EUROPEAN MARKET MONITOR
CARS AND VANS: AUGUST 2025

PASSENGER CAR REGISTRATIONS

The average share of battery electric vehicles (BEVs) among total new registrations in Europe reached 19% in August 2025, up from 17% in July. The BMW pool led with a 29% share and was followed by the Mercedes-Volvo-Polestar (26%), Hyundai (22%), Kia (21%) and Volkswagen (20%) pools. The Tesla pool (16%), SAIC (13%), the Renault pool (12%) and Nissan (8%) all were below the European average. Year-to-date (YTD) 2025, the BEV share remained stable at 17%, which represents an increase of 4 percentage points compared with the same period of 2024. Several manufacturing pools had significant increases in BEV shares in YTD 2025 versus YTD 2024. Kia (20%) and Volkswagen (18%) both recorded increases of 8 percentage points, while BEV shares for the Hyundai (18%) and BMW (25%) pools increased 7 and 4 percentage points, respectively. In contrast, SAIC stood out with a drop from 38% in YTD 2024 to 13% in YTD 2025. Plug-in hybrid electric vehicles (PHEVs) had an average market share among new registrations in Europe of 9% in YTD 2025 (up 2 percentage points over YTD 2024), led by the Mercedes-Volvo-Polestar pool (23% share). For full hybrid electric vehicles (HEVs), SAIC (41%), Nissan (37%), and the Renault pool (29%) recorded the largest shares in YTD 2025. In the mild hybrid electric vehicle (MHEV) segment, the BMW and Mercedes-Volvo-Polestar pools led registration shares, each with a 37% in YTD 2025.

