

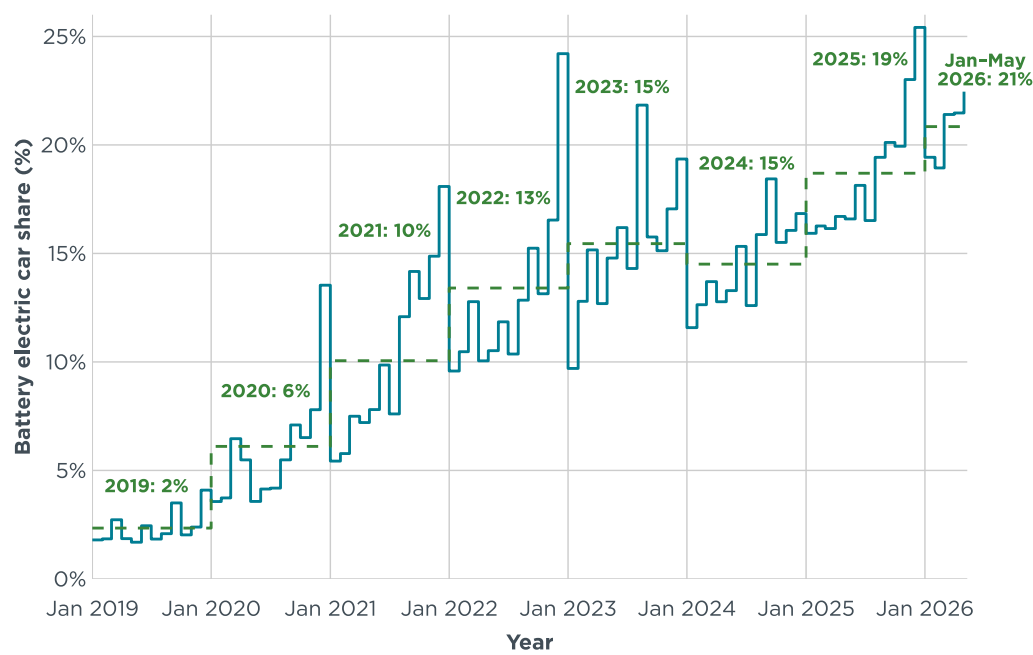
EUROPEAN CAR MARKET MONITOR: MAY 2026

AT A GLANCE

- » In January–May 2026, Europe’s battery electric car registrations recorded a 21% market share, up 5 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–May 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 6 and 3 percentage points compared with January–May 2025.
- » France and Spain, the third- and fourth-largest European markets, also saw growth, with battery electric shares at 28% and 9%, respectively, up 10 and 2 percentage points from January–May 2025. Poland increased its market share by 1 percentage point to 5%.
- » From January 2025 to May 2026, adjusted carbon dioxide (CO₂) 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–May 2026 at 27%. The Mercedes-Benz Group recorded a 7-percentage-point increase in battery electric car shares compared with January–May 2025, while the Hyundai, Renault, and Toyota groups all recorded increases of 5 percentage points. Toyota doubled its share from 5% to 10%.
- » Corporate fleets, which account for around 60% of new car registrations in Europe, recorded notable increases in BEV shares in January–May 2026 compared with the same period in 2025. Based on total corporate registrations, BEV shares in several countries are likely already approaching the draft 2030 targets proposed under the 2025 Clean Corporate Vehicle Regulation (CCVR). For example, BEV shares for large companies in France exceeded the proposed 2030 CCVR target in April 2026.

