EUROPEAN MARKET MONITOR
CARS AND VANS: MARCH 2025

PASSENGER CAR REGISTRATIONS

The average share of battery electric vehicles (BEVs) among total new registrations in Europe was 16% in March 2025, the same as in February 2025. The BMW pool had the highest BEV share in March (25%) and was followed by the Mercedes-Volvo-Polestar (23%), Kia (19%), Hyundai (18%), and Volkswagen (17%) pools. The Tesla-Stellantis-Toyota pool (14% BEV share) was below the European average, as were Renault (12%), SAIC (8%), and Nissan (6%). Shares of plug-in hybrid electric vehicles (PHEVs) in new registrations in Europe increased slightly to 8% in March, led by the Mercedes-Volvo-Polestar pool with a 23% PHEV share. SAIC had the largest share of full hybrid electric vehicles (HEVs) in March, 41%, and that was a 24 percentage point increase over the 2024 average share. The BMW and Mercedes-Volvo-Polestar pools and Nissan led in new registration shares of mild hybrid electric vehicles (MHEVs) at 37%.

Figure 1

Share of battery electric in new passenger car registrations in Europe

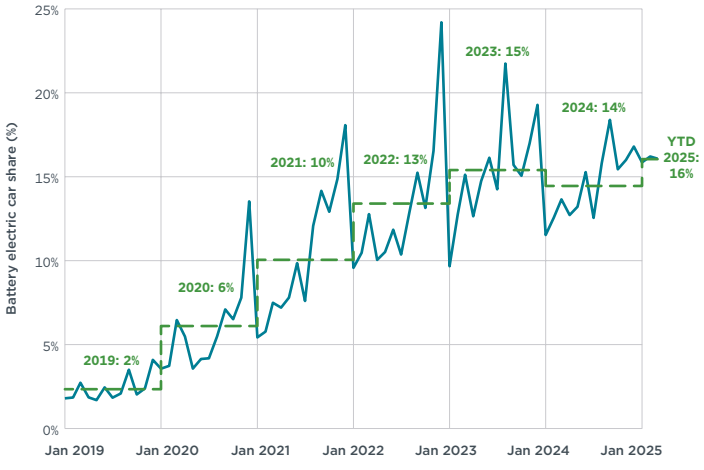
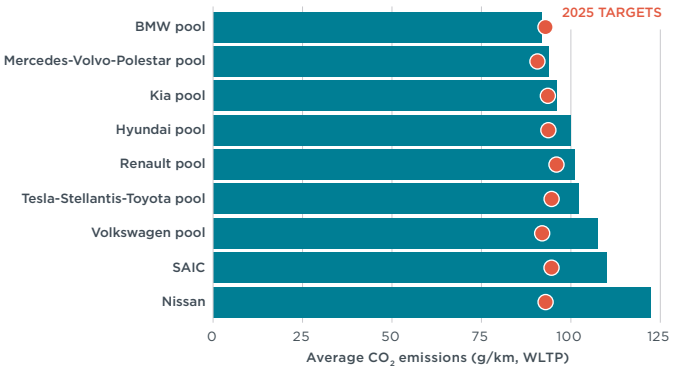


Figure 2

Average CO_2 emissions of manufacturer pools and individual manufacturers compared with estimated 2025 targets, 2025 YTD



Note: Includes compliance credits. All CO_2 values are estimates according to the Worldwide harmonized Light vehicles Test Procedure (WLTP). Only manufacturer pools and individual manufacturers with at least 1% market share YTD are shown. See the section on definitions, data sources, methodology, and assumptions for more.

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Carbon dioxide (CO_2) emissions among manufacturer pools averaged 103 g CO_2/km in March 2025. As a result, manufacturing pools remain 10 g CO_2/km from the average target of 93 g CO_2/km for 2025. The Hyundai and Tesla-Stellantis-Toyota pools reduced their target gaps significantly compared with the previous month, by 25% and 13%, respectively. The BMW pool is currently in compliance with its 2025 target, while Nissan (29 g CO_2/km above) is the farthest from reaching its target.

Looking at individual car brands with market shares of 1% or larger, apart from Tesla, Volvo had the greatest over-compliance at 29 g CO_2/km below its projected brand-level target for 2025 and was followed by Cupra (19 g CO_2/km below target). While Audi's target gap remains sizable at 30 CO_2/km, that is a 3 g CO_2/km reduction from the previous month. Ford (26 CO_2/km) and Mercedes-Benz (24 CO_2/km), also among the highest-emitting brands, reduced their target gaps by 2 CO_2/km each. Nissan's target gap increased by 3 CO_2/km in March compared with the previous month, and reached 29 CO_2/km.

