EUROPEAN CAR MARKET MONITOR: APRIL 2026

AT A GLANCE

- In January–April 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 2 percentage points to a 10% market share.
- Registrations of conventional combustion engine cars fell by 9 percentage points to a 31% market share in January–April 2026, while mild hybrids and full hybrids increased their shares to 25% and 14%, up 2 and 1 percentage points, respectively.
- Germany and Italy, currently Europe's largest car markets, registered battery electric market shares of 24% and 8%, respectively, representing increases of 7 and 3 percentage points compared with January–April 2025.
- France and Spain, the third- and fourth-largest European markets, also saw growth, with battery electric shares at 27% and 9%, respectively, 9 and 2 percentage points up from January–April 2025. Poland increased its market share by 2 percentage points to 6%.
- From January 2025 to April 2026, adjusted carbon dioxide (CO_2) emissions among manufacturer pools stood at 96 g/km on average, 3 grams away from the EU manufacturer average target for 2025–2027 of 93 g/km.
- Among the seven largest automakers in Europe, the BMW Group registered the highest share of battery electric cars in January–April 2026 at 26%. The Hyundai, Mercedes-Benz, and Toyota groups all recorded increases of 5 percentage points in battery electric car shares compared with January–April 2025, with Toyota more than doubling its share from 4% to 9%.
- Looking at the used vehicle market in Germany, battery electric vehicle (BEV) registration shares increased from 3.0% in April 2025 to almost 7.7% in April 2026, while total used BEV registrations were nearly 150% higher in April 2026 compared with the same month last year.

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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.

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Agora Verkehrswende

alinnea

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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

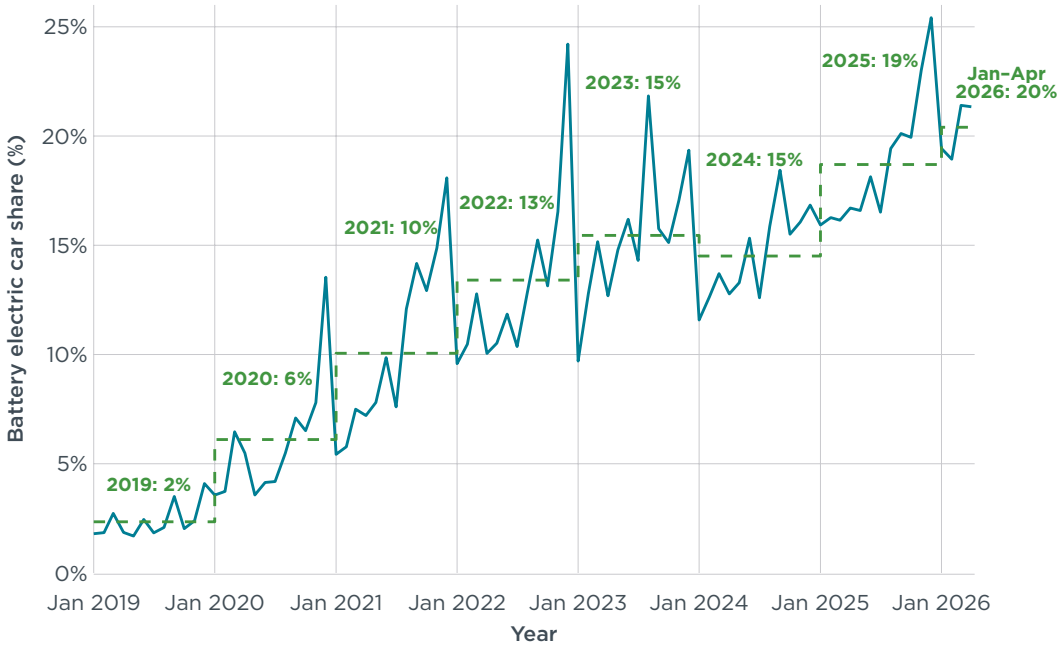

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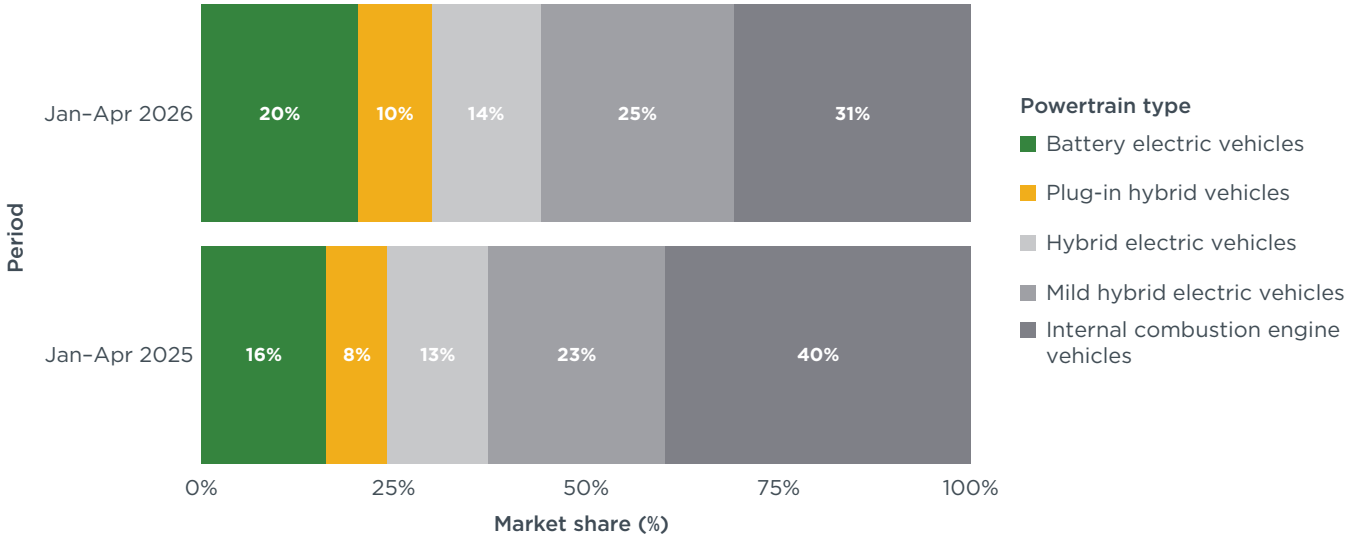
Figure 2

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



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PASSENGER CAR REGISTRATIONS IN EUROPE

In April 2026, new battery electric car registrations reached a 21% market share out of all new registrations. This brought the average share of BEVs among total new registrations in Europe to 20% in January–April 2026, surpassing the 2025 average and marking a 4-percentage-point increase compared with the same period in 2025 (see Figure 1).