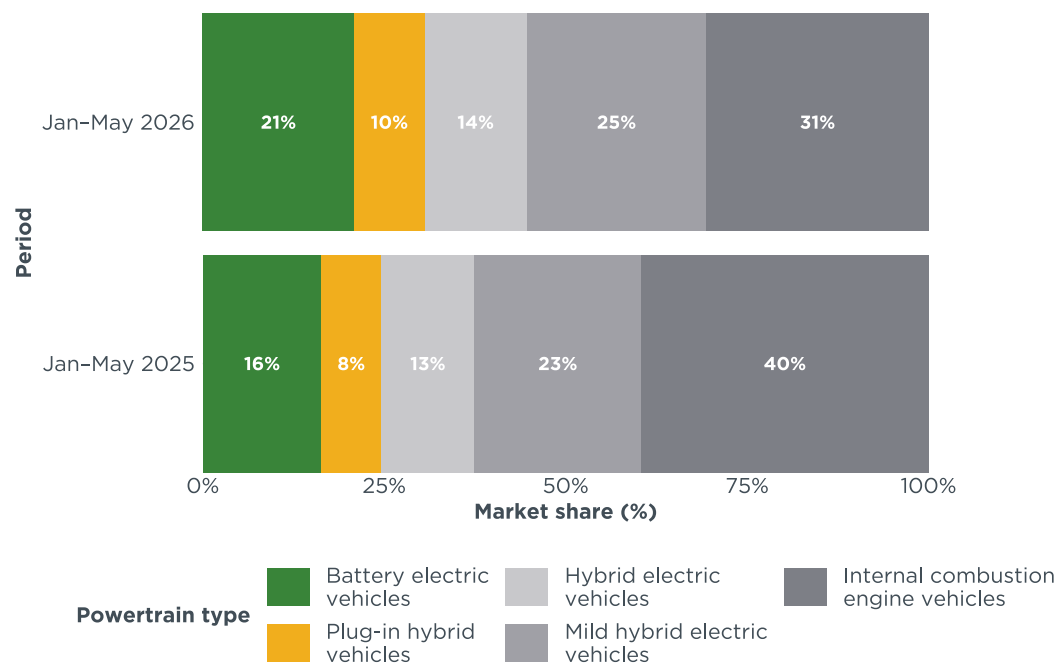
¹ Geographic scope: To the greatest extent permitted by data availability, the definition of Europe used in the ICCT’s Market Monitor reports aligns with EU regulations. The European CO₂ standards for cars and vans applies to the countries of the European Economic Area (EEA), excluding Liechtenstein. This includes the 27 Member States of the European Union plus Iceland and Norway.

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–May 2026 versus January–May 2025



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PASSENGER CAR REGISTRATIONS IN EUROPE

In May 2026, new battery electric car registrations reached a 22% market share out of all new registrations. This brought the average share of BEVs among total new registrations in Europe to 21% in January–May 2026, surpassing the 2025 average and marking a 5-percentage-point increase compared with the same period in 2025 (see Figure 1).

In January–May 2026, plug-in hybrid vehicles (PHEVs) had an average market share of 10% among new registrations in Europe, up 2 percentage points from January–May 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–May 2026. Meanwhile, conventional internal combustion engine vehicles (ICEVs) comprised 31% of new registrations in January–May 2026. This is 9 percentage points lower than the market share during the same period in 2025 (see Figure 2).

PASSENGER CAR REGISTRATIONS BY COUNTRY

Total new registrations increased in many of the 10 largest European markets in January–May 2026, with Austria and Denmark reporting the biggest increases (+13% each) compared with January–May 2025 (see Table A5 in the Appendix).