Table 1

Share of battery electric, plug-in hybrid, full hybrid, and mild hybrid passenger cars by manufacturer pool or large manufacturer not forming a pool

Manufacturer or manufacturer pool	March 2025				2025 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
BMW pool	**25%**	13%	0%	37%	**25%**	14%	0%	36%	**22%**	14%	0%	33%
Mercedes-Volvo-Polestar pool	**23%**	23%	0%	37%	**23%**	23%	0%	37%	**26%**	24%	0%	33%
All other brands	**22%**	23%	2%	10%	**23%**	21%	2%	11%	**21%**	20%	2%	13%
Kia pool	**19%**	5%	15%	16%	**21%**	5%	15%	14%	**12%**	9%	16%	17%
Hyundai pool	**18%**	5%	22%	14%	**16%**	6%	22%	13%	**11%**	4%	20%	18%
Volkswagen pool	**17%**	9%	0%	14%	**17%**	8%	0%	15%	**12%**	6%	0%	13%
AVERAGE	**16%**	**8%**	**13%**	**24%**	**16%**	**8%**	**13%**	**23%**	**14%**	**7%**	**12%**	**20%**
Tesla-Stellantis-Toyota pool	**14%**	5%	19%	35%	**13%**	4%	21%	33%	**14%**	4%	21%	23%
Renault pool	**12%**	1%	31%	8%	**12%**	1%	28%	8%	**8%**	0%	21%	8%
SAIC	**8%**	6%	41%	0%	**11%**	6%	42%	0%	**31%**	3%	17%	0%
Nissan	**6%**	0%	31%	37%	**8%**	0%	36%	32%	**9%**	0%	39%	31%

Note: Only manufacturer pools and individual manufacturers with at least 1% market share YTD are shown.

Table 2

Fleet-average CO_2 emissions of new passenger cars and market share by manufacturer pool or large manufacturer not forming a pool

Manufacturer or manufacturer pool	Target gap	New car fleet-average CO_2 (in g/km)								Market share 2025 YTD
		March 2025	2025 YTD	Compliance credits	Adj. 2025 YTD	Reference target 2025	Compliance credits	Target 2025	Target gap	
		WLTP	WLTP	Eco-innovations	WLTP	WLTP	ZLEV factor	WLTP	WLTP	
BMW pool	-1%	94	93	1	92	88	1.05	93	-1	7%
Kia pool	3%	99	97	0.9	96	93	1.01	94	2	4%
Mercedes-Volvo-Polestar pool	3%	94	94	0.3	94	86	1.05	91	3	8%
Renault pool	5%	102	103	1.4	101	96	1	96	5	11%
Hyundai pool	7%	98	101	0.9	100	94	1	94	6	4%
Tesla-Stellantis-Toyota pool	8%	102	103	1.1	102	95	1	95	7	33%
AVERAGE	**10%**	**103**	**103**	**1**	**102**	**93**	**1**	**93**	**10**	
SAIC	16%	113	110	0	110	95	1	95	15	2%
Volkswagen pool	17%	107	109	1	108	92	1	92	16	27%
Nissan	31%	126	123	1.1	122	93	1	93	29	3%

Note: All CO_2 values are estimates according to the WLTP. Only manufacturer pools and individual manufacturers with at least 1% market share YTD are shown. See the section on definitions, data sources, methodology, and assumptions for details.

Table 3

Fleet-average CO_2 emissions of new passenger cars and market share by manufacturer group and brand

Manufacturer group/brand	New car fleet-average CO_2 (in g/km)								Market share 2025 YTD
	March 2025	2025 YTD	Compliance credits	Adj. 2025 YTD	Reference target 2025*	Compliance credits	Target 2025*	Target gap*	
	WLTP	WLTP	Eco-innovations	WLTP	WLTP	ZLEV factor	WLTP	WLTP	
Tesla	0	0	0	0	87	1.05	91	-91	1%
Tesla	0	0	0	0	87	1.05	91	-91	1%
Volvo Cars	59	57	0.3	57	86	1.05	90	-34	2%
Volvo	64	62	0.3	62	86	1.05	90	-29	2%
BMW Group	94	93	1	92	88	1.05	93	-1	7%
BMW	95	94	0.9	93	87	1.05	92	1	6%
Toyota Group	96	98	0.5	98	95	1	95	3	8%
Toyota	96	98	0.5	97	95	1	95	2	7%
Hyundai Group	97	99	0.9	98	93	1	93	5	7%
Kia	97	97	0.9	96	93	1.01	94	2	4%
Hyundai	97	101	0.9	100	94	1	94	6	4%
Renault Group	102	103	1.4	101	96	1	96	5	11%
Renault	94	95	1.3	94	95	1	95	-1	6%
Dacia	114	113	1.6	111	97	1	97	14	5%
Volkswagen Group	107	109	1	108	92	1	92	16	27%
VW	105	106	0.9	105	92	1	92	13	11%
Škoda	109	110	1.1	109	93	1	93	16	6%
Audi	115	120	0.8	119	89	1	89	30	5%
Cupra	76	79	1	78	92	1.05	96	-19	2%
SEAT	124	124	1.7	122	96	1	96	26	2%
Stellantis	110	109	1.4	107	96	1	96	12	16%
Peugeot	106	105	1.4	104	95	1	95	8	6%
Citroën	108	108	1.6	106	96	1	96	10	3%
Fiat	119	116	1	115	99	1	99	16	3%
Opel/Vauxhall	109	108	1.5	106	96	1	96	10	3%
Jeep	112	113	1.2	111	93	1	93	18	1%
Mercedes-Benz Group	110	112	0.3	112	86	1.05	91	21	5%
Mercedes-Benz	111	114	0.3	114	86	1.04	90	24	5%
Suzuki	112	113	1.8	112	98	1	98	13	2%
Suzuki	112	113	1.8	112	98	1	98	13	2%
SAIC	113	110	0	110	95	1	95	15	2%
MG	113	110	0	110	95	1	95	15	2%
Ford	115	119	1.6	118	92	1	92	26	3%
Ford	115	119	1.6	118	92	1	92	26	3%
Mazda	123	123	0.5	123	93	1	93	30	1%
Mazda	123	123	0.5	123	93	1	93	30	1%
Nissan	126	123	1.1	122	93	1	93	29	3%
Nissan	126	123	1.1	122	93	1	93	29	3%