In January–April 2026, plug-in hybrid vehicles (PHEVs) had an average market share of 10% among new registrations in Europe, up 2 percentage points from January–April 2025.

Compared with the same period in 2025, full hybrid electric vehicles (HEVs) and mild hybrid electric vehicles (MHEVs) increased in market share by 1 and 2 percentage points, respectively, reaching shares of 14% and 25% in January–April 2026. Meanwhile, conventional internal combustion engine vehicles (ICEVs) comprised 31% of new registrations in January–April 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 most of the 10 largest European markets in April 2026, with Italy registering the biggest increase (+11%) compared with April 2025 (see Table A5 in the Appendix).

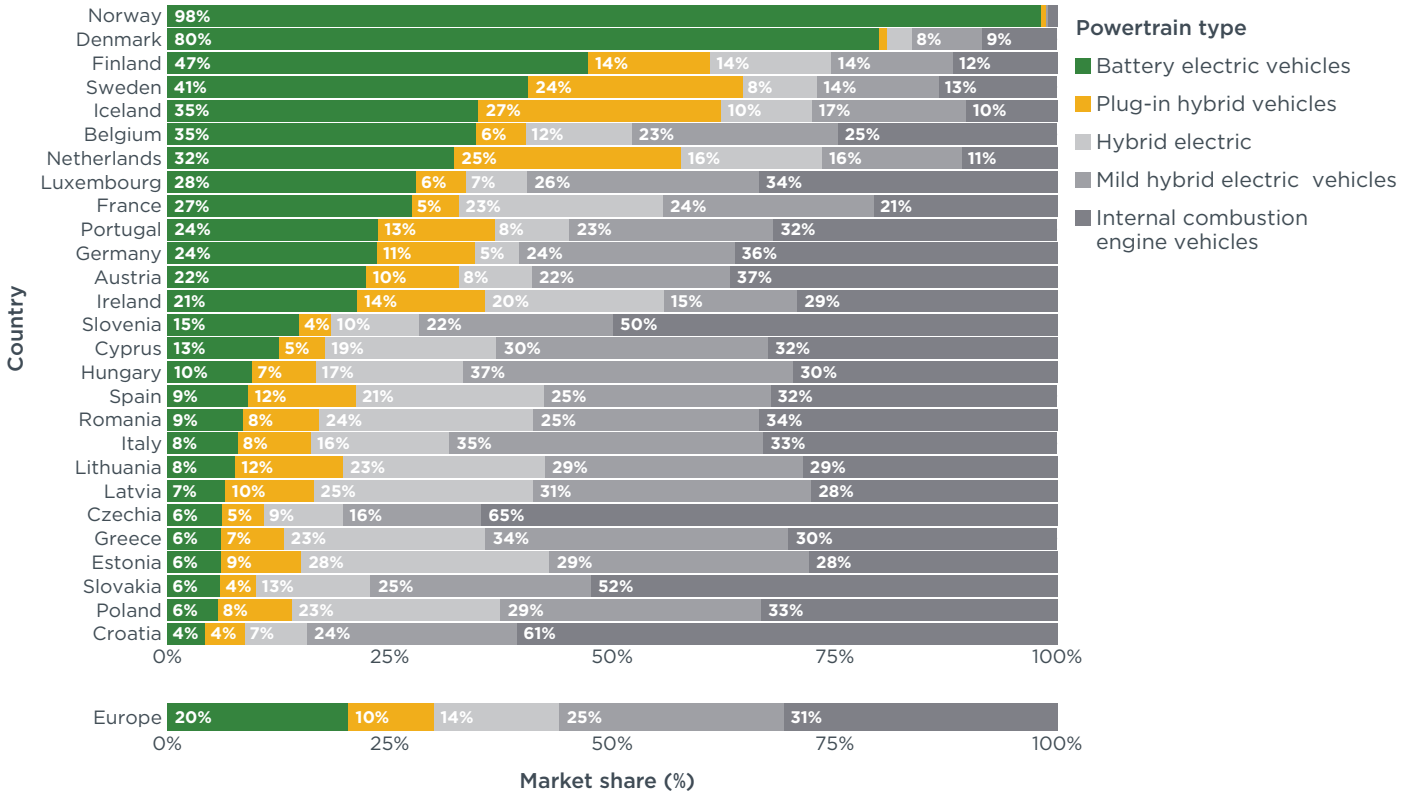
Looking at new BEV registrations in January–April 2026, Germany and Italy—currently Europe's largest car markets—had BEV market shares of 24% and 8%, respectively. These represent increases of 7 and 3 percentage points, respectively, compared with the same period in 2025.

France and Spain, the third- and fourth-largest markets, had increases of 9 and 2 percentage points in January–April 2026, reaching BEV shares of 27% and 9%, respectively.

Nordic countries led Europe's battery electric car registration shares in January–April 2026, with Norway and Denmark already reaching shares of 98% and 80%, respectively, followed by Finland (47%) and Sweden (41%; Figure 3). Belgium and Iceland (both 35%), the Netherlands (32%), Luxembourg (28%), and France (27%) all had BEV shares of 25% or greater. In January–April 2026, Denmark recorded the greatest increase in BEV market share compared with the same period in the previous year (+16 percentage points).