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Figure 1

Share of battery electric in new passenger car registrations in Europe

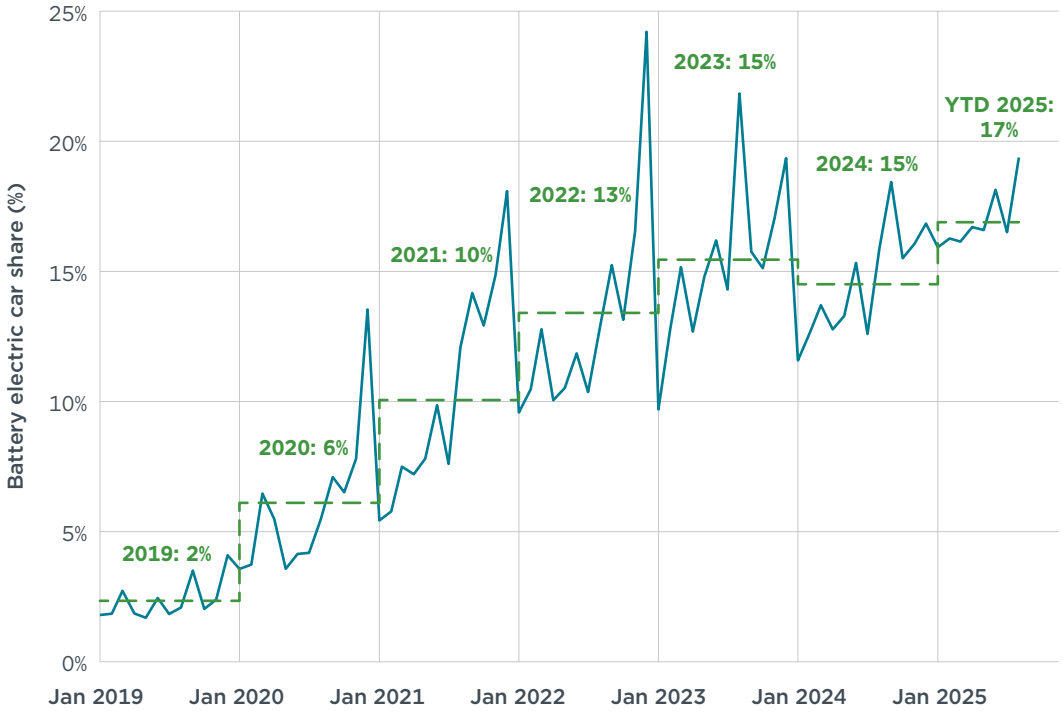

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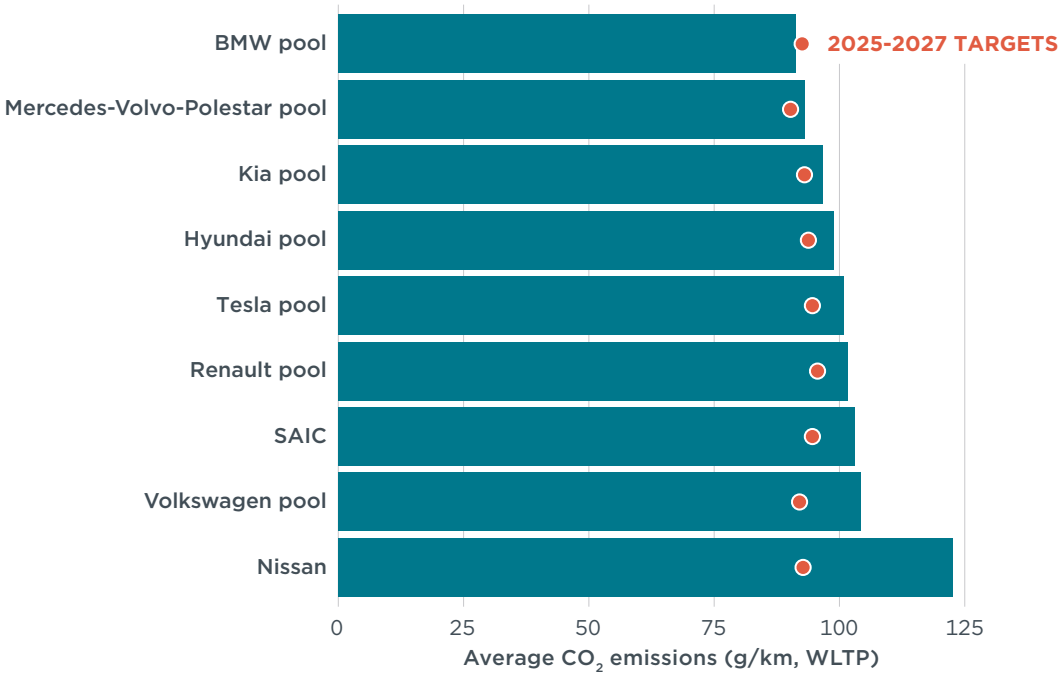
Figure 2

Average CO_2 emissions of manufacturer pools and individual manufacturers compared with estimated 2025–2027 targets, YTD 2025



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 information.

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Carbon dioxide (CO_2) emissions among manufacturer pools averaged 102 g CO_2/km in the first eight months of 2025. Manufacturing pools thus remain 8 g CO_2/km from the average target of 93 g CO_2/km for the 2025–2027 period. With a combined market share of 58%, the Tesla and Volkswagen pools reduced their target gap by 1 g CO_2/km compared with the previous month. The BMW pool is currently in compliance with its 2025–2027 target, while Nissan (30 g CO_2/km above) remains the farthest behind.