Note: Brand shares may not add up to manufacturer group totals, because only brands with at least 1% market share YTD are displayed in the table. Manufacturers are sorted by ascending fleet-average CO_2 emissions. All CO_2 values are estimates according to the WLTP. See the section on definitions, data sources, methodology, and assumptions for details.

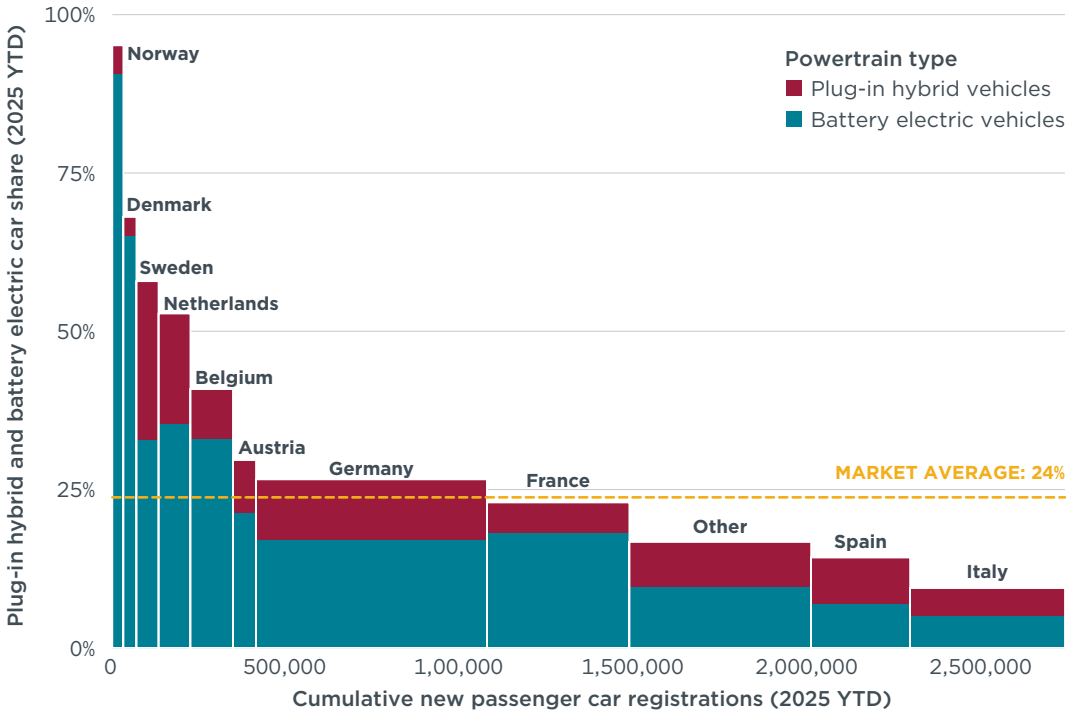
* The CO_2 targets in the table are hypothetical only, as official targets are set at the manufacturer or manufacturer-pool level, not at the brand level.

PASSENGER CAR REGISTRATIONS BY COUNTRY

Looking at the major European markets, total passenger car registrations in France and the Netherlands fell 15% in March compared with March 2024, and Italy surpassed France in market size. New registrations increased 24% in Spain and 19% in Czechia compared with the same month in the previous year. Combined BEV and PHEV market shares averaged 24% in Europe in March 2025, up 1 percentage point from February 2025. Norway (95%), Denmark (68%), Sweden (58%), and the Netherlands (53%) all had shares above 50%, and Belgium (41%), Austria (30%), and Germany (27%) also recorded combined BEV and PHEV market shares above the average for Europe. Among the largest markets, the highest increase in BEV registrations occurred in Czechia, Spain, and Italy, where registrations increased 261%, 94%, and 78%, respectively, in March 2025 compared with March 2024; meanwhile, registrations in France and the Netherlands decreased 14% compared with March 2024. Over 42,000 BEVs were registered last month in Germany, Europe's largest market, and that was up 35% over March 2024. The largest year-over-year increase in PHEV registrations was in Czechia (+90% over March 2024) and HEV registrations increased the most in Spain (+34%). Shares of MHEVs were highest in Italy (32%) and Poland (30%) in March 2025, and they are gaining popularity in France and Spain, where registrations increased 59% (France) and 52% (Spain) in March 2025 compared with March 2024.

