# Global electric vehicle market monitor for light-duty vehicles in key markets, 2025 H1

**Ilma Fadhil and Chang Shen**

This global market monitor analyzes the development of the electric vehicle (EV) market for light-duty vehicles (LDVs). It covers the major auto markets of China, Europe, the United States, and India and selected emerging markets in the first half of 2025 (2025 H1).[1] Definitions and details about the data sources, methodology, and assumptions that underlie the analysis are in the appendices.

## THE GLOBAL MARKET

Globally, over 9 million EVs were sold in 2025 H1, representing about 23% of all new LDVs sold, an increase from 19% in 2024.[2] Nearly 90% of the EVs sold were in the four largest LDV markets: China, the United States, Europe, and India.[3] Together, these four markets were home to 71% of global LDV sales in 2025 H1.

**Figure 1** presents the light-duty EV sales share—that is, the proportion of EV sales to total LDV sales—and number of EVs sold in the four major markets from 2020 to 2025 H1. **China** was the world's largest EV market in 2025 H1, with 5.4 million EVs sold; 47% of LDVs sold in China were EVs, up from 44% for the full year 2024 and 37% in 2024 H1. In **Europe**, about 23% of all new LDVs sold in 2025 H1 were EVs, a 3-percentage-point increase from the 20% EV sales share in 2024. The EV sales share in the United States dropped slightly to 9% in 2025 H1 from 10% in 2024. India recorded a 3% EV sales share of all new LDVs sold in 2025 H1, a slight increase from just under 3% in 2024. Full details by vehicle segment across the four major markets are in **Table A1** in the appendix.

www.theicct.org

communications@theicct.org

@theicct.org

1 The emerging markets considered in this analysis are Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, the Philippines, South Africa, Thailand, Türkiye, and Vietnam. These are growing vehicle markets that have a large potential to reduce $CO_2$ emissions by transitioning to electric vehicles. Some are also vehicle-producing markets. For the previous version of this briefing, see https://theicct.org/publication/global-ev-market-monitor-for-ldv-in-key-markets-2024-jun25/.

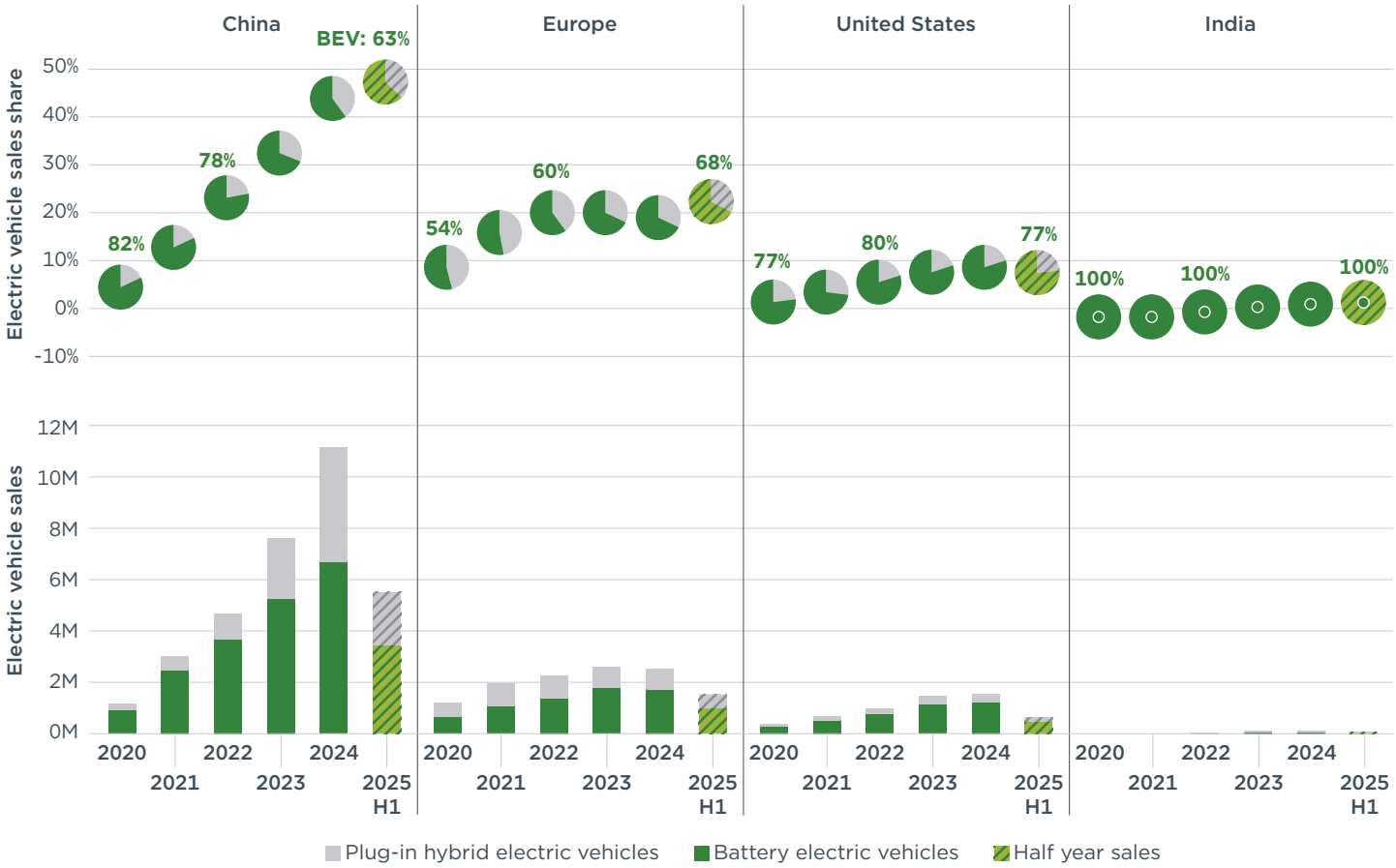
2 Electric vehicle refers to battery electric vehicles and plug-in hybrid electric vehicles.

3 Europe includes the 27 Member States of the European Union and the four members of the European Free Trade Association (Iceland, Liechtenstein, Norway, and Switzerland).

icct
THE INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION

**Figure 1**

**Light-duty EV sales share, number of EVs sold, and mix of BEVs and PHEVs across the four major markets, 2020 to 2025 H1**



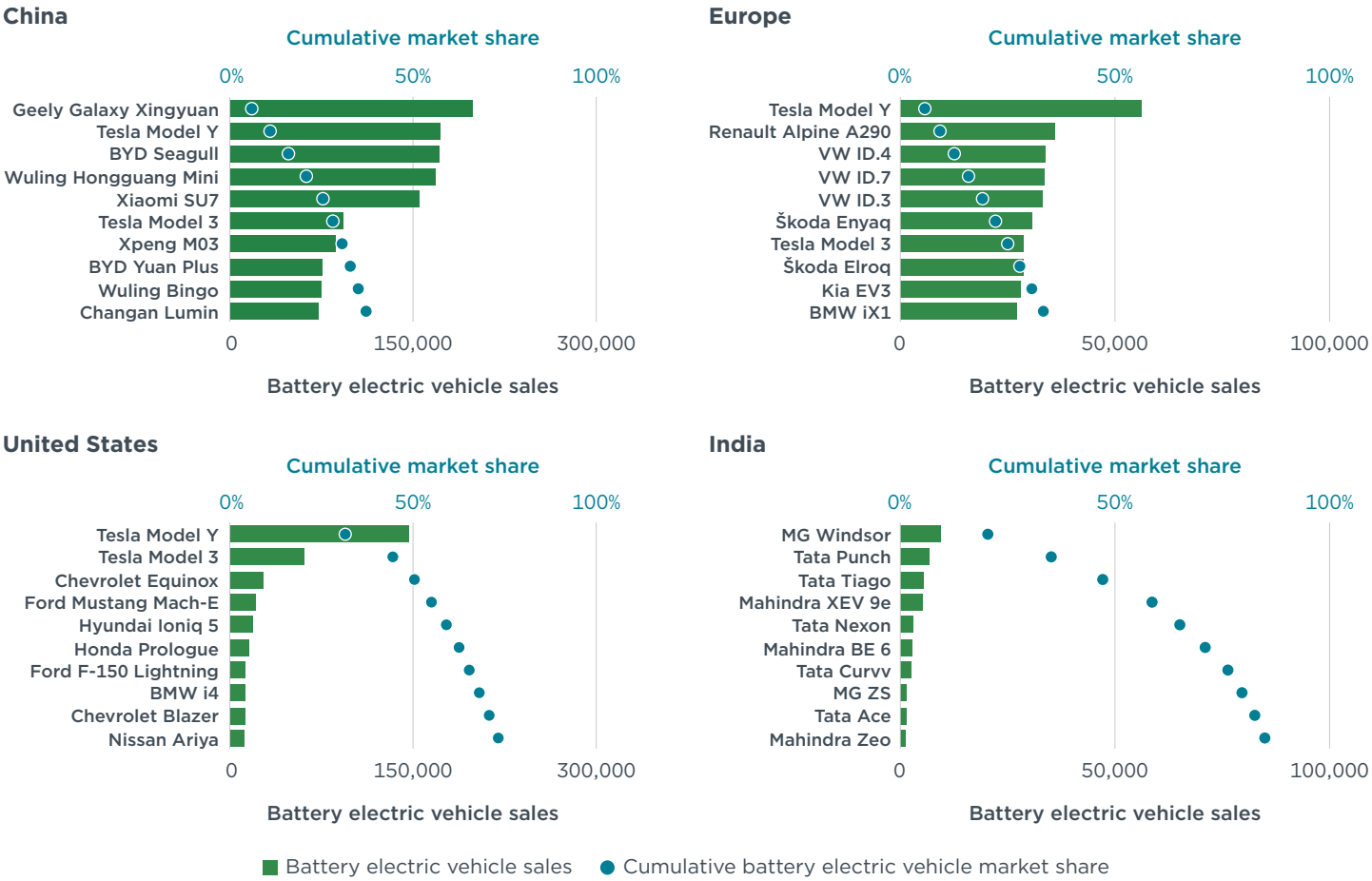

THE INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION **THEICCT.ORG**

Figure 1 also details the shares of battery electric vehicles (BEVs) and plug-in hybrid electric vehicles (PHEVs) among EVs sold. The global share of BEVs was 65% in 2025 H1, a slight drop from 66% in 2024. The share of BEVs in China was 63% in 2025 H1, an increase from 60% for the full year 2024 and 61% in 2024 H1. This marks the first reversal since 2023, with the BEV share rising and PHEV share declining. Although BEVs remained dominant in the United States, the sales share dropped slightly to 77% from 80% in 2024. The BEV share in Europe remained unchanged from 2024, with BEVs accounting for 68% of total EVs sold, an increase from 54% BEV share in 2020. Meanwhile, in India, BEVs continued to make up nearly all of EVs sold.

