52% ↓
HEV	469,727	147,600 ↑	25.63%	5.35% ↑
BEV	308,794	38,379 ↑	16.85%	-0.17% ↓
PHEV	144,565	47,278 ↑	7.89%	1.76% ↑
Diesel	119,365	-5,562 ↓	6.51%	-1.35% ↓
Grand total	1,832,965	244,301 ↑	100%	0%

Latest month, changes vs last year

Fuel Type	Regs. ▼	Δ	Mkt. Share	Δ
Petrol	52,654	-10,364 ↓	41.89%	-8.6% ↓
HEV	33,842	10,086 ↑	26.92%	7.89% ↑
BEV	21,601	2,021 ↑	17.18%	1.5% ↑
PHEV	9,625	1,501 ↑	7.66%	1.15% ↑
Diesel	7,906	-2,345 ↓	6.29%	-1.92% ↓
Grand total	125,708	880 ↑	100%	0%

Top car brands' electrification, last 12 months

Marque	Total ▼	BEVs	BEV %	Δ
VOLKSWAGEN	156,926	19,200	12.2%	-2.8% ↓
FORD	132,481	3,271	2.5%	0.0% ↑
AUDI	124,036	23,436	18.9%	4.1% ↑
BMW	111,901	31,995	28.6%	6.6% ↑
KIA	102,924	16,237	15.8%	0.1% ↑
VAUXHALL	100,501	11,904	11.8%	-2.6% ↓
TOYOTA	98,202	4,167	4.2%	3.6% ↑
NISSAN	92,947	8,859	9.5%	-3.9% ↓
MERCEDES-BE...	86,346	21,915	25.4%	6.9% ↑
HYUNDAI	81,780	13,163	16.1%	-0.8% ↓
MG	80,582	27,732	34.4%	-2.9% ↓
SKODA	68,846	8,042	11.7%	-0.4% ↓
PEUGEOT	66,202	6,286	9.5%	-9.2% ↓
VOLVO	50,067	12,590	25.1%	6.7% ↑
RENAULT	47,972	4,800	10.0%	-12.1% ↓
TESLA	46,144	46,144	100.0%	0.0%
LAND ROVER	44,610	0	0.0%	0.0%
MINI	40,001	5,213	13.0%	-2.7% ↓
SEAT	33,853	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	137,975	18.1%	11.3%	-9,346
STELLANTIS	78,550	21.3%	14.7%	-5,184
HYUNDAI	65,342	15.8%	16.4%	356
BMW	53,360	22.0%	22.0%	-17
FORD	38,065	19.5%	5.8%	-5,208
NISSAN	36,415	17.2%	10.1%	-2,550
TOYOTA	34,227	12.5%	13.6%	370
MERCEDES	32,803	22.0%	23.6%	515
RENAULT	26,928	16.7%	5.2%	-3,097
SAIC	26,869	22.0%	26.6%	1,226
TATA	24,613	10.8%	7.3%	-861
TESLA	12,637	22.0%	100.0%	9,857
HONDA	12,045	20.1%	14.5%	-677
SUZUKI	8,523	21.4%	0.0%	-1,828
MAZDA	8,075	12.5%	3.8%	-706
BYD	1,535	22.0%	100.0%	1,197
SUBARU	919	21.7%	28.7%	65
GEELY	719	14.7%	19.3%	33
GREAT WALL	503	22.0%	100.0%	392
ASTON MARTIN	250	18.5%	0.0%	-46

