EUROPEAN MARKET MONITOR
CARS AND VANS: JUNE 2025

PASSENGER CAR REGISTRATIONS

The average share of battery electric vehicles (BEVs) among total new registrations in Europe reached 18% in June 2025 and 17% in the first half (H1) of 2025, compared with 13% in H1 2024. Several manufacturing pools had significant increases in BEV shares in H1 2025 compared with the same period in 2024. Kia (20%) and Volkswagen (18%) both recorded increases of 8 percentage points, and BEV shares for BMW (25%) and Hyundai (17%) pools each increased 6 percentage points. In contrast, SAIC stood out with a drop from a 41% BEV share in H1 2024 to 13% in H1 2025. The BMW pool had the highest BEV share in June (25%) and was followed by the Mercedes-Volvo-Polestar (23%), Hyundai (19%), Volkswagen (18%), and Kia (18%) pools, and SAIC (18%). The Tesla-Stellantis-Toyota pool (17%), Renault pool (11%), and Nissan (6%) were below the European average in June. Plug-in hybrid electric vehicles (PHEVs) had an average market share among new registrations in Europe of 8% in H1 2025 (up 1 percentage point over H1 2024), led by the Mercedes-Volvo-Polestar pool (23% share). SAIC and Nissan had the largest shares of full hybrid electric vehicles (HEVs) with 40% and 36%, respectively, in H1 2025 and the Mercedes-Volvo-Polestar and BMW pools led in new registration shares of mild hybrid electric vehicles (MHEVs) in H1 2025 with 38% and 37%, respectively.

Figure 1

Share of battery electric in new passenger car registrations in Europe

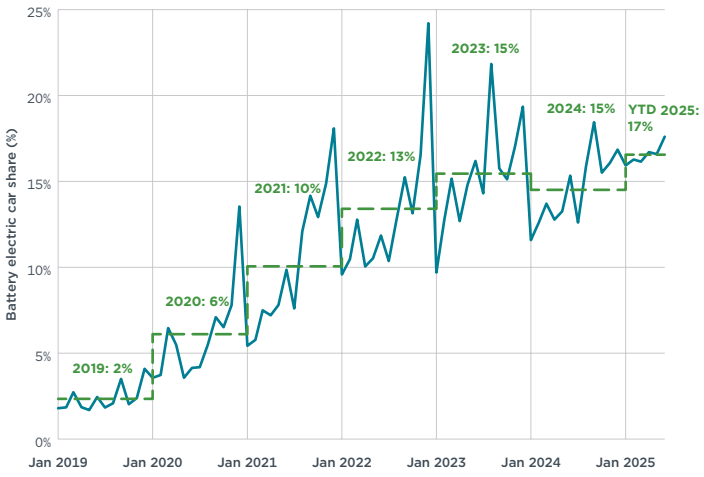
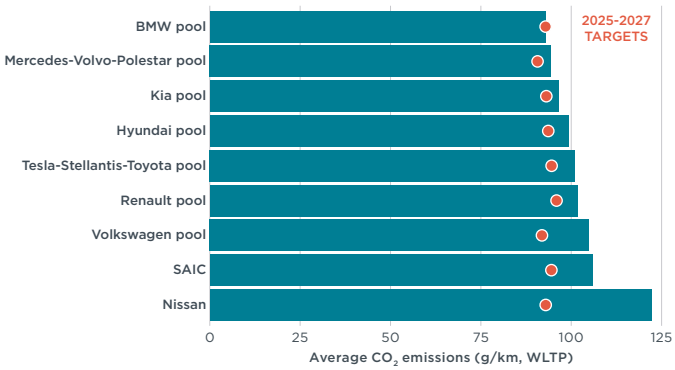


Figure 2

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 H1 2025. Manufacturing pools thus remain 9 g CO_2/km from the average target of 93 g CO_2/km for the 2025–2027 period. With a market share of 32%, the Tesla-Stellantis-Toyota pool reduced its target gap by 1 g CO_2/km compared with the previous month. The BMW pool is now on track to meet its 2025–2027 target, while Nissan (29 g CO_2/km above) remains 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 26 g CO_2/km below its projected brand-level average target for 2025–2027, and was followed by Cupra, which was 15 g CO_2/km below its target. Mazda and Nissan currently have the largest target gaps at 28 and 29 CO_2/km, respectively.