Figure 3

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



Note: Data for Austria and Portugal cover January to March 2026 only.

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Looking at other powertrains in the 10 largest European markets, PHEV shares were the highest in the Netherlands (25%) and Sweden (24%) in January–April 2026. Poland (23%), France (23%), and Spain (21%) had the highest HEV shares, while MHEV shares were the highest in Italy, at 35%, followed by Poland with 29%.

CO_2 EMISSIONS PERFORMANCE BY MANUFACTURER POOL AND GROUP

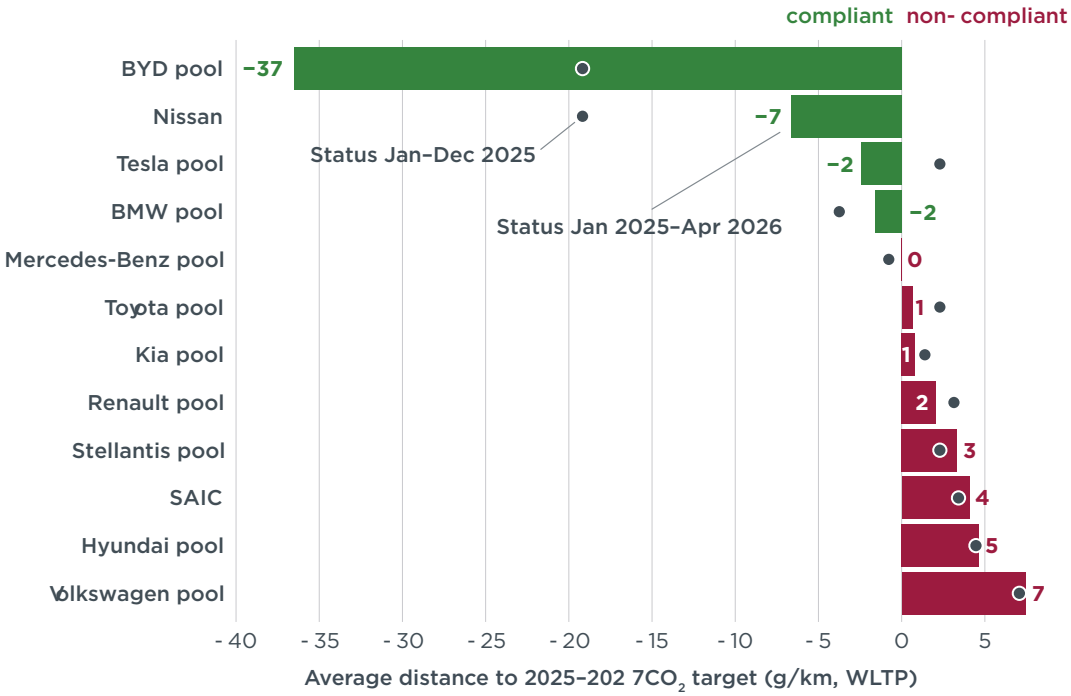
Under EU regulation, carmakers are required to reduce their CO_2 emissions from new cars incrementally through 2035. The current target value applies for each year from 2025 to 2029. However, compliance with the targets will first be assessed at the end of 2027 and will consider average CO_2 emissions for new car fleets over 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–April 2026, manufacturer CO_2 emissions averaged 96 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 April 2026, adjusted emissions stood at around 96 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–April 2026 reporting period, the BYD pool (37 g CO_2/km below), Nissan (7 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.

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The BYD and Mercedes-Benz pools had the largest BEV registration shares in April 2026, at 40% and 32%, respectively. The Kia (31%), BMW (28%), Tesla (27%), and Hyundai (22%) pools also had shares above the European average of 21%. The Toyota pool (11%), SAIC, and Nissan (both 12%) had the lowest BEV shares in April (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 77 g CO_2/km, respectively, below their projected brand-level average targets for 2025–2027 at the end of April 2026, followed by Volvo (29 g CO_2/km below), Mini (17 g CO_2/km below), and Cupra (16 g CO_2/km below). Nissan (28 g CO_2/km above), SEAT (24 g CO_2/km above), Mercedes-Benz (20 g CO_2/km above), and Mazda (20 g CO_2/km above) had the largest target gaps (see Table A4 in the Appendix).

Among the largest carmakers, the BMW Group had the greatest BEV share in January–April 2026 at 26%. The Hyundai, Mercedes-Benz, and Toyota groups all recorded increases in BEV shares of 5 percentage points compared with January–April 2025, with Toyota more than doubling its share from 4% to 9% (Table 1). With a 26% market share in January–April 2026, the Volkswagen Group increased its PHEV share by 3 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–April 2026

