© 2026 INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION (ID 610)

EUROPEAN CAR MARKET MONITOR: MARCH 2026

AT A GLANCE

- In January–March 2026, Europe's battery electric car registrations recorded a 20% market share, up 4 percentage points from the same period in 2025.[1] Meanwhile, plug-in hybrid cars grew 1 percentage point to a 9% market share.
- Registrations of conventional combustion engine cars fell by 9 percentage points to a 31% market share in the first quarter, while mild hybrids and full hybrids increased their shares to 26% and 14%, up 3 and 1 percentage points, respectively.
- Germany and Italy, currently Europe's largest car markets, registered battery electric market shares of 23% and 8%, respectively, representing increases of 6 and 3 percentage points compared with January–March 2025.
- France and Spain, the third and fourth largest European markets, also saw growth, with battery electric shares at 28% and 9%, respectively, 10 and 2 percentage points up from January–March 2025. Poland increased its market share 2 percentage points to 6%.
- From January 2025 to March 2026, adjusted carbon dioxide (CO_2) emissions among manufacturer pools stood at 97 grams per kilometer on average, 3 grams away from the EU manufacturer average target for 2025–2027 of 93 grams per kilometer.
- Among the seven largest automakers in Europe, the BMW Group registered the highest battery electric car share in January–March 2026 at 26%. The Hyundai and Toyota groups recorded the highest increase in battery electric car shares compared with January–March 2025, up 5 percentage points each to respective shares of 22% and 8%.
- Over 1.17 million public charging points had been installed in Europe by the end of March 2026. Belgium recorded the greatest growth from March 2025 to March 2026, with a 43% increase in direct current (DC) charging points and a 28% increase in alternating current (AC) charging points.

icct
THE INTERNATIONAL COUNCIL ON CLEAN TRANSPORTATION

1 Geographic scope: To the greatest extent permitted by data availability, the definition of Europe used in the ICCT's Market Monitor reports aligns with EU regulations. The European CO_2 standards for cars and vans applies to the countries of the European Economic Area (EEA), excluding Liechtenstein. This includes the 27 Member States of the European Union plus Iceland and Norway.

THIS PUBLICATION IS A COLLABORATION BETWEEN THE ICCT, AGORA VERKEHRSWENDE, ALINNEA, ECCO THINK TANK, IMT-IDDRI, AND PSNM.

Agora Verkehrswende

alinnea

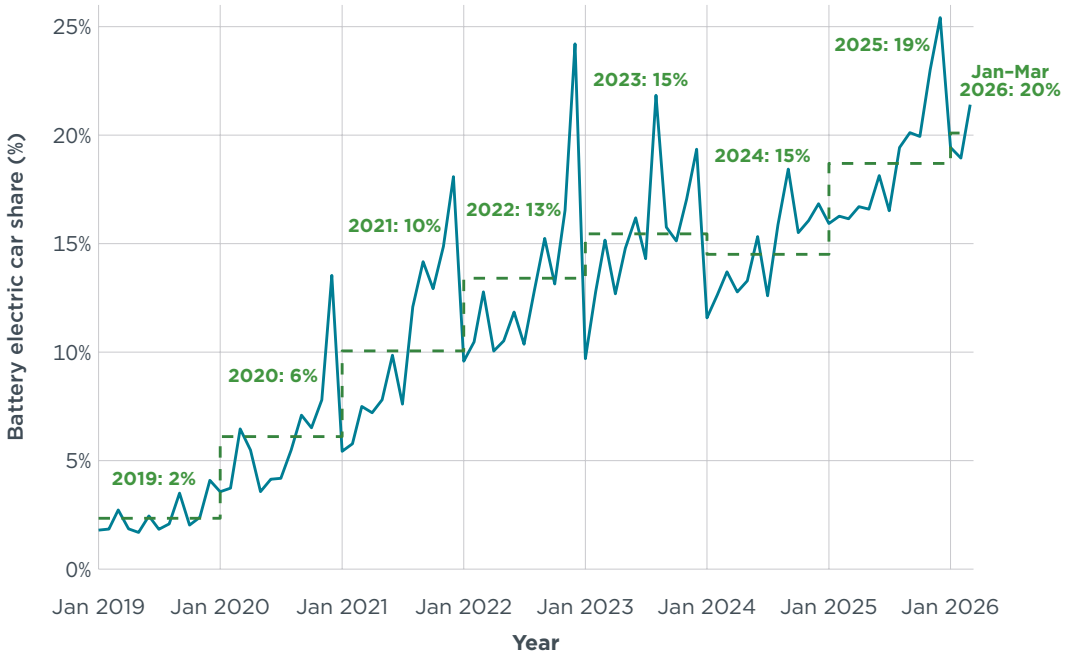
psnm NEW MOBILITY ASSOCIATION

ECCO THE ITALIAN CLIMATE CHANGE THINK TANK

IDDRI INSTITUT MOBILITÉS EN TRANSITION

Figure 1

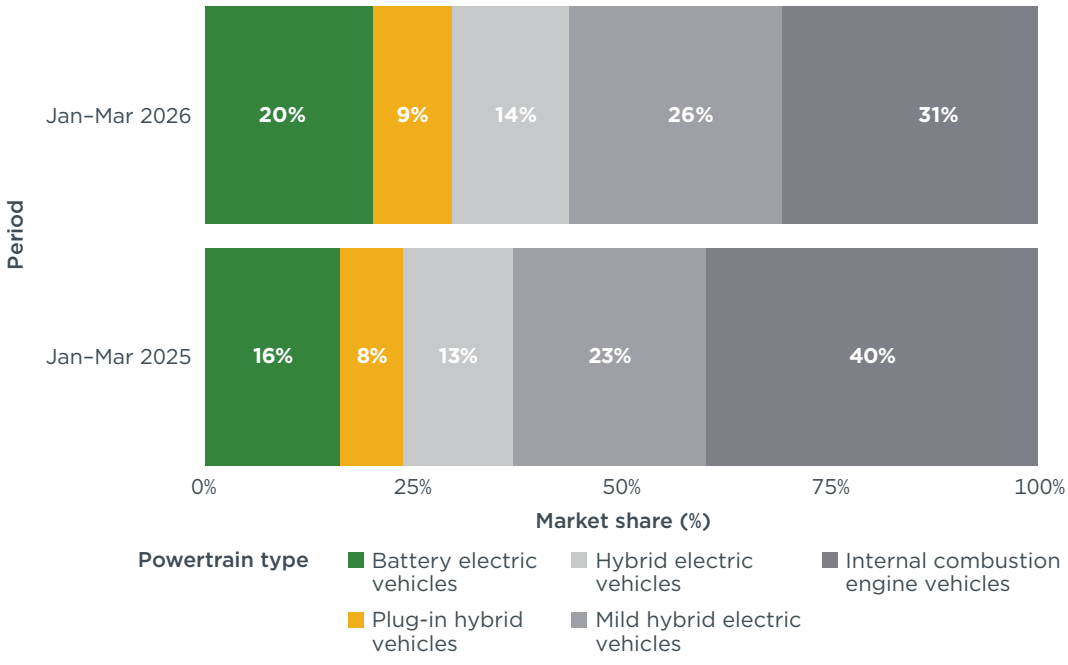
Share of battery electric vehicles among new passenger car registrations in Europe



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

Figure 2

Europe's new car market share by powertrain type, January–March 2026 versus January–March 2025



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

PASSENGER CAR REGISTRATIONS IN EUROPE

In March 2026, new battery electric car registrations increased around 50% in Europe compared with March 2025, reaching a 21% market share out of all new registrations. Meanwhile, overall registrations for all powertrains increased 13% during the same period. This brought the average share of battery electric vehicles (BEVs) among total new registrations in Europe to 20% in January–March 2026, surpassing the 2025 average and marking a 4-percentage-point increase compared with the same period in 2025 (see Figure 1).