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	June 2025				2025 YTD				2024 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
BMW pool	**25%**	14%	0%	38%	**25%**	14%	0%	37%	**19%**	14%	0%	31%	**22%**	14%	0%	33%
All other brands	**25%**	28%	1%	6%	**24%**	25%	2%	9%	**17%**	18%	2%	16%	**21%**	20%	2%	13%
Mercedes-Volvo-Polestar pool	**23%**	20%	0%	39%	**23%**	23%	0%	38%	**26%**	24%	0%	32%	**26%**	24%	0%	33%
Hyundai pool	**19%**	6%	20%	14%	**17%**	6%	21%	13%	**11%**	4%	17%	20%	**11%**	4%	20%	18%
Volkswagen pool	**18%**	10%	0%	14%	**18%**	9%	0%	15%	**10%**	6%	0%	12%	**12%**	6%	0%	14%
Kia pool	**18%**	6%	16%	17%	**20%**	6%	15%	14%	**12%**	10%	16%	19%	**12%**	9%	16%	17%
SAIC	**18%**	11%	38%	0%	**13%**	8%	40%	0%	**41%**	3%	2%	0%	**31%**	3%	17%	0%
AVERAGE	**18%**	**9%**	**12%**	**23%**	**17%**	**8%**	**13%**	**23%**	**13%**	**7%**	**11%**	**19%**	**15%**	**7%**	**12%**	**20%**
Tesla-Stellantis-Toyota pool	**17%**	5%	18%	33%	**13%**	5%	20%	33%	**13%**	4%	20%	22%	**14%**	4%	21%	23%
Renault pool	**11%**	1%	32%	10%	**11%**	1%	29%	9%	**8%**	0%	18%	6%	**8%**	0%	21%	8%
Nissan	**6%**	0%	39%	34%	**8%**	0%	36%	33%	**8%**	0%	39%	33%	**9%**	0%	39%	32%

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
		June 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%	92	94	1	93	88	1.05	93	0	7%
Kia pool	4%	101	97	0.9	96	93	1	93	3	4%
Mercedes-Volvo-Polestar pool	4%	99	95	0.3	94	86	1.05	91	4	8%
Hyundai pool	6%	99	100	0.9	99	94	1	94	6	4%
Renault pool	6%	103	103	1.4	102	96	1	96	6	12%
Tesla-Stellantis-Toyota pool	7%	98	102	1.1	101	95	1	95	6	32%
AVERAGE	**9%**	**100**	**102**	**1**	**101**	**93**	**1**	**93**	**9**	
SAIC	12%	94	106	0	106	95	1	95	11	2%
Volkswagen pool	14%	104	106	1	105	92	1	92	13	27%
Nissan	31%	126	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
	June 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	66	59	0.3	58	86	1.05	90	-32	2%
Volvo	77	65	0.3	64	86	1.05	90	-26	2%
BMW Group	92	94	1	93	88	1.05	93	0	7%
BMW	94	95	0.9	94	87	1.05	92	2	6%
SAIC Motor	94	106	0	106	95	1	95	11	2%
MG	94	106	0	106	95	1	95	11	2%
Toyota Group	95	97	0.5	96	95	1	95	2	7%
Toyota	95	97	0.5	96	95	1	95	1	7%
Hyundai Group	100	99	0.9	98	93	1	93	4	7%
Hyundai	99	100	0.9	99	94	1	94	5	4%
Kia	101	97	0.9	96	93	1	93	3	4%
Renault Group	103	103	1.4	102	96	1	96	6	12%
Renault	96	96	1.3	95	95	1	95	0	6%
Dacia	113	114	1.6	112	97	1	97	15	5%
Volkswagen Group	104	106	1	105	92	1	92	13	27%
VW	103	104	0.9	103	92	1	93	11	11%
Škoda	101	105	1.1	104	93	1	93	11	6%
Audi	110	115	0.8	114	89	1.01	90	24	5%
Cupra	83	82	1	81	92	1.05	96	-15	2%
SEAT	123	123	1.7	122	96	1	96	26	2%
Ford	109	116	1.6	114	92	1	92	22	4%
Ford	109	116	1.6	114	92	1	92	22	4%
Stellantis	110	109	1.4	108	96	1	96	12	16%
Peugeot	105	105	1.4	104	95	1	95	8	6%
Citroën	114	108	1.6	106	96	1	96	11	3%
Opel/Vauxhall	109	107	1.5	106	96	1	96	10	3%
Fiat	122	121	1	120	99	1	99	21	3%
Jeep	104	109	1.2	108	93	1	93	15	1%
Suzuki	112	113	1.8	111	98	1	98	13	1%
Suzuki	112	113	1.8	111	98	1	98	13	1%
Mercedes-Benz Group	112	112	0.3	112	87	1.05	91	21	5%
Mercedes-Benz	114	114	0.3	113	86	1.04	90	23	5%
Mazda	119	121	0.5	121	93	1	93	28	1%
Mazda	119	121	0.5	121	93	1	93	28	1%
Nissan	126	123	1.1	122	93	1	93	29	2%
Nissan	126	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.