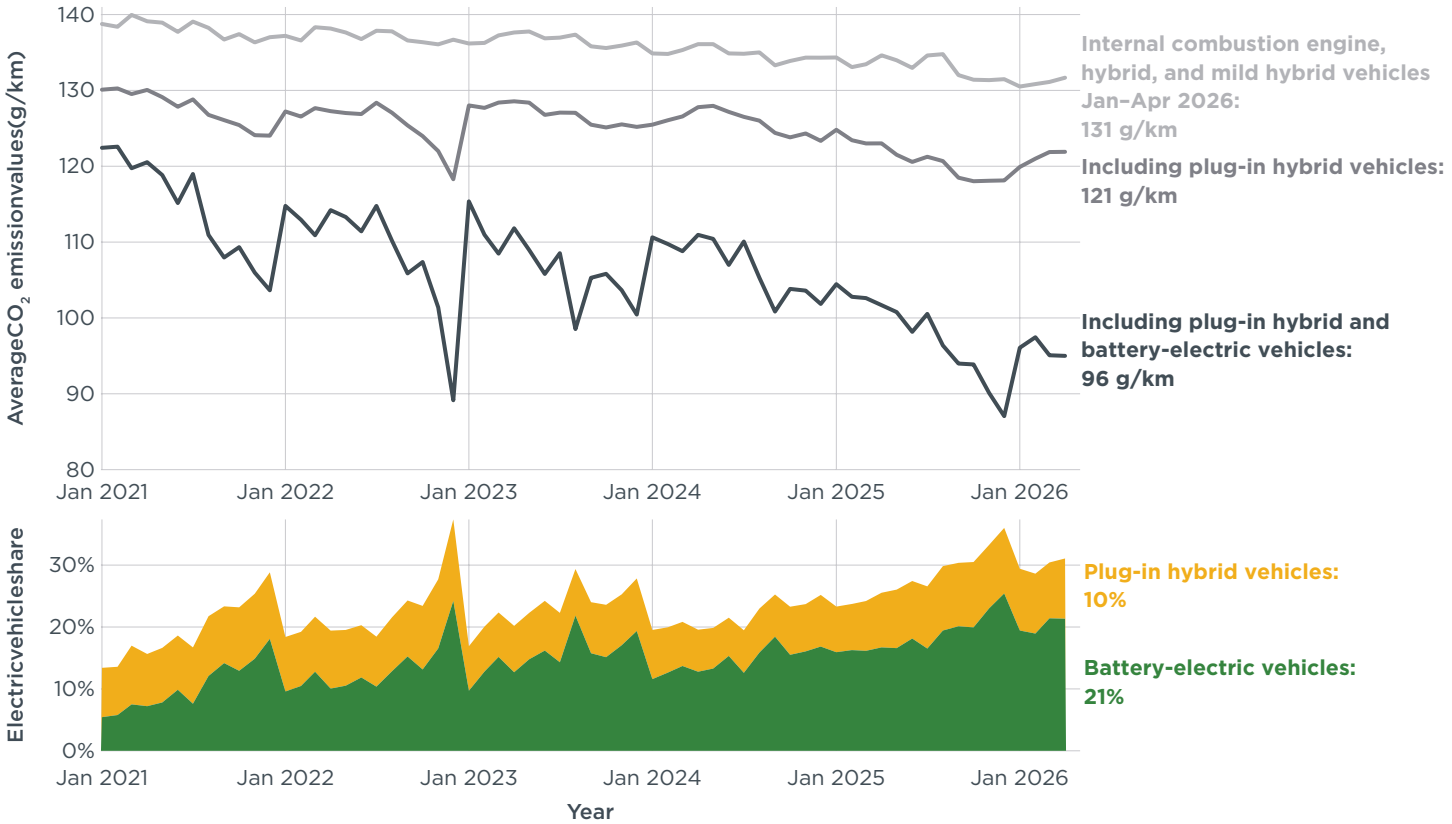
Manufacturer group	Battery electric car share		Plug-in hybrid car share		Market share Jan–Apr 2026
	Jan–Apr 2026	Change vs. Jan–Apr 2025	Jan–Apr 2026	Change vs. Jan–Apr 2025	
BMW Group	26%	+2 pp	14%	−1 pp	7%
Hyundai Group	23%	+5 pp	5%	−1 pp	7%
Mercedes-Benz Group	22%	+5 pp	18%	−1 pp	5%
Volkswagen Group	19%	+1 pp	12%	+3 pp	26%
Renault Group	16%	+4 pp	1%	0 pp	10%
Stellantis	14%	+2 pp	2%	0 pp	17%
Toyota Group	9%	+5 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–April 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–April (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



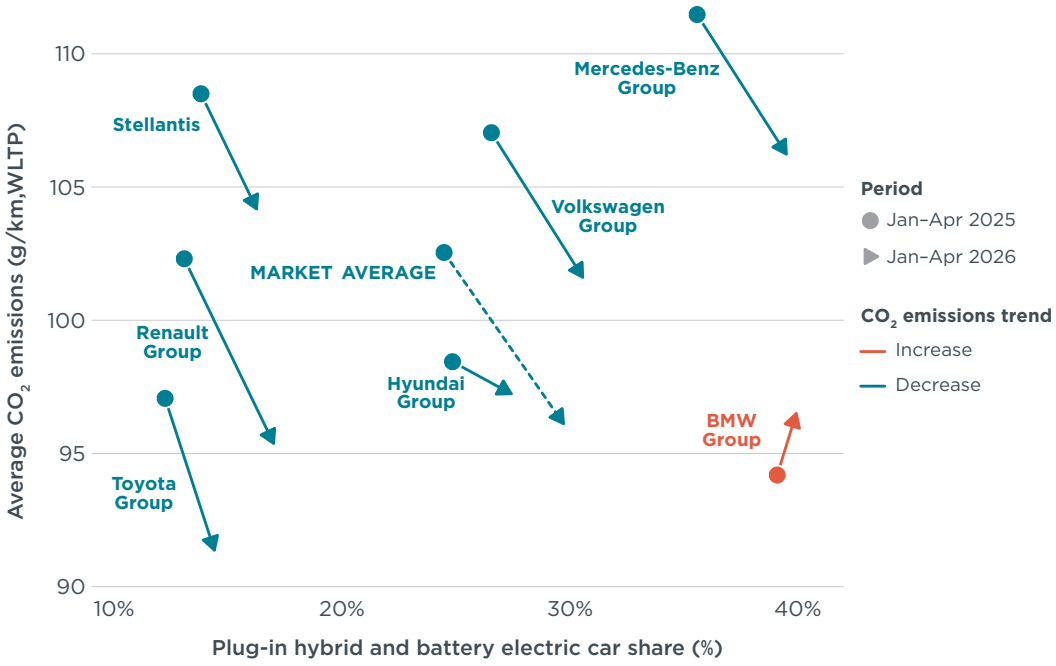
2 Marie Rajon Bernard et al., *The EV Transition Check: Measuring Progress towards Zero-Emission for Passenger Cars in the European Union* (International Council on Clean Transportation, 2025), https://theicct.org/publication/ev-transition-check-sep25/.