Figure 3

Share of plug-in hybrid and battery electric passenger cars by country, including information on market size (total new car registrations)



Note: "Other" includes EEA countries not individually highlighted in the figure, except for Bulgaria, Liechtenstein, and Malta.

Table 4

New passenger car registrations by country

	March 2025	vs. March 2024	2025 YTD	vs. 2024 YTD
Germany	253,497	-4%	664,571	-4%
Italy	173,125	6%	445,772	-2%
France	153,842	-15%	410,096	-8%
Spain	118,788	24%	284,932	15%
Poland	53,126	6%	142,272	2%
Belgium	40,778	-10%	122,402	-11%
Netherlands	31,515	-15%	91,766	-10%
Austria	26,150	0%	66,477	4%
Sweden	24,254	1%	63,671	6%
Czechia	22,566	19%	59,686	4%
Other	146,033	4%	402,096	2%
ALL	**1,043,674**	**0%**	**2,753,741**	**-1%**

Table 5

New battery electric, plug-in hybrid, hybrid, and mild hybrid passenger car registrations by country

	March 2025				vs. March 2024				2025 YTD				vs. 2024 YTD			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	42,509	26,574	13,860	60,980	35%	66%	18%	10%	112,939	63,858	31,394	160,824	39%	42%	13%	10%
France	29,261	8,312	37,337	33,309	-14%	-49%	29%	59%	74,524	19,628	95,001	89,230	-7%	-49%	28%	75%
Belgium	13,652	3,105	4,700	8,267	17%	-56%	9%	22%	40,405	9,612	15,032	24,042	30%	-65%	18%	21%
Netherlands	11,196	6,262	4,672	4,774	-14%	26%	-4%	-12%	32,440	16,010	12,247	14,683	8%	12%	-12%	-6%
Italy	9,373	7,873	22,402	55,134	78%	37%	23%	23%	23,019	19,064	55,529	142,628	75%	31%	14%	15%
Sweden	8,388	6,319	2,180	3,247	0%	14%	16%	15%	20,946	15,923	5,633	9,371	13%	13%	-2%	23%
Spain	8,373	8,466	18,730	30,362	94%	51%	34%	52%	19,842	20,793	52,014	69,527	69%	32%	38%	35%
Austria	6,122	2,277	1,810	5,414	31%	54%	7%	20%	14,177	5,535	4,196	13,982	31%	29%	3%	28%
Poland	2,306	2,434	11,132	15,938	35%	77%	14%	28%	5,101	5,885	34,381	39,790	22%	56%	9%	25%
Czechia	1,395	976	1,723	3,219	261%	90%	11%	31%	3,113	2,166	4,650	8,397	138%	54%	4%	27%
Other	35,204	11,072	17,200	24,944	27%	17%	14%	19%	95,446	31,445	49,272	65,936	33%	13%	6%	17%
ALL	167,779	83,670	135,746	245,588	18%	13%	21%	25%	441,952	209,919	359,349	638,410	25%	1%	17%	22%

Table 6

Share of new battery electric, plug-in hybrid, full hybrid, and mild hybrid passenger cars by country