Looking at individual car brands with market shares of 1% or greater, apart from Tesla, Volvo had the greatest over-compliance at 28 g CO_2/km below its projected brand-level average target for 2025–2027, followed by Cupra (15 g CO_2/km below its target) and Mini (13 g CO_2/km below its target). Nissan, Mazda, and SEAT currently have the largest target gaps at 30, 26 and 25 g 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	August 2025				YTD 2025				YTD 2024				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
BMW pool	29%	16%	0%	36%	25%	15%	0%	37%	21%	14%	0%	32%	22%	14%	0%	33%
All other brands	28%	30%	3%	8%	25%	26%	2%	9%	18%	18%	2%	15%	21%	20%	2%	13%
Mercedes-Volvo-Polestar pool	26%	23%	0%	36%	23%	23%	0%	37%	26%	24%	0%	33%	26%	24%	0%	33%
Hyundai pool	22%	6%	22%	14%	18%	6%	21%	13%	11%	4%	18%	19%	11%	4%	20%	18%
Kia pool	21%	6%	16%	12%	20%	6%	16%	14%	12%	9%	16%	18%	12%	9%	16%	17%
Volkswagen pool	20%	11%	0%	14%	18%	10%	0%	14%	10%	6%	0%	13%	12%	6%	0%	13%
AVERAGE	19%	10%	13%	22%	17%	9%	13%	23%	13%	7%	11%	19%	15%	7%	12%	20%
Tesla pool	16%	6%	22%	32%	13%	5%	21%	33%	13%	4%	20%	23%	14%	4%	21%	23%
SAIC	13%	14%	46%	0%	13%	9%	41%	0%	38%	3%	6%	0%	31%	3%	17%	0%
Renault pool	12%	1%	29%	11%	12%	1%	29%	9%	7%	0%	19%	6%	8%	0%	21%	8%
Nissan	8%	0%	38%	34%	8%	0%	37%	32%	8%	0%	40%	32%	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 YTD 2025
		August 2025	YTD 2025	Compliance credits	Adj. YTD 2025	Reference target 2025–2027	Compliance credits	Target 2025–2027	Target gap	
		WLTP	WLTP	Eco-innovations	WLTP	WLTP	ZLEV factor	WLTP	WLTP	
BMW pool	-1%	87	92	1	91	88	1.05	93	-1	7%
Mercedes-Volvo-Polestar pool	3%	90	93	0.2	93	86	1.05	90	3	8%
Kia pool	4%	95	97	0.3	97	93	1	93	4	4%
Hyundai pool	5%	96	99	0.3	99	94	1	94	5	4%
Renault pool	6%	100	103	1.2	102	96	1	96	6	11%
Tesla pool	7%	98	102	1	101	95	1	95	6	31%
AVERAGE	9%	98	102	0.8	101	93	1	93	8	
SAIC	9%	95	103	0	103	95	1	95	9	2%
Volkswagen pool	13%	101	105	0.6	104	92	1	92	12	27%
Nissan	32%	123	124	0.9	123	93	1	93	30	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
	August 2025	YTD 2025	Compliance credits	Adj. YTD 2025	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	48	57	0.1	57	86	1.05	90	-34	3%
Volvo	55	63	0.1	63	86	1.05	91	-28	2%
BMW Group	87	92	1	91	88	1.05	93	-1	7%
BMW	89	93	1	92	87	1.05	92	1	6%
Mini	74	85	1	84	93	1.05	97	-13	1%
SAIC Motor	95	103	0	103	95	1	95	9	2%
MG	95	103	0	103	95	1	95	9	2%
Toyota Group	95	96	0.5	96	95	1	95	1	7%
Toyota	96	97	0.5	96	95	1	95	1	7%
Hyundai Group	96	98	0.3	98	93	1	93	4	8%
Hyundai	96	99	0.3	99	94	1	94	5	4%
Kia	95	97	0.3	97	93	1	93	4	4%
Renault Group	100	103	1.2	102	96	1	96	6	11%
Renault	89	95	1.1	94	94	1	94	-1	6%
Dacia	113	114	1.4	113	97	1	97	15	5%
Volkswagen Group	101	105	0.6	104	92	1	92	12	27%
VW	100	103	0.4	103	92	1.01	93	10	11%
Škoda	98	104	0.4	103	93	1	93	11	6%
Audi	105	113	0.7	112	89	1.01	90	23	5%
Cupra	84	82	0.8	81	92	1.05	96	-15	2%
SEAT	123	123	1.7	121	97	1	97	25	2%
Ford	103	114	1	113	91	1	91	22	4%
Ford	103	114	1	113	91	1	91	22	4%
Mercedes-Benz Group	106	111	0.2	110	86	1.05	90	20	5%
Mercedes-Benz	108	113	0.2	112	86	1.05	90	22	5%
Stellantis	108	109	1.3	108	96	1	96	12	16%
Peugeot	102	105	1.2	104	95	1	95	9	5%
Citroën	108	109	1.6	107	96	1	96	11	3%
Opel/Vauxhall	106	108	1.6	106	96	1	96	10	3%
Fiat	120	121	0.9	120	99	1	99	21	3%
Jeep	106	108	1.4	107	94	1	94	13	1%
Mazda	112	119	0.5	119	93	1	93	26	1%
Mazda	112	119	0.5	119	93	1	93	26	1%
Nissan	123	124	0.9	123	93	1	93	30	2%
Nissan	123	124	0.9	123	93	1	93	30	2%
Suzuki	123	114	1.5	113	99	1	99	14	1%
Suzuki	123	114	1.5	113	99	1	99	14	1%

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.

