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EUROPEAN MARKET MONITOR
CARS AND VANS: APRIL 2025

PASSENGER CAR REGISTRATIONS

The average share of battery electric vehicles (BEVs) among total new registrations in Europe increased 1 percentage point to 17% in April 2025, up from 16% in March. While several manufacturer pools had decreases in BEV shares of 1 or 2 percentage points in April compared with the previous month, including the BMW, Mercedes-Volvo-Polestar, Hyundai, Tesla-Stellantis-Toyota, and Renault pools, other pools increased their shares. The 19% BEV share of the Volkswagen pool was a notable jump of 7 percentage points over its 2024 average. The BMW pool had the highest BEV share in April (24%) and was followed by Mercedes-Volvo-Polestar (22%) and Kia (21%). The Hyundai pool (16% BEV share) was below the European average, as were SAIC (13%), the Tesla-Stellantis-Toyota pool (12%), the Renault pool (11%), and Nissan (9%). Shares of plug-in hybrid electric vehicles (PHEVs) among new registrations in Europe increased slightly to 9% in April (from 8% in March 2025), and the Mercedes-Volvo-Polestar pool led with a 24% PHEV share. Nissan had the largest share of full hybrid electric vehicles (HEVs) in April (40%) and the BMW and Mercedes-Volvo-Polestar pools led in new registration shares of mild hybrid electric vehicles (MHEVs) at 39% and 38%, respectively.

Figure 1

Share of battery electric in new passenger car registrations in Europe

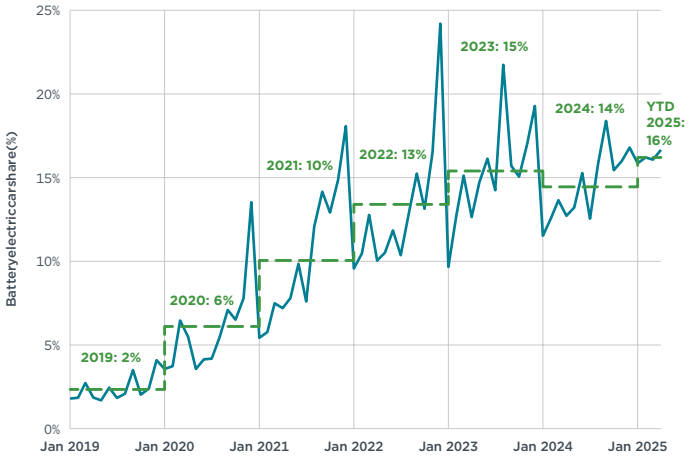
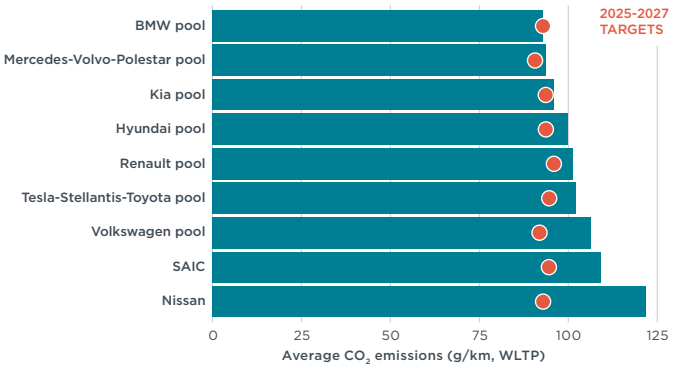


Figure 2

Average CO_2 emissions of manufacturer pools and individual manufacturers compared with estimated 2025–2027 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 102 g CO_2/km in April 2025. As a result, manufacturing pools are 9 g CO_2/km from the average target of 93 g CO_2/km for the 2025–2027 period. The Volkswagen pool reduced its target gap by 2 g CO_2/km compared with the previous month. The BMW pool is currently in compliance with its 2025–2027 target, and 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 greater, apart from Tesla, Volvo had the greatest over-compliance at 27 g CO_2/km below its projected brand-level average target for 2025–2027, and it was followed by Cupra (17 g CO_2/km below target). Mazda and Nissan currently have the largest target gaps at 29 CO_2/km each. While Audi's target gap remains sizable at 28 CO_2/km, that is a 2 g CO_2/km reduction from the previous month, and Ford (25 CO_2/km) and Mercedes-Benz (23 CO_2/km) also reduced their target gaps by 1 CO_2/km each.