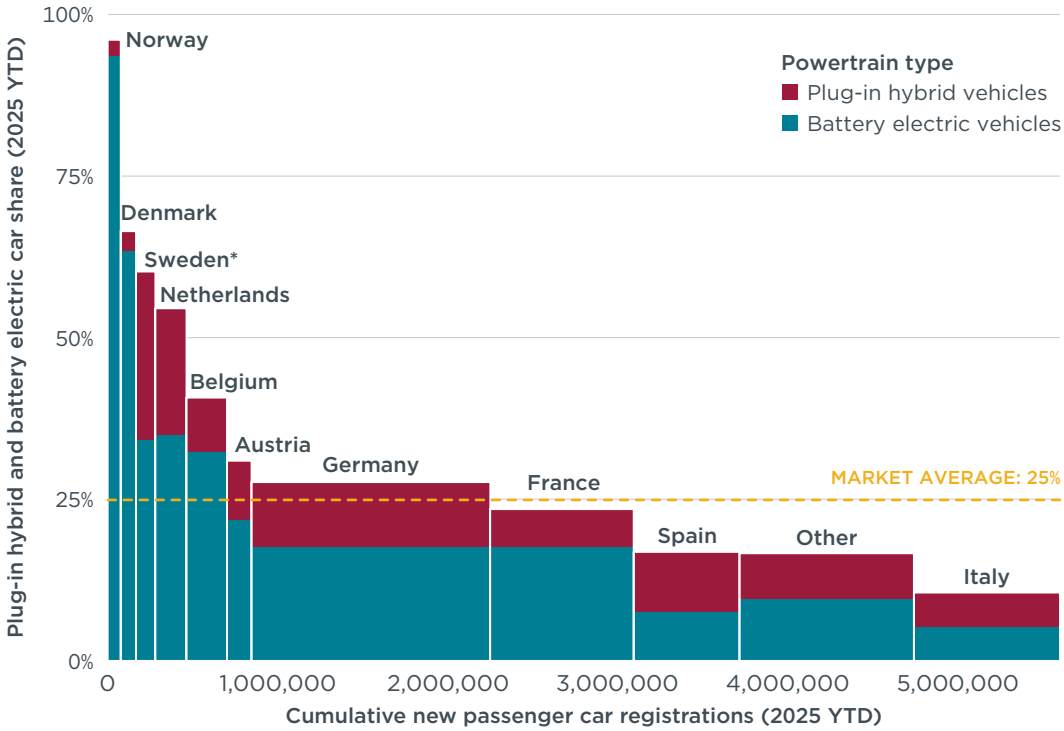
* The CO_2 targets in the table are hypothetical only, as official targets are set at the manufacturer or manufacturer-pool level, not at the brand level.

PASSENGER CAR REGISTRATIONS BY COUNTRY

Looking at the major European markets, total passenger car registrations in Spain grew 14% in H1 2025 compared with the same period in 2024, while registrations decreased in Belgium (-11%), France (-8%), Germany (-5%), and Italy (-4%). Focusing on the largest markets by combined new BEV and PHEV registrations, Norway (96%), Denmark (66%), Sweden (60%), and the Netherlands (55%) all had combined shares above 50%, and Belgium (41%), Austria (31%), and Germany (28%) also recorded combined BEV and PHEV market shares above the average for Europe. Among the largest markets by total new passenger car registrations, the highest growth in BEV registrations occurred in Spain, Czechia, and Poland, where they increased 83%, 66%, and 61%, respectively, in H1 2025 compared with H1 2024. Registrations in France dropped 6% during the same period. BEV registrations in the largest European market of Germany continued to rise, with a 35% increase in BEV registrations in H1 2025 compared with H1 2024 and over 47,000 BEVs were registered in June alone. Registrations of PHEVs increased the most in Spain (+84%) and Poland (+81%) in H1 2025 compared with H1 2024 and HEV registrations increased the most in Austria (+31%) and Spain (+30%). Shares of MHEVs were highest in Italy (31%) and Poland (28%) in H1 2025, and they are gaining popularity in France, where registrations increased 52% in H1 2025 compared with the same period in 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: The figure highlights the 10 largest markets by new BEV and PHEV registrations YTD. The "Other" category includes all remaining EEA countries not individually highlighted, except for Bulgaria, Liechtenstein, and Malta.