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–April 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–April 2026, the highest level among Europe's largest carmaker groups. As a counterexample, with its focus on hybrid powertrains, Toyota had average CO_2 emissions below its 2026 target in January–April despite maintaining the lowest electric vehicle share.

Among Europe's top manufacturers, the BMW Group is the only case where emissions increased in 2026 compared with the previous year. This disparity is due in part 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 at the beginning of the year. However, it also mirrors a trend observed in previous CO_2 target cycles: without interim annual targets, manufacturers often scale back their CO_2 reduction efforts once meeting their defined emissions target instead of using the momentum to reach the next target on a continuous reduction pathway. These delayed efforts have historically resulted in manufacturers claiming that the defined targets cannot be met and calling for last-minute policy action to weaken the targets (see Figure 6).[3]

Figure 6

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



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3 Sonsoles Díaz et al., *CO_2 Emissions from New Passenger Cars in Europe: Car Manufacturers' Performance in 2024* (International Council on Clean Transportation, 2025), https://theicct.org/publication/co2-emissions-from-new-passenger-cars-in-europe-car-manufacturers-performance-in-2024-dec25/.

SPOTLIGHT: USED EV MARKET IN GERMANY

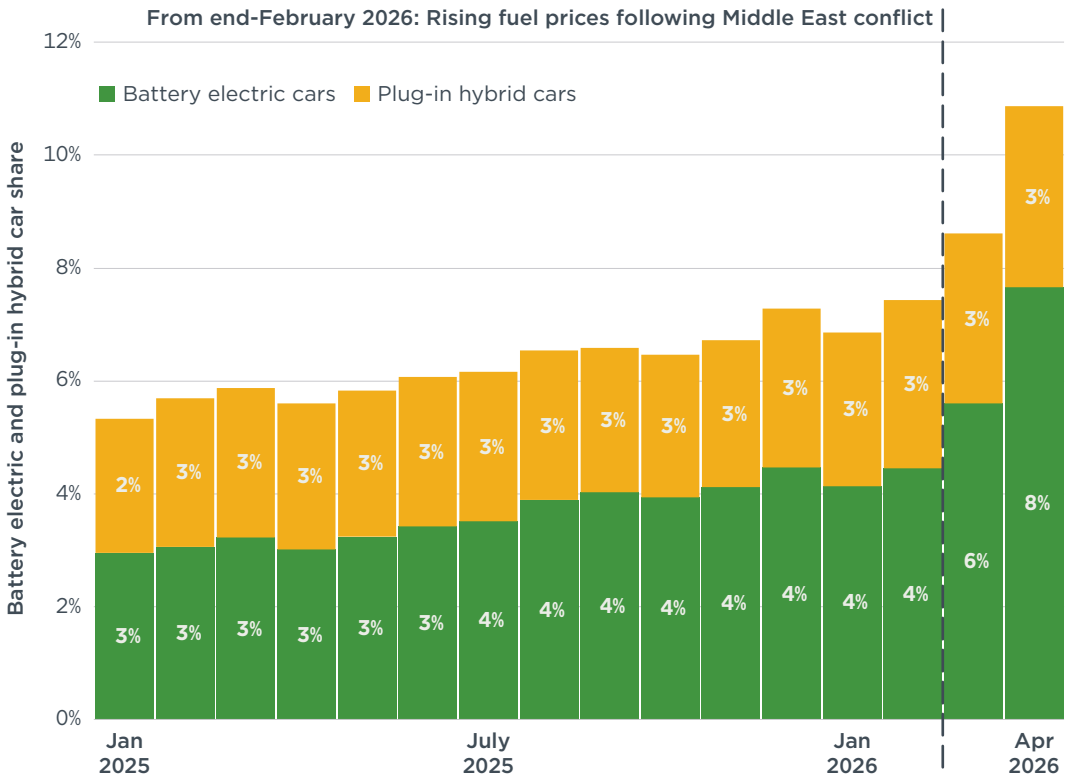
Germany's used EV market is gaining momentum. The combined share of BEVs and PHEVs in used car registrations (measured as changes in vehicle ownership) almost doubled between April 2025 and April 2026, rising from 5.6% to 10.9%. This growth was driven primarily by BEVs, whose share increased from 3.0% to 7.7% over the same period, while the share of PHEVs remained relatively stable (2.6% vs. 3.2%).

Growth in the absolute number of used BEV registrations also accelerated significantly, increasing year-on-year by 25% in January, 40% in February, 89% in March, and 147% in April. By comparison, used PHEV registrations grew more moderately, by 2% in January, 9% in February, 24% in March, and 20% in April. Overall, between January–April 2025 and January–April 2026, used BEV registrations rose by 77% compared with 14% for PHEVs.

The used car market is central to scaling BEV adoption. In Germany, it accounts for more than twice as many vehicle registrations as first-hand (new) car registrations (6.51 million vs. 2.86 million in 2025), meaning that more affordable used vehicles are available to a broader consumer group, supporting the shift to BEVs.

Figure 7

Share of battery electric and plug-in hybrid cars in used passenger car registrations in Germany, January 2025–April 2026