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	April 2025				2025 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
All other brands	25%	27%	1%	9%	24%	22%	2%	10%	21%	20%	2%	13%
BMW pool	24%	14%	0%	39%	25%	14%	0%	37%	22%	14%	0%	33%
Mercedes-Volvo-Polestar pool	22%	24%	0%	38%	23%	24%	0%	37%	26%	24%	0%	33%
Kia pool	21%	5%	16%	14%	21%	5%	15%	14%	12%	9%	16%	17%
Volkswagen pool	19%	10%	0%	14%	18%	9%	0%	15%	12%	6%	0%	13%
AVERAGE	17%	9%	13%	22%	16%	8%	13%	23%	14%	7%	12%	20%
Hyundai pool	16%	6%	20%	12%	16%	6%	21%	13%	11%	4%	20%	18%
SAIC	13%	7%	39%	0%	12%	6%	41%	0%	31%	3%	17%	0%
Tesla-Stellantis-Toyota pool	12%	5%	20%	32%	13%	5%	21%	33%	14%	4%	21%	23%
Renault pool	11%	1%	32%	8%	12%	1%	29%	8%	8%	0%	21%	8%
Nissan	9%	0%	40%	28%	8%	0%	36%	31%	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
		April 2025	2025 YTD	Compliance credits	Adj. 2025 YTD	Reference target 2025-2027	Compliance credits	Target 2025-2027	Target gap	
		WLTP	WLTP	Eco-innovations	WLTP	WLTP	ZLEV factor	WLTP	WLTP	
BMW pool	0%	97	94	1	93	88	1.05	93	0	7%
Kia pool	2%	97	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%	103	103	1.4	101	96	1	96	5	11%
Hyundai pool	7%	101	101	0.9	100	94	1	94	6	4%
Tesla-Stellantis-Toyota pool	8%	104	103	1.1	102	95	1	95	8	32%
AVERAGE	10%	102	103	1	102	93	1	93	9	
SAIC	15%	107	109	0	109	95	1	95	15	2%
Volkswagen pool	16%	104	107	1	106	92	1	92	14	27%
Nissan	31%	120	123	1.1	122	93	1	93	29	2%

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
	April 2025	2025 YTD	Compliance credits	Adj. 2025 YTD	Reference target 2025-2027*	Compliance credits	Target 2025-2027*	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	62	58	0.3	58	86	1.05	90	-32	3%
Volvo	67	64	0.3	63	86	1.05	90	-27	2%
Toyota Group	96	98	0.5	97	95	1	95	3	8%
Toyota	97	98	0.5	97	95	1	95	2	7%
BMW Group	97	94	1	93	88	1.05	93	0	7%
BMW	98	95	0.9	94	87	1.05	92	2	6%
Hyundai Group	99	99	0.9	98	93	1	93	5	8%
Kia	97	97	0.9	96	93	1.01	94	2	4%
Hyundai	101	101	0.9	100	94	1	94	6	4%
Renault Group	103	103	1.4	101	96	1	96	5	11%
Renault	96	95	1.3	94	95	1	95	-1	6%
Dacia	115	113	1.6	112	97	1	97	14	5%
Volkswagen Group	104	107	1	106	92	1	92	14	27%
VW	101	105	0.9	104	92	1	92	12	11%
Škoda	103	108	1.1	107	93	1	93	14	6%
Audi	111	118	0.8	117	89	1	89	28	5%
Cupra	85	80	1	79	92	1.05	96	-17	2%
SEAT	123	124	1.7	122	96	1	96	26	2%
SAIC Motor	107	109	0	109	95	1	95	15	2%
MG	107	109	0	109	95	1	95	15	2%
Stellantis	109	109	1.4	107	96	1	96	12	16%
Peugeot	105	105	1.4	104	95	1	95	8	6%
Citroën	107	107	1.6	106	96	1	96	10	3%
Fiat	126	119	1	118	99	1	99	19	3%
Opel/Vauxhall	104	107	1.5	105	96	1	96	9	3%
Jeep	108	111	1.2	110	93	1	93	17	1%
Mercedes-Benz Group	111	112	0.3	111	86	1.05	91	21	5%
Mercedes-Benz	112	114	0.3	113	86	1.05	90	23	5%
Suzuki	113	113	1.8	111	98	1	98	13	2%
Suzuki	113	113	1.8	111	98	1	98	13	2%
Ford	115	118	1.6	117	92	1	92	25	4%
Ford	115	118	1.6	117	92	1	92	25	4%
Mazda	120	123	0.5	122	93	1	93	29	1%
Mazda	120	123	0.5	122	93	1	93	29	1%
Nissan	120	123	1.1	122	93	1	93	29	2%
Nissan	120	123	1.1	122	93	1	93	29	2%

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.