**Figure 2** shows the 10 best-selling BEV models and the percentage of new BEV sales these models represented in each of the four major markets in 2025 H1. The green bars reflect the absolute number of sales of each model and the teal circles reflect their cumulative BEV market share, progressing from the top-selling model to the 10th. The 10 best-selling BEV models accounted for approximately 37% of the BEV market in China, 33% in Europe, 73% in the United States, and 85% in India.

**Figure 2**

**Top 10 best-selling BEV models in the four major markets, 2025 H1**




*Note:* Automaker-level data for India is from the first quarter of 2025.

THE INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION **THEICCT.ORG**

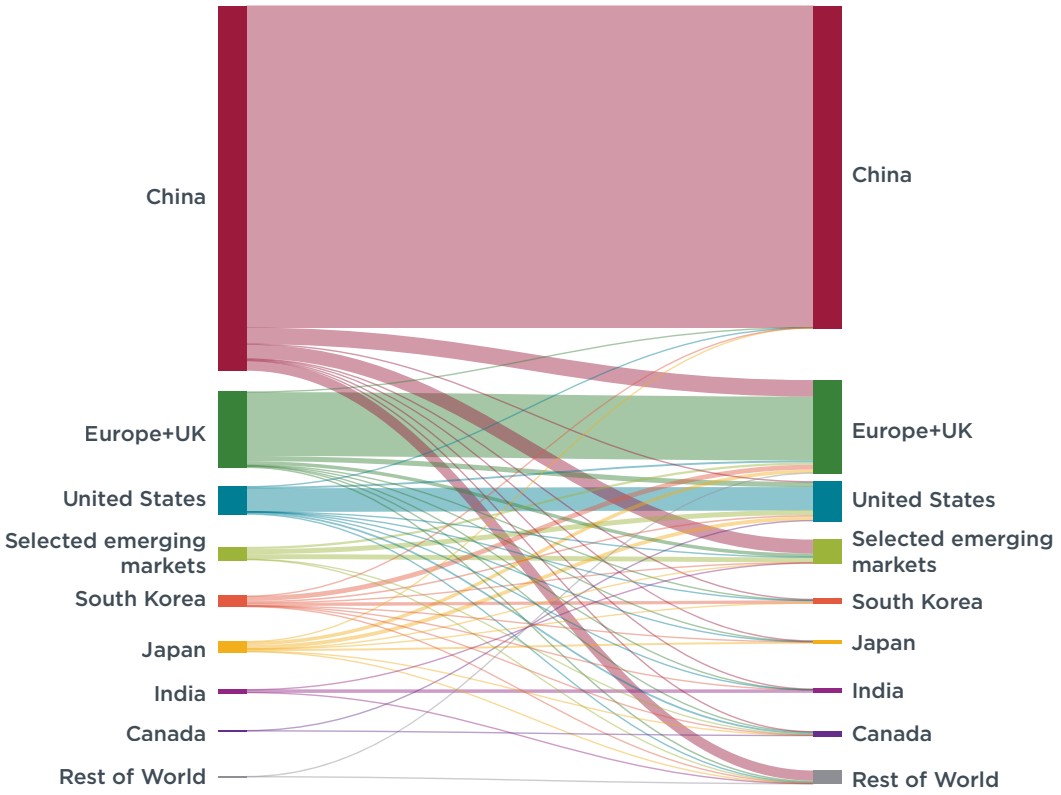
In China, Geely, Xpeng, and Xiaomi entered the top 10 best-selling BEV list for the first time, with Geely's Xingyuan model (a minicar) ranking first. Tesla, BYD, SAIC Motor, and Changan remained on the list. Minicars (often A0 or A00 class in China) continued to be popular in China, reflecting strong demand for affordable urban mobility. Five of the top 10 best-selling EVs in China were minicars, up from four in 2024. In Europe, VW Group and Tesla continued to lead in BEV sales. VW Group had five models in the top 10: three from VW (the ID.4, ID.7, and ID.3) and two from Škoda (Enyaq and Elroq). Newcomers to Europe's top 10 best-selling BEV list in 2025 H1 were Renault's Alpine A290 and the Kia EV3. In the United States, Tesla continued to record the most sales, capturing a 44% market share in 2025 H1, while the Hyundai Ioniq, BMW i4, Chevrolet Blazer, and Nissan Ariya made it into the top 10 list for the first time. In India, MG topped the list for the first time with its Windsor model, which accounted for 20% of total BEV sales in the first quarter (Q1) of 2025. Tata Motors still dominated the BEV market overall with five best-selling models that together accounted for 42% of all BEV sales in 2025 Q1, a drop from 61% in 2024.

**Figure 3** depicts the global flow of electric LDV production and sales in 2025 H1. China remained the largest EV producer, home to 72% of global EV production. Europe[4] was second, with 15% of global EV production, a slight increase from 14% in 2024. Meanwhile, the share of EVs produced in the United States decreased to 5% in 2025 H1 from 7% in 2024 and 8% in 2024 H1.

4 Europe here includes European Union Member States, EFTA members, and the United Kingdom.

**Figure 3**

**Global production (left) and sales (right) of electric LDVs by market, 2025 H1**




*Note:* Selected emerging markets include Brazil, Indonesia, Malaysia, Mexico, Thailand, Türkiye, and Vietnam.

THE INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION **THEICCT.ORG**

The majority of EVs produced in the major vehicle markets were sold domestically. About 88% of the EVs China produced were sold in the domestic market in 2025 H1, and shares were similar in Europe (84%) and the United States (83%). In contrast, Japan and South Korea had a more diverse customer base and exported to several different markets, including the United States and Europe. Emerging markets remained net importers, with EV-producing countries in this group, notably Brazil and Mexico, exporting a higher share of production to the United States than anywhere else. Among other, non-emerging market countries (grouped in Figure 3 as "Rest of World"), the highest sales were in Europe (77%) and in respective domestic markets (11%).

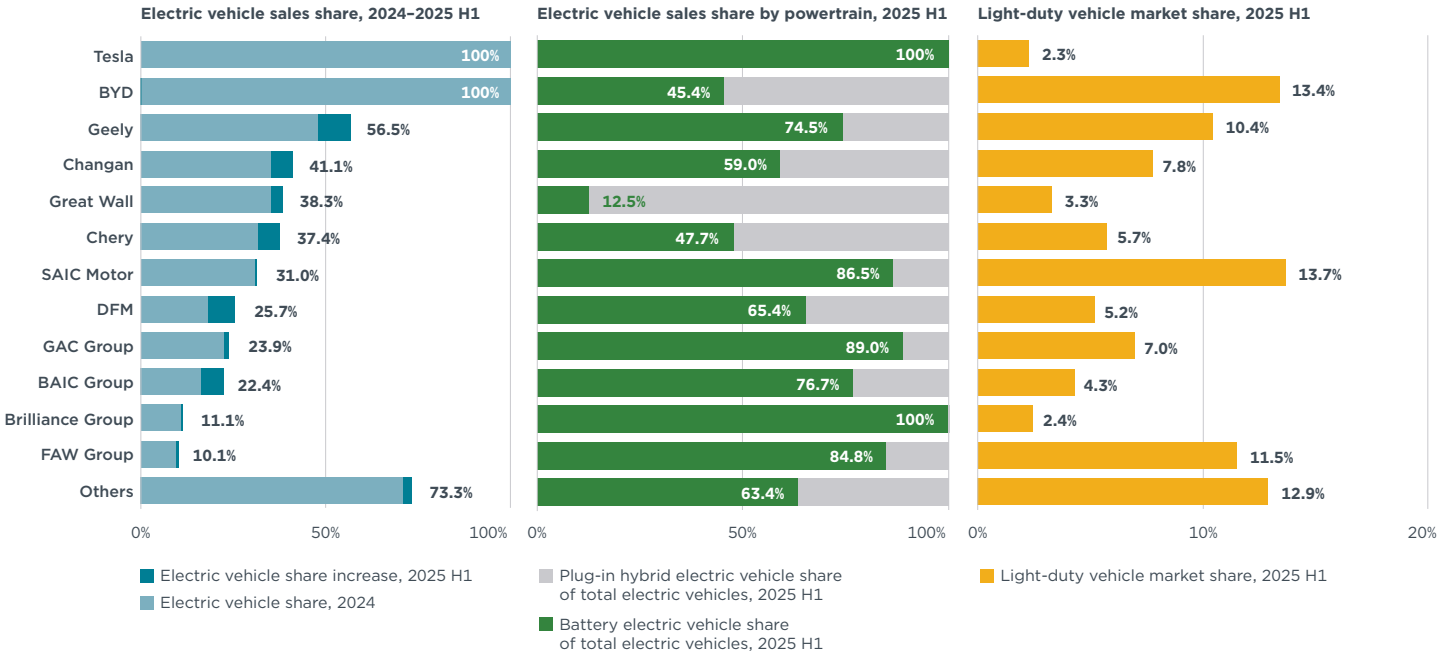
## CHINA

In 2025 H1, over 5 million new electric LDVs were sold in China, comprising 47% of new LDV sales in the country. Approximately 96% of the electric LDVs were passenger cars; apart from Tesla, all 12 top manufacturers in China produced both passenger cars and light commercial vehicles.