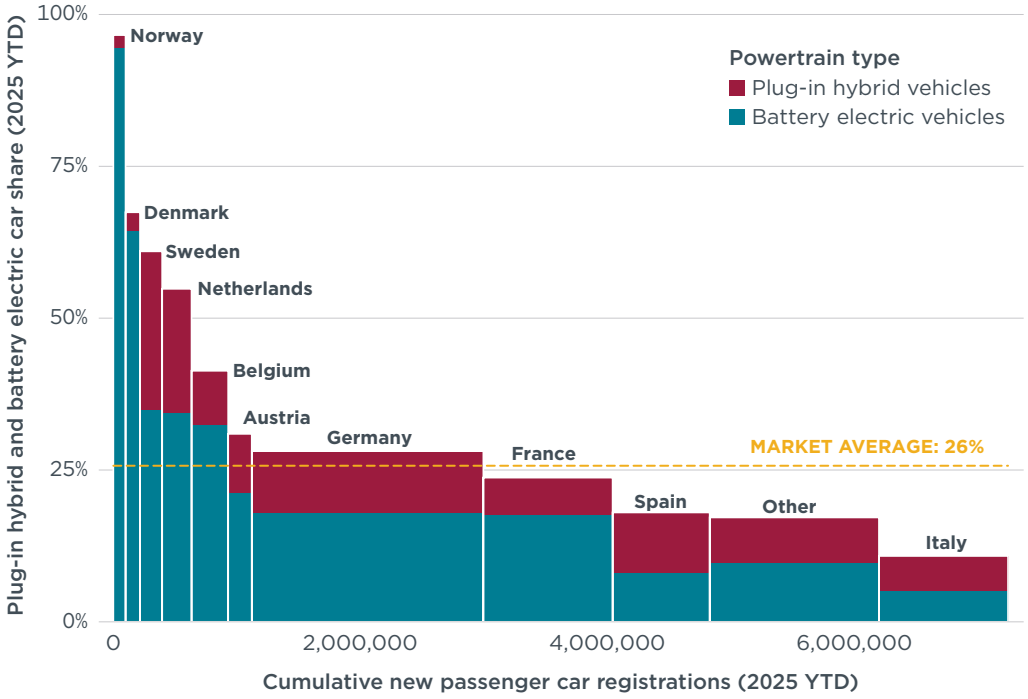
* The CO_2 targets in the table are hypothetical only, as official targets are set at the manufacturer or manufacturer-pool level, not at the brand level.

PASSENGER CAR REGISTRATIONS BY COUNTRY

Between January and August 2025, total passenger car registrations among the major European markets grew most in Spain (+15%) and Austria (+10%) compared with the same period in 2024, while registrations declined the most in Belgium (-10%) and France (-7%). Focusing on the largest markets by combined new BEV and PHEV registrations, Norway (97%), Denmark (67%), Sweden (61%), 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 European average. Among the largest markets by total new passenger car registrations, BEV growth was strongest in Poland (+95%), Spain (+94%), and Czechia (+53%) in YTD 2025 compared with YTD 2024. In France, BEV registrations fell by 2% over the same period, while Germany, the largest European market, continued to see significant growth, with BEV registrations up 39% in YTD 2025 compared with YTD 2024 and over 39,000 units registered in August alone. Registrations of PHEVs increased the most in Spain (+102%) and Poland (+86%) in YTD 2025 compared with the same period in 2024 and HEV registrations increased the most in Austria (+32%) and Spain (+26%). Shares of MHEVs were highest in Italy (31%) and Poland (28%) in YTD 2025, and the vehicles are gaining popularity in France, where registrations increased 50% in YTD 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 Cyprus, Ireland, Lithuania, and Portugal, categorized under "Other," covers January to July 2025 only.