The March figure marks a notable acceleration relative to February 2026—which saw battery electric car registrations grow 18% year-on-year—and the first quarter of 2026 overall, when growth averaged 29%. This coincided with a sharp rise in crude oil prices following the closure of the Strait of Hormuz and recent national purchase schemes supporting car electrification in Germany, France, and Italy—variables that warrant additional analysis.

In January–March 2026, plug-in hybrid vehicles (PHEVs) had an average market share of 9% among new registrations in Europe, up 1 percentage point from January–March 2025.

Compared with the same period in 2025, full hybrid (HEVs) and mild hybrid electric vehicles (MHEVs) increased in market share by 1 and 3 percentage points, respectively, reaching shares of 14% and 26% in January–March 2026. Meanwhile, conventional internal combustion engine vehicles (ICEVs) comprised 31% of new registrations in January–March 2026. This is 9 percentage points lower than in the same period in 2025 (see Figure 2).

PASSENGER CAR REGISTRATIONS BY COUNTRY

Registrations increased in all of the 10 largest European markets in March 2026, with Austria registering the biggest increase (+27%) compared with March 2025 (see Table A5 in the Appendix).

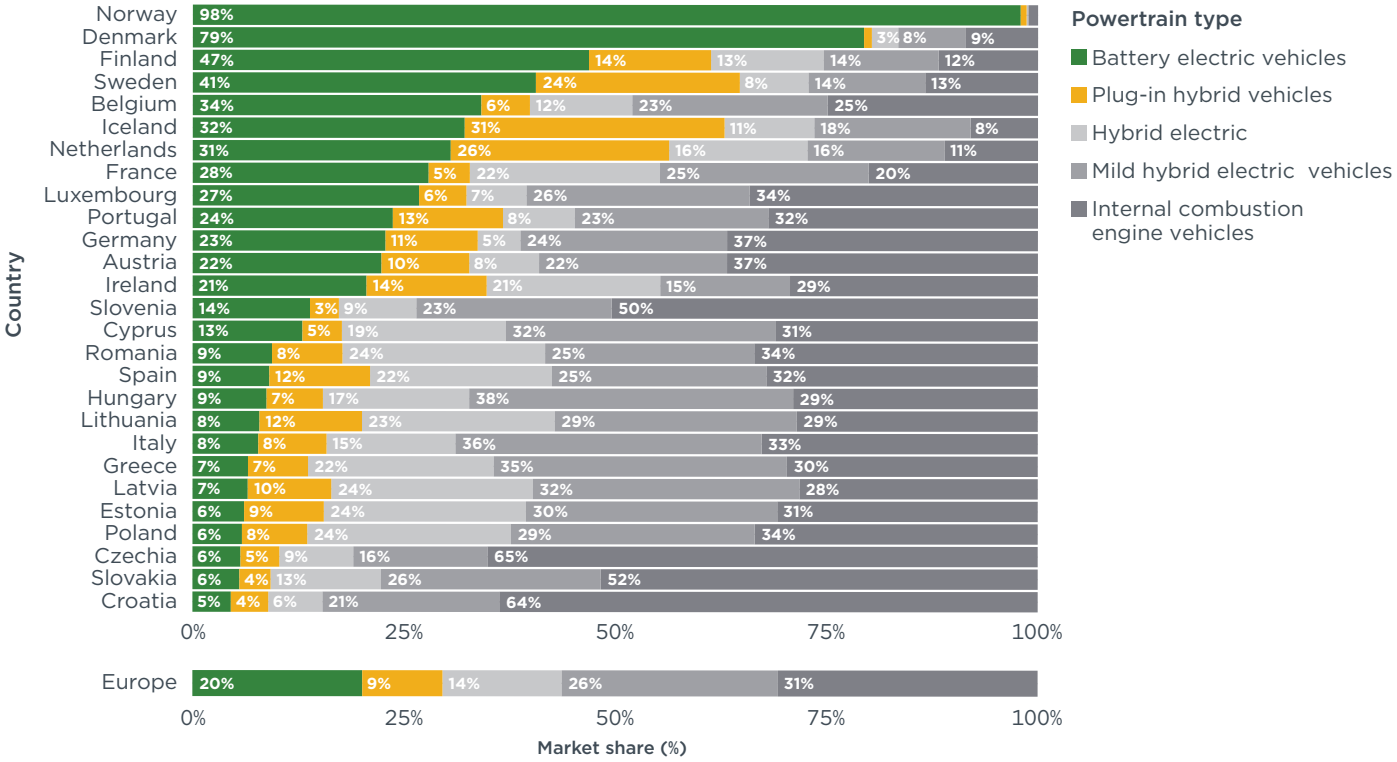
Looking at new BEV registrations in January–March 2026, Germany and Italy had BEV market shares of 23% and 8%, respectively. These represent increases of 6 and 3 percentage points compared with the same period in 2025.

France and Spain, the third and fourth largest markets, had increases of 10 and 2 percentage points in January–March 2026, reaching BEV shares of 28% and 9%, respectively.

Nordic countries led Europe's battery electric car registration shares in January–March 2026, with Norway and Denmark already reaching shares of 98% and 79%, respectively, followed by Finland (47%) and Sweden (41%; Figure 3). Belgium (34%), Iceland (32%), the Netherlands (31%), France (28%), and Luxembourg (27%) all had BEV shares of 25% or greater. Also with BEV market shares above of the European average were Portugal (24%), Germany (23%), Austria (22%), and Ireland (21%). In January–March 2026, Denmark recorded the greatest increase in BEV market share compared with the same period in the previous year (+14 percentage points).

Figure 3

Europe's new car market share by country and powertrain type, January–March 2026



Note: Data for Cyprus and Malta are not available.

Looking at other powertrains in the 10 largest European markets, PHEV shares were the highest in the Netherlands (26%) and Sweden (24%) in January–March 2026. Poland (24%), France (22%), and Spain (22%) had the highest HEV shares, while MHEV shares were the highest in Italy, at 36%, followed by Poland with 29%.