**Figure 4** shows EV trends in China at the manufacturer level, with automakers listed in descending order of EV sales share in 2025 H1. The left panel shows the change in EV sales share for each manufacturer from 2024 (light blue) to 2025 H1 (dark blue), with the 2025 H1 EV sales share also displayed as a percentage. The figure indicates that all manufacturers that also sold combustion engine vehicles increased their EV sales shares from 2024 to 2025 H1. The middle panel illustrates the technology mix of EVs sold by each manufacturer, with BEVs in green and PHEVs in gray. The right panel reflects each manufacturer's share of the overall LDV market (all powertrains) in 2025 H1.

**Figure 4**

**Light-duty EV sales share, technology mix, and market share by manufacturer in China**




THE INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION **THEICCT.ORG**

Highlights for China in 2025 H1 include:

» BYD, an all-EV manufacturer, continued to lead light-duty EV sales, accounting for more than one fourth of all sales. Geely led among legacy automakers: 57% of its LDV sales were EVs, up from 43% in 2024 H1 and 48% in the full year 2024.

» Apart from Tesla and BYD, which already had 100% EV sales shares since 2023, eight of the 10 major LDV manufacturers operating in China increased their EV sales shares from 2024 to 2025 H1, and nine from 2024 H1. Geely, Chery, BAIC, DFM, and Changan led with 6–9 percentage point increases over the full year 2024, while Brilliance and SAIC declined by 1 and 4 percentage points, respectively.

» 2025 H1 marked the first decline in PHEV share of EVs sold since 2023, falling from 39% in 2024 H1 and 40% in full year 2024 to 37% in 2025 H1. Despite significant growth in PHEV share between 2023 and 2024, BEVs remained dominant, accounting for 63% of EVs sold in 2025 H1. All manufacturers except BYD, Chery, and Great Wall sold more BEVs than PHEVs in 2025 H1.

» PHEV share trends diverged among manufacturers. Great Wall's PHEV share continued to increase, from 78% (2024 H1) and 79% (full year 2024) to 88% (2025 H1); Chery's rose from 34% (2024 H1) and 47% (full year 2024) to 52% (2025 H1). Notably, PHEVs accounted for 70% of Great Wall's EV sales growth between 2024 and 2025 H1, compared with 40% for Chery. On the other hand, Geely and Changan's PHEV shares saw continuous declines: Geely's dropped from 34% (2024 H1) and 30% (full year 2024) to 25% (2025 H1), while Changan's declined from 52% (2024 H1) and 50% (full year 2024) to 41% (2025 H1).

» Progress toward EV targets varied significantly across manufacturers in 2025 H1.[5] Geely stood out by exceeding its goal, reaching a 57% EV sales share against

5 Chang Shen et al., *The Global Automaker Rating 2024/2025: Who is Leading the Transition to Electric Vehicles?* (International Council on Clean Transportation, 2025), https://theicct.org/global-automaker-rating-2024/.

a 50% target for 2025. Chery and Changan showed steady progress, with Chery reaching 37% toward its target of 40% by 2030, and Changan at 41% toward its goal of 75% by 2030. In contrast, SAIC and Great Wall remained well below their 2025 targets: SAIC reached just 31% against a 50% goal, while Great Wall stood at 38%, short of its target of 80% by 2025.

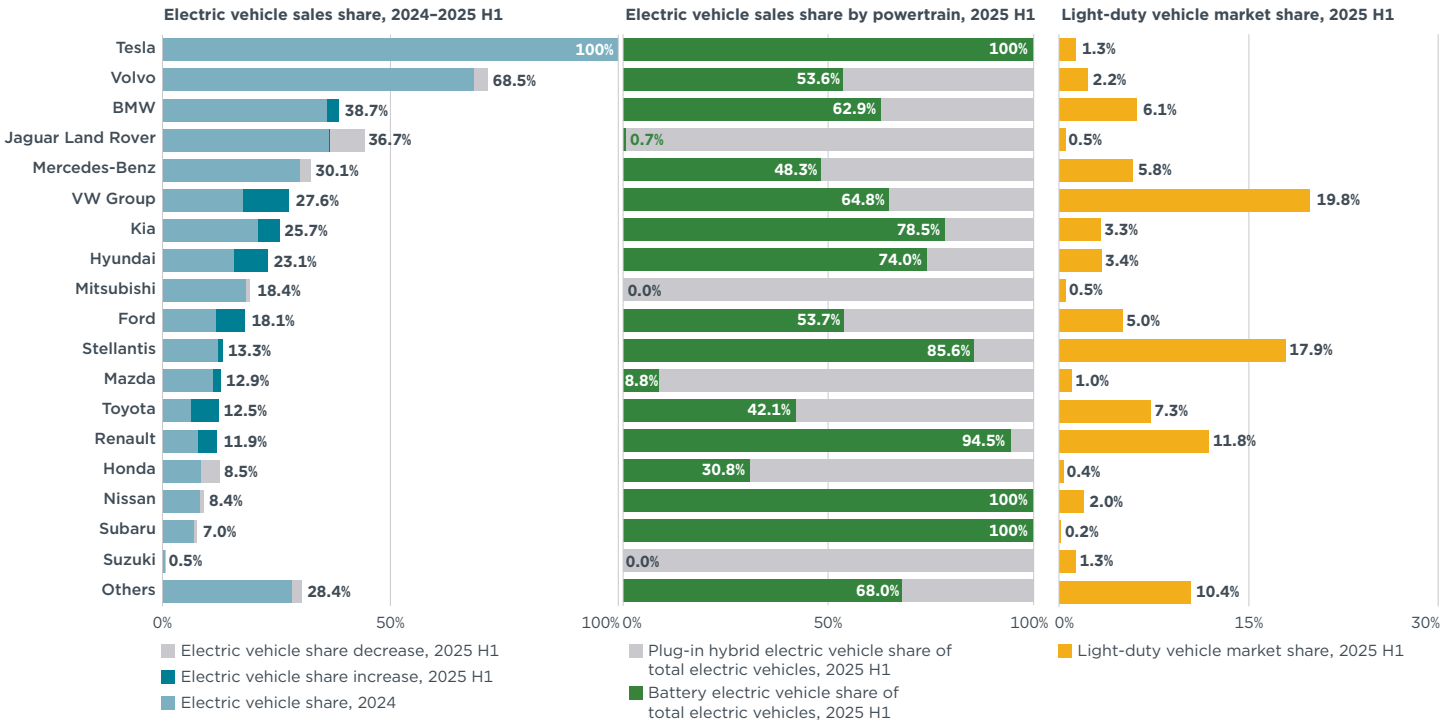
» The adoption of EVs in China is advancing faster than policy targets. The 47% EV market share among LDVs sold in 2025 H1 outpaced the 20% by 2025 EV target set in the *New Energy Vehicle Industry Development Plan (2021 to 2035)*.[6] Indeed, China has already met the goal of 45% new energy vehicle penetration by 2027 announced by the State Council in early 2024.[7]

## EUROPE

In 2025 H1, about 1.5 million LDVs sold in Europe were electric. This represented around 23% of new LDVs, a 3-percentage-point increase from the 20% EV sales share in 2024. **Figure 5** shows EV trends in Europe at the manufacturer level, with automakers listed in descending order of EV sales share in 2025 H1. The left panel shows the change in EV share of total LDV sales for each manufacturer from 2024 to 2025 H1; the light blue portions of the bars represent 2024 EV sales shares, and the dark blue (or light gray) portions represent the increase (or decrease) in sales share from 2024 to 2025 H1. The 2025 H1 EV sales share is also displayed as a percentage. The middle panel illustrates the technology mix of EVs sold by each manufacturer, with BEVs in green and PHEVs in gray. The right panel reflects the overall LDV market share of each manufacturer (all powertrains) in 2025 H1.

**Figure 5**

**Light-duty EV sales share, technology mix, and market share by manufacturer in Europe**






6 State Council, "国务院办公厅关于印发新能源汽车产业发展规划 (2021–2035年) 的通知 [Notice on Printing and Issuing the Development Plan for the New Energy Vehicle Industry (2021–2035)]," October 20, 2020, http://www.gov.cn/zhengce/content/2020-11/02/content_5556716.htm.

7 State Council, "中共中央国务院关于全面推进美丽中国建设的意见 [Opinions of the Central Committee of the Communist Party of China and the State Council on Comprehensively Promoting the Construction of a Beautiful China]," December, 27, 2024, https://www.gov.cn/zhengce/202401/content_6925405.htm. The EV targets also include heavy-duty vehicles. As of 2024, EVs accounted for 41% of the total vehicle fleet, including both LDVs and heavy-duty vehicles.

Highlights for Europe in 2025 H1 include:

» Nine automakers saw an increase in EV sales share compared with 2024. VW Group saw the largest jump in EV sales share, of 10 percentage points, from 18% in 2024 to 28% in 2025 H1. Hyundai, Toyota, and Ford followed, recording sales share increases of 7 percentage points (Hyundai) and 6 percentage points (Toyota and Ford). Other than Tesla, which sold only EVs, Volvo maintained the highest EV sales share, at 69%, although this was a slight drop from 71% in 2024. Other automakers saw declines in their EV sales shares from 2024 to 2025 H1, notably Jaguar Land Rover (of 8 percentage points) and Mercedes-Benz (of 2 percentage points).