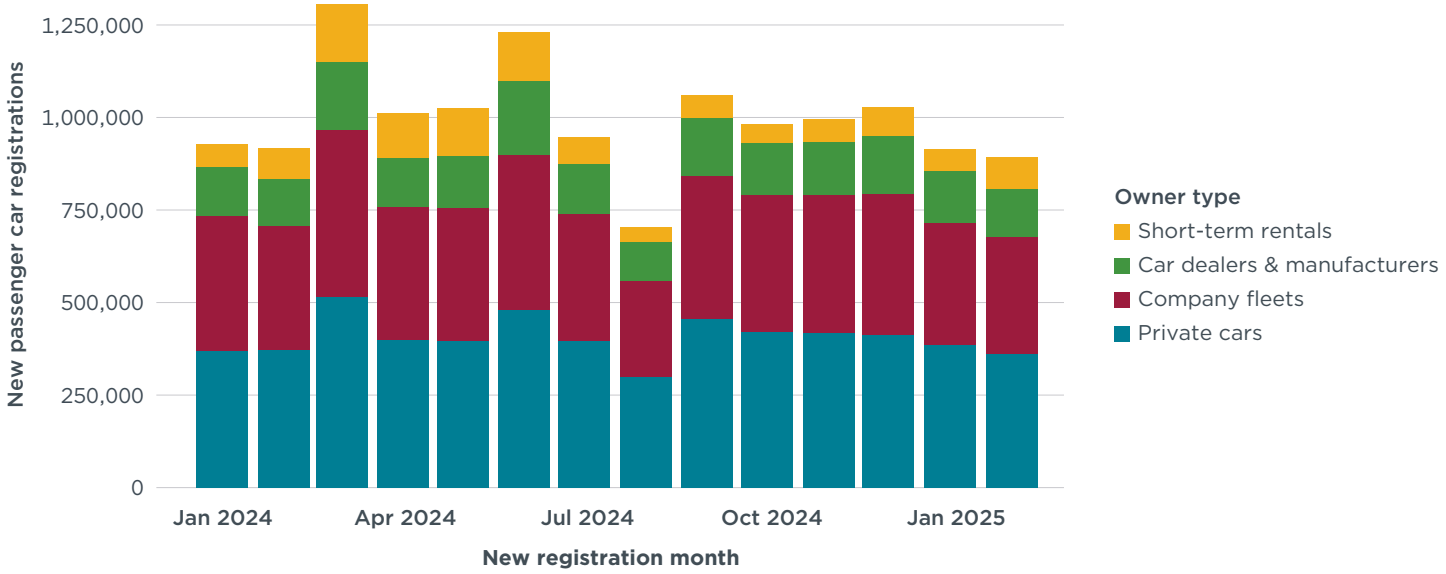
	March 2025				2025 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Netherlands	36%	20%	15%	15%	35%	17%	13%	16%	35%	14%	14%	14%
Sweden	35%	26%	9%	13%	33%	25%	9%	15%	35%	23%	9%	12%
Belgium	33%	8%	12%	20%	33%	8%	12%	20%	28%	15%	9%	16%
Other	24%	8%	12%	17%	24%	8%	12%	16%	22%	7%	11%	15%
Austria	23%	9%	7%	21%	21%	8%	6%	21%	17%	7%	7%	18%
France	19%	5%	24%	22%	18%	5%	23%	22%	17%	9%	19%	15%
Germany	17%	10%	5%	24%	17%	10%	5%	24%	14%	7%	5%	22%
AVERAGE	16%	8%	13%	24%	16%	8%	13%	23%	14%	7%	12%	20%
Spain	7%	7%	16%	26%	7%	7%	18%	24%	6%	6%	16%	21%
Czechia	6%	4%	8%	14%	5%	4%	8%	14%	5%	3%	8%	12%
Italy	5%	5%	13%	32%	5%	4%	12%	32%	4%	3%	12%	28%
Poland	4%	5%	21%	30%	4%	4%	24%	28%	3%	3%	22%	24%

PASSENGER CAR REGISTRATIONS BY OWNER

Private cars made up over 40% of new registrations in Europe in 2024, and these were followed by company fleets with 36%, and then car dealers and manufacturers and short-term rentals, which made up 14% and 9% of the total registrations, respectively. Short-term rental registrations fluctuated more than other owner types; they ranged from nearly 13% of sales in May 2024 to only 5% in October 2024. In February 2025, the split of new registrations by owner type largely mirrored that of February 2024.

Figure 4

New passenger car registrations by owner for 19 select European countries



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VAN REGISTRATIONS

Over 346,000 new vans were registered in Europe in the first quarter of 2025, a 13% decrease over the same period in 2024. Of newly registered vans, 9% were battery electric; in the first quarter of 2024, 6% of new vans were battery electric. Nissan (13%), the Volkswagen pool (12%), Toyota (11%), and the Renault (10%) and Stellantis (9%) pools all had BEV shares at or above the European average; the Mercedes-Benz (7%) and Ford (4%) pools and Iveco (1%) were below the European average. Looking at the largest markets, shares of battery electric vans increased by 1 to 2 percentage points in the first quarter of 2025 compared with the same period in 2024. None of the manufacturers are currently on track to meet their CO_2 targets for 2025 and the average target gap is 18 g CO_2/km. Among manufacturers and manufacturer pools, Iveco and the Ford and Mercedes-Benz pools are currently the farthest from their 2025 CO_2 targets, with respective target gaps of 35, 33, and 32 g CO_2/km.

Table 7

Share of battery electric, plug-in hybrid, full hybrid, and mild hybrid vans by manufacturer pool or large manufacturer not forming a pool

	Q1/2025				2025 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
All other brands	17%	1%	1%	17%	17%	1%	1%	17%	16%	0%	1%	13%
Nissan	13%	0%	4%	1%	13%	0%	4%	1%	14%	0%	4%	1%
Volkswagen pool	12%	1%	0%	0%	12%	1%	0%	0%	8%	0%	0%	0%
Toyota	11%	0%	5%	4%	11%	0%	5%	4%	7%	0%	6%	0%
Renault pool	10%	0%	3%	1%	10%	0%	3%	1%	4%	0%	2%	0%
Stellantis pool	9%	0%	0%	2%	9%	0%	0%	2%	6%	0%	0%	2%
AVERAGE	9%	1%	1%	2%	9%	1%	1%	2%	6%	0%	1%	1%
Mercedes-Benz pool	7%	0%	0%	0%	7%	0%	0%	0%	7%	0%	0%	0%
Ford pool	4%	3%	0%	0%	4%	3%	0%	0%	3%	1%	0%	2%
Iveco	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%

Note: Only manufacturer pools and individual manufacturers with at least 1% market share YTD are shown.