Source: KBA

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	Apr 2026				Jan–Apr 2026				Jan–Apr 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
BYD pool	**40%**	60%	0%	0%	**44%**	56%	0%	0%	**62%**	38%	0%	0%	**58%**	42%	0%	0%
Mercedes-Benz pool	**32%**	18%	0%	37%	**29%**	20%	0%	37%	**23%**	24%	0%	37%	**26%**	24%	0%	36%
Kia pool	**31%**	3%	18%	12%	**26%**	4%	18%	14%	**21%**	5%	15%	14%	**22%**	5%	16%	13%
All other brands	**29%**	25%	14%	9%	**29%**	24%	13%	9%	**16%**	15%	2%	15%	**21%**	21%	4%	11%
BMW pool	**28%**	12%	0%	38%	**26%**	14%	0%	38%	**25%**	14%	0%	37%	**27%**	15%	0%	37%
Tesla pool	**27%**	7%	13%	40%	**35%**	6%	11%	36%	**22%**	7%	13%	42%	**31%**	7%	12%	37%
Hyundai pool	**22%**	5%	27%	4%	**21%**	6%	25%	6%	**16%**	6%	21%	13%	**18%**	6%	21%	13%
AVERAGE	**21%**	**10%**	**14%**	**24%**	**20%**	**10%**	**14%**	**25%**	**16%**	**8%**	**13%**	**23%**	**19%**	**9%**	**13%**	**22%**
Volkswagen pool	**20%**	12%	0%	19%	**19%**	12%	0%	18%	**18%**	9%	0%	15%	**19%**	11%	0%	14%
Renault pool	**17%**	1%	33%	6%	**16%**	1%	34%	7%	**12%**	1%	29%	8%	**13%**	1%	29%	9%
Stellantis pool	**14%**	2%	0%	53%	**14%**	2%	0%	57%	**12%**	2%	0%	44%	**13%**	3%	0%	47%
Nissan	**12%**	0%	47%	27%	**7%**	0%	37%	38%	**8%**	0%	36%	32%	**7%**	0%	40%	31%
SAIC	**12%**	9%	61%	0%	**10%**	7%	61%	0%	**12%**	6%	41%	0%	**14%**	10%	46%	0%
Toyota pool	**11%**	5%	80%	0%	**9%**	6%	81%	0%	**4%**	8%	75%	0%	**4%**	8%	74%	0%

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–April 2026

Manufacturer or manufacturer pool	New car fleet-average CO_2 (in g/km, per WLTP)								Market share Jan–Apr 2026
	Apr 2026	Jan–Apr 2026	Compliance credits – Eco-innovations	Adj. Jan–Apr 2026	Reference target 2026	Compliance credits – ZLEV factor	Target 2026	Target gap	
BYD pool	28	23	0	23	87	1.05	91	–69	2%
Tesla pool	94	81	0.7	81	92	1.05	97	–16	8%
Toyota pool	88	91	0.5	91	95	1	95	–4	7%
Renault pool	94	96	1.2	94	96	1	96	–1	10%
Kia pool	88	94	0.3	94	93	1.02	95	–1	3%
Mercedes-Benz pool	90	93	0.2	93	86	1.05	91	3	7%
AVERAGE	**96**	**96**	**0.7**	**96**	**93**	**1**	**93**	**3**	
BMW pool	96	97	1	96	89	1.02	91	5	7%
Hyundai pool	100	100	0.3	99	94	1	94	5	3%
SAIC	98	101	0	101	95	1	95	6	2%
Stellantis pool	105	104	1.3	102	97	1	97	6	17%
Volkswagen pool	99	101	0.6	101	92	1	92	9	26%
Nissan	110	120	0.9	119	93	1	93	25	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–April 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–April 2026

Manufacturer or manufacturer pool	New registrations		New car fleet-average CO_2 (in g/km, per WLTP)						
	2025	Jan–Apr 2026	Adj. 2025	Target 2025	Adj. Jan–Apr 2026	Target 2026	Adj. Jan 2025–Apr 2026	Target 2025–2027	Target gap
BYD pool	134,886	72,657	76	95	23	91	57	94	−37
Nissan	197,056	77,454	76	95	119	93	88	95	−7
Tesla pool	871,140	299,976	97	95	81	97	93	95	−2
BMW pool	774,937	253,578	89	93	96	91	91	93	−2
Mercedes-Benz pool	896,219	282,153	90	91	93	91	91	91	0
Toyota pool	815,957	273,347	97	95	91	95	96	95	1
Kia pool	395,669	129,490	96	94	94	95	95	94	1
Renault pool	1,234,444	377,434	99	96	94	96	98	96	2
Stellantis pool	1,681,985	647,708	97	95	102	97	99	95	3
AVERAGE	**11,043,733**	**3,616,963**	**97**	**93**	**96**	**93**	**96**	**93**	**3**
SAIC	218,661	76,726	99	95	101	95	99	95	4
Hyundai pool	431,436	125,969	99	94	99	94	99	94	5
Volkswagen pool	3,017,974	1,000,471	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–April 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–April 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 April 2026

Manufacturer group/brand	New car fleet-average CO_2 (in g/km)									Market share Jan–Apr 2026
	Apr 2026	Jan 2026–Apr 2026	Jan 2025–Apr 2026	Compliance credits – Eco-innovations	Adj. Jan 2025–Apr 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	28	23	14	0	14	87	1.05	92	−77	2%
BYD	28	23	14	0	14	87	1.05	92	−77	2%
Volvo Cars	65	65	56	0.1	56	87	1.05	91	−35	2%
Volvo	72	72	63	0.1	63	87	1.05	91	−29	2%
Toyota Group	88	91	95	0.5	95	95	1	95	−1	7%
Toyota	88	91	95	0.5	95	96	1	96	−1	7%
Renault Group	93	95	99	1.2	98	96	1	96	2	10%
Renault	82	84	89	1.1	88	95	1	95	−7	6%
Dacia	111	113	113	1.4	112	98	1	98	14	4%
Hyundai Group	94	97	97	0.3	97	94	1	94	3	7%
Kia	88	94	96	0.3	95	93	1.01	94	1	3%
Hyundai	100	100	99	0.3	99	94	1	94	5	3%
BMW Group	96	97	92	1	91	89	1.05	93	−2	7%
BMW	97	98	94	1	93	88	1.05	92	0	6%
Mini	90	88	81	1	80	93	1.05	98	−17	1%
SAIC Motor	98	101	99	0	99	95	1	95	4	2%
MG	98	101	99	0	99	95	1	95	4	2%
Volkswagen Group	99	101	102	0.6	101	92	1.01	93	8	26%
VW	100	102	101	0.4	100	93	1.02	94	6	10%
Škoda	95	97	99	0.4	99	93	1	93	6	7%
Audi	98	101	106	0.7	105	89	1.02	91	15	5%
Cupra	86	87	81	0.8	80	92	1.05	97	−16	2%
SEAT	123	123	123	1.7	121	97	1	97	24	2%
Mercedes-Benz Group	101	106	107	0.2	107	86	1.05	90	16	5%
Mercedes-Benz	104	108	109	0.2	109	86	1.03	89	20	5%
Ford	105	106	106	1	105	92	1	92	13	3%
Ford	105	106	106	1	105	92	1	92	13	3%
Stellantis	105	104	106	1.3	104	96	1	96	8	17%
Peugeot	98	97	100	1.2	99	96	1	96	3	5%
Fiat	124	121	118	0.9	118	100	1	100	18	3%
Citroën	99	99	104	1.6	103	96	1	96	6	3%
Opel/Vauxhall	104	101	104	1.6	103	97	1	97	6	3%
Jeep	110	108	108	1.4	107	95	1	95	12	1%
Nissan	110	120	122	0.9	121	93	1	93	28	2%
Nissan	110	120	122	0.9	121	93	1	93	28	2%
Suzuki	110	110	113	1.5	111	99	1	99	12	1%
Suzuki	110	110	113	1.5	111	99	1	99	12	1%
Mazda	123	117	114	0.5	113	93	1	93	20	1%
Mazda	123	117	114	0.5	113	93	1	93	20	1%