CO_2 EMISSIONS PERFORMANCE BY MANUFACTURER POOL AND GROUP

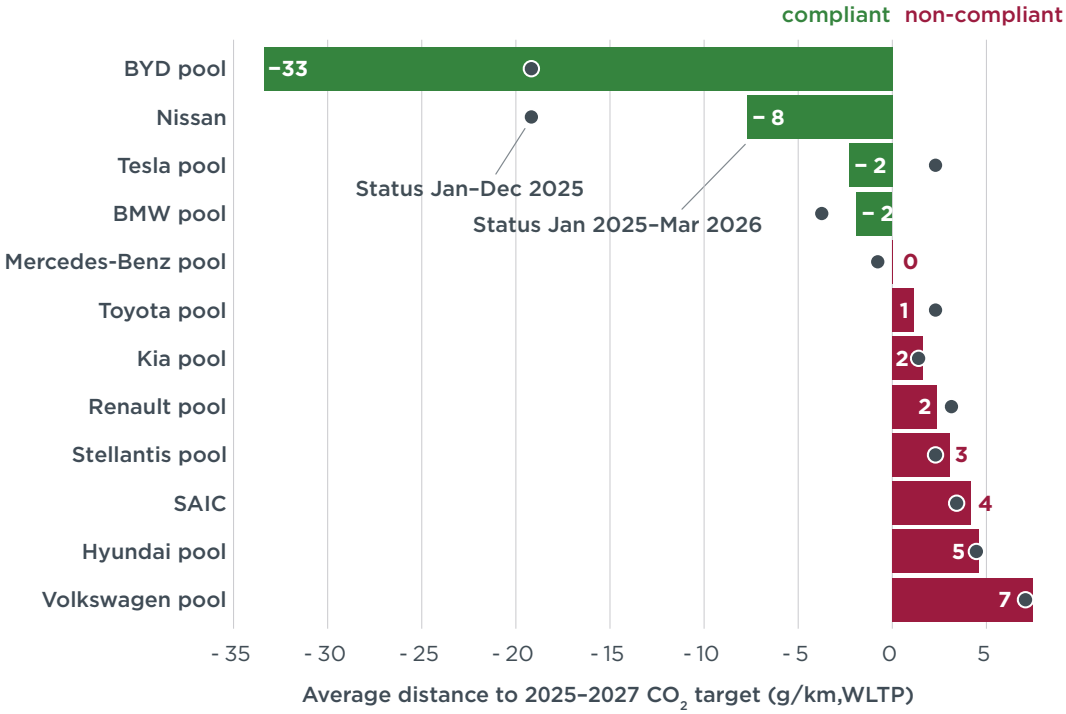
Under EU regulation, carmakers are required to reduce their CO_2 emissions from new cars incrementally through 2035. The current target value applies for each year from 2025 to 2029. However, compliance with the targets will first be assessed at the end of 2027 and will consider average CO_2 emissions for new car fleets from the 2025–2027 period. Automakers are permitted to combine their emissions performance across these 3 years through pooling arrangements (manufacturing pools) and may use compliance credits earned by selling zero- and low-emission vehicles (ZLEVs) as well as by deploying eco-innovations (i.e., technologies that deliver real-world CO_2 savings beyond what is measured over the standardized test cycle during type approval). Increasing the share of battery electric cars is the leading strategy used by manufacturers to achieve these reductions and avoid penalties.

In January–March 2026, manufacturer CO_2 emissions averaged 97 g CO_2/km. After accounting for compliance credits, manufacturers were on average 3 g CO_2/km above the 2026 target (see Table A2 of the Appendix). For the full reporting period from January 2025 to March 2026, adjusted emissions stood at around 97 g CO_2/km. Including compliance credits, manufacturing pools thus remained 3 g CO_2/km short of the average target of 93 g CO_2/km for the 2025–2027 period, unchanged from the target gap recorded in 2025 (see Table A3 in the Appendix).

For the full January 2025–March 2026 reporting period, the BYD pool (33 g CO_2/km below), Nissan (8 g CO_2/km below), the Tesla and BMW pools (each 2 g CO_2/km below), and the Mercedes-Benz pool (at target) were all on track to meet their 2025–2027 targets, while the Volkswagen pool (+7 g CO_2/km) remained the farthest from its target (see Figure 4).

Figure 4

Average distance to 2025–2027 CO_2 targets for manufacturer pools and individual manufacturers



Note: Emission values include 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 in 2025 are shown. See the section on definitions, data sources, methodology, and assumptions for more information.

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

The Tesla and BYD pools had the largest BEV registration shares in March 2026, at 46% and 39%, respectively. The Mercedes-Benz (29%), BMW (28%), and Kia (23%) pools also had shares above the European average of 21%. Nissan (6%), the Toyota pool (9%), and SAIC (9%) had the lowest BEV shares in March (see Table A1 in the Appendix).

Looking at individual car brands with market shares of 1% or greater, Tesla and BYD had the greatest over-compliance at 92 g CO_2/km and 79 g CO_2/km, respectively, below their projected brand-level average targets for 2025–2027, followed by Volvo (29 g CO_2/km below), Mini (18 g CO_2/km below), and Cupra (17 g CO_2/km below). The brands with the largest target gaps were Nissan (28 g CO_2/km above), SEAT (24 g CO_2/km above), Mercedes-Benz (20 g CO_2/km above), and Mazda (19 g CO_2/km above; see Table A4 in the Appendix).

Among the largest carmakers, the Hyundai and Toyota groups had the greatest increase in BEV market share in January–March 2026, increasing 4 percentage points each compared with January–March 2025 (Table 1). With a 26% market share in March 2026, the Volkswagen Group increased its PHEV share by 4 percentage points relative to the same period in 2025.

Table 1

Share of battery electric and plug-in hybrid cars for the top seven manufacturer groups, January–March 2026

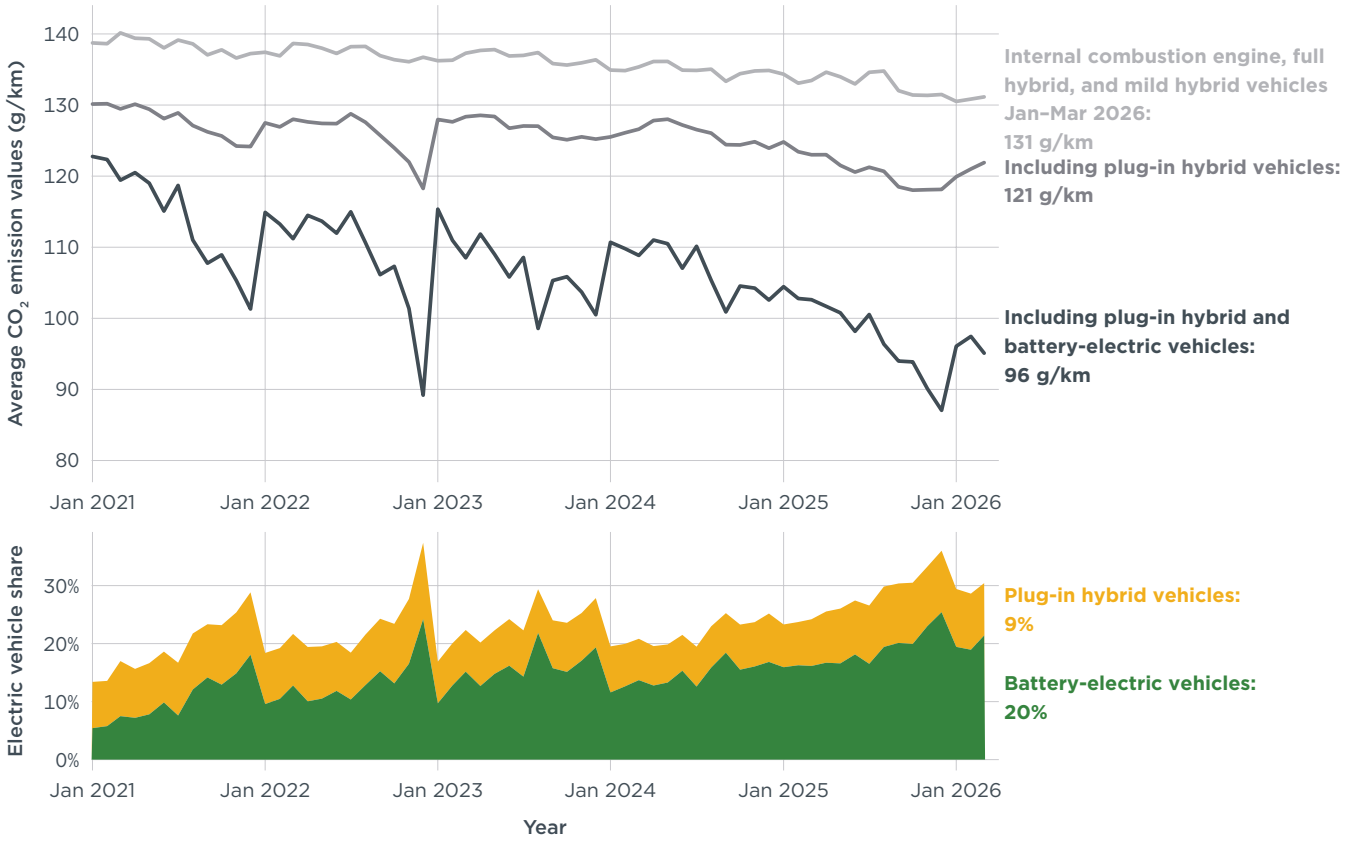
Manufacturer group	Battery electric car share		Plug-in hybrid car share		Market share Jan–Mar 2026
	Jan–Mar 2026	Change vs. Jan–Mar 2025	Jan–Mar 2026	Change vs. Jan–Mar 2025	
BMW Group	26%	+1 pp	14%	0 pp	7%
Hyundai Group	22%	+4 pp	5%	−1 pp	7%
Mercedes-Benz Group	20%	+3 pp	19%	+1 pp	5%
Volkswagen Group	19%	+1 pp	12%	+4 pp	26%
Renault Group	16%	+3 pp	1%	0 pp	10%
Stellantis	14%	+3 pp	2%	+1 pp	17%
Toyota Group	8%	+4 pp	6%	−2 pp	7%