» The automakers with the largest LDV market shares—VW Group, Stellantis, and Renault—saw increases in EV sales share from 2024 ranging from 1 to 10 percentage points. Meanwhile, despite an increase in overall EV sales of 33% from 2024 and nearly 100% from 2024 H1, manufacturers outside of the top 18 (grouped as "Others") saw a slight drop in EV sales share due to higher sales of LDVs.

» BEVs remained dominant in the European market, with a BEV sales share of 68%, the same as in 2023 and 2024. Most automakers saw increases in the share of BEVs in their total EV sales, with the exception of Honda, Mazda, Renault, Volvo, VW Group, and Jaguar Land Rover, which recorded increases in the PHEV share of total EVs sold. Kia and Stellantis saw the largest increases in BEV share of total EVs sold compared with 2024, with Kia's BEV share increasing from 59% to 78% and Stellantis' BEV share increasing from 76% to 86%. Honda saw the largest drop in BEV sales share from 2024, from 69% to 31%. BEVs comprised all EVs sold by Nissan and Subaru, while PHEVs comprised all EVs sold by Mitsubishi and Suzuki.

» Manufacturers are ramping up EV production to comply with average $CO_2$ emissions targets for 2025–2027. In various EU Member States, EV uptake is supported by tax incentives and subsidies to lower the cost of EVs in the short term. Major European markets such as Spain extended their EV incentives,[8] and Germany launched new EV incentive plans, which commenced in July 2025.[9]

## UNITED STATES

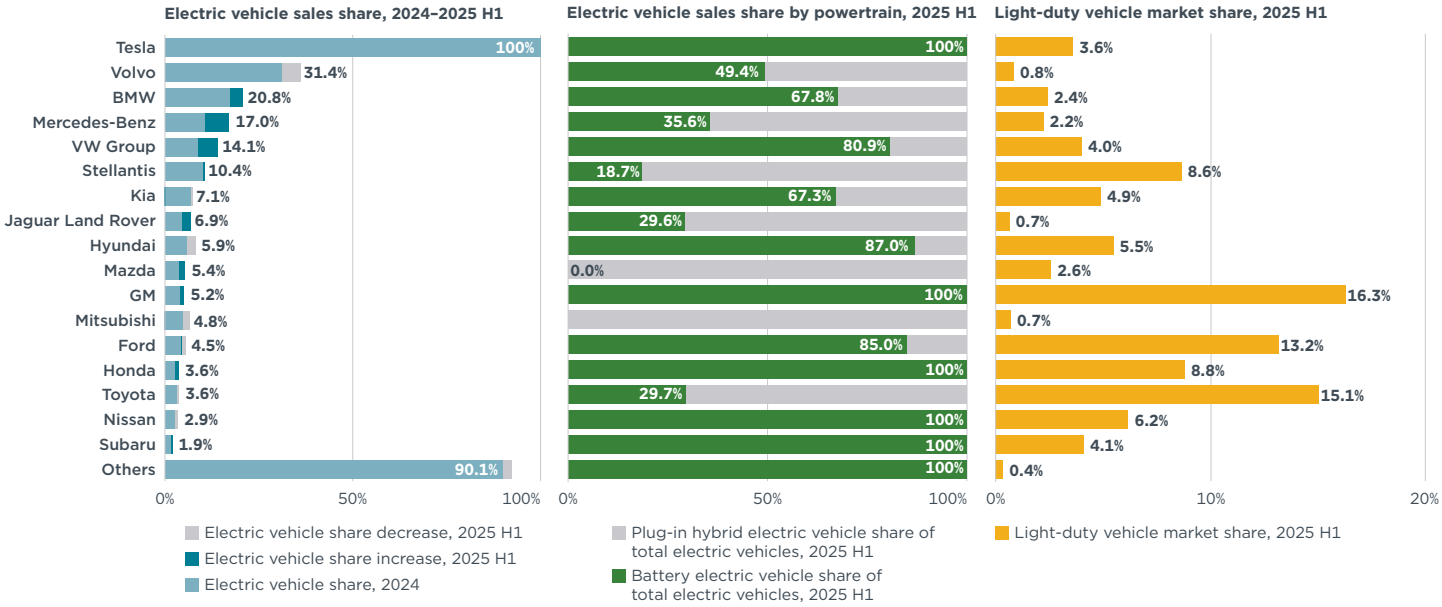
More than 600,000 EVs were sold in the United States in 2025 H1. These were 9% of all new LDVs sold, a 1-percentage-point drop from 2024. **Figure 6** shows EV trends in the United States at the manufacturer level, with automakers listed in descending order of EV sales share in 2025 H1. The left panel shows the change in EV share of total LDV sales for each manufacturer from 2024 to 2025 H1; the light blue portions of the bars represent 2024 EV sales shares, and dark blue (or light gray) portions represent the increase (or decrease) in sales share from 2024 to 2025 H1. The 2025 H1 EV sales share is also displayed as a percentage. The middle panel illustrates the technology mix of EVs sold by each manufacturer, with BEVs in green and PHEVs in gray. The right panel reflects the 2025 H1 LDV market share of each manufacturer (all powertrains).

8 Council of Ministers, "The Government of Spain Extends Incentives for Electric Vehicles and Charging Infrastructure," press release, April 1, 2025, https://www.lamoncloa.gob.es/lang/en/gobierno/councilministers/paginas/2025/20250401-council-press-conference.aspx#:~:text=The%20Council%20of%20Ministers%20has,January%20to%2031%20December%202025.

9 Alternative Fuels Observatory, "Germany Launches New Incentive Plans for Electric Vehicles," June 2, 2025, https://alternative-fuels-observatory.ec.europa.eu/general-information/news/germany-launches-new-incentive-plans-electric-vehicles#:~:text=The%20first%20tangible%20financial%20mechanisms,fleet%20electrification%2C%20and%20infrastructure%20deployment.

**Figure 6**

**Light-duty EV sales share, technology mix, and market share by manufacturer in the United States**




THE INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION **THEICCT.ORG**

Highlights for the United States in 2025 H1 include:

» Most automakers saw moderate increases in EV sales share compared with 2024. Mercedes-Benz and VW Group saw the largest gains, of 6 percentage points and 5 percentage points, respectively. Volvo recorded a drop in EV sales share from 36% in 2024 to 31% in 2025 H1 but continued to lead all legacy manufacturers in EV sales share. Hyundai, Mitsubishi, Ford, and Nissan also saw declines in EV sales share compared with 2024, ranging between 1 and 2 percentage points.

» In terms of EV sales share, the U.S. market remained stagnant at 9% compared with 2024 H1, while EV sales decreased by 15% compared with 2024 H1. The decline was mainly driven by Tesla, which saw a 35% drop in EV sales compared with 2024 H1. Other manufacturers also experienced decreases in EV sales, including Kia (-31%) and Ford (-15%), but the impact on overall market trends was not as significant. Excluding Tesla, EV sales fell by 2% in 2025 H1 compared with 2024 H1.

» All Europe-based manufacturers recorded double-digit EV sales shares in 2025 H1: Volvo (31%), BMW (21%), Mercedes-Benz (17%), VW Group (14%), and Stellantis (10%). Meanwhile, the leading automakers by LDV market share had relatively lower EV sales shares, with GM at 5%, Toyota at 4%, and Ford at 4%.

» BEVs continued to dominate the market, comprising 77% of new EVs sold. This is a slight drop from 2024, when BEVs made up 80% of EVs sold. In 2025 H1, seven automakers sold more PHEVs than BEVs, five more than in 2024 and six more than in 2024 H1. For Tesla, GM, Honda, Nissan, and Subaru, BEVs made up all EVs sold in 2025 H1, while for Mitsubishi and Mazda, PHEVs made up all EVs sold. For manufacturers in the "Others" category, BEVs comprised all EVs sold.

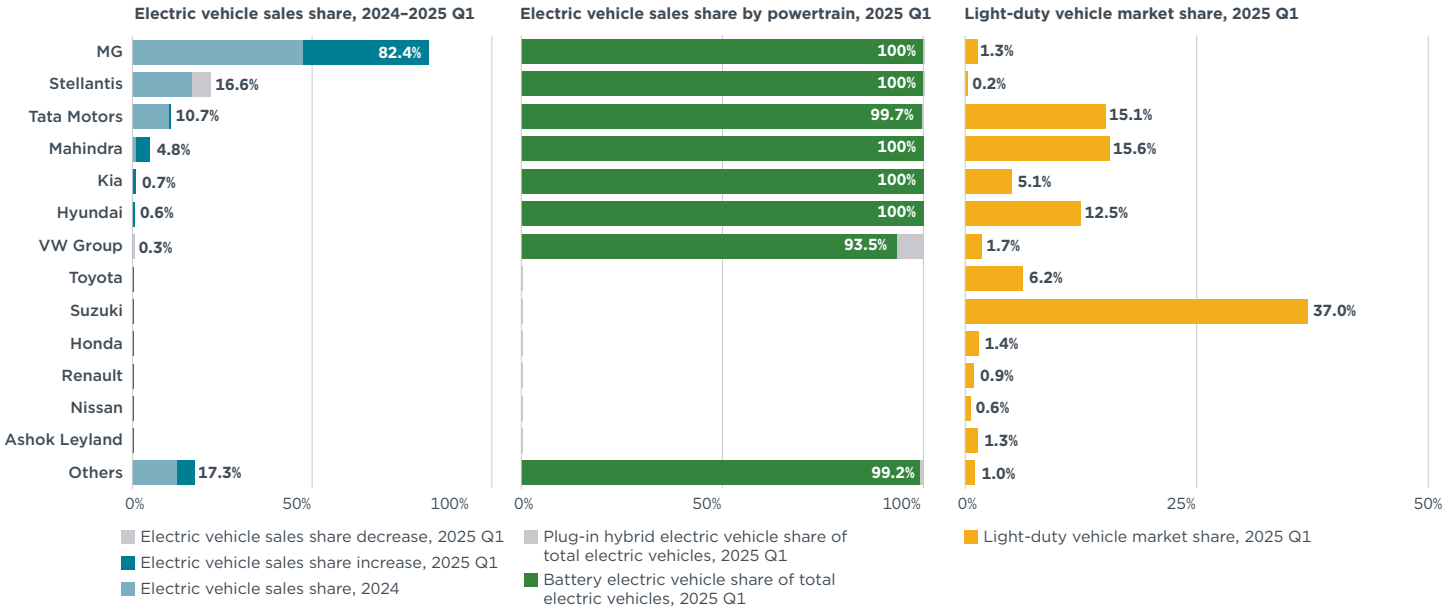
» Policy uncertainty and a changing regulatory environment shaped EV sales trends in the United States. In June 2025, President Trump signed a congressional resolution disapproving California's waiver under the Clean Air Act to set more stringent emission standards, including zero-emission vehicle regulations and