Table 4

New passenger car registrations by country

	August 2025	vs. August 2024	YTD 2025	vs. YTD 2024
Germany	207,229	5%	1,874,820	-2%
France	87,849	2%	1,046,446	-7%
Italy	67,354	-2%	1,044,963	-4%
Spain	62,774	18%	785,995	15%
Poland	42,511	14%	378,448	6%
Netherlands	26,663	-3%	237,828	-4%
Belgium	26,513	-11%	296,614	-10%
Austria	21,597	24%	190,981	10%
Sweden	20,214	6%	179,434	7%
Czechia	17,611	3%	161,067	5%

Table 5

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

	August 2025				vs. August 2024				YTD 2025				vs. YTD 2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	**39,360**	23,997	11,060	47,548	**46%**	77%	0%	6%	**336,629**	190,275	89,378	444,231	**39%**	61%	8%	11%
France	**16,992**	5,889	18,833	20,854	**29%**	-4%	8%	59%	**184,880**	63,594	239,932	229,026	**-2%**	-29%	16%	50%
Belgium	**9,093**	2,864	2,589	5,765	**-9%**	-22%	2%	16%	**96,376**	26,232	33,288	63,498	**15%**	-51%	13%	23%
Netherlands	**9,051**	5,843	3,972	3,266	**-4%**	51%	5%	-26%	**81,767**	48,636	32,745	34,849	**5%**	37%	-6%	-9%
Spain	**7,174**	8,101	11,996	13,447	**161%**	168%	25%	15%	**63,710**	77,834	135,135	184,192	**94%**	102%	26%	32%
Sweden	**6,770**	5,138	2,243	2,662	**0%**	33%	15%	24%	**62,673**	46,786	14,902	24,529	**15%**	20%	-5%	20%
Austria	**4,314**	2,424	1,838	4,714	**39%**	116%	21%	47%	**40,769**	18,340	14,655	39,462	**44%**	63%	32%	32%
Poland	**3,309**	2,490	10,498	10,860	**238%**	112%	14%	19%	**21,386**	18,770	83,743	104,230	**95%**	86%	7%	20%
Italy	**3,270**	4,744	9,435	20,867	**37%**	94%	8%	9%	**53,793**	59,522	134,360	324,701	**31%**	62%	11%	9%
Czechia	**840**	963	1,888	2,658	**8%**	105%	21%	38%	**8,822**	6,875	14,020	22,842	**53%**	74%	15%	23%