*Data for Sweden covers January to May 2025 only. The same applies to Cyprus, Latvia, Lithuania, and Portugal, all categorized under "Other."

Table 4

New passenger car registrations in the 10 largest markets, by country

	June 2025	vs. June 2024	2025 YTD	vs. 2024 YTD
Germany	256,193	-14%	1,402,789	-5%
France	169,505	-7%	842,218	-8%
Italy	132,721	-17%	858,376	-4%
Spain	120,864	15%	622,177	14%
Poland	49,599	-1%	285,598	3%
Belgium	42,180	-16%	237,912	-11%
Netherlands	34,641	-1%	182,711	-5%
Austria	28,121	-9%	144,345	6%
Czechia	22,208	-1%	122,639	3%
Sweden	—	—	113,786	6%

Note: For Sweden, June 2025 data is not available and YTD figures cover January to May 2025 only.

Table 5

New battery electric, plug-in hybrid, full hybrid, and mild hybrid passenger car registrations in the 10 largest markets, by country

	June 2025				vs. June 2024				2025 YTD				vs. 2024 YTD			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	**47,160**	25,634	12,252	61,072	**9%**	66%	-3%	2%	**248,675**	139,047	64,864	334,997	**35%**	55%	9%	10%
France	**28,857**	11,816	37,528	36,781	**-3%**	-16%	9%	32%	**148,338**	49,229	195,540	180,606	**-6%**	-33%	21%	52%
Belgium	**12,800**	3,646	4,274	10,462	**-7%**	-38%	-11%	29%	**77,060**	19,802	27,168	50,855	**20%**	-56%	12%	23%
Netherlands	**12,205**	7,430	5,111	5,066	**6%**	41%	8%	-8%	**63,880**	35,752	25,066	27,496	**6%**	29%	-6%	-7%
Spain	**11,515**	13,834	18,588	28,040	**102%**	158%	20%	28%	**47,605**	57,155	105,254	148,604	**83%**	84%	30%	35%
Italy	**7,974**	9,625	17,164	39,810	**-40%**	71%	-5%	-8%	**44,774**	45,739	108,756	267,597	**29%**	56%	11%	8%
Austria	**6,239**	2,581	2,422	5,613	**33%**	43%	39%	2%	**31,535**	13,132	10,750	29,462	**42%**	51%	31%	28%
Poland	**3,781**	2,721	9,092	13,485	**79%**	87%	-9%	5%	**14,256**	13,683	62,725	79,809	**61%**	81%	4%	20%
Czechia	**1,358**	996	1,969	3,046	**-11%**	88%	27%	13%	**6,910**	4,957	10,115	17,210	**66%**	69%	9%	20%
Sweden	—	—	—	—	—	—	—	—	**38,979**	29,540	9,664	16,151	**18%**	15%	-7%	22%

Note: For Sweden, June 2025 data is not available and YTD figures cover January to May 2025 only.

Table 6

Share of new battery electric, plug-in hybrid, full hybrid, and mild hybrid passenger cars in the 10 largest car markets, by country