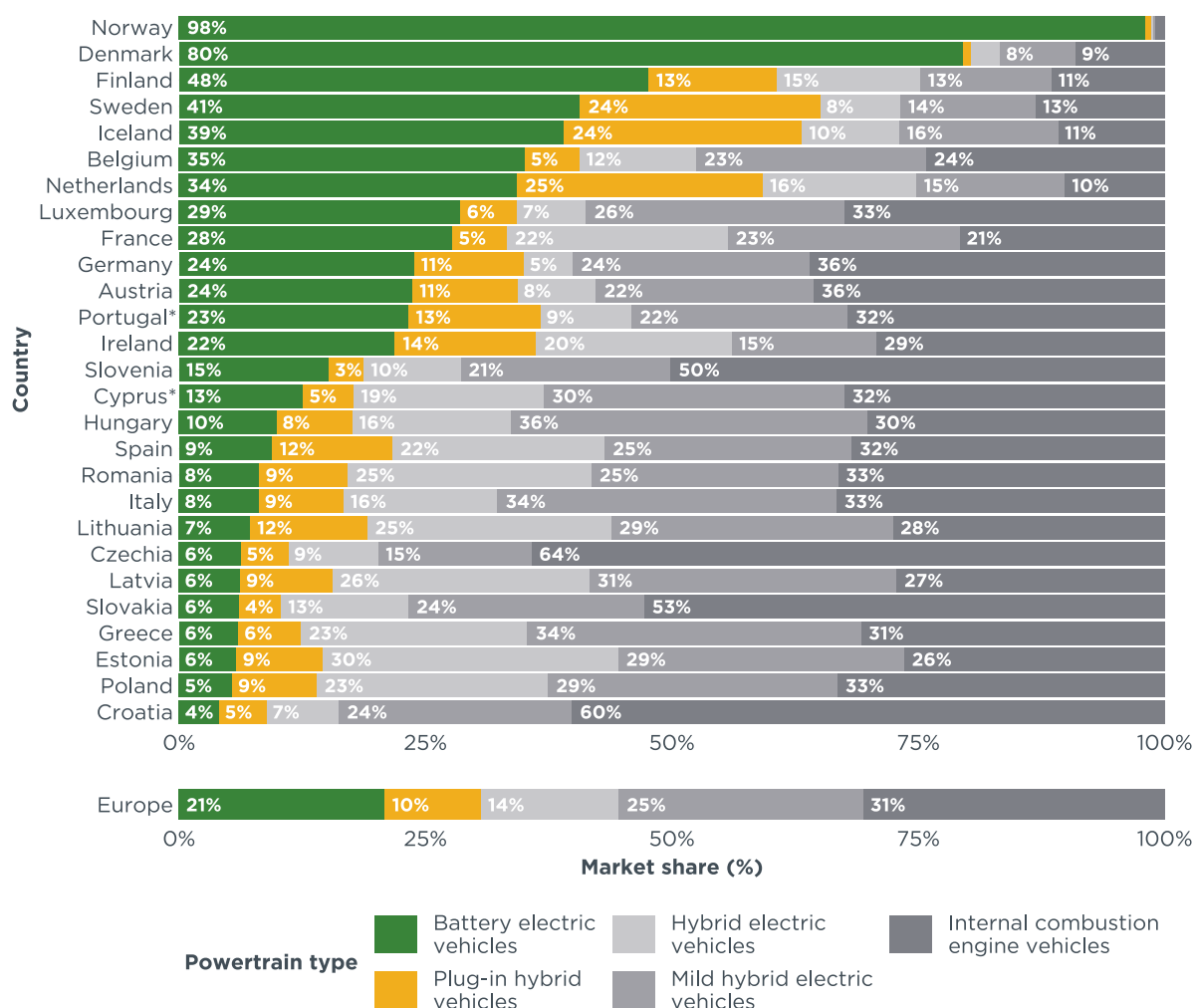
Looking at new BEV registrations in January–May 2026, Germany and Italy—currently Europe’s largest car markets—had BEV market shares of 24% and 8%, respectively. These represent increases of 6 and 3 percentage points, respectively, compared with the same period in 2025.

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

Nordic countries led Europe’s battery electric car registration shares in January–May 2026, with Norway and Denmark already reaching shares of 98% and 80%, respectively, followed by Finland (48%) and Sweden (41%). Iceland (39%), Belgium (35%), the Netherlands (34%), Luxembourg (29%), and France (28%) all had BEV shares of 25% or greater (Figure 3). In January–May 2026, Denmark recorded the greatest increase in BEV market share (+17 percentage points) compared with the same period in 2025.