CO_2 EMISSIONS BY POWERTRAIN TYPE

Of all powertrain types, battery electric cars have the largest potential to reduce total CO_2 emissions.[2] When looking at new registrations of ICEVs (including HEVs and MHEVs) alone, CO_2 emissions averaged 131 g CO_2/km in January–March 2026. Including PHEVs reduced the average to 121 g CO_2/km, while the increasing market share of BEVs reduced average CO_2 emissions by an additional 25 g CO_2/km in January–March (see Figure 5).

Figure 5

Average CO_2 emissions of newly registered internal combustion engine vehicles and fleet-average reductions associated with including electrified powertrains

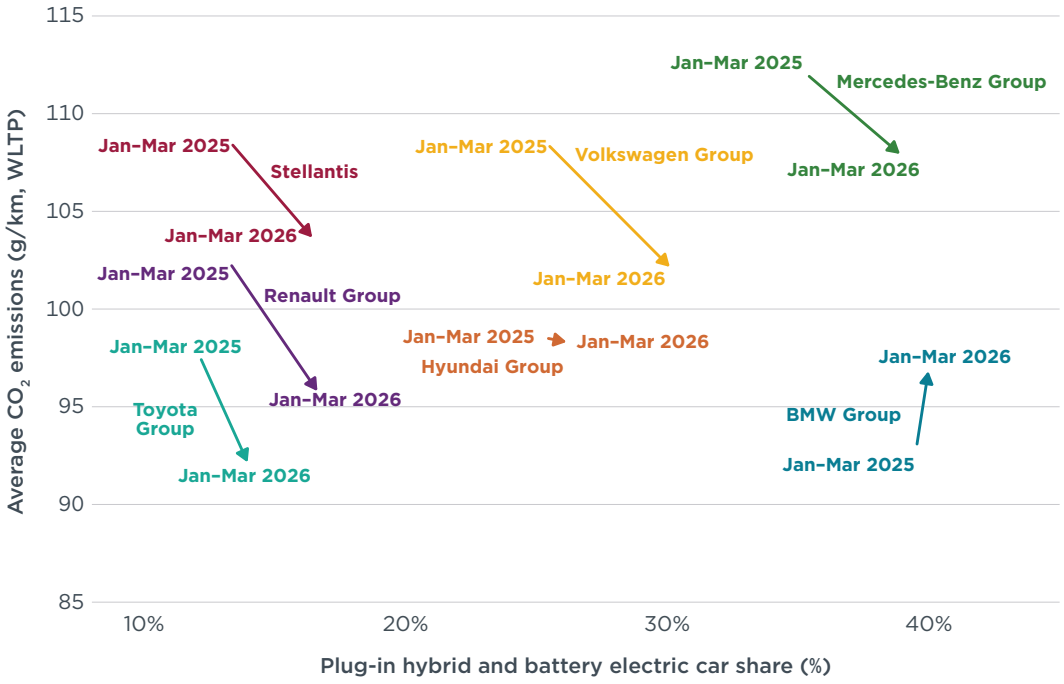


2 Marie Rajon Bernard et al., *The EV Transition Check: Measuring Progress towards Zero-Emission for Passenger Cars in the European Union* (International Council on Clean Transportation, 2025), https://theicct.org/publication/ev-transition-check-sep25/.

Looking at the relationship between electric car shares and average CO_2 emissions, the Mercedes-Benz group had the highest average emissions of the top manufacturers in Europe while having the second highest share of PHEVs and BEVs in January–March of 2025 and 2026. This was largely due to the high average CO_2 emissions of the group's non-electrified powertrains, which stood at about 163 g CO_2/km in January–March 2026, the highest level among Europe's largest carmaker groups. Although the BMW Group had consistently low fleet emissions in 2025, it has seen higher emissions in 2026. This disparity is due to an increase in recorded PHEV emissions to more realistic levels resulting from the European Commission correction of the electric driving share assumed for type-approval. With its focus on hybrid powertrains, Toyota had average CO_2 emissions below its 2026 target in January–March despite maintaining the lowest electric vehicle share (see Figure 6).

Figure 6

Fleet-average CO_2 emissions compared with electric vehicle share by manufacturer group, January–March 2026 versus January–March 2025



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

SPOTLIGHT: CHARGING INFRASTRUCTURE DEVELOPMENT

The deployment of public charging infrastructure is expanding steadily in Europe. About 1.17 million public charging points had been installed in Europe by the end of the first quarter (Q1) of 2026, up from around 989,000 at the end of Q1 2025. For alternating current (AC) charging, this represents a 15% increase since the end of Q1 2025. Direct current (DC) charging points showed even greater growth, increasing 31% since the end of Q1 2025. Approximately 79% of Europe's public charging points supply AC, while the remaining 21% supply DC. Among the 10 markets with the highest number of installed chargers, Belgium recorded the largest growth in DC chargers by the end of Q1 2026 (+43%) compared with the end of Q1 2025, followed by Italy (+40%) and Denmark (+38%). At +28%, Belgium also saw the largest growth in AC chargers. Although AC charging points generally outnumbered DC charging points in nearly all countries, Norway had nearly equal shares of both (Table 2).