low-emission vehicle tailpipe standards.[10] The action is being challenged in court by California and other states. Separately, the One Big Beautiful Bill Act, enacted in July 2025, repeals the EV tax credits established by the Inflation Reduction Act at the end of September 2025; the act maintained the Advanced Manufacturing Production Credit, which covers battery production, but with new restrictions. A previous ICCT analysis modeled the impacts of IRA repeal on EV sales trends in the United States, projecting that it would result in slower growth of EV sales, but that the EV sales share would still reach 30% by 2030 without EV incentives and regulations, largely as a result of declining EV prices over time.[11]

## INDIA

Automaker-level data for India were only available through the first quarter of 2025. Over 40,000 EVs were sold in India in 2025 Q1. This made up 4% of the country's LDV market, up 1 percentage point from 2024. **Figure 7** shows EV market trends in India at the manufacturer level, with automakers listed in descending order of EV sales share in 2025 Q1. The left panel shows the changes in EV sales share of total LDVs sold for each manufacturer from 2024 to 2025 Q1; the light blue portions of the bars represent 2024 EV sales shares while the dark blue (or gray) portions represent the increase (or decrease) in sales share from 2024 to 2025 Q1. The 2025 Q1 EV sales share is also displayed as a percentage. The middle panel illustrates the technology mix of EVs sold by each manufacturer, with BEVs in green and PHEVs in gray. The right panel reflects the overall LDV market share of each manufacturer in 2025 Q1 (all powertrains).

**Figure 7**
**Light-duty EV sales share, technology mix, and market share by manufacturer in India**






10 Pub L. No. 119-16, June 12, 2025, https://www.congress.gov/bill/119th-congress/house-joint-resolution/88/text.

11 Anh Bui et al., *How the Inflation Reduction Act is Driving U.S. Job Growth Across the Electric Vehicle Industry* (International Council on Clean Transportation, 2025), https://theicct.org/publication/how-the-ira-is-driving-us-job-growth-across-the-electric-vehicle-industry-apr25/.

Highlights for India in 2025 Q1 include:

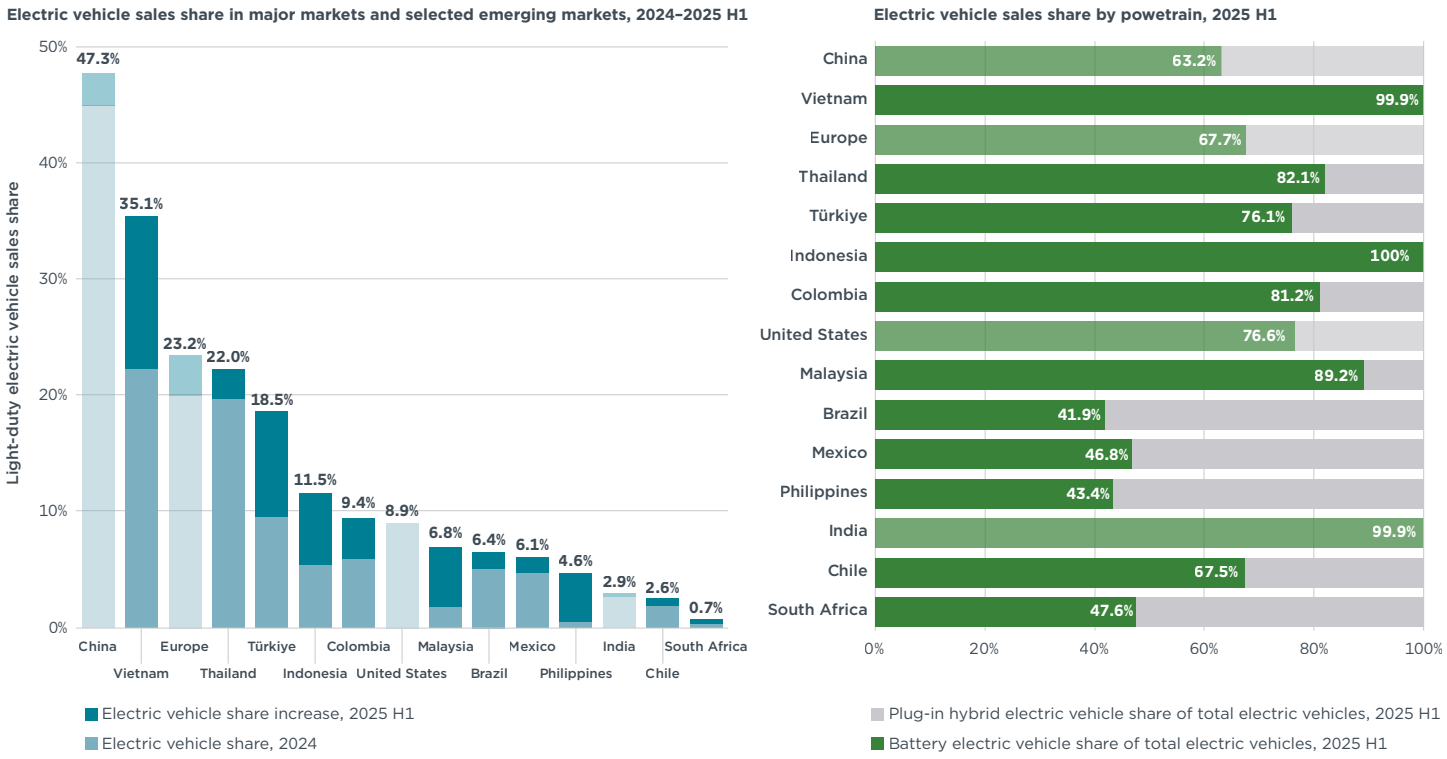
- Apart from Stellantis, all manufacturers that sold EVs increased their EV sales shares from 2024. MG's EV sales share grew from 47% in 2024 to 82% in 2025 Q1, marking the largest gain in EV sales share in the market. Mahindra, which captured about 16% of the LDV market, increased its EV sales share to approximately 5% in 2025 Q1. Stellantis' share dropped from 22% in 2024 to 17% in 2025 Q1.
- Suzuki, the largest LDV automaker in India, accounted for 37% of the country's LDV sales and sold no EVs in 2025 Q1. For Tata Motors, India's third largest automaker, EVs made up 11% of new LDV sales in 2025 Q1, the same as in 2024. Other leading manufacturers in terms of LDV market share registered very low EV sales: Hyundai, Kia, and VW Group had EV sales shares between 0.3% and 0.7%, while Toyota did not sell any EVs in 2025 Q1.
- Tata Motors accounted for 42% of India's light-duty EV sales, a decrease from 61% in 2024. This drop was primarily due to the increasing number of EVs from other automakers, notably MG and Mahindra. Combined, manufacturers in the "Others" category made up approximately 17% of the Indian light-duty EV market in 2025 Q1, an increase from 13% in 2024.
- Nearly all EVs sold in India were BEVs. Although PHEVs were sold in India in 2025 Q1, they accounted for only about 0.1% of total EV sales. These PHEVs mostly belonged to luxury brands, including Jaguar Land Rover and BMW, and they were sold at higher price points that limited their potential for mass market adoption.
- Existing incentives for both consumers and producers have contributed to the growth of the EV market in India. Central government policies, including fuel consumption standards for LDVs and Phase 3 (expected in 2027) and Phase 4 (expected in 2032) fuel economy standards for passenger cars currently under development, will be vital for continuing to promote EV adoption.

## EMERGING MARKETS

In 2025 H1, EV sales in emerging markets continued to grow and, in some cases, surpassed major markets such as the United States and India. **Figure 8** shows the EV sales share of total LDVs sold and the EV sales share by powertrain of selected emerging markets, with countries listed in descending order of EV sales share in 2025 H1. The left panel illustrates the EV sales share for each market in 2025 H1, and the right panel shows the technology mix of EVs sold in each market, with BEVs in green and PHEVs in gray. Nearly all light-duty EVs sold in these markets were passenger cars, comprising between 66% and 100% of EVs sold, depending on the market. Table A2 in the appendix details these EV sales shares by segment.

## Figure 8

**Light-duty EV sales by country in selected emerging markets, 2025 H1**




THE INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION **THEICCT.ORG**

In 2025 H1, Vietnam recorded the highest sales share of EVs among the emerging markets considered, at 35%. This was driven by growing sales by VinFast, a domestic all-electric manufacturer, and fiscal incentives for EV uptake, described below. Thailand, one of Southeast Asia's largest vehicle markets, followed with a 22% EV sales share, a 2-percentage-point increase from 2024. Türkiye (with an 18% EV sales share), Indonesia (11%), and Colombia (9%) each reached new highs for EV sales shares, surpassing the share in some major markets, notably the United States and India. Brazil and Mexico, the largest auto markets in Latin America, also saw EV sales share increases, each surpassing 6% shares.