Figure 3

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



* Data for Cyprus and Portugal cover January to April 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–May 2026. Poland (23%), France (22%), and Spain (22%) had the highest HEV shares, while MHEV shares were the highest in Italy, at 34%, followed by Poland with 29%.

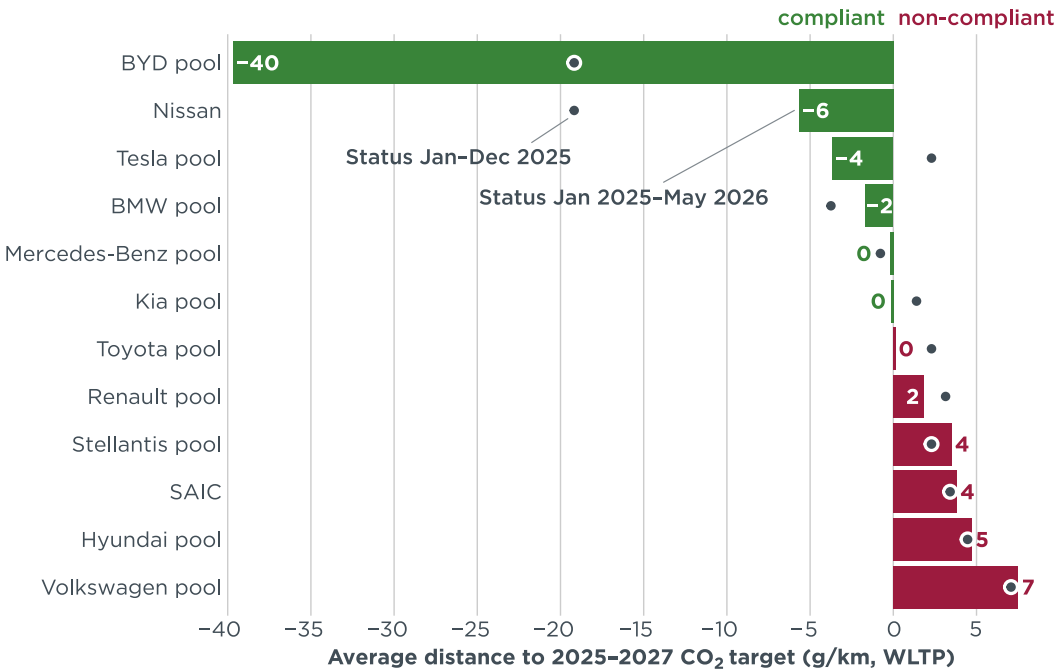
CO₂ EMISSIONS PERFORMANCE BY MANUFACTURER POOL AND GROUP

Under EU regulation, carmakers are required to reduce their CO₂ 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 CO₂ 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 CO₂ 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–May 2026, manufacturer CO₂ emissions averaged 96 g CO₂/km. After accounting for compliance credits, manufacturers were on average 2 g CO₂/km above the 2026 target (see Table A2 of the Appendix). For the full reporting period from January 2025 to May 2026, adjusted emissions stood at around 96 g CO₂/km. When including compliance credits, manufacturing pools thus remained 3 g CO₂/km short of the average target of 93 g CO₂/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–May 2026 reporting period, the BYD pool (40 g CO₂/km below), Nissan (6 g CO₂/km below), the Tesla pool (4 g CO₂/km below), the BMW pool (2 g CO₂/km below), as well as the Mercedes-Benz, Kia, and Toyota pools (at target) were all on track to meet their 2025–2027 targets, while the Volkswagen pool (+7 g CO₂/km) remained the furthest from its target (see Figure 4).