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	Apr 2026	Percentage change vs. Apr 2025	Jan–Apr 2026	Percentage change vs. Jan–Apr 2025
Germany	249,163	3%	948,567	5%
Italy	155,358	11%	641,909	10%
France	138,339	0%	539,896	−2%
Spain	109,232	8%	416,167	8%
Poland	51,925	10%	203,791	8%
Belgium	38,463	0%	154,050	−4%
Netherlands	25,704	−5%	106,611	−10%
Sweden	24,307	0%	86,559	−2%
Czechia	22,397	6%	82,947	3%
Denmark	16,833	10%	60,799	15%
Greece	14,093	−4%	48,675	4%
Hungary	11,832	10%	48,291	11%
Norway	11,103	−2%	38,278	−11%
Ireland	10,811	17%	78,858	3%
Romania	10,333	2%	37,894	−14%
Croatia	8,478	−8%	25,069	2%
Slovakia	7,173	−10%	27,785	−4%
Slovenia	6,027	15%	22,584	13%
Finland	5,705	−9%	22,907	0%
Luxembourg	4,948	12%	17,575	2%
Bulgaria	4,732	18%	16,164	4%
Lithuania	4,693	17%	14,246	10%
Estonia	1,923	81%	6,197	94%
Latvia	1,908	−7%	6,819	0%
Cyprus	1,185	8%	4,800	−13%
Iceland	1,033	−33%	4,514	11%
Austria	-	-	-	-
Portugal	-	-	-	-

Note: Data for Austria and Portugal are not available.

Table A6

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

Country	Apr 2026				Percentage change vs. Apr 2025				Jan–Apr 2026				Percentage change vs. Jan–Apr 2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	64,321	27,590	11,919	58,200	**41%**	13%	15%	2%	**223,906**	103,833	47,297	229,161	**41%**	18%	13%	5%
France	36,216	8,792	32,076	30,342	**42%**	−8%	−11%	13%	**148,299**	28,413	123,875	127,980	**48%**	−3%	−6%	10%
Belgium	13,972	1,898	4,449	8,887	**12%**	−42%	5%	3%	**53,442**	8,530	18,454	35,612	**1%**	−34%	−4%	9%
Denmark	13,715	119	324	1,238	**43%**	−77%	−44%	21%	**48,626**	524	1,700	4,756	**43%**	−67%	−14%	27%
Italy	13,087	13,229	26,089	50,028	**97%**	64%	45%	17%	**50,924**	52,514	100,131	226,351	**72%**	94%	36%	22%
Norway	10,952	25	0	22	**0%**	−55%	−100%	175%	**37,569**	214	29	60	**−5%**	−86%	−97%	−51%
Spain	10,048	13,587	22,068	27,972	**43%**	46%	30%	18%	**37,914**	50,164	88,122	105,824	**41%**	67%	28%	13%
Sweden	9,854	5,818	2,159	3,232	**15%**	−15%	16%	−2%	**35,123**	20,836	7,222	11,827	**19%**	−8%	−4%	−7%
Netherlands	9,616	6,143	3,799	3,647	**5%**	8%	2%	−6%	**34,417**	27,156	16,939	16,706	**−17%**	26%	7%	−10%
Ireland	2,784	1,537	1,845	1,318	**105%**	16%	25%	23%	**16,854**	11,278	15,923	11,761	**49%**	6%	3%	33%
Finland	2,783	637	831	783	**21%**	−51%	−20%	27%	**10,846**	3,121	3,126	3,122	**37%**	−36%	−22%	28%
Poland	2,691	5,124	11,265	15,921	**5%**	91%	18%	15%	**11,580**	16,854	47,875	59,681	**51%**	97%	9%	11%
Czechia	1,684	1,087	2,093	3,257	**37%**	28%	25%	9%	**5,127**	3,863	7,399	12,858	**18%**	28%	17%	13%
Luxembourg	1,533	274	319	1,237	**53%**	−34%	−2%	22%	**4,914**	981	1,216	4,569	**4%**	−30%	−2%	28%
Hungary	1,420	1,004	1,690	3,920	**102%**	74%	−7%	5%	**4,617**	3,433	7,999	17,892	**48%**	94%	21%	12%
Slovenia	1,042	237	746	1,086	**160%**	54%	127%	14%	**3,341**	795	2,264	4,908	**97%**	56%	63%	29%
Greece	692	956	3,442	4,558	**12%**	6%	39%	2%	**2,961**	3,412	11,038	16,555	**15%**	−1%	29%	22%
Romania	639	919	2,556	2,768	**160%**	73%	46%	−6%	**3,229**	3,215	9,165	9,587	**32%**	51%	29%	−19%
Slovakia	518	340	892	1,536	**44%**	−1%	−3%	−4%	**1,655**	1,102	3,600	6,869	**25%**	−8%	3%	19%
Iceland	460	159	93	136	**26%**	−59%	−57%	−32%	**1,580**	1,229	463	779	**10%**	29%	−14%	106%
Lithuania	329	569	1,052	1,392	**54%**	112%	−9%	63%	**1,085**	1,728	3,230	4,128	**56%**	75%	−9%	35%
Croatia	317	350	644	2,310	**403%**	135%	83%	187%	**1,071**	1,108	1,755	5,913	**267%**	121%	88%	133%
Cyprus	181	53	259	277	**101%**	−9%	−11%	6%	**606**	244	926	1,464	**34%**	−16%	−19%	7%
Latvia	123	191	513	581	**−9%**	−21%	12%	25%	**444**	676	1,685	2,129	**4%**	−6%	6%	27%
Estonia	115	154	706	537	**60%**	86%	108%	113%	**376**	557	1,728	1,808	**39%**	72%	93%	129%
Austria	-	-	-	-	**-**	-	-	-	**-**	-	-	-	**-**	-	-	-
Portugal	-	-	-	-	**-**	-	-	-	**-**	-	-	-	**-**	-	-	-