Table 2

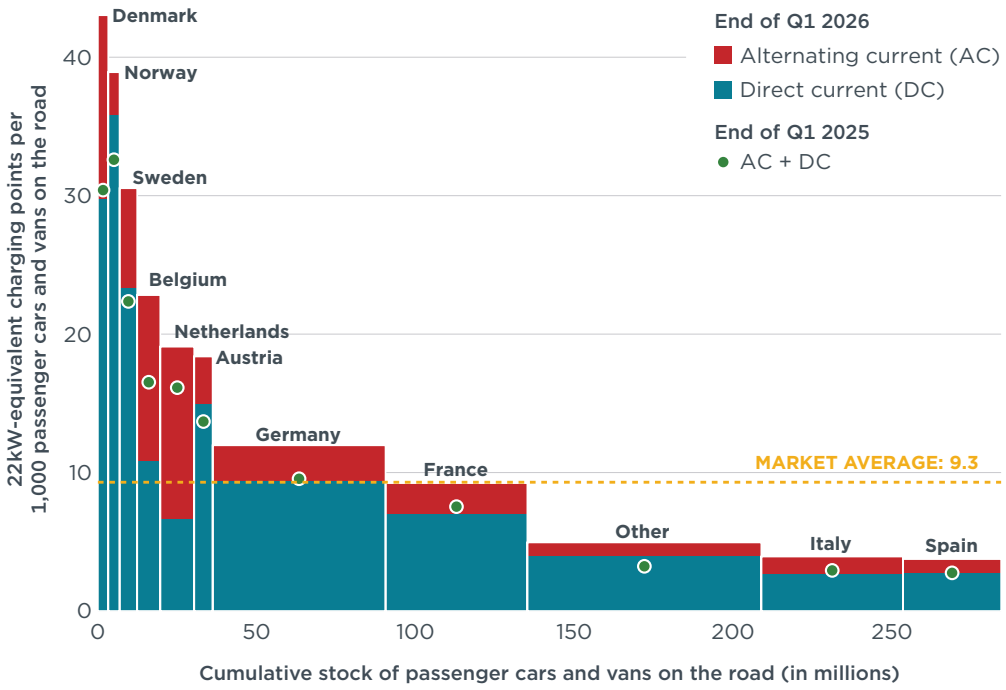
Number of publicly accessible charging points by country and power output

Country	End of Q1 2026		vs. end of Q1 2025	
	AC	DC	AC	DC
Netherlands	209,211	8,252	14%	33%
Germany	157,253	56,454	20%	30%
France	129,625	43,217	9%	22%
Belgium	101,998	8,252	28%	43%
Italy	62,883	20,276	14%	40%
Sweden	55,493	12,424	16%	28%
Spain	38,932	16,487	13%	27%
Denmark	43,549	9,469	21%	38%
Austria	26,896	10,457	0%	27%
Norway	15,717	14,391	–10%	11%
Other	81,203	47,398	20%	45%
Total	**922,760**	**247,077**	**15%**	**31%**

At the end of Q1 2026, there were on average roughly 9.3 22 kW-equivalent publicly accessible charging points installed per thousand passenger cars and vans on the road in Europe, up from 7.1 at the end of Q1 2025 (Figure 7). With about 43 22 kW-equivalent publicly accessible charging points per thousand passenger cars and vans, Denmark led Europe in charging infrastructure, followed by Norway (39), Sweden (31), and Belgium (23). Italy (4) and Spain (4) fell below the European average for publicly accessible charging points.

Figure 7

22 kW-equivalent publicly accessible charging points installed per thousand passenger cars and vans, by power output and country, by the end of Q1 2026



Note: The width of the bars corresponds to passenger car and van stock size estimates as of the end of 2025. 22 kW-equivalent is used to account for different power outputs while allowing for comparison among countries and over time independent of electric vehicle uptake.

APPENDIX

Table A1

Share of battery electric, plug-in hybrid, full hybrid, and mild hybrid passenger cars by manufacturer pool or manufacturer

Manufacturer or manufacturer pool	Mar 2026				Jan–Mar 2026				Jan–Mar 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Tesla pool	46%	5%	10%	31%	**37%**	6%	11%	35%	**23%**	7%	13%	42%	**31%**	7%	12%	37%
BYD pool	39%	61%	0%	0%	**45%**	55%	0%	0%	**64%**	36%	0%	0%	**58%**	42%	0%	0%
Mercedes-Benz pool	29%	20%	0%	37%	**27%**	21%	0%	37%	**23%**	23%	0%	37%	**26%**	24%	0%	36%
All other brands	29%	24%	12%	9%	**28%**	23%	13%	9%	**16%**	14%	2%	16%	**21%**	21%	4%	11%
BMW pool	28%	12%	0%	37%	**26%**	14%	0%	39%	**25%**	15%	0%	36%	**27%**	15%	0%	37%
Kia pool	23%	4%	18%	14%	**24%**	4%	18%	14%	**21%**	5%	15%	14%	**22%**	5%	16%	13%
AVERAGE	**21%**	**9%**	**14%**	**25%**	**20%**	**9%**	**14%**	**26%**	**16%**	**8%**	**13%**	**23%**	**19%**	**9%**	**13%**	**22%**
Volkswagen pool	19%	11%	0%	18%	**19%**	12%	0%	18%	**17%**	8%	0%	15%	**19%**	11%	0%	14%
Hyundai pool	18%	4%	25%	6%	**20%**	6%	24%	7%	**16%**	6%	22%	13%	**18%**	6%	21%	13%
Renault pool	15%	1%	34%	8%	**15%**	1%	34%	7%	**12%**	1%	28%	9%	**13%**	1%	29%	9%
Stellantis pool	14%	2%	0%	58%	**14%**	2%	0%	58%	**11%**	2%	0%	45%	**13%**	3%	0%	47%
SAIC	9%	7%	63%	0%	**10%**	7%	62%	0%	**11%**	6%	42%	0%	**14%**	10%	46%	0%
Toyota pool	9%	5%	80%	0%	**8%**	6%	81%	0%	**4%**	8%	75%	0%	**4%**	8%	74%	0%
Nissan	6%	0%	33%	42%	**6%**	0%	35%	40%	**8%**	0%	36%	32%	**7%**	0%	40%	31%

Note: Only manufacturer pools and individual manufacturers with at least 1% market share in 2025 are shown.

Table A2

Fleet-average CO_2 emissions of new passenger cars and market share by manufacturer pool or manufacturer, January–March 2026

Manufacturer or manufacturer pool	New car fleet-average CO_2 (in g/km, per WLTP)								Market share Jan–Mar 2026
	Mar 2026	Jan–Mar 2026	Compliance credits – Eco-innovations	Adj. Jan–Mar 2026	Reference target 2026	Compliance credits – ZLEV factor	Target 2026	Target gap	
BYD pool	26	21	0	21	87	1.05	91	–71	2%
Tesla pool	68	78	0.7	77	92	1.05	97	–19	8%
Toyota pool	91	92	0.5	91	95	1	95	–3	7%
Renault pool	97	96	1.2	95	96	1	96	–1	10%
Kia pool	98	96	0.3	96	93	1	93	2	3%
AVERAGE	**96**	**97**	**0.7**	**96**	**93**	**1**	**93**	**3**	
Mercedes-Benz pool	94	94	0.2	94	86	1.05	91	4	7%
Hyundai pool	107	100	0.3	99	94	1	94	5	3%
Stellantis pool	105	103	1.3	102	97	1	97	6	17%
BMW pool	95	97	1	96	89	1.02	90	6	7%
SAIC	103	102	0	102	95	1	95	7	2%
Volkswagen pool	101	102	0.6	101	92	1	92	9	26%
Nissan	122	122	0.9	121	93	1	93	27	2%

Note: Only manufacturer pools and individual manufacturers with at least 1% market share in 2025 are shown. See the section on definitions, data sources, methodology, and assumptions for details. The adjusted January–March 2026 CO_2 value equals the average CO_2 emissions for that period minus eco-innovation credits. The target value was calculated as the reference target value multiplied by the ZLEV factor.