Figure 4
Average distance to 2025–2027 CO₂ targets for manufacturer pools and individual manufacturers



Note: Emission values include compliance credits. All CO₂ 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 Tesla and BYD pools had the largest BEV registration shares in May 2026, at 41% and 35%, respectively. The Kia (32%), Mercedes-Benz (32%), and BMW (29%) pools also had shares above the European average of 22%. The Toyota pool (12%), SAIC (13%), and Stellantis pool (14%) had the lowest BEV shares in May (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 CO₂/km and 76 g CO₂/km, respectively, below their projected brand-level average targets for 2025–2027 at the end of May 2026, followed by Volvo (29 g CO₂/km below), Mini (17 g CO₂/km below), and Cupra (16 g CO₂/km below). Nissan (27 g CO₂/km above), SEAT (24 g CO₂/km above), Mazda (20 g CO₂/km above), Mercedes-Benz (19 g CO₂/km above), and Fiat (18 g CO₂/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–May 2026 at 27%. The Mercedes-Benz Group increased its BEV share by 7 percentage points compared with January–May 2025, and the Hyundai, Renault, and Toyota groups all recorded increases in BEV shares of 5 percentage points, with Toyota doubling its share from 5% to 10% (Table 1). With a 26% market share in January–May 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–May 2026

Manufacturer group	Battery electric car share		Plug-in hybrid car share		Market share Jan–May 2026
	Jan–May 2026	Change vs. Jan–May 2025	Jan–May 2026	Change vs. Jan–May 2025	
BMW Group	27%	+3 pp	13%	–1 pp	7%
Hyundai Group	24%	+5 pp	5%	–1 pp	7%
Mercedes-Benz Group	23%	+7 pp	17%	–2 pp	5%
Volkswagen Group	19%	+1 pp	12%	+3 pp	26%
Renault Group	17%	+5 pp	1%	0 pp	10%
Stellantis	14%	+2 pp	2%	0 pp	17%
Toyota Group	10%	+5 pp	6%	–2 pp	7%