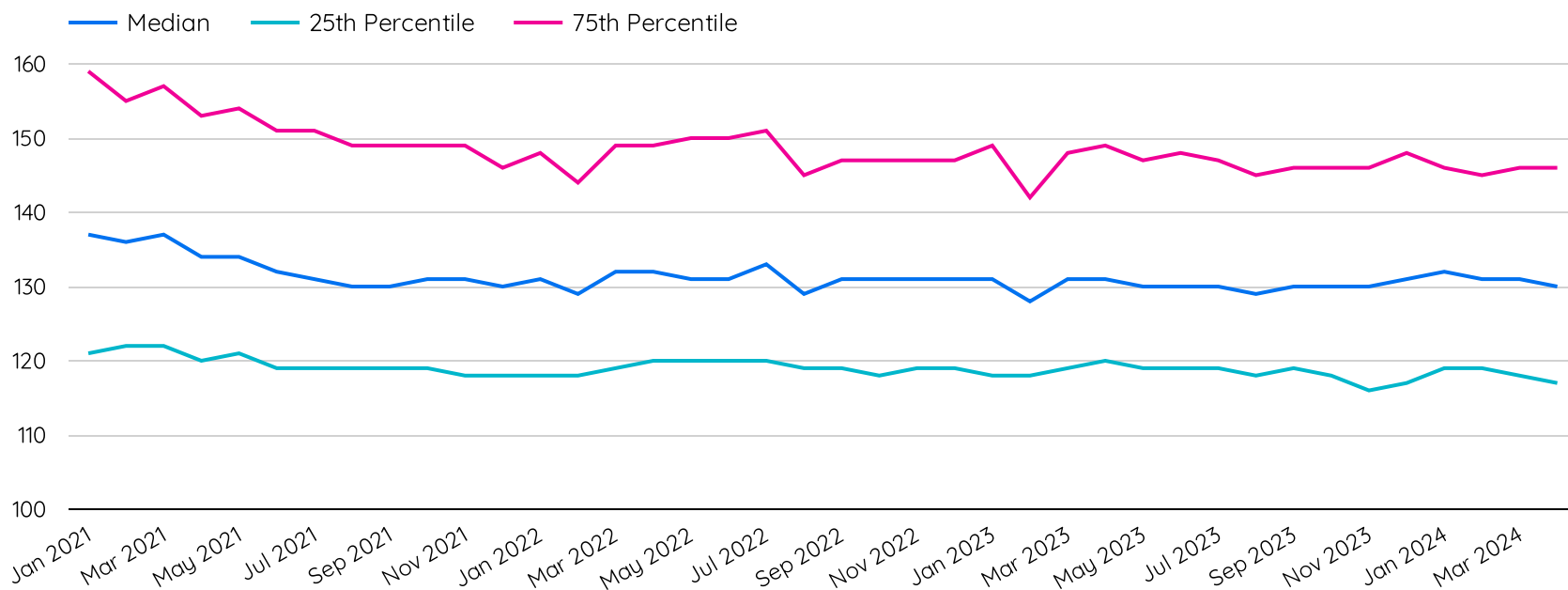
The year so far: One-third of the way into the first year of the UK's Zero Emissions Vehicle (ZEV) mandate, 16% of GB car sales this year were fully electric. While that appears far below the headline 22% ZEV mandate target, we estimate that only 18.5% of sales must be electric for manufacturers to meet compliance via trading. Amongst the biggest manufacturers, SAIC (owners of MG), Toyota, Mercedes and Hyundai are all on course to exceed their targets, whilst BMW are very close. VW and Stellantis, who have complained most vociferously about the targets - and Ford, who have new models imminent - are furthest off.

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 10.8% in 2024. The cap is tightened in subsequent years, with no further ZEV credits for CO2 overperformance after 2026.