Table 8

Fleet-average CO_2 emissions of new vans and market share by manufacturer pool or large manufacturer not forming a pool

		New van fleet-average CO_2 (in g/km)								
	Target gap	Q1/2025	2025 YTD	Compliance credits	Adj. 2025 YTD	Reference target 2025	Compliance credits	Target 2025	Target gap	Market share 2025 YTD
		WLTP	WLTP	Eco-innovations	WLTP	WLTP	ZLEV factor	WLTP	WLTP	
Volkswagen pool	10%	182	182	0.8	181	172	1	165	16	11%
AVERAGE	11%	177	177	0.4	176	159	1	159	18	
Toyota	13%	167	167	0.3	167	154	1	148	19	6%
Renault pool	13%	164	164	1	163	150	1	144	19	14%
Nissan	14%	166	166	1	165	151	1	144	21	2%
Iveco	16%	252	252	0	252	224	1	217	35	4%
Stellantis pool	17%	161	161	0.3	161	144	1	137	24	31%
Mercedes-Benz pool	18%	207	207	0.4	207	181	1	174	32	9%
Ford pool	20%	197	197	0	197	171	1	164	33	18%

Note: Only manufacturer pools and individual manufacturers with at least 1% market share YTD are shown. All CO_2 values are estimates. See the section on definitions, data sources, methodology, and assumptions for details.

Table 9

New van registrations by country

	Q1/2025	vs. Q1/2024	2025 YTD	vs. 2024 YTD
France	85,383	-11%	85,383	-11%
Germany	63,329	-11%	63,329	-11%
Italy	44,638	-17%	44,638	-17%
Spain	37,226	5%	37,226	5%
Other	116,113	-18%	116,113	-18%
ALL	346,689	-13%	346,689	-13%

Table 10

Share of battery electric, plug-in hybrid, full hybrid, and mild hybrid vans by country

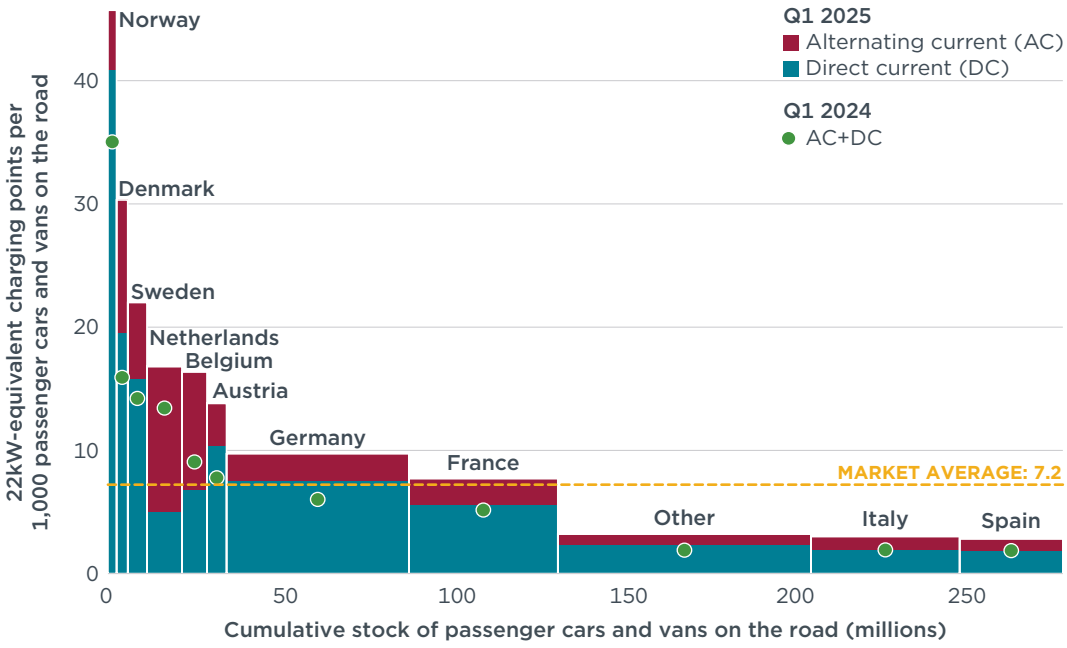
	Q1/2025				2025 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Other	13%	1%	0%	1%	13%	1%	0%	1%	8%	0%	0%	0%
France	9%	1%	2%	3%	9%	1%	2%	3%	7%	0%	2%	1%
AVERAGE	9%	1%	1%	2%	9%	1%	1%	2%	6%	0%	1%	1%
Germany	6%	0%	0%	1%	6%	0%	0%	1%	5%	0%	0%	1%
Spain	4%	1%	0%	0%	4%	1%	0%	0%	3%	0%	0%	1%
Italy	3%	0%	2%	6%	3%	0%	2%	6%	2%	0%	2%	6%