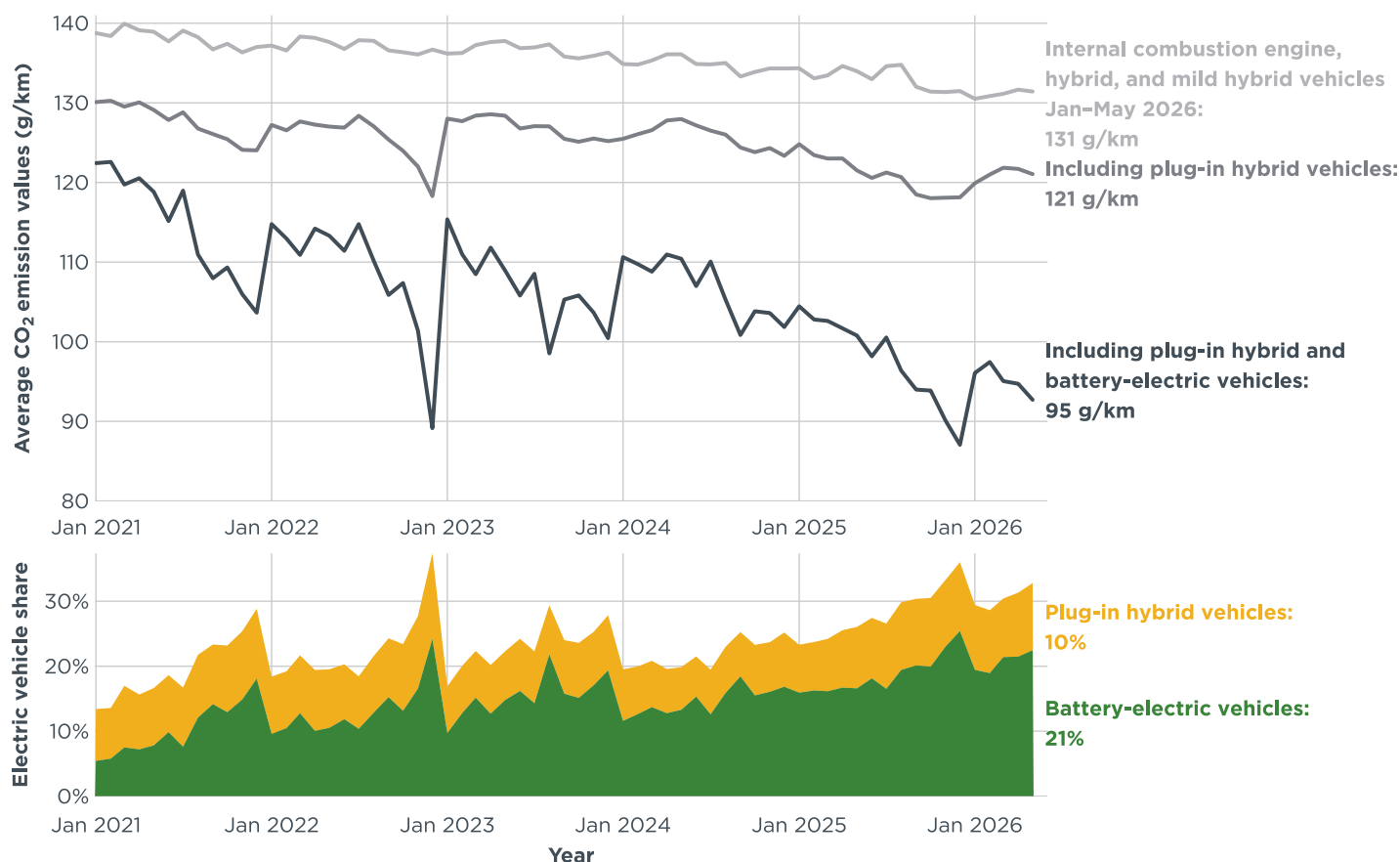
CO₂ EMISSIONS BY POWERTRAIN TYPE

Of all powertrain types, battery electric cars have the largest potential to reduce total CO₂ emissions.² When looking at new registrations of ICEVs (including HEVs and MHEVs) alone, CO₂ emissions averaged 131 g CO₂/km in January–May 2026. Including PHEVs reduced the average to 121 g CO₂/km, while the increasing market share of BEVs reduced average CO₂ emissions by an additional 26 g CO₂/km in January–May (see Figure 5).

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/>.

Figure 5

Average CO₂ emissions of newly registered internal combustion engine vehicles and fleet-average reductions associated with including electrified powertrains



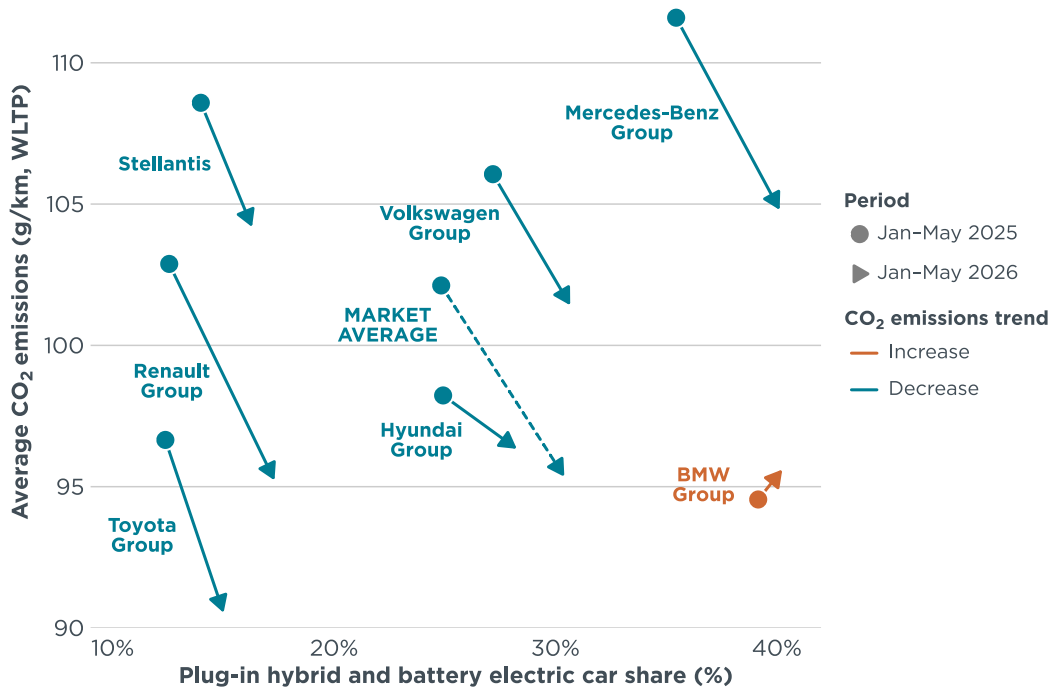
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Looking at the relationship between electric car shares and average CO₂ emissions, the Mercedes-Benz Group had the highest average emissions of the top manufacturers in Europe while also having the highest combined share of PHEVs and BEVs in January–May 2026. This was largely due to the high average CO₂ emissions of the group’s non-electrified powertrains, which stood at about 163 g CO₂/km in January–May 2026, the highest level among Europe’s largest carmaker groups. By contrast, Toyota, with its focus on hybrid powertrains, had average CO₂ emissions below its 2026 target in January–May 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’s 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 CO₂ target cycles: without interim annual targets, manufacturers often scale back their CO₂ 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