BEVs dominated sales in the selected emerging markets, comprising nearly 74% of EVs sold. All EVs sold in Vietnam and Indonesia were BEVs. BEVs represented over 80% of EV sales in Malaysia, Thailand, and Colombia; over 70% in Türkiye; and over 60% of EV sales in Chile. In contrast, the majority of EVs sold in Brazil and Mexico were PHEVs, accounting for 58% and 51% of EVs sold, respectively.

In Vietnam, the government provided fiscal incentives to boost EV demand, with registration fee exemptions and special consumption tax rates for domestically produced electric passenger cars through 2027.[12] Thailand's EV growth has been supported by an extensive fiscal policy package, including purchase subsidies and import duty reductions, and by an increase in Chinese EVs in the domestic market.[13]

12 Decree No. 10/2022/ND-CP, January 15, 2022, https://lawnet.vn/en/vb/Decree-10-2022-ND-CP-Payers-of-registration-fees-7AB4C.html; Law No. 03/2022/QH15, January 11, 2022 https://vepg.vn/wp-content/uploads/2022/07/03_2022_QH15_507262_EN.pdf.

13 The Government Public Relations Department, "Government Supports EV 3.5 Measures to Promote the Use of Electric Vehicles," press release, December 20, 2023, https://thailand.prd.go.th/en/content/category/detail/id/48/iid/242869.

EV adoption in Turkiyë has been driven by preferential vehicle tax policies and a strong domestic EV manufacturing ecosystem.[14] In Indonesia, the Ministry of Finance issued new tax incentives to spur EV production and sales, including a reduction in value-added tax from 12% to 2%, the removal of luxury taxes for EVs, and a waiver of import taxes for the fiscal year 2025.[15] The jump in Malaysia's EV sales share can mainly be attributed to tax incentives available until the end of 2025, including road tax exemptions, import and excise duty exemptions for locally assembled EVs, rebates of up to RM2,500 (US$576) for EV charging costs, and tax reductions for EV rentals.[16]

EV uptake also increased in Latin America, which has seen rapid growth in the overall vehicle market and a surge of new automakers in the region.[17] In Colombia, EV uptake was driven by fiscal incentives such as import duty and purchase tax reductions and demand incentives, including city-level exemptions from road circulation restrictions (e.g., in Bogota) and the phase out of gasoline subsidies; the country is now working on a light-duty fuel consumption standard. Meanwhile, Chile's LDV efficiency standards spurred EV adoption, as manufacturers—which are mostly importers—include more EVs in their vehicle mix to meet compliance requirements. This resulted in a slight increase in EV sales share from 2% in 2024 to 3% in 2025 H1.

**Table 1** shows 2025 H1 light-duty EV sales shares in the top 5 selected emerging markets based on EV sales share by automaker. BYD was a top seller of EVs in Brazil, Colombia, and Thailand, capturing about 66%, 45%, and 41% of the EV market share in these markets, respectively. In addition to BYD, other China-based automakers such as SAIC, GAC, Changan, and Great Wall dominated Thailand's EV market, making up over 70% of the EVs sold in 2025 H1. Similarly, China-based automakers made up over 80% of the EV market in Indonesia, followed by VinFast (9%).

In 2025 H1, VinFast, the only domestic EV automaker in Vietnam, sold nearly all EVs in Vietnam, with a 99% market share. In Türkiye, BYD recorded the highest EV market share (23%), taking over Togg (15%), a domestic EV automaker, which accounted for 44% of Türkiye's EV market share in 2024 and 52% in 2024 H1. Legacy global automakers such as BMW, Hyundai, and Stellantis recorded a notable presence across emerging EV markets, although they were still behind China-based manufacturers.

**Table 1**

**Electric light-duty vehicle sales by automaker in selected emerging markets, 2025 H1**

| Market | Top EV selling automakers |
|---|---|
| **Vietnam** | VinFast (99%), Others (1%) |
| **Thailand** | BYD (41%), SAIC (10%), GAC (9%), Changan (8%), Great Wall (5%), Others (26%) |
| **Türkiye** | BYD (23%), Togg (15%), Tesla (11%), Stellantis (10%), Hyundai (9%), Others (32%) |
| **Indonesia** | BYD (35%), Chery (14%), Wuling (13%), VinFast (9%), Chery (11%), Others (17%) |
| **Colombia** | BYD (45%), Hyundai (10%), Kia (8%), Volvo (7%), BMW (7%), Others (31%) |
| **Brazil** | BYD (66%), Great Wall (17%), Volvo (6%), BMW (2%), VW Group (2%), Others (8%) |

*Sources:* EV Volumes (Brazil, Indonesia, Thailand, Türkiye, and Vietnam), VinFast (Vietnam), and the Asociación Nacional de Movilidad Sostenible (Colombia).

14 Accelerating to Zero Coalition, "Investing in a Domestic Turkish Electric Vehicle Ecosystem," August 5, 2025, https://acceleratingtozero.org/investing-in-a-domestic-turkish-electric-vehicle-ecosystem/.

15 Cabinet Secretary of Indonesia, "Pemerintah Luncurkan Insentif Pembelian Kendaraan Listrik Roda Empat dan Bus [Government Launches Incentives for the Purchase of Electric Four-Wheeler Passenger Cars and Buses]", January 2024, https://setkab.go.id/pemerintah-luncurkan-insentif-pembelian-kendaraan-listrik-roda-empat-dan-bus/.

16 Dongchedi, accessed February 2025, https://www.dongchedi.com/.

17 BloombergNEF, "Latin America's EV Get a Big Boost From Chinese Carmakers," December 19, 2024, https://about.bnef.com/insights/clean-energy/latin-americas-evs-get-a-big-boost-from-chinese-carmakers/.

# APPENDIX A. LIGHT-DUTY ELECTRIC VEHICLE MARKET PERFORMANCE

Table A1 presents light-duty EV market shares in the four major markets by technology. It shows the BEV and PHEV market shares for the passenger car (PC) and light commercial vehicle (LCV)/light truck (LT) categories for 2025 H1 and 2024. Shares by technology and category may not sum to the total light-duty EV market share due to rounding.

**Table A1**

**Sales shares of light-duty EVs by market, segment, and technology**

| Market | 2025 H1 | | | | | | 2024 | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | PC | | LCV/LT | | LDV | | PC | | LCV/LT | | LDV | |
| | BEV | PHEV | BEV | PHEV | BEV | PHEV | BEV | PHEV | BEV | PHEV | BEV | PHEV |
| China | 30% | 18% | 23% | 1% | 30% | 17% | 27% | 19% | 22% | 0% | 27% | 18% |
| Europe | 17% | 8% | 9% | 1% | 16% | 8% | 15% | 7% | 6% | 0% | 13% | 6% |
| United States | 9% | 1% | 7% | 2% | 7% | 2% | 8% | 1% | 8% | 2% | 8% | 2% |
| India | 3% | <0.5% | 2% | 0% | 3% | <0.1% | 3% | <0.1% | <0.1% | 0% | 3% | <0.1% |
| Global | 16% | 9% | 7% | <0.5% | 15% | 7% | 14% | 8% | 8% | 2% | 13% | 6% |

**Table A2**

**Sales shares of EVs and LDVs by segment in emerging markets**

| Market | EV | LDV | |
|---|---|---|---|
| | LDV | PC | LCV |
| Vietnam | 35% | 89% | 11% |
| Thailand | 22% | 69% | 31% |
| Türkiye | 18% | 80% | 20% |
| Indonesia | 11% | 82% | 18% |
| Colombia | 9% | 81% | 19% |
| Malaysia | 7% | 93% | 7% |
| Brazil | 6% | 79% | 21% |
| Mexico | 6% | 43% | 57% |
| Philippines | 5% | 75% | 25% |
| Chile | 3% | 68% | 32% |
| South Africa | 1% | 66% | 34% |

## Table A3

### Light-duty EV market performance in China, 2025 H1

| Manufacturer | EV sales share | | Percentage point change of EV sales shares from 2024 | | Number of EV models | | LDV market share | EV market share |
|---|---|---|---|---|---|---|---|---|
| | BEV | PHEV | BEV | PHEV | BEV | PHEV | | |
| Tesla | 100% | 0% | 0 pp | 0 pp | 3 | 0 | 2% | 5% |
| BYD | 45% | 55% | +2 pp | -2 pp | 27 | 21 | 13% | 28% |
| Geely | 42% | 14% | +9 pp | 0 pp | 63 | 14 | 10% | 13% |
| SAIC Motor | 27% | 4% | -1 pp | 0 pp | 50 | 15 | 14% | 9% |
| Changan | 24% | 17% | +6 pp | -1 pp | 34 | 26 | 8% | 7% |
| GAC Group | 21% | 3% | +2 pp | -1 pp | 17 | 7 | 7% | 4% |
| Chery | 18% | 20% | +1 pp | +5 pp | 27 | 21 | 6% | 5% |
| BAIC Group | 17% | 5% | +2 pp | +4 pp | 37 | 6 | 4% | 2% |
| DFM | 17% | 9% | +5 pp | +2 pp | 35 | 12 | 5% | 3% |
| Brilliance Group | 11% | 0% | -4 pp | 0 pp | 8 | 0 | 2% | 1% |
| FAW Group | 9% | 2% | 0 pp | +1 pp | 15 | 7 | 12% | 3% |
| Great Wall | 5% | 34% | -3 pp | +6 pp | 7 | 10 | 3% | 3% |
| Others | 47% | 27% | +12 pp | -9 pp | 123 | 30 | 13% | 20% |
| **Fleet** | **30%** | **17%** | **+3 pp** | **-1 pp** | **446** | **169** | **100%** | **100%** |