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

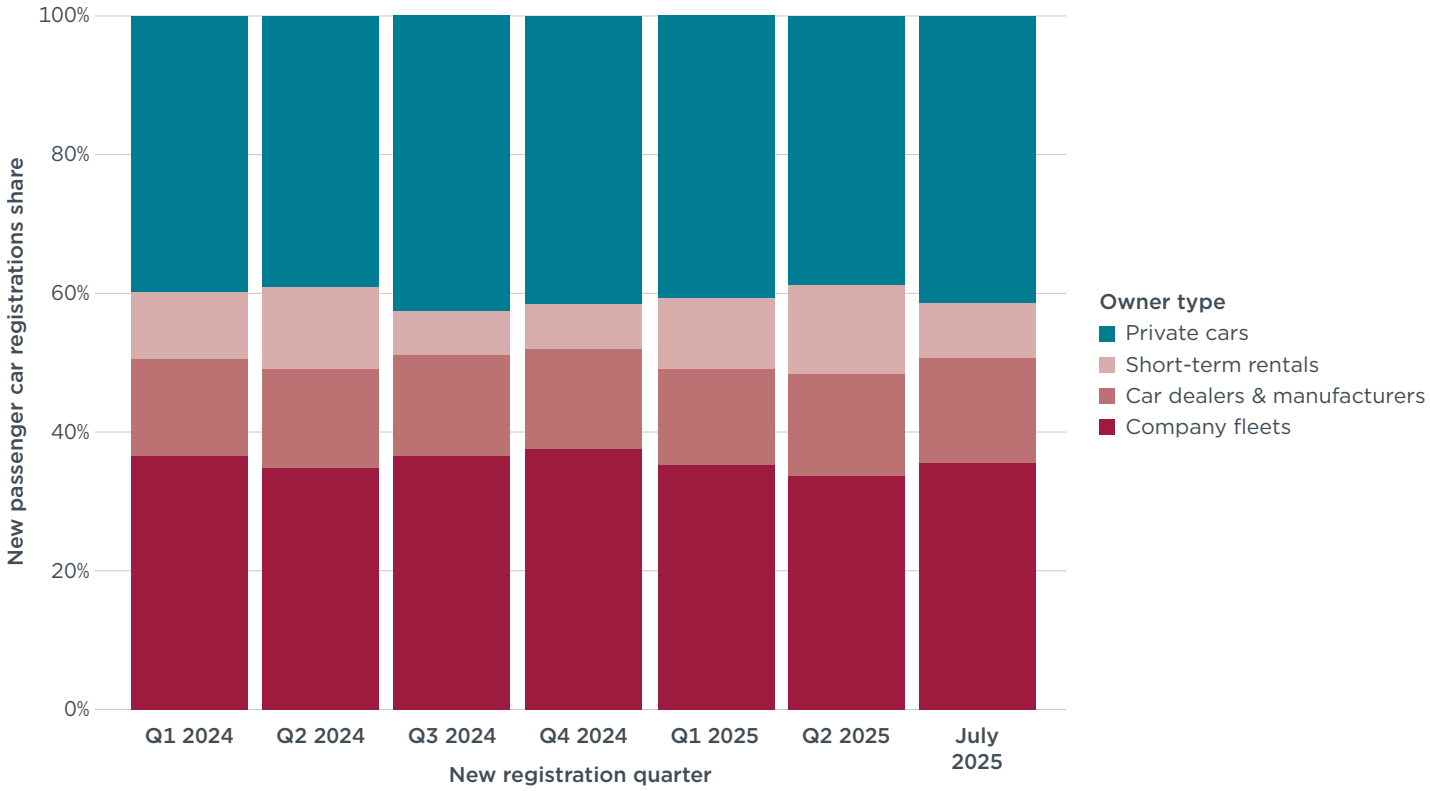
	August 2025				YTD 2025				YTD 2024				2024			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Belgium	**34%**	11%	10%	22%	**32%**	9%	11%	21%	**26%**	16%	9%	16%	**28%**	15%	9%	16%
Netherlands	**34%**	22%	15%	12%	**34%**	20%	14%	15%	**31%**	14%	14%	16%	**35%**	14%	14%	14%
Sweden	**33%**	25%	11%	13%	**35%**	26%	8%	14%	**32%**	23%	9%	12%	**35%**	23%	9%	12%
Austria	**20%**	11%	9%	22%	**21%**	10%	8%	21%	**16%**	6%	6%	17%	**17%**	7%	7%	18%
France	**19%**	7%	21%	24%	**18%**	6%	23%	22%	**17%**	8%	18%	14%	**17%**	9%	19%	15%
Germany	**19%**	12%	5%	23%	**18%**	10%	5%	24%	**13%**	6%	4%	21%	**14%**	7%	5%	22%
Spain	**11%**	13%	19%	21%	**8%**	10%	17%	23%	**5%**	6%	16%	20%	**6%**	6%	16%	21%
Poland	**8%**	6%	25%	26%	**6%**	5%	22%	28%	**3%**	3%	22%	24%	**3%**	3%	22%	24%
Italy	**5%**	7%	14%	31%	**5%**	6%	13%	31%	**4%**	3%	11%	28%	**4%**	3%	12%	28%
Czechia	**5%**	5%	11%	15%	**5%**	4%	9%	14%	**4%**	3%	8%	12%	**5%**	3%	8%	12%

PASSENGER CAR REGISTRATIONS BY OWNER

Corporate fleets, comprised of company fleets (35%), car dealers and manufacturers (15%), and short-term rentals (8%), made up 59% of total registrations in July 2025, while private cars made up 41% of the market. Short-term rental registrations fluctuate more than other owner types; they ranged from only 6% in Q3 2024 to nearly 13% of sales in Q2 2025. In July 2025, the split of new registrations by owner type largely mirrored that of Q3 2024.