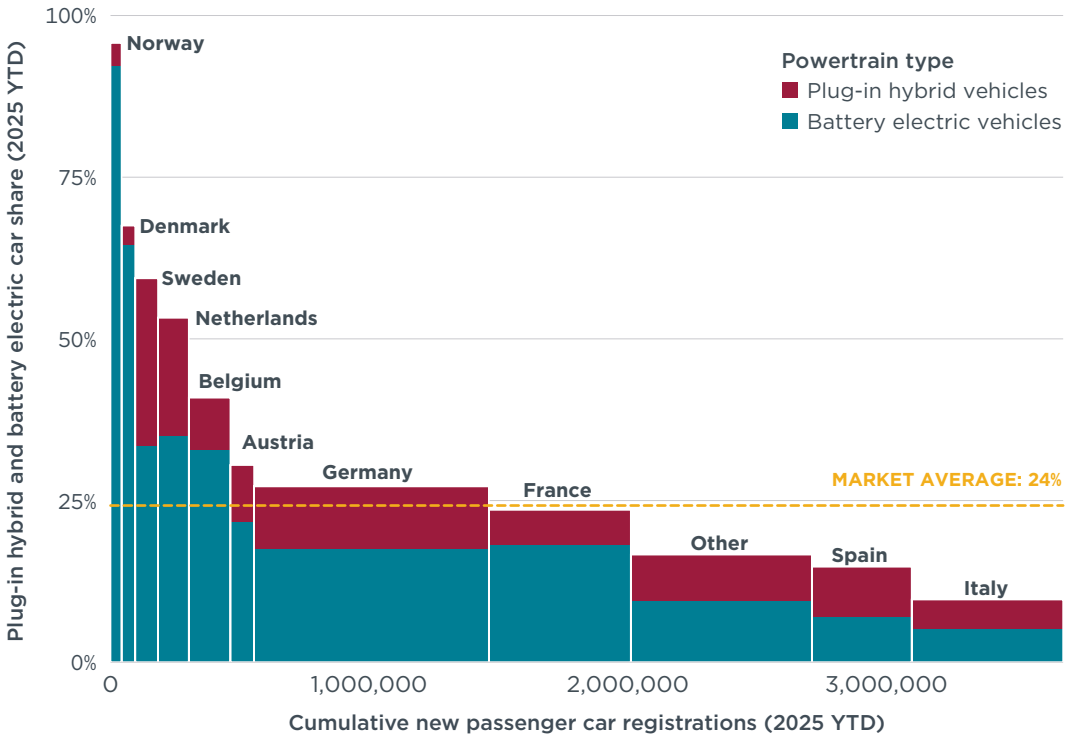
* The CO_2 targets in the table are hypothetical only, as official targets are set at the manufacturer or manufacturer-pool level, not at the brand level.

PASSENGER CAR REGISTRATIONS BY COUNTRY

Looking at the major European markets, total passenger car registrations in France, Belgium, and the Netherlands fell 6%, 5%, and 4%, respectively, in April 2025 compared with April 2024, and Italy surpassed France in market size. New registrations increased 16% in Austria, 10% in Sweden, and 9% in Czechia compared with April 2024. Combined BEV and PHEV market shares held steady at 24% in Europe YTD in 2025. Norway (96%), Denmark (68%), Sweden (59%), and the Netherlands (53%) all had combined 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 Italy, Czechia, and Poland, where registrations increased 110%, 109%, and 103%, respectively, in April 2025 compared with April 2024; registrations in France and the Netherlands remained similar to April 2024. In Germany, BEV registrations continue to rise, with over 45,500 BEVs registered in April, a market share of 19%. As Europe's largest market, Germany's 54% increase in total BEVs registered over April 2024 is noteworthy. Registrations of PHEVs increased the most in Poland (+125%) in April 2025 compared with April 2024 and HEV registrations increased the most in Austria (+79%). Shares of MHEVs were the highest in Italy (31%) and Poland (29%) in April, and they are gaining popularity in Sweden, Austria, and France, where registrations increased 55%, 51%, and 50%, respectively, in April 2025 compared with April 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