Table A3

Fleet-average CO_2 emissions of new passenger cars and market share by manufacturer pool or manufacturer, January 2025–March 2026

Manufacturer or manufacturer pool	New registrations		New car fleet-average CO_2 (in g/km, per WLTP)						
	2025	Jan–Mar 2026	Adj. 2025	Target 2025	Adj. Jan–Mar 2026	Target 2026	Adj. Jan 2025–Mar 2026	Target 2025–2027	Target gap
BYD pool	134,886	51,663	76	95	21	91	61	94	–33
Nissan	197,056	64,655	76	95	121	93	87	95	–8
Tesla pool	871,140	236,879	97	95	77	97	93	95	–2
BMW pool	774,937	189,693	89	93	96	90	91	93	–2
Mercedes-Benz pool	896,219	207,312	90	91	94	91	91	91	0
Toyota pool	815,957	206,629	97	95	91	95	96	95	1
Kia pool	395,669	95,409	96	94	96	93	96	94	2
Renault pool	1,234,444	284,386	99	96	95	96	98	96	2
Stellantis pool	1,681,985	493,846	97	95	102	97	98	95	3
AVERAGE	**11,043,733**	**2,727,946**	**97**	**93**	**96**	**93**	**97**	**93**	**3**
SAIC	218,661	55,362	99	95	102	95	99	95	4
Hyundai pool	431,436	93,926	99	94	99	94	99	94	5
Volkswagen pool	3,017,974	748,186	101	94	101	92	101	94	7

Note: Only manufacturer pools and individual manufacturers with at least 1% market share in 2025 are shown. See the section on definitions, data sources, methodology, and assumptions for details. Adjusted 2025 and January–March 2026 CO_2 values are calculated as the average CO_2 emissions for the respective period minus eco-innovation credits. Compliance with each pool's 2025–2027 target was assessed using the registrations-weighted average of adjusted CO_2 emissions in 2025 and January–March 2026. If a manufacturer was part of a pool in 2025, the pool's average CO_2 emissions for that year are used instead of the manufacturer's individual average. Similarly, 2025–2027 target values were calculated as the registrations-weighted average of the 2025 and 2026 targets. If a manufacturer was part of a pool in 2025, the pool's target for that year was used instead of the manufacturer's standalone target.

Table A4

Fleet-average CO_2 emissions of new passenger cars and market share by manufacturer group and brand, January 2025 to March 2026

Manufacturer group/ brand	New car fleet-average CO_2 (in g/km)									Market share Jan–Mar 2026
	Mar 2026	Jan 2026–Mar 2026	Jan 2025–Mar 2026	Compliance credits – Eco-innovations	Adj. Jan 2025–Mar 2026	Reference target 2025–2027*	Compliance credits – ZLEV factor	Target 2025–2027*	Target gap*	
Tesla	0	0	0	0	0	88	1.05	92	−92	2%
Tesla	0	0	0	0	0	88	1.05	92	−92	2%
BYD	26	21	13	0	13	87	1.05	92	−79	2%
BYD	26	21	13	0	13	87	1.05	92	−79	2%
Volvo Cars	67	65	56	0.1	56	87	1.05	91	−36	2%
Volvo	75	72	62	0.1	62	87	1.05	91	−29	2%
Toyota Group	91	92	96	0.5	95	95	1	95	0	7%
Toyota	91	91	96	0.5	95	96	1	96	0	7%
BMW Group	95	97	92	1	91	89	1.05	93	−3	7%
BMW	95	99	94	1	93	88	1.05	92	0	6%
Mini	92	87	81	1	80	93	1.05	98	−18	1%
Renault Group	96	96	99	1.2	98	96	1	96	2	10%
Renault	87	85	90	1.1	88	95	1	95	−6	6%
Dacia	112	113	113	1.4	112	98	1	98	14	4%
Volkswagen Group	101	102	102	0.6	101	92	1.01	93	8	26%
VW	102	103	101	0.4	100	93	1.02	94	6	10%
Škoda	96	97	100	0.4	99	93	1	93	6	7%
Audi	101	102	107	0.7	106	89	1.02	91	15	5%
Cupra	85	87	81	0.8	80	92	1.05	97	−17	2%
SEAT	124	123	123	1.7	121	97	1	97	24	2%
Hyundai Group	103	98	98	0.3	97	94	1	94	4	7%
Kia	98	96	96	0.3	96	93	1.01	94	2	3%
Hyundai	107	100	99	0.3	99	94	1	94	5	3%
SAIC Motor	103	102	99	0	99	95	1	95	4	2%
MG	103	102	99	0	99	95	1	95	4	2%
Stellantis	105	103	106	1.3	104	96	1	96	8	17%
Peugeot	98	96	100	1.2	99	96	1	96	4	5%
Fiat	122	120	118	0.9	117	100	1	100	18	4%
Citroën	99	99	105	1.6	103	96	1	96	7	4%
Opel/Vauxhall	102	100	105	1.6	103	97	1	97	6	3%
Jeep	110	108	108	1.4	106	95	1	95	12	1%
Ford	105	106	106	1	105	92	1	92	13	3%
Ford	105	106	106	1	105	92	1	92	13	3%
Mercedes-Benz Group	107	108	107	0.2	107	86	1.05	90	17	5%
Mercedes-Benz	109	110	109	0.2	109	86	1.03	89	20	5%
Suzuki	112	110	113	1.5	112	99	1	99	12	1%
Suzuki	112	110	113	1.5	112	99	1	99	12	1%
Mazda	120	115	113	0.5	113	93	1	93	19	1%
Mazda	120	115	113	0.5	113	93	1	93	19	1%
Nissan	122	122	122	0.9	122	93	1	93	28	2%
Nissan	122	122	122	0.9	122	93	1	93	28	2%

Note: Brand shares may not add up to manufacturer group totals, because only brands with at least 1% market share in 2025 are displayed in the table. Manufacturers are sorted by ascending fleet-average CO_2 emissions. 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.