Figure 4

New passenger car registrations by owner for 19 selected European countries



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SPOTLIGHT: EV UPTAKE IN THE UNITED KINGDOM

After leaving the EU in January 2020, the United Kingdom developed its own CO_2 targets for new light duty vehicles and implemented a zero-emission vehicle (ZEV) mandate. Since 2024, car and van manufacturers have been required to meet annual ZEV registration percentage targets, replacing the EU's stepwise CO_2 targets set at five-year intervals. Unlike in the EU, the U.K. regulation prohibits manufacturers from forming pools with carmakers outside their ownership group. However, within a group, manufacturers that exceed their ZEV targets can share spare allowances with affiliates that fall short. Manufacturer groups can also trade allowances to other groups.

Since their introduction, these measures have created stronger incentives to accelerate electric vehicle sales in the United Kingdom compared with the EU. Battery electric cars increased their market share from about 17% in 2023 to roughly 20% in 2024, and approximately 22% YTD, around five percentage points higher than the combined YTD average share for the EU, Norway, and Iceland. Over the past five years, BEV registrations in the United Kingdom have tended to surge in the run-up to the end of the annual compliance period on December 31. Thus, the 2025 year-end market share is likely to be closer to the 2025 target set at 28%.

Although manufacturers missed the 2024 U.K. ZEV target of 22% on average, they effectively over-complied by using non-ZEV CO_2 credits. These credits can be earned by improving the CO_2 emissions performance of non-zero-emission cars relative to manufacturer-specific CO_2 baseline values. This flexibility effectively lowered the 2024 fleet-wide ZEV target from 22% to 18%. For 2025, the estimated effective target—accounting for these flexibilities—is about 22% and, therefore, manufacturers are expected to again be in compliance. In April 2025, the U.K. Government proposed additional flexibilities to the ZEV regulation, such as higher caps for non-ZEV CO_2 credits, that are expected to further lower the effective ZEV share targets.

Complementing the supply-side ZEV mandate, the United Kingdom offers consumer-facing incentives, including reduced taxes for the private use of zero- and low-emission company cars. In addition, upfront purchase incentives of up to £3,750 (about €4,300) for qualifying ZEV models were reintroduced in August 2025. As of August 2025, only two models are eligible for the maximum grant.

The rapid rise in BEV adoption in the United Kingdom has taken place despite the high cost of public charging, which is typically at least seven times higher than home charging, thus costing a similar amount to fueling an equivalent gasoline vehicle. With lower public charging costs, the uptake of BEVs would likely have been even stronger.

The authors thank Corrin Reilly, Ciara Cook, and David Farrar from New AutoMotive who provided key input on policy and market developments in the United Kingdom.

Figure 5

Share of battery electric in new passenger car registrations in the United Kingdom and EEA countries