	June 2025				2025 YTD				2024 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Netherlands	**35%**	21%	15%	15%	**35%**	20%	14%	15%	**31%**	14%	14%	15%	**35%**	14%	14%	14%
Belgium	**30%**	9%	10%	25%	**32%**	8%	11%	21%	**24%**	17%	9%	15%	**28%**	15%	9%	16%
Austria	**22%**	9%	9%	20%	**22%**	9%	7%	20%	**16%**	6%	6%	17%	**17%**	7%	7%	18%
Germany	**18%**	10%	5%	24%	**18%**	10%	5%	24%	**13%**	6%	4%	21%	**14%**	7%	5%	22%
France	**17%**	7%	22%	22%	**18%**	6%	23%	21%	**17%**	8%	18%	13%	**17%**	9%	19%	15%
Spain	**10%**	11%	15%	23%	**8%**	9%	17%	24%	**5%**	6%	15%	20%	**6%**	6%	16%	21%
Poland	**8%**	5%	18%	27%	**5%**	5%	22%	28%	**3%**	3%	22%	24%	**3%**	3%	22%	24%
Czechia	**6%**	4%	9%	14%	**6%**	4%	8%	14%	**3%**	2%	8%	12%	**5%**	3%	8%	12%
Italy	**6%**	7%	13%	30%	**5%**	5%	13%	31%	**4%**	3%	11%	28%	**4%**	3%	12%	28%
Sweden	—	—	—	—	**34%**	26%	8%	14%	**32%**	23%	9%	12%	**35%**	23%	9%	12%

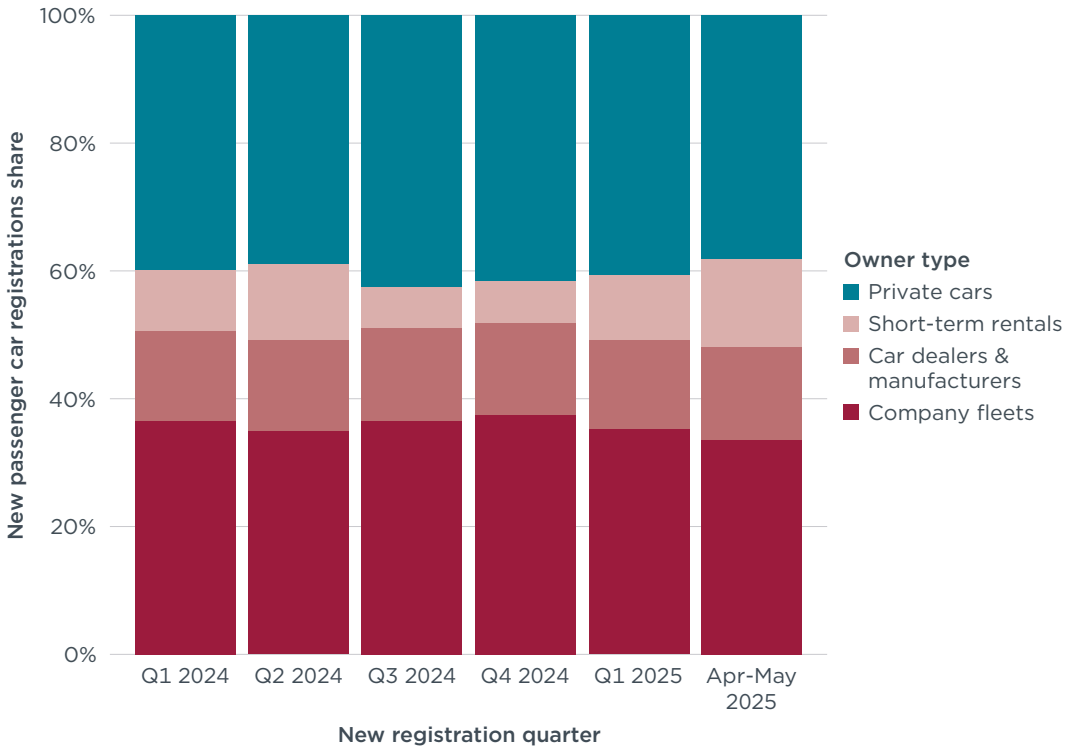
Note: For Sweden, May 2025 data is not available and YTD figures cover January to May 2025 only.

PASSENGER CAR REGISTRATIONS BY OWNER

Corporate fleets, comprised of company fleets (34%), car dealers and manufacturers (15%), and short-term rentals (14%), made up 63% of the total registrations in April and May 2025, while private cars made up 37% of the market. Short-term rental registrations appear to fluctuate more than other owner types; they ranged from nearly 14% of sales in April and May 2025 to only 6% in the third quarter (Q3) 2024. In April and May 2025, the split of new registrations by owner type largely mirrored that of Q2 2024.