Table A5

New passenger car registrations by country

Country	Mar 2026	Percentage change vs. Mar 2025	Jan–Mar 2026	Percentage change vs. Jan–Mar 2025
Germany	294,161	16%	699,404	5%
Italy	185,820	7%	486,470	9%
France	173,634	13%	401,558	–2%
Spain	132,779	12%	306,935	8%
Poland	63,938	20%	151,866	7%
Belgium	44,356	9%	115,587	–6%
Austria	33,204	27%	77,646	17%
Netherlands	31,467	1%	81,480	–11%
Sweden	26,744	10%	62,252	–2%
Czechia	23,916	6%	60,550	1%
Portugal	22,229	13%	54,272	4%
Denmark	19,024	26%	43,968	17%
Norway	17,685	33%	27,175	–14%
Hungary	17,443	32%	36,455	11%
Ireland	16,942	–7%	68,607	2%
Greece	14,672	20%	34,576	7%
Romania	10,496	6%	27,561	–18%
Slovakia	8,535	10%	20,373	–3%
Croatia	7,953	21%	16,591	9%
Finland	6,791	10%	17,202	3%
Slovenia	6,557	24%	16,557	13%
Luxembourg	4,854	–1%	12,627	–1%
Bulgaria	4,462	6%	11,400	–2%
Lithuania	4,129	16%	9,553	7%
Latvia	2,018	0%	4,911	3%
Estonia	1,763	82%	4,274	101%
Iceland	1,282	12%	3,481	37%
Cyprus	-	-	-	-
ALL	**1,176,854**	**13%**	**2,855,732**	**4%**

Note: Data for Cyprus and Malta are not available.

Table A6

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

Country	Mar 2026				Percentage change vs. Mar 2025				Jan–Mar 2026				Percentage change vs. Jan–Mar 2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	**70,645**	30,044	16,128	71,610	**66%**	13%	16%	17%	**159,585**	76,243	35,378	170,961	**41%**	19%	13%	6%
France	**49,406**	8,091	38,909	41,652	**69%**	−3%	4%	25%	**112,083**	19,555	90,343	99,160	**50%**	0%	−5%	11%
Norway	**17,406**	126	1	16	**56%**	−90%	−100%	−74%	**26,617**	189	29	38	**−7%**	−87%	−97%	−67%
Italy	**16,033**	15,288	28,696	64,935	**71%**	94%	28%	18%	**37,836**	39,272	74,207	176,177	**64%**	106%	34%	24%
Belgium	**15,661**	2,429	5,227	10,215	**15%**	−22%	11%	24%	**39,470**	6,632	14,005	26,725	**−2%**	−31%	−7%	11%
Denmark	**14,567**	142	589	1,875	**48%**	−75%	−8%	52%	**34,913**	405	1,376	3,518	**43%**	−63%	−1%	29%
Spain	**12,125**	15,219	28,194	33,677	**45%**	80%	51%	11%	**27,866**	36,577	66,054	77,852	**40%**	76%	27%	12%
Netherlands	**11,114**	7,515	5,392	4,543	**0%**	21%	18%	−4%	**24,869**	21,056	13,337	13,237	**−23%**	32%	10%	−10%
Sweden	**10,891**	6,502	1,964	3,857	**30%**	3%	−10%	19%	**25,269**	15,018	5,063	8,595	**21%**	−6%	−10%	−8%
Austria	**8,206**	3,168	2,870	7,644	**34%**	39%	59%	41%	**17,347**	8,061	6,412	17,268	**22%**	46%	53%	24%
Portugal	**4,845**	2,943	1,773	5,425	**38%**	34%	50%	55%	**12,850**	7,075	4,612	12,421	**12%**	19%	32%	63%
Ireland	**3,885**	2,352	3,351	2,455	**53%**	0%	−14%	9%	**14,113**	9,748	14,095	10,530	**41%**	5%	0%	36%
Poland	**3,429**	5,113	14,392	19,866	**49%**	110%	29%	25%	**8,889**	11,730	36,610	43,760	**74%**	99%	6%	10%
Finland	**3,369**	899	872	939	**38%**	−25%	−15%	57%	**8,063**	2,484	2,295	2,339	**43%**	−31%	−23%	28%
Hungary	**1,557**	1,026	2,653	7,488	**35%**	113%	34%	50%	**3,192**	2,430	6,309	13,972	**33%**	104%	31%	14%
Czechia	**1,541**	994	2,217	3,857	**10%**	2%	28%	20%	**3,443**	2,777	5,303	9,603	**11%**	28%	14%	14%
Luxembourg	**1,384**	234	351	1,232	**−3%**	−40%	−4%	31%	**3,381**	707	899	3,330	**−9%**	−29%	−2%	31%
Slovenia	**1,162**	247	526	1,484	**142%**	75%	18%	50%	**2,299**	566	1,518	3,822	**78%**	59%	44%	34%
Greece	**1,007**	904	3,024	4,959	**35%**	13%	53%	36%	**2,269**	2,456	7,594	11,994	**15%**	−3%	25%	33%
Romania	**678**	777	2,767	2,488	**138%**	57%	67%	−13%	**2,590**	2,296	6,609	6,819	**18%**	44%	23%	−23%
Iceland	**617**	272	108	209	**12%**	30%	−19%	109%	**1,120**	1,070	370	643	**4%**	89%	14%	257%
Slovakia	**449**	286	1,146	2,163	**6%**	−16%	31%	42%	**1,131**	753	2,659	5,300	**17%**	−12%	4%	27%
Croatia	**446**	370	464	1,621	**413%**	203%	110%	140%	**754**	734	1,065	3,470	**229%**	108%	83%	100%
Lithuania	**276**	452	1,038	1,242	**26%**	110%	−13%	57%	**756**	1,159	2,178	2,736	**57%**	61%	−9%	24%
Latvia	**133**	188	616	560	**5%**	−14%	12%	20%	**321**	485	1,172	1,548	**10%**	1%	3%	28%
Estonia	**119**	161	543	492	**45%**	69%	91%	100%	**261**	403	1,022	1,271	**31%**	67%	83%	136%
Cyprus	**-**	-	-	-	**-**	-	-	-	**-**	-	-	-	**-**	-	-	-
ALL	**250,951**	**105,742**	**163,811**	**296,504**	**50%**	**26%**	**21%**	**21%**	**571,599**	**269,993**	**400,980**	**727,856**	**29%**	**29%**	**12%**	**14%**

Note: Data for Cyprus and Malta are not available.