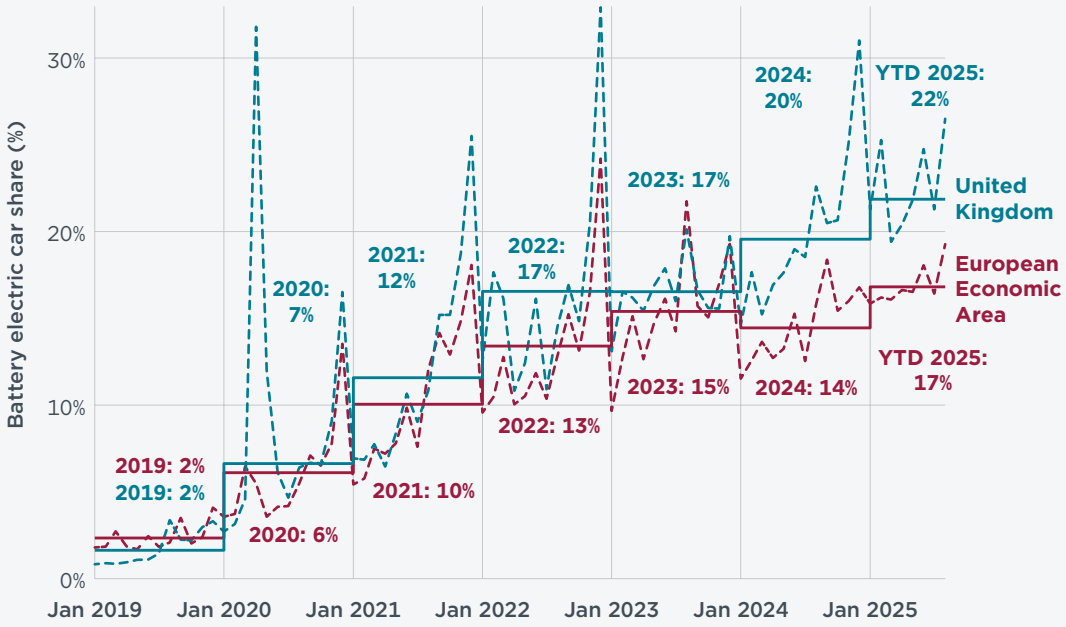

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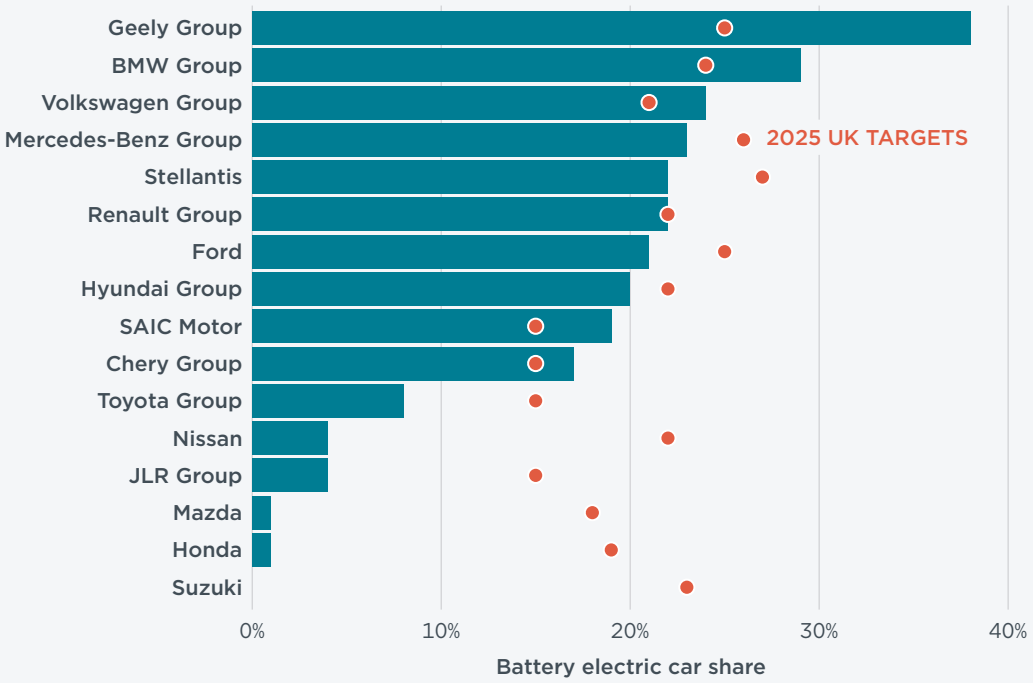
Figure 6

Battery electric car share by manufacturer group compared with their estimated 2025 targets in the United Kingdom, YTD 2025. Source: New AutoMotive.



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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 March 15, 2025, are used. The 2024 closed pools from this list have been carried over to 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 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 pool (Citroën, Fiat, Ford, Jeep, Mazda, Opel, Peugeot, Suzuki, Tesla, Toyota), Volkswagen pool (Audi, Cupra, Porsche, SEAT, Škoda, VW). Nissan and SAIC are large passenger car manufacturers not part of a pool.

» **Abbreviations: CO_2** = carbon dioxide emissions; **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 Liechtenstein and Malta. Data for CO_2 emission levels additionally omits Bulgaria, Hungary, Romania, and Slovenia. 2025 data for Cyprus, Ireland, Lithuania, and Portugal covers January to July 2025 only.

» **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 2024 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%, 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 2024; the average 2024 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 the United Kingdom.

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