Figure 4

New passenger car registrations by owner for 19 selected European countries



VAN REGISTRATIONS

New van registrations declined in Germany (-15%), France (-12%), and Italy (-12%) in H1 2025 compared with the same period in 2024, and registrations in Spain grew by 7% compared with H1 2024. Of newly registered vans, 9% were battery electric in H1 2025, compared with 6% in H1 2024. Nissan (14%), Toyota (12%), the Volkswagen pool (11%), and the Renault pool (9%) all had BEV shares at or above the European average, while the Mercedes-Benz (8%), Stellantis (8%), and Ford (5%) pools and Iveco (1%) remained below the average. Shares of battery electric vans increased the most in Italy, rising 3 percentage points to 5% in H1 2025 compared with the same period in 2024. Looking at manufacturers and pools, the average target gap decreased slightly to 17 g CO_2/km after Q2 2025. Ford notably reduced its target gap by 6 g CO_2/km in Q2 2025, while Iveco and the Mercedes-Benz pool are currently the farthest from their 2025 CO_2 targets, with target gaps of 37 and 31 g CO_2/km, respectively.

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

	Q2/2025				2025 YTD				2024 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
All other brands	28%	1%	1%	12%	23%	1%	1%	15%	16%	0%	0%	12%	16%	0%	1%	13%
Nissan	16%	0%	5%	2%	14%	0%	4%	2%	11%	0%	4%	2%	14%	0%	4%	1%
Toyota	13%	0%	4%	4%	12%	0%	5%	4%	7%	0%	5%	0%	7%	0%	6%	0%
Volkswagen pool	11%	1%	0%	0%	11%	1%	0%	0%	8%	0%	0%	0%	8%	0%	0%	0%
AVERAGE	9%	1%	1%	2%	9%	1%	1%	2%	6%	0%	1%	2%	6%	0%	1%	1%
Renault pool	9%	0%	3%	1%	9%	0%	3%	1%	5%	0%	1%	0%	4%	0%	2%	0%
Mercedes-Benz pool	8%	0%	0%	0%	8%	0%	0%	0%	7%	0%	0%	0%	7%	0%	0%	0%
Stellantis pool	8%	0%	0%	3%	8%	0%	0%	3%	6%	0%	0%	2%	6%	0%	0%	2%
Ford pool	6%	6%	0%	0%	5%	4%	0%	0%	2%	0%	0%	3%	3%	1%	0%	2%
Iveco	1%	0%	0%	0%	1%	0%	0%	0%	0%	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	Q2/2025	2025 YTD	Compliance credits	Adj. 2025 YTD	Reference target 2025–2027	Compliance credits	Target 2025–2027	Target gap	Market share 2025 YTD
		WLTP	WLTP	Eco-innovations	WLTP	WLTP	ZLEV factor	WLTP	WLTP	
Volkswagen pool	10%	183	182	0.8	181	172	1	165	16	12%
AVERAGE	11%	175	176	0.4	175	159	1	159	17	
Nissan	13%	159	163	1	162	150	1	144	18	1%
Renault pool	14%	164	164	1	163	150	1	143	19	15%
Toyota	14%	171	169	0.3	169	154	1	148	21	7%
Ford pool	16%	187	192	0	192	172	1	165	27	17%
Iveco	17%	256	254	0	254	224	1	217	37	4%
Mercedes-Benz pool	18%	204	205	0.4	205	181	1	174	31	9%
Stellantis pool	18%	162	161	0.3	161	144	1	137	24	31%

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 9

New van registrations by country, for the four largest European markets

	Q2/2025	vs. Q2/2024	2025 YTD	vs. 2024
France	98,896	-13%	184,279	-12%
Germany	64,928	-18%	128,257	-15%
Italy	48,457	-8%	93,134	-12%
Spain	45,745	9%	82,971	7%

Table 10

Share of battery electric, plug-in hybrid, full hybrid, and mild hybrid vans by country, for the four largest European markets