	April 2025	vs. April 2024	2025 YTD	vs. 2024 YTD
Germany	242,728	0%	907,299	-3%
Italy	139,672	3%	585,444	-1%
France	138,696	-6%	548,792	-7%
Spain	101,051	8%	385,983	13%
Poland	47,039	6%	189,311	3%
Belgium	38,434	-5%	160,836	-9%
Netherlands	27,157	-4%	118,923	-9%
Austria	25,162	16%	91,639	7%
Sweden	24,364	10%	88,035	7%
Czechia	21,226	9%	80,912	5%

Table 5

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

	April 2025				vs. April 2024				2025 YTD				vs. 2024 YTD			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	**45,523**	24,343	10,341	57,005	**54%**	61%	2%	14%	**158,462**	88,201	41,735	217,829	**43%**	47%	10%	11%
France	**25,542**	9,603	36,156	26,892	**3%**	-12%	30%	50%	**100,066**	29,231	131,157	116,122	**-4%**	-41%	29%	69%
Belgium	**12,486**	3,288	4,245	8,628	**36%**	-48%	18%	32%	**52,891**	12,900	19,277	32,670	**31%**	-62%	18%	24%
Netherlands	**9,206**	5,681	3,751	3,896	**1%**	42%	-11%	-10%	**41,646**	21,691	15,998	18,579	**6%**	19%	-12%	-7%
Sweden	**8,560**	6,833	1,859	3,308	**26%**	19%	-11%	55%	**29,506**	22,756	7,492	12,679	**16%**	15%	-4%	30%
Spain	**7,043**	9,318	16,953	23,768	**75%**	82%	21%	44%	**26,885**	30,111	68,967	93,295	**71%**	44%	33%	38%
Italy	**6,646**	8,029	18,053	42,827	**110%**	77%	20%	11%	**29,665**	27,093	73,582	185,455	**82%**	42%	16%	14%
Austria	**5,690**	2,536	2,275	4,859	**76%**	89%	79%	51%	**19,867**	8,071	6,471	18,841	**42%**	43%	21%	33%
Poland	**2,551**	2,676	9,554	13,802	**103%**	125%	5%	26%	**7,652**	8,561	43,935	53,592	**41%**	72%	8%	25%
Czechia	**1,229**	847	1,646	3,013	**109%**	80%	-1%	23%	**4,342**	3,013	6,296	11,410	**129%**	61%	3%	26%