## Table A4

### Light-duty EV market performance in Europe, 2025 H1

| Manufacturer | EV sales share | | Percentage point change of EV sales shares from 2024 | | Number of EV models | | LDV market share | EV market share |
|---|---|---|---|---|---|---|---|---|
| | BEV | PHEV | BEV | PHEV | BEV | PHEV | | |
| Tesla | 100% | 0% | 0 pp | 0 pp | 4 | 0 | 1% | 6% |
| Volvo | 37% | 32% | -5 pp | +2 pp | 7 | 7 | 2% | 7% |
| BMW | 24% | 14% | +2 pp | 0 pp | 10 | 10 | 6% | 10% |
| Kia | 20% | 6% | +8 pp | -3 pp | 4 | 5 | 3% | 4% |
| VW Group | 18% | 10% | +6 pp | +4 pp | 20 | 30 | 20% | 24% |
| Hyundai | 17% | 6% | +6 pp | +2 pp | 6 | 2 | 3% | 3% |
| Mercedes-Benz | 15% | 16% | -1 pp | -1 pp | 14 | 12 | 6% | 8% |
| Stellantis | 11% | 2% | +2 pp | -1 pp | 43 | 19 | 18% | 10% |
| Renault | 11% | 1% | +4 pp | 0 pp | 10 | 2 | 12% | 6% |
| Ford | 10% | 8% | +4 pp | +2 pp | 10 | 7 | 5% | 4% |
| Nissan | 8% | 0% | -1 pp | 0 pp | 4 | 0 | 2% | 1% |
| Subaru | 7% | 0% | -1 pp | 0 pp | 1 | 0 | 0% | 0% |
| Toyota | 5% | 7% | +3 pp | +4 pp | 8 | 5 | 7% | 4% |
| Honda | 3% | 6% | -6 pp | +2 pp | 1 | 1 | 0% | 0% |
| Mazda | 1% | 12% | -1 pp | +2 pp | 1 | 2 | 1% | 1% |
| Jaguar Land Rover | 0% | 36% | 0 pp | -7 pp | 0 | 7 | 0% | 1% |
| Mitsubishi | 0% | 18% | 0 pp | -1 pp | 0 | 3 | 0% | 0% |
| Suzuki | 0% | 1% | 0 pp | 0 pp | 0 | 1 | 1% | 0% |
| Others | 19% | 9% | -6 pp | +4 pp | 52 | 14 | 10% | 13% |
| **Fleet** | **16%** | **8%** | **+3 pp** | **+2 pp** | **195** | **127** | **100%** | **100%** |

## Table A5

### Light-duty EV market performance in the United States, 2025 H1

| Manufacturer | EV sales share | | Percentage point change of EV sales shares from 2024 | | Number of EV models | | LDV market share | EV market share |
|---|---|---|---|---|---|---|---|---|
| | BEV | PHEV | BEV | PHEV | BEV | PHEV | | |
| Tesla | 100% | 0% | 0 pp | 0 pp | 5 | 0 | 3% | 30% |
| Volvo | 16% | 16% | +6 pp | -11 pp | 6 | 3 | 1% | 3% |
| BMW | 14% | 7% | +1 pp | +3 pp | 6 | 6 | 2% | 6% |
| VW Group | 11% | 3% | +4 pp | +1 pp | 9 | 4 | 4% | 6% |
| Mercedes-Benz | 6% | 11% | -3 pp | +9 pp | 7 | 4 | 2% | 4% |
| GM | 5% | 0% | +1 pp | 0 pp | 12 | 0 | 18% | 10% |
| Hyundai | 5% | 1% | -2 pp | 0 pp | 6 | 1 | 6% | 4% |
| Kia | 5% | 2% | -2 pp | +2 pp | 3 | 3 | 5% | 4% |
| Ford | 4% | 1% | -1 pp | 0 pp | 3 | 2 | 13% | 7% |
| Honda | 4% | 0% | +1 pp | 0 pp | 2 | 0 | 9% | 4% |
| Nissan | 3% | 0% | -1 pp | 0 pp | 2 | 0 | 7% | 2% |
| Jaguar Land Rover | 2% | 5% | 0 pp | +3 pp | 1 | 2 | 1% | 1% |
| Stellantis | 2% | 8% | +2 pp | -2 pp | 4 | 5 | 7% | 9% |
| Subaru | 2% | 0% | 0 pp | 0 pp | 1 | 0 | 4% | 1% |
| Toyota | 1% | 3% | 0 pp | 0 pp | 2 | 5 | 15% | 6% |
| Mazda | 0% | 5% | 0 pp | +1 pp | 0 | 2 | 3% | 2% |
| Mitsubishi | 0% | 5% | 0 pp | -2 pp | 0 | 1 | 1% | 0% |
| Others | 90% | 0% | -2 pp | 0 pp | 6 | 2 | 0% | 3% |
| **Fleet** | **7%** | **2%** | **-1 pp** | **0 pp** | **75** | **40** | **100%** | **100%** |

## Table A6

### Light-duty EV market performance in India, 2025 Q1

| Manufacturer | EV sales share | | Percentage point change of EV sales shares from 2024 | | Number of EV models | | LDV market share | EV market share |
|---|---|---|---|---|---|---|---|---|
| | BEV | PHEV | BEV | PHEV | BEV | PHEV | | |
| MG | 82% | 0% | +35 pp | 0 pp | 3 | 0 | 1% | 25% |
| Stellantis | 17% | 0% | -5 pp | 0 pp | 0 | 0 | 0% | 1% |
| Tata Motors | 11% | 0.03% | 0 pp | 0 pp | 7 | 0 | 14% | 43% |
| Mahindra | 5% | 0.0% | +4 pp | 0 pp | 5 | 0 | 16% | 22% |
| Kia | 0.7% | 0% | 0 pp | 0 pp | 1 | 0 | 6% | 1% |
| Hyundai | 0.6% | 0% | 0 pp | 0 pp | 1 | 0 | 12% | 2% |
| VW Group | 0.3% | 0.02% | 0 pp | 0 pp | 0 | 0 | 2% | 0% |
| Suzuki | 0% | 0% | 0 pp | 0 pp | 0 | 0 | 38% | 0% |
| Toyota | 0% | 0% | 0 pp | 0 pp | 0 | 0 | 6% | 0% |
| Honda | 0% | 0% | 0 pp | 0 pp | 0 | 0 | 2% | 0% |
| Ashok Leyland | 0% | 0% | 0 pp | 0 pp | 0 | 0 | 1% | 0% |
| Renault | 0% | 0% | 0 pp | 0 pp | 0 | 0 | 1% | 0% |
| Nissan | 0% | 0% | 0 pp | 0 pp | 0 | 0 | 1% | 0% |
| Others | 17% | 0% | +5 pp | 0 pp | 4 | 0 | 1% | 6% |
| **Fleet** | **4%** | **0.01%** | **+1 pp** | **0 pp** | **21** | **0** | **100%** | **100%** |

## APPENDIX B. DEFINITIONS OF LIGHT-DUTY VEHICLES

**China, Europe, and India:** LDVs include both PCs and LCVs. PCs are defined as motor vehicles with at least four wheels designed for the carriage of passengers that have no more than eight seats, excluding the driver's seat, and a maximum gross weight below 3.5 tons. Under vehicle classifications used in Europe and India, PCs are included in the M1 category. Under LCVs are motor vehicles with at least four wheels designed for the carriage of goods with a maximum gross weight below 3.5 tons. In Europe and India, LCVs fall under the N1 category. In China, passenger vehicles with more than nine seats are considered LCVs and are included in the N1 and M2 categories.

**Mexico and the United States:** LDVs include PCs and light trucks. Under PCs are vehicles designed for the carriage of up to 10 passengers that do not qualify as light trucks; these typically include sedans, hatchbacks, and some crossovers and small sport utility vehicles (SUVs). Light trucks are defined as vehicles that meet certain technical specifications related to cargo capacity, four-wheel-drive capability, and chassis design, and they have a gross vehicle weight of up to 8,500 lb (3,856 kg); these typically include pickup trucks, vans, large SUVs, and some crossovers and small SUVs.

**Brazil:** Under LDVs are passenger cars and LCVs with a maximum weight less than or equal to 3,856 kg and a maximum running weight less than or equal to 2,720 kg. Passenger cars should be designed to carry passengers and have no more than eight seats in addition to the driver's seat. For LCVs, these should be designed for: (i) the transport of a payload greater than 1,000 kg; (ii) passenger transport, with more than eight seats in addition to the driver's seat; or (iii) special characteristics for off-road use.

**Thailand:** Under LDVs are PCs, pickup PCs, and pickup trucks.

**Vietnam:** Under LDVs are PCs, pickup PCs, and vans.

**Other emerging markets**: LDVs include both PCs and LCVs. PCs comprise hatchbacks, mini cars, multi-purpose vans, sedans, and SUVs; LCVs include minivans, light trucks, pickup trucks, and vans.

# APPENDIX C. SPECIFICATIONS, MODEL DEFINITIONS, AND DATA SOURCES

**Specifications:** Vehicle specifications for Chinese models were collected from Dongchedi and registration data.[18] For all other models, specification data were collected from specification brochures on manufacturers' official websites and major EV information hubs, including EV Database,[19] EV Specifications,[20] and EV Volumes.[21]

**Model definition**: All sales databases were analyzed at the model level. For example, we group both the Audi Q8 e-tron 50 Sportback and Audi Q8 e-tron 55 Sportback as Audi Q8 e-tron models. We only counted EV models with at least 100 unit sales, to exclude models unavailable to the mass market.

## DATA SOURCES

**China:** Sales data and model information were drawn from registration data from Gasgoo.[22] Sales are based on new registrations of LDVs; registration data for new registrations are a close proxy for retail sales.