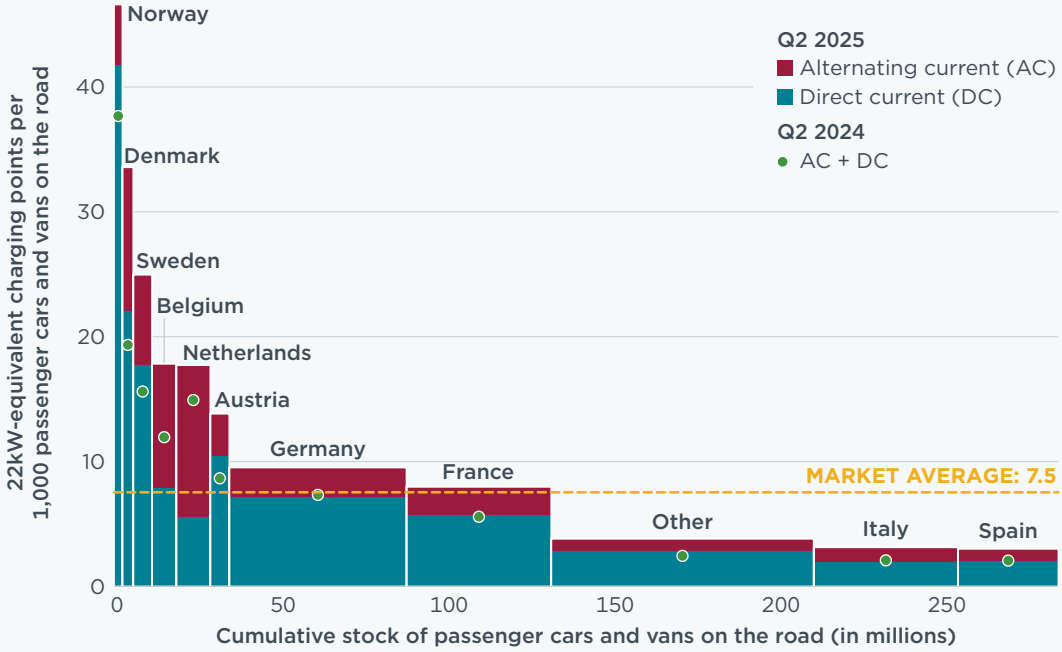
	Q2/2025				2025 YTD				2024 YTD				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	8%	1%	0%	0%	7%	1%	0%	1%	5%	0%	0%	1%	5%	0%	0%	1%
France	8%	1%	2%	3%	8%	1%	2%	3%	7%	0%	1%	1%	7%	0%	2%	1%
Italy	6%	1%	2%	6%	5%	1%	2%	6%	2%	0%	1%	7%	2%	0%	2%	6%
Spain	4%	3%	0%	0%	4%	2%	0%	0%	3%	0%	0%	1%	3%	0%	0%	1%

SPOTLIGHT: CHARGING INFRASTRUCTURE DEVELOPMENT

More than 1.05 million public charging points were installed in Europe by the end of Q2 2025, up from around 1 million at the end of Q1 2025. For alternating current (AC) charging, this is a 22% increase over the same point in 2024. Direct current (DC) charging points showed even greater growth, increasing 41% compared with the end of Q2 2024. Approximately 81% of Europe's public charging points supply AC and the remaining 19% supply DC. Denmark recorded the largest growth in terms of both AC (+50%) and DC (+79%) chargers by the end of Q2 2025 compared with 2024, and DC charging points also increased substantially in Italy (+62%) and Belgium and Austria, both +59%. On average, there were about 7.5 22 kW-equivalent publicly accessible charging points installed per thousand passenger cars and vans on the road in Europe at the end of June 2025, up from 7.2 at the end of March 2025. With over 46 22 kW-equivalent publicly accessible charging points per thousand passenger cars and vans, Norway continues to lead Europe in charging infrastructure, and is followed by Iceland (39), Denmark (34), and Sweden (25). Along with increasing BEV shares of new vehicle registrations, charging infrastructure in Italy (3) and Spain (3) is increasing at a pace at or above the European average for publicly accessible charging points.

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 June 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 Q2/2025		vs. end of Q2/2024	
	AC	DC	AC	DC
Netherlands	191,050	6,820	17%	25%
Germany	141,181	44,472	14%	25%
France	123,490	36,423	18%	41%
Belgium	82,550	6,346	31%	59%
Italy	56,338	15,240	22%	62%
Sweden	56,236	10,484	42%	42%
Spain	35,801	13,620	36%	52%
Denmark	38,114	7,551	50%	79%
Austria	26,515	8,113	22%	59%
Norway	17,739	13,086	-7%	11%
Other	84,582	40,554	24%	54%
Total	**853,596**	**202,709**	**22%**	**41%**

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. The 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), and Volkswagen pool (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, Hungary, Romania, and Slovenia. 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). 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. Similarly, charging infrastructure data may also be retrospectively updated by Eco-Movement.
- **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 3-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.

» **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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