Table 6

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

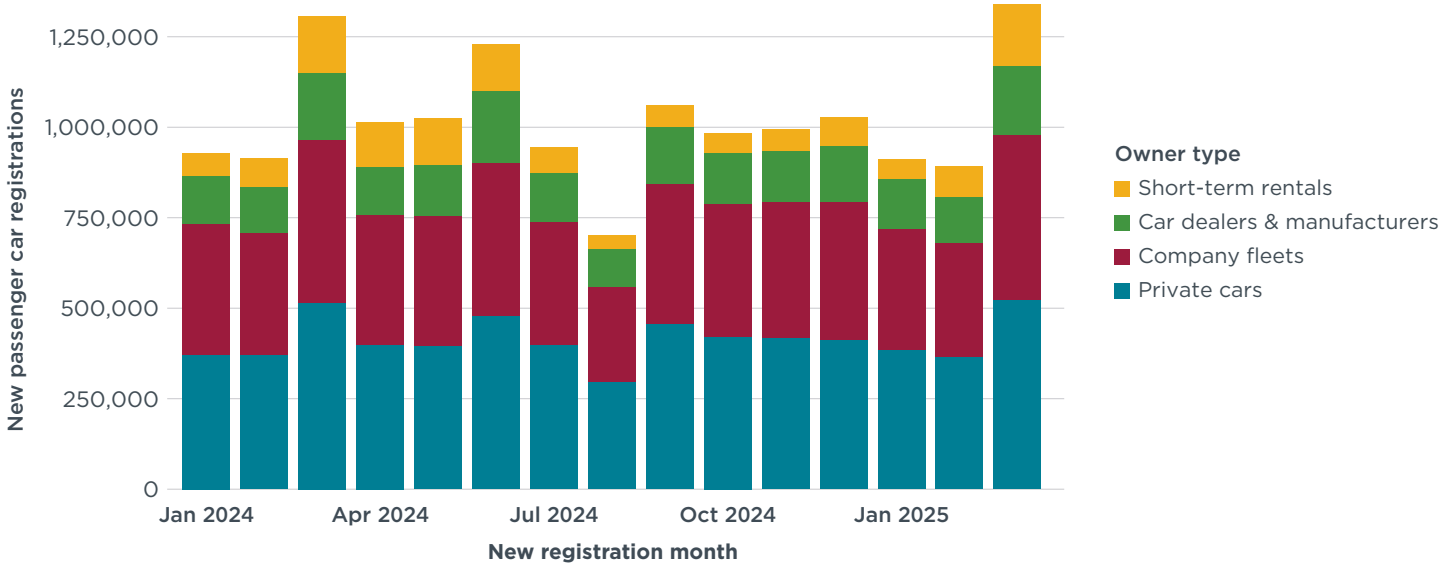
	April 2025				2025 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Sweden	**35%**	28%	8%	14%	**34%**	26%	9%	14%	**35%**	23%	9%	12%
Netherlands	**34%**	21%	14%	14%	**35%**	18%	13%	16%	**35%**	14%	14%	14%
Belgium	**32%**	9%	11%	22%	**33%**	8%	12%	20%	**28%**	15%	9%	16%
Austria	**23%**	10%	9%	19%	**22%**	9%	7%	21%	**17%**	7%	7%	18%
Germany	**19%**	10%	4%	23%	**17%**	10%	5%	24%	**14%**	7%	5%	22%
France	**18%**	7%	26%	19%	**18%**	5%	24%	21%	**17%**	9%	19%	15%
AVERAGE	**15%**	**9%**	**13%**	**23%**	**15%**	**8%**	**13%**	**24%**	**13%**	**7%**	**12%**	**20%**
Spain	**7%**	9%	17%	24%	**7%**	8%	18%	24%	**6%**	6%	16%	21%
Czechia	**6%**	4%	8%	14%	**5%**	4%	8%	14%	**5%**	3%	8%	12%
Poland	**5%**	6%	20%	29%	**4%**	5%	23%	28%	**3%**	3%	22%	24%
Italy	**5%**	6%	13%	31%	**5%**	5%	13%	32%	**4%**	3%	12%	28%

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 March 2025, the split of new registrations by owner type largely mirrored that of March 2024.