Note: Data for Austria and Portugal are not available.

Table A7

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

Country	Apr 2026				Jan–Apr 2026				Jan–Apr 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Norway	99%	0%	0%	0%	**98%**	1%	0%	0%	**92%**	3%	2%	0%	**96%**	2%	1%	0%
Denmark	81%	1%	2%	7%	**80%**	1%	3%	8%	**64%**	3%	4%	7%	**68%**	3%	4%	7%
Finland	49%	11%	15%	14%	**47%**	14%	14%	14%	**35%**	21%	17%	11%	**37%**	20%	17%	10%
Iceland	45%	15%	9%	13%	**35%**	27%	10%	17%	**35%**	23%	13%	9%	**41%**	20%	12%	10%
Sweden	41%	24%	9%	13%	**41%**	24%	8%	14%	**34%**	26%	9%	14%	**36%**	27%	9%	13%
Netherlands	37%	24%	15%	14%	**32%**	25%	16%	16%	**35%**	18%	13%	16%	**40%**	19%	13%	13%
Belgium	36%	5%	12%	23%	**35%**	6%	12%	23%	**33%**	8%	12%	20%	**34%**	9%	11%	21%
Luxembourg	31%	6%	6%	25%	**28%**	6%	7%	26%	**28%**	8%	7%	21%	**27%**	8%	7%	23%
France	26%	6%	23%	22%	**27%**	5%	23%	24%	**18%**	5%	24%	21%	**20%**	7%	22%	21%
Germany	26%	11%	5%	23%	**24%**	11%	5%	24%	**17%**	10%	5%	24%	**19%**	11%	5%	24%
Ireland	26%	14%	17%	12%	**21%**	14%	20%	15%	**15%**	14%	20%	12%	**18%**	14%	19%	11%
Slovenia	17%	4%	12%	18%	**15%**	4%	10%	22%	**8%**	3%	7%	19%	**11%**	3%	8%	19%
Cyprus	15%	4%	22%	23%	**13%**	5%	19%	30%	**8%**	5%	21%	25%	**10%**	5%	21%	26%
Hungary	12%	8%	14%	33%	**10%**	7%	17%	37%	**7%**	4%	15%	37%	**9%**	6%	15%	35%
Spain	9%	12%	20%	26%	**9%**	12%	21%	25%	**7%**	8%	18%	24%	**9%**	11%	18%	23%
Italy	8%	9%	17%	32%	**8%**	8%	16%	35%	**5%**	5%	13%	32%	**6%**	6%	13%	31%
Czechia	8%	5%	9%	15%	**6%**	5%	9%	16%	**5%**	4%	8%	14%	**6%**	4%	9%	14%
Slovakia	7%	5%	12%	21%	**6%**	4%	13%	25%	**5%**	4%	12%	20%	**5%**	5%	13%	22%
Lithuania	7%	12%	22%	30%	**8%**	12%	23%	29%	**5%**	8%	27%	24%	**7%**	11%	25%	22%
Latvia	6%	10%	27%	30%	**7%**	10%	25%	31%	**6%**	11%	23%	25%	**7%**	12%	25%	24%
Romania	6%	9%	25%	27%	**9%**	8%	24%	25%	**6%**	5%	16%	27%	**6%**	6%	19%	24%
Estonia	6%	8%	37%	28%	**6%**	9%	28%	29%	**8%**	10%	28%	25%	**6%**	11%	23%	28%
Poland	5%	10%	22%	31%	**6%**	8%	23%	29%	**4%**	5%	23%	28%	**7%**	6%	22%	26%
Greece	5%	7%	24%	32%	**6%**	7%	23%	34%	**6%**	7%	18%	29%	**6%**	8%	20%	30%
Croatia	4%	4%	8%	27%	**4%**	4%	7%	24%	**1%**	2%	4%	10%	**2%**	3%	5%	12%
Austria	-	-	-	-	**-**	-	-	-	**22%**	9%	7%	21%	**21%**	10%	8%	21%
Portugal	-	-	-	-	**-**	-	-	-	**22%**	12%	6%	16%	**24%**	15%	6%	16%

Note: Data for Austria and Portugal 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 18 May 2026 together with the assumptions outlined below. To date, two closed pools (the BMW and Hyundai pools) have been declared for 2025–2027. In addition, two open pools (the Mercedes-Benz and Tesla pools) have 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: CO_2** = carbon dioxide; **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** 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 Malta. Data for CO_2 emission levels additionally omit Bulgaria, Hungary, Romania, and Slovenia. In addition, April 2026 data are not available for Austria and Portugal.

» **Data sources:** Dataforce (new vehicle registrations) 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 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.

» **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 on 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/.

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