**Europe:** Sales data and model information are from MarkLines.[23] Sales figures are based on new registrations of LDVs. The United Kingdom was excluded from the manufacturer-level analysis. We used one data source to ensure consistency and comparability. Cyprus, Iceland, Latvia, Liechtenstein, Lithuania, and Malta were not included due to data limitations. These countries accounted for less than 1% of the total sales in 2025 H1.

**United States:** Sales data and model information are from EV Volumes.[24] Incomplete data at the brand level due to regrouping at a more aggregated (manufacturing group) level were supplemented with data from MarkLines.[25]

**India:** Manufacturer-level sales and model data are from Segment Y[26] and national sales data are from Vahan.[27]

**Emerging markets**: Our primary sales data were obtained from the Associação Brasileira do Veículo Elétrico (ABVE)[28] and Federação Nacional da Distribuição de Veículos Automores (Fenabrave)[29] for Brazil, the Asociación Nacional Automotriz de Chile A G (ANAC) for Chile,[30] the Asociación Nacional de Movilidad Sostenible (ANDEMOS) for Colombia,[31] the Gabungan Indostri Kendaraan Bermotor Indonesia (GAIKINDO)[32] for Indonesia, the Malaysia Automotive Association for Malaysia,[33] the Government of Mexico and JATO for Mexico,[34] the Thailand Automotive Industry

18 Dongchedi, accessed July 2025, https://www.dongchedi.com/.
19 Electric Vehicle Database, accessed July 2025, https://ev-database.org/.
20 EV Specifications, accessed July 2025, https://www.evspecifications.com/.
21 EV Volumes, accessed July 2025, https://www.ev-volumes.com/.
22 Gasgoo, accessed July 2025, https://i.gasgoo.com/.
23 MarkLines, accessed July 2025, https://www.marklines.com/en/vehicle_sales/index.
24 EV Volumes, accessed July 2025, https://www.ev-volumes.com/datacenter/.
25 MarkLines, accessed July 2025, https://www.marklines.com/en/vehicle_sales/index.
26 Segment Y, accessed July 2025, https://www.segmenty.com/.
27 Vahan Report, accessed July 2025, https://vahan.parivahan.gov.in/vahanreport/.
28 ABVE Data, accessed July 2025, https://abve.org.br/bi-geral/.
29 Fenabrave Movendo o Brasil, accessed July 2025, https://www.fenabrave.org.br/portal/files/2024_06_02.pdf.
30 ANAC, accessed July 2025, https://www.anac.cl/category/estudio-de-mercado/?anno=2024.
31 ANDEMOS, accessed February 2025, https://www.andemos.org/.
32 GAIKINDO, accessed February 2025, https://www.gaikindo.or.id/indonesian-automobile-industry-data/.
33 Malaysia Automotive Association, accessed February 2025, https://www.maa.org.my/pdf/2024/Market_Review_2024.pdf.
34 JATO, accessed March 2025, https://www.jato.com/.

Association for Thailand, the Automotive Distributors' and Mobility Association (ODMD) for Türkiye,[35] and Hyundai Thanh Cong, the Vietnamese Automobile Manufacturer's Association (VAMA), and VinFast[36] for Vietnam. If not available, we supplemented with data from EV Volumes and MarkLines.[37]

**Global:** Sales and production data are from the EV Volumes database.[38]

35 ODMD, accessed February 2025, https://www.odmd.org.tr/.

36 VinFast Auto, accessed February 2025, https://vinfastauto.com/vn_vi/vinfast-giao-gan-21800-o-to-dien-trong-6-thang-dau-nam-2024.

37 MarkLines, accessed February 2025, https://www.marklines.com/en/vehicle_sales/index.

38 EV Volumes, accessed February 2025, http://www.ev-volumes.com/datacenter/.

# APPENDIX D. MANUFACTURER AND BRAND GROUPINGS

**China:** For joint ventures, manufacturers were grouped under the name of the dominant shareholder. For example, two manufacturers, DFM and Nissan, were grouped under DFM in this analysis.

**United States:** In cases where sales numbers in the primary data source were aggregated at the manufacturer group level, sales were disaggregated to the brand level using the supplementary database (MarkLines). For example, the brands Hyundai, Genesis, and Kia are grouped under "Hyundai Motor" and were split into "Hyundai" for Hyundai and Genesis and "Kia" for the Kia brand.

**Others:** This group refers to manufacturers that make up a smaller share (< 5%) of the market and reflect the corresponding main brands sold under the listed manufacturers.

**Table D1**
**Manufacturers and corresponding main brands in China**

| Light-duty vehicles in China | |
|---|---|
| **Manufacturer** | **Main brands** |
| **BAIC Group** | Beijing, Benz, Foton, Hyundai |
| **Brilliance Group** | BMW, Jinbei |
| **BYD** | BYD |
| **Changan** | Changan |
| **Chery** | Chery, Exeed, Jaguar, Jetour, Karry, Land Rover |
| **DFM** | Dongfeng, Honda, Nissan |
| **FAW Group** | Audi, Bestune, Hongqi, Jetta, Jiefang, Mazda, Toyota, Volkswagen |
| **GAC Group** | Fiat, Hongda, Jeep, Mitsubishi, Toyota, Trumpchi |
| **Geely** | Geely, Lynkco, Volvo Cars |
| **Great Wall** | Great Wall, Haval, Wey |
| **SAIC Motor** | Buick, MG, Volkswagen, Wuling, Yuejing |
| **Tesla** | Tesla |

## Table D2

**Manufacturers and corresponding main brands in Europe**

| Light-duty vehicles in Europe | |
|---|---|
| **Manufacturer** | **Main brands** |
| **BMW** | BMW, MINI |
| **Ford** | Ford, Lincoln |
| **Honda** | Honda |
| **Hyundai** | Genesis, Hyundai |
| **Jaguar Land Rover** | Jaguar, Land Rover |
| **Kia** | Kia |
| **Mazda** | Mazda |
| **Mercedes-Benz** | Mercedes-Benz, Smart |
| **Mitsubishi** | Mitsubishi |
| **Nissan** | Infiniti, Nissan |
| **Renault** | Dacia, Renault |
| **Stellantis** | Alfa Romeo, Citröen, DS Automobiles, Fiat, Jeep, Lancia, Opel, Peugeot, Vauxhall |
| **Subaru** | Subaru |
| **Suzuki** | Suzuki |
| **Tesla** | Tesla |
| **Toyota** | Lexus, Toyota |
| **Volvo** | Polestar, Volvo |
| **Volkswagen Group** | Audi, Porsche, Seat, Škoda, Volkswagen |
| **Others** | GM, Isuzu, Iveco, MG, SsangYong |

## Table D3

**Manufacturers and corresponding main brands in the United States**

| Light-duty vehicles in the United States | |
|---|---|
| **Manufacturer** | **Main brands** |
| **BMW** | BMW, MINI |
| **Ford** | Ford, Lincoln |
| **GM** | Buick, Cadillac, Chevrolet, GMC |
| **Honda** | Acura, Honda |
| **Hyundai** | Genesis, Hyundai |
| **Jaguar Land Rover** | Jaguar, Land Rover |
| **Kia** | Kia |
| **Mazda** | Mazda |
| **Mercedes-Benz** | Mercedes-Benz |
| **Mitsubishi** | Mitsubishi |
| **Nissan** | Nissan, Infiniti |
| **Stellantis** | Alfa Romeo, Chrysler, Dodge, Fiat, Jeep, Maserati, RAM |
| **Subaru** | Subaru |
| **Tesla** | Tesla |
| **Toyota** | Lexus, Toyota |
| **Volvo** | Volvo |
| **Volkswagen Group** | Audi, Bentley, Porsche, Volkswagen |
| **Others** | Karma, Lucid, McLaren, Rivian |

**Table D4**

**Manufacturers and corresponding main brands in India**

| Light-duty vehicles in India | |
|---|---|
| **Manufacturer** | **Main brands** |
| **Ashok Leyland** | Ashok Leyland |
| **Honda** | Honda |
| **Hyundai** | Hyundai |
| **Kia** | Kia |
| **Mahindra** | Mahindra electric, Mahindra & Mahindra |
| **MG** | MG |
| **Nissan** | Datsun, Nissan |
| **Renault** | Renault |
| **Suzuki** | Maruti, Suzuki |
| **Stellantis** | Alfa Romeo, Chrysler, Dodge, Fiat, Jeep, Maserati, RAM |
| **Tata Motors** | Jaguar, Land Rover, Tata |
| **Toyota** | Lexus, Toyota |
| **Volkswagen Group** | Audi, Škoda, Volkswagen |
| **Others** | BYD, BMW, Force, Mercedes-Benz, PMV Electric, Volvo |

**Table D5**

**Manufacturers and corresponding main brands categorized as "Others" in selected emerging markets**

| Light-duty vehicles in selected emerging markets | |
|---|---|
| **Market** | **Main brands** |
| **Brazil** | Chery, Nissan, Mercedes-Benz, Jaguar Land Rover, JAC Motor |
| **Colombia** | VW Group, Nissan, Geely, GM, SAIC |
| **Indonesia** | Hyundai, SAIC, Neta, BMW, Stellantis |
| **Thailand** | Tesla, BMW, Neta, Chery, Mercedes-Benz |
| **Türkiye** | BMW, VW, Volvo, KG, Mercedes-Benz |
| **Vietnam** | BYD, BMW, SAIC, Mercedes-Benz, Tesla |

www.theicct.org

communications@theicct.org

@theicct.org

icct
THE INTERNATIONAL COUNCIL
ON CLEAN TRANSPORTATION

BEIJING | BERLIN | NEW DELHI | SAN FRANCISCO | SÃO PAULO | WASHINGTON DC