ICE Car CO2 Emissions Ratings

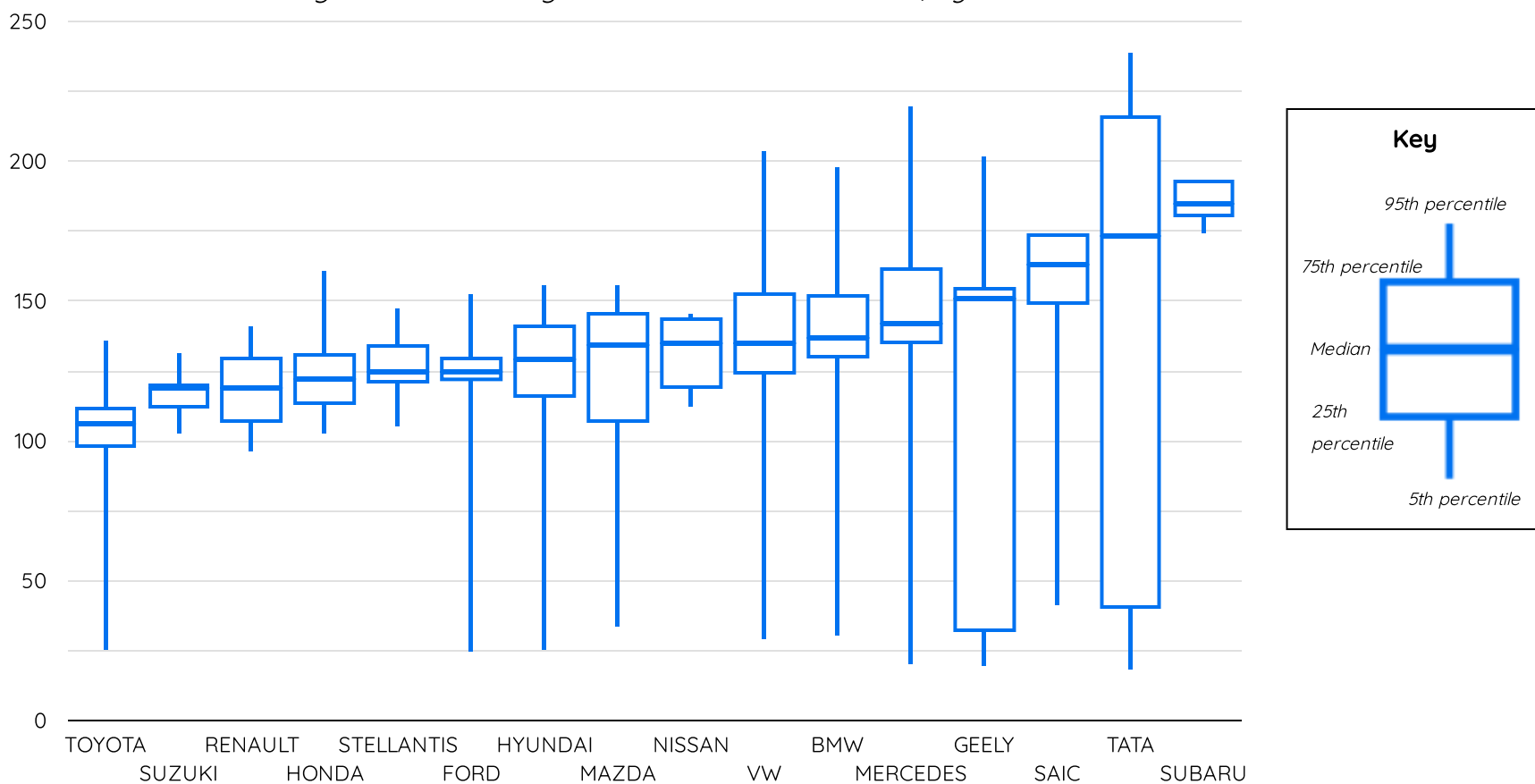
Average CO2 ratings of newly registered internal combustion engine cars by month of registration, gCO2/km



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

Diesel remains dominant in van-land as the market share of battery electric vans in the year to date stays at 5.25%.

Whilst this is some way off the 10% target set out in the ZEV mandate, there are opportunities - as with cars - for manufacturers to lower the targets through outperformance on the emissions of non-zero emission vans. Anticipating the slower pace of adoption, Government also made additional provision by permitting firms to borrow up to 90% of the allowances required to meet their targets in 2024, and a further 50% in 2025.

Some firms are nevertheless performing well, with Nissan and Maxus each over 10%, whilst Stellantis (who own manufacturers Peugeot, Citroen and Fiat) are close at 8.7%, and Renault, VW and Toyota are at least two-thirds of the way there. Of the big players, only Mercedes and especially Ford, who sell more vans than the next three manufacturers combined, are far off track.

Meanwhile DSKF, the pureplay electric van maker, has crept into the electrified top 10.

BEV market share (YTD)

	Marque	BEVs ▼	Share of UK BEV vans (%)
1.	PEUGEOT	1,140	18.6%
2.	VAUXHALL	864	14.1%
3.	VOLKSWAGEN	795	13.0%
4.	RENAULT	631	10.3%
5.	FORD	491	8.0%
6.	TOYOTA	464	7.6%
7.	CITROEN	451	7.4%
8.	DFSK	311	5.1%
9.	MERCEDES-BENZ	283	4.6%
10.	MAXUS	273	4.5%
11.	NISSAN	269	4.4%
12.	FIAT	104	1.7%
13.	RENAULT TRUCKS	27	0.4%
14.	BYD	9	0.1%
15.	GOUPIL	7	0.1%
16.	IVECO	3	0.0%