Figure 4

New passenger car registrations by owner for 19 select European countries



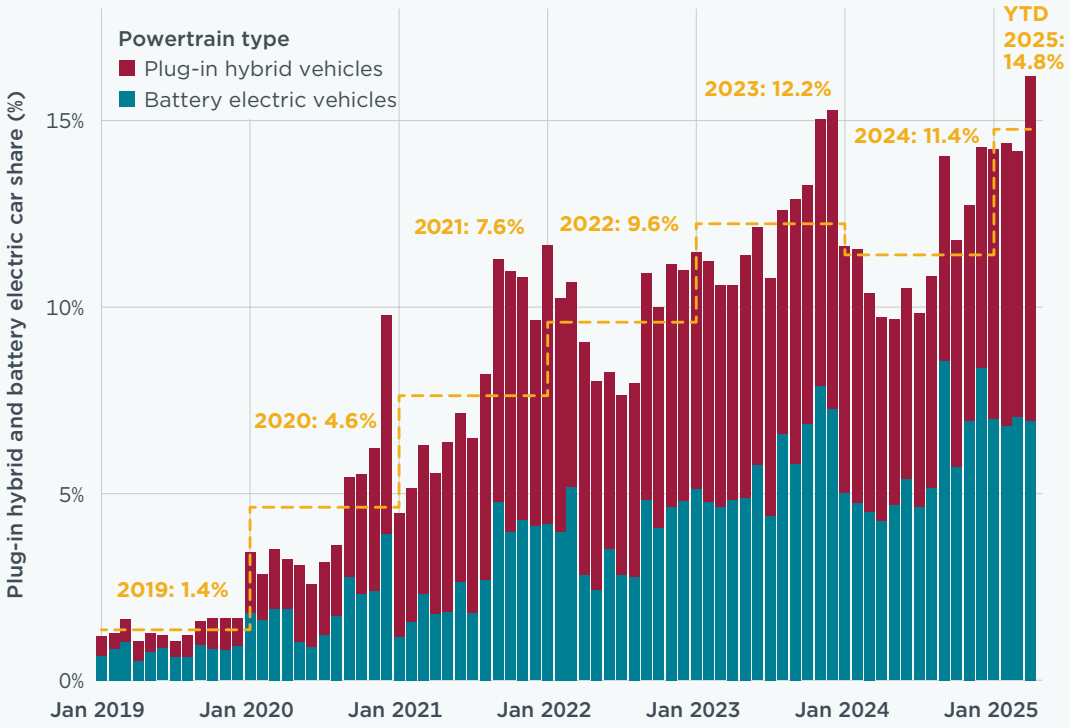
SPOTLIGHT: SPAIN

In Spain, registrations of new BEVs and PHEVs are showing strong growth in 2025, with YTD sales up 55% compared with the same period in 2024. Total new passenger car registrations YTD increased by 13% over the same period in 2024. This growth is partly driven by a surge in vehicle sales in the Valencian Community, backed by the Spanish government's Plan Reinicia Auto+; this is a recovery initiative launched in response to the DANA weather event of October 2024, which caused the loss of approximately 120,000 vehicles. The plan provides subsidies of up to €10,000 for new BEVs and PHEVs purchased to replace insured vehicles written off due to DANA. Meanwhile, subsidies for other Euro 6-compliant powertrain types are limited to half that amount. As of March 2025, about 14% of subsidy requests were for BEVs and PHEVs, while HEVs accounted for 40%. The Valencian Community has seen a 141% YTD increase in new BEV registrations compared with the same period in 2024; this is the second-highest growth among Spain's autonomous regions and the strongest among the country's largest regional markets. Registrations of PHEVs rose even more sharply, with a 160% increase YTD over the same period in 2024, the highest of all of Spain's autonomous regions.

Moreover, in April 2025, the Spanish government reactivated the MOVES III program, an incentive scheme aimed at promoting the purchase of new zero- and low-emission vehicles and the installation of private and publicly accessible electric vehicle chargers. Originally launched in 2021, the program was extended (with retroactive effect from January 1) and will remain in force either until the end of 2025 or until the allocated €400 million in funding is exhausted. Incentives for the purchase of new electric vehicles with an electric range exceeding 90 km are €4,500 per vehicle, and that rises to €7,000 if a vehicle older than 7 years is scrapped as part of the transaction. For the installation of chargers, private individuals are eligible to receive 70%–80% of the installation costs.

Figure 5

Share of battery electric and plug-in hybrid electric in new passenger car registrations in Spain



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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," version of 15 March 2025, is used. 2024 closed pools from this list 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 a closed passenger car pool in 2025 with its affiliated manufacturers. 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). Nissan and SAIC are large passenger car 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** 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 registrations and shares of electric vehicles in this publication cover all of these countries, with the exception of Cyprus, Liechtenstein and Malta. Data for CO_2 emission levels additionally omits Bulgaria and Romania.

» **Data sources:** Dataforce (new vehicle registrations), European Environment Agency (vehicle mass and eco-innovation credits). Historical values are regularly updated to reflect all latest data available.

» **Results may change over time:** Registrations and/or CO_2 data may be retrospectively updated by some of the national type-approval authorities.

» **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 pool 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/.

» **2025-2027 averaging**: Rather than being required to meet the CO_2 target applying from 2025 onwards in each individual year, manufacturers are granted the flexibility to comply based on their average CO_2 emissions over the three-year period 2025-2027. This means that manufacturers may exceed their CO_2 targets in one or more years, provided that any excess emissions are balanced out by equivalent over-compliance in other years within the averaging period. For more details on the provision, see ICCT, *Public comments on the European Commission proposal to introduce a 3-year "averaging" provision for the CO_2 standards regulation for new cars and vans* (International Council on Clean Transportation, 2025), https://theicct.org/wp-content/uploads/2025/03/PublicComments-Averaging-final-27March.pdf.

» **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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