Table A7

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

Country	Mar 2026				Jan–Mar 2026				Jan–Mar 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Norway	**98%**	1%	0%	0%	**98%**	1%	0%	0%	**91%**	5%	3%	0%	**96%**	2%	1%	0%
Denmark	**77%**	1%	3%	10%	**79%**	1%	3%	8%	**65%**	3%	4%	7%	**68%**	3%	4%	7%
Finland	**50%**	13%	13%	14%	**47%**	14%	13%	14%	**34%**	22%	18%	11%	**37%**	20%	17%	10%
Iceland	**48%**	21%	8%	16%	**32%**	31%	11%	18%	**42%**	22%	13%	7%	**41%**	20%	12%	10%
Sweden	**41%**	24%	7%	14%	**41%**	24%	8%	14%	**33%**	25%	9%	15%	**36%**	27%	9%	13%
Netherlands	**35%**	24%	17%	14%	**31%**	26%	16%	16%	**35%**	17%	13%	16%	**40%**	19%	13%	13%
Belgium	**35%**	5%	12%	23%	**34%**	6%	12%	23%	**33%**	8%	12%	20%	**34%**	9%	11%	21%
Luxembourg	**29%**	5%	7%	25%	**27%**	6%	7%	26%	**29%**	8%	7%	20%	**27%**	8%	7%	23%
France	**28%**	5%	22%	24%	**28%**	5%	22%	25%	**18%**	5%	23%	22%	**20%**	7%	22%	21%
Austria	**25%**	10%	9%	23%	**22%**	10%	8%	22%	**21%**	8%	6%	21%	**21%**	10%	8%	21%
Germany	**24%**	10%	5%	24%	**23%**	11%	5%	24%	**17%**	10%	5%	24%	**19%**	11%	5%	24%
Ireland	**23%**	14%	20%	14%	**21%**	14%	21%	15%	**15%**	14%	21%	12%	**18%**	14%	19%	11%
Portugal	**22%**	13%	8%	24%	**24%**	13%	8%	23%	**22%**	11%	7%	15%	**24%**	15%	6%	16%
AVERAGE	**21%**	**9%**	**14%**	**25%**	**20%**	**9%**	**14%**	**26%**	**16%**	**8%**	**13%**	**23%**	**19%**	**9%**	**13%**	**22%**
Slovenia	**18%**	4%	8%	23%	**14%**	3%	9%	23%	**9%**	2%	7%	19%	**11%**	3%	8%	19%
Spain	**9%**	11%	21%	25%	**9%**	12%	22%	25%	**7%**	7%	18%	24%	**9%**	11%	18%	23%
Hungary	**9%**	6%	15%	43%	**9%**	7%	17%	38%	**7%**	4%	15%	37%	**9%**	6%	15%	35%
Italy	**9%**	8%	15%	35%	**8%**	8%	15%	36%	**5%**	4%	12%	32%	**6%**	6%	13%	31%
Greece	**7%**	6%	21%	34%	**7%**	7%	22%	35%	**6%**	8%	19%	28%	**6%**	8%	20%	30%
Estonia	**7%**	9%	31%	28%	**6%**	9%	24%	30%	**9%**	11%	26%	25%	**6%**	11%	23%	28%
Lithuania	**7%**	11%	25%	30%	**8%**	12%	23%	29%	**5%**	8%	27%	25%	**7%**	11%	25%	22%
Latvia	**7%**	9%	31%	28%	**7%**	10%	24%	32%	**6%**	10%	24%	25%	**7%**	12%	25%	24%
Romania	**6%**	7%	26%	24%	**9%**	8%	24%	25%	**7%**	5%	16%	26%	**6%**	6%	19%	24%
Czechia	**6%**	4%	9%	16%	**6%**	5%	9%	16%	**5%**	4%	8%	14%	**6%**	4%	9%	14%
Croatia	**6%**	5%	6%	20%	**5%**	4%	6%	21%	**1%**	2%	4%	11%	**2%**	3%	5%	12%
Poland	**5%**	8%	23%	31%	**6%**	8%	24%	29%	**4%**	4%	24%	28%	**7%**	6%	22%	26%
Slovakia	**5%**	3%	13%	25%	**6%**	4%	13%	26%	**5%**	4%	12%	20%	**5%**	5%	13%	22%
Cyprus	**-**	-	-	-	**-**	-	-	-	**8%**	5%	19%	25%	**10%**	5%	21%	26%

Note: Data for Cyprus and Malta are not available.

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 pools are defined according to the European Commission's "M1 pooling list" (cars) version from 23 December 2025 and the "Declarations of Intent to Form Open Pools" from 5 March 2026, together with the assumptions outlined below. To date, two closed pools (the BMW and Hyundai pools) and one open pool (Mercedes-Benz pool) have been declared for 2025–2027. In addition, the Tesla pool has been declared for 2026. For the purposes of this analysis, vehicle makes not part of the declared pools were assigned to manufacturers and grouped into closed pools based on patterns observed in the 2024 CO_2 monitoring data published by the European Environment Agency. In general, all makes registered by a given manufacturer were consolidated within that manufacturer's closed pool (e.g., the makes Renault and Dacia were both assigned to the Renault pool). Where two or more manufacturers registered vehicles under the same make, these manufacturers were considered to form a pool together (e.g., Automobiles Citroën and Stellantis Auto SAS both registered vehicles under the make Citroën and were grouped into the Stellantis pool). Where a single make was registered by a single manufacturer no pool was assumed (e.g., SAIC). In addition, it was assumed that all manufacturers belonging to the Volkswagen Group formed a single closed pool. The main brands are: BMW pool (BMW, Mini), BYD pool (BYD), Hyundai pool (Hyundai), Kia pool (Kia), Mercedes-Benz pool (Mercedes-Benz, Polestar, Smart, Volvo), Renault pool (Dacia, Renault), Stellantis pool (Citroën, Fiat, Jeep, Opel, Peugeot), Tesla pool (Ford, Honda, Mazda, Suzuki, Tesla), Toyota pool (Toyota), and Volkswagen pool (Audi, Cupra, Porsche, SEAT, Škoda, VW). Nissan and SAIC are large passenger car manufacturers that are not part of a pool.
- **Abbreviations: AC** = alternating current; **CO_2** = carbon dioxide; **DC** = direct current; **g/km** = grams per kilometer; **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. HEVs can operate using only electric power for limited periods, 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 and Norway but excludes Liechtenstein. Data for new car registrations and shares of EVs in this publication cover all of these countries, with the exception of Cyprus and Malta. Data for CO_2 emission levels additionally omit Bulgaria, Hungary, Romania, and Slovenia.
- **Data sources:** Dataforce (new vehicle registrations), Eco-Movement (charging infrastructure), and European Environment Agency (vehicle mass and eco-innovation credits). Historical values are regularly updated to reflect the latest data available. Dataforce data used in the Market Monitor analyses may deviate from the official CO_2 monitoring data published by the European Environment Agency. In 2024, deviations in annual new registrations by make were below 5% for the 20 largest makes, while deviations in average CO_2 emissions were below 3 g/km. The only exception was Fiat, for which the data we obtained from Dataforce overestimated new registrations by 14% and average CO_2 emissions by 14 g/km, likely due to a significant share of special-purpose vehicles in the Dataforce dataset that, however, are not subject to the CO_2 regulation.
- **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 the CO_2 targets, manufacturers

can make use of a number of compliance mechanisms, including (1) **eco-innovation technologies** and (2) **ZLEV factors**. First, manufacturers can reduce their CO_2 level by up to 6 g/km by deploying eco-innovation technologies. As a conservative estimate, we applied the 2024 level of eco-innovation CO_2 emission reductions per brand to both 2025 and 2026 registrations. For more on the methodology used, see: Uwe Tietge et al., *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. Second, if a manufacturer's ZLEV share exceeds 25% (for cars) or 17% (for 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 include BEVs and vehicles with CO_2 emissions of 50 g/km or less (per WLTP). 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 **2026 CO_2 target value** applies, depending on the average WLTP test mass of the new vehicles registered. For this publication, we assumed the average WLTP test mass per manufacturer remained the same as in 2024. The average 2024 BEV and non-BEV test mass for each manufacturer was calculated based on data from the European Environment Agency and then weighted according to their 2026 BEV market shares. For more on the methodology used, see: Uwe Tietge et al., *CO_2 Emissions from New Passenger Cars in Europe: Car Manufacturers' Performance in 2024* (International Council Clean Transportation, 2025), https://theicct.org/publication/co2-emissions-from-new-passenger-cars-in-europe-car-manufacturers-performance-in-2024-dec25/.

» **2025–2027 averaging**: Rather than an annual requirement to meet the CO_2 target applying from 2025 onward, manufacturers were 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 1 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: International Council on Clean Transportation, *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* (2025), https://theicct.org/icct-comments-on-the-european-commission-proposal-to-introduce-a-3-year-averaging-provision-for-the-co2-standards-regulation-for-new-cars-and-vans/.

» **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."

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