CHARGING INFRASTRUCTURE DEVELOPMENT

Over 1 million public charging points were installed in Europe by the end of the first quarter of 2025, up from around 950,000 at the end of 2024. For alternating current (AC) charging, this represents a 28% increase compared with the same point in 2024. Direct current (DC) charging points showed even greater growth, increasing 54% compared with the first quarter of 2024. Approximately 81% of Europe's public charging points supply AC, and the remaining 19% supply DC. Denmark recorded the largest growth in DC chargers by the end of the first quarter of 2025, +104% compared with the first quarter of 2024, and was followed by Belgium, which recorded a substantial increase in both DC and AC publicly accessible charging points (+92% and +60%, respectively). There were on average about 7.2 publicly accessible 22 kW-equivalent charging points installed per thousand passenger cars and vans on the road in Europe at the end of March 2025, up from 6.5 at the end of 2024. With nearly 46 publicly accessible 22 kW-equivalent charging points per thousand passenger cars and vans, Norway continues to lead Europe in charging infrastructure and is followed by Iceland (35), Denmark (30), and Sweden (22). Italy (3) and Spain (3) remain well below the European average.

Figure 5

22 kW-equivalent publicly accessible charging points installed per thousand passenger cars and vans, by type of power output and country by the end of March 2025



Note: The width of the bars provides information on passenger car and van stock size estimates as of the end of 2024. 22 kW-equivalent is used to account for different power outputs while allowing for comparison among countries.

Table 11

Number of publicly accessible charging points installed, by country and type of power output

	End of Q1/2025		vs. end of Q1/2024	
	AC	DC	AC	DC
Netherlands	184,146	6,197	22%	28%
Germany	131,531	43,373	24%	52%
France	119,165	35,534	25%	49%
Belgium	79,429	5,770	60%	92%
Italy	55,322	14,460	29%	71%
Sweden	48,034	9,723	23%	45%
Spain	34,559	12,981	44%	59%
Denmark	36,133	6,839	58%	104%
Austria	26,956	8,242	22%	84%
Norway	17,506	13,012	-14%	24%
Other	81,980	36,661	30%	60%
Total	814,761	192,792	28%	54%

DEFINITIONS, DATA SOURCES, METHODOLOGY, AND ASSUMPTIONS

- **Manufacturer pools:** Automakers are allowed to form pools to jointly comply with CO_2 targets. For this publication, the 2025 pools listed in the European Commission's "M1 pooling list" (cars) and "N1 pooling list" (vans), version of 15 March 2025, are used. 2024 closed pools from these lists have been carried over into 2025, even in the absence of a 2025 formal declaration, as they typically remain stable due to ongoing commercial affiliations (e.g., the BMW, Hyundai, and Kia pools). In contrast, only open pools that have been confirmed for 2025 are included, as their composition tends to change more frequently than closed pools. Additionally, it is assumed that the Renault Group forms closed passenger car and van pools in 2025 with its affiliated manufacturers. For cars, the main brands are: BMW pool (BMW, Mini), Hyundai pool (Hyundai), Kia pool (Kia), Mercedes-Volvo-Polestar pool (Mercedes-Benz, Polestar, Smart, Volvo), Renault pool (Dacia, Renault), Tesla-Stellantis-Toyota pool (Citroën, Fiat, Ford, Jeep, Mazda, Opel, Peugeot, Suzuki, Tesla, Toyota), Volkswagen (Audi, Cupra, Porsche, SEAT, Škoda, VW). For vans, the main brands are: Ford pool (Ford), Mercedes-Benz pool (Mercedes-Benz, Mitsubishi Fuso), Renault pool (Renault), Stellantis pool (Citroën, Fiat, Opel, Peugeot), Volkswagen pool (MAN, Volkswagen). Nissan and SAIC are large passenger car manufacturers not part of a pool. Similarly, Iveco, Nissan, and Toyota are large van manufacturers not part of a pool.
- **Abbreviations: AC** = alternating current; **CO_2** = carbon dioxide emissions; **DC** = direct current; **g/km** = grams per kilometer; **YTD** = year-to-date; **ZLEV** = zero- and low-emission vehicle.
- **Technical scope:** This publication focuses on new **passenger car and van** registrations. **Battery electric vehicles** (BEVs) are powered exclusively by an electric motor, with no additional source of propulsion. **Plug-in hybrid electric vehicles** (PHEVs) combine a conventional combustion engine with an electric propulsion system that can be recharged via an external power source. **Hybrid electric vehicles** here include full hybrid electric vehicles (HEVs) and mild hybrid electric vehicles (MHEVs). HEVs and MHEVs integrate two propulsion systems, usually a combustion engine and an electric propulsion system that cannot be recharged via an external power source. Key differences between HEVs and MHEVs are the system voltage and system power. This enables HEVs to drive partially pure electric, while the electric propulsion system of MHEVs is typically only capable of assisting the combustion engine. For more on HEVs and MHEVs see: Jan Dornoff et al., *Mild-Hybrid Vehicles: A Near Term Technology Trend for CO_2 Emissions Reduction* (International Council on Clean Transportation, 2022), https://theicct.org/publication/mild-hybrid-emissions-jul22/.
- **Geographic scope:** The European CO_2 regulation for vehicle manufacturers applies to all countries of the European Economic Area (EEA). This includes the 27 Member States of the European Union plus Iceland, Liechtenstein, and Norway. Data for new car and van registrations and shares of electric vehicles in this publication cover all of these countries, with the exception of Liechtenstein and Malta. Data for CO_2 emission levels additionally omits Bulgaria and Romania. Charging infrastructure data are presented for the 27 EU members plus the four European Free Trade Association countries (Iceland, Liechtenstein, Norway, and Switzerland).
- **Data sources:** Dataforce (new vehicle registrations), Eco-Movement (charging points), European Environment Agency (vehicle mass and eco-innovation credits).
- **Results may change over time:** Registrations and/or CO_2 data may be retrospectively updated by some of the national type-approval authorities. Similarly, charging infrastructure data may also be retrospectively updated by Eco-Movement. Historical values are regularly updated to reflect all latest data available.
- **Test procedures:** CO_2 values are provided according to the Worldwide harmonized Light vehicles Test Procedure (**WLTP**).