Sales by fuel type, last 12 months vs previous

Fuel	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	306,511	19.2% ↑	91.1%	-0.3% ↓
BEV	21,375	15.7% ↑	6.35%	-0.21% ↓
Petrol	6,470	76.2% ↑	1.92%	0.62% ↑
Hybrid	2,086	2.0% ↑	0.62%	-0.11% ↓
Grand total	336,443	19.6% ↑	100%	0%

Total sales by fuel type, latest month vs last year

Fuel	Regs. ▼	Δ	Mkt. Share	Δ
Diesel	20,997	1,349 ↑	93.22%	2.8% ↑
BEV	889	-652 ↓	3.95%	-3.14% ↓
Petrol	462	28 ↑	2.05%	0.05% ↑
Hybrid	176	69 ↑	0.78%	0.29% ↑
Grand total	22,524	794 ↑	100%	0%

Top van sellers' BEV sales (YTD)

Marque	Total ▼	BEVs	BEV %	Δ
FORD	35,062	491	1.4%	0.4% ↑
VAUXHALL	11,652	864	7.4%	-14.6% ↓
VOLKSWAGEN	11,089	795	7.2%	5.2% ↑
CITROEN	9,331	451	4.8%	-2.4% ↓
PEUGEOT	7,894	1,140	14.4%	3.7% ↑
RENAULT	7,710	631	8.2%	7.3% ↑
MERCEDES-BE...	7,624	283	3.7%	0.1% ↑
TOYOTA	7,133	464	6.5%	-1.3% ↓
NISSAN	2,535	269	10.6%	10.6% ↑
FIAT	2,206	104	4.7%	0.8% ↑
MAXUS	2,198	273	12.4%	-57.5% ↓
IVECO	2,111	3	0.1%	0.1% ↑
LAND ROVER	1,824	0	0.0%	0.0%
ISUZU	1,085	0	0.0%	0.0%
RENAULT TRUC...	959	27	2.8%	0.8% ↑
MAN	739	0	0.0%	-0.1% ↓
SUZUKI	549	0	0.0%	0.0%
ISUZU TRUCKS	491	0	0.0%	0.0%
KGM	449	0	0.0%	-
DFSK	311	311	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	43,643	3,808 ↑	99.34%	-0.36% ↓
BEV	288	171 ↑	0.66%	0.36% ↑
Grand total	43,931	3,979 ↑	100%	0%

HGVs latest month vs last year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Diesel	3,938	18.4% ↑	99.54%	-0.07% ↓
BEV	18	38.5% ↑	0.46%	0.07% ↑
Grand total	3,956	18.5% ↑	100%	0%

18 battery electric HGVs were sold in April 2024, an increase of 38% against the same month last year. 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 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 remains missing in action.

Motorbikes

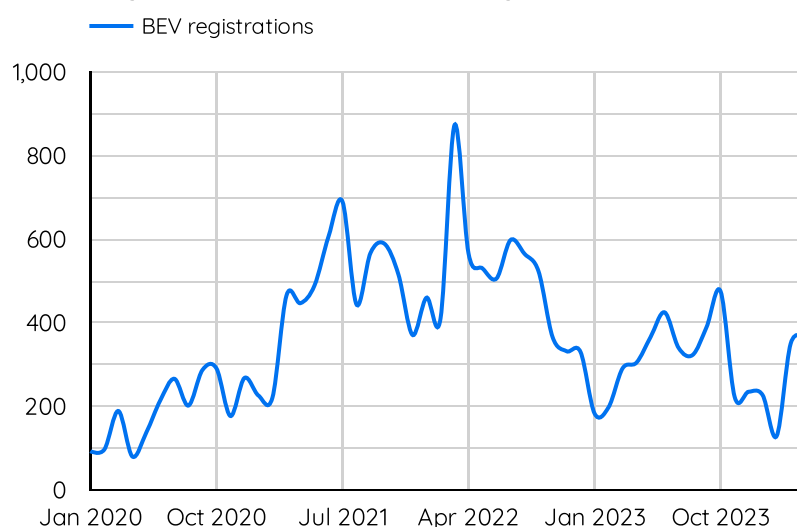
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs. ▼	% Δ	Mkt. Share	Δ
Petrol	101,477	11% ↑	96.35%	0.85% ↑
BEV	3,835	-18.9% ↓	3.64%	-0.86% ↓
Grand total	105,326	0.2% ↑	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



It is hard to draw solid conclusions about the electric motorbike market, as April sales appear lower than they were in October, 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 (currently unknown) 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

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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'.