» **Flexible compliance mechanisms:** To facilitate meeting their CO_2 targets, manufacturers can make use of a number of compliance mechanisms: (1) Manufacturers can reduce their CO_2 level by up to 6 g/km by deploying **eco-innovation** technologies. As a conservative estimate, we apply the 2023 level of eco-innovation CO_2 emission reductions per brand. For more on the methodology used, see: Uwe Tietge, Peter Mock, and Jan Dornoff, *Overview and Evaluation of Eco-Innovations in European Passenger Car CO_2 Standards* (International Council on Clean Transportation, 2018), https://theicct.org/publications/eco-innovations-european-passenger-car-co2-standards; (2) If a manufacturer's ZLEV share exceeds 25% (cars) or 17% (vans), its CO_2 target is increased by the same number of percentage points, up to a maximum of 5%. This adjustment is referred to as the **ZLEV factor**, while the target before adjustment is called the manufacturer reference target**.** The manufacturer target is calculated by multiplying the reference target by the ZLEV factor. ZLEVs are BEVs and vehicles with CO_2 emissions of 50 g/km (WLTP) or less. For details on the ZLEV factor mechanism, see: Jan Dornoff, *CO_2 Emission Standards for New Passenger Cars and Vans in the European Union* (International Council on Clean Transportation, 2023), https://theicct.org/publication/eu-co2-standards-cars-vans-may23/.

» **Mass-based targets:** For each manufacturer or manufacturer pool, a specific **2025 CO_2 target value** applies, depending on the average WLTP test mass of the new vehicles registered. For this publication, we assume the average WLTP test mass per manufacturer remains the same as in 2023; the average 2023 BEV and non-BEV test mass for each manufacturer was calculated based on EEA data and then weighted according to their year-to-date 2025 BEV market shares. For more on the methodology used, see: Uwe Tietge, Jan Dornoff, and Peter Mock, *CO_2 Emissions From New Passenger Cars in Europe: Car Manufacturers' Performance in 2023* (International Council Clean Transportation, 2024), https://theicct.org/publication/co2-emissions-new-pv-europe-car-manufacturers-performance-2023-sept24/.

» **Charging point:** As defined in the Alternative Fuels Infrastructure Regulation, a charging point "means a fixed or mobile interface that allows for the transfer of electricity to an electric vehicle, which, whilst it may have one or several connectors to accommodate different connector types, is capable of recharging only one electric vehicle at a time, and excludes devices with a power output less than or equal to 3.7 kW the primary purpose of which is not recharging electric vehicles."

» **Owner types:** This publication considers four types of owners: private cars, company fleets, short-term rentals, and car dealers and manufacturers. The private car category includes all registrations under private individuals, including those of self-employed persons, provided the vehicles are not registered under a company name. Private leasing is also included. Company fleets encompass all vehicles registered to companies, excluding those intended for resale or rental. This category includes company and public administration fleets, commercial long-term rentals, commercial leases, taxis, driving schools, diplomats, etc. The size of the fleet and the extent to which the vehicles are used privately are not considered relevant. The short-term rentals type covers all registrations under large or small national and local rental companies. It also covers all vehicles flagged by authorities as being used for self-drive rental purposes. The car dealers and manufacturers type includes all vehicles registered by car dealers and manufacturers. For automakers, this includes vehicles used for press purposes as well as those for their employees. New registrations data by owner type is aggregated for the following 19 European countries: Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Iceland, Italy, Latvia, Lithuania, the Netherlands, Norway, Poland, Portugal, Spain, Sweden, Switzerland, and United Kingdom.

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