³ Sonsoles Díaz et al., *CO₂ 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/>.

Figure 6
Fleet-average CO₂ emissions compared with electric vehicle share by manufacturer group, January–May 2026 versus January–May 2025



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SPOTLIGHT: EV UPTAKE IN EUROPE'S CORPORATE FLEETS

In Europe, corporate registrations account for about 60% of the new car market. This category includes all vehicles registered to legal entities that are not private individuals, such as company fleets of any size, rental fleets, and dealers' and manufacturers' self-registrations. Given their substantial share of new registrations and distinct usage patterns, corporate fleets represent a key lever for accelerating the decarbonization of road transport. Compared with privately owned cars, corporate vehicles tend to cover greater annual distances, resulting in higher cumulative CO₂ emissions. Further, corporate vehicle fleets typically have a faster turn over; they therefore enter the second-hand market more quickly, expanding access for a wider range of consumers.⁴

In Europe's four largest car markets by new registrations (Germany, Italy, France, and Spain), the BEV adoption rate for corporate fleets has been slower or equal to that of private households.⁵ To accelerate corporate uptake of ZLEVs, the European Commission put forward the CCVR proposal in December 2025.⁶ The proposal sets binding fleet electrification targets for large companies⁷ by individual Member State (and not by individual company) for 2030 and 2035, with the aim of creating a predictable ZLEV demand, accelerating emission reductions, and increasing the availability of more affordable used ZLEVs.

Figure 7 shows the battery electric share of total corporate car registrations (across all company sizes) in January–May 2026 and January–May 2025 for nine selected countries (January–March for Belgium), comparing these shares with proposed zero-emission car targets for large companies (250 employees and more) for 2030 under the CCVR. Although the targets apply specifically to large companies, the ZLEV shares of the full corporate market provide a useful benchmark for overall progress. Year-on-year, all countries except Italy and Spain saw an increase in their corporate BEV shares. Belgium stood out with a BEV share of 59% in total new corporate registrations in January–March 2026, slightly above the 2030 target level set for large companies. Denmark, which also has a target of 58%, reached a corporate BEV share of 51% in January–May 2026, slightly below the proposed target. By contrast, Italy recorded a corporate BEV share of just 5% in January–May 2026, substantially below its proposed 45% target for large companies by 2030.

4 Sandra Wappelhorst, *The European Union's Proposal for a Clean Corporate Vehicles Regulation: Scope and Relevance for Germany* (International Council on Clean Transportation, 2026), <https://theicct.org/publication/eu-proposal-for-a-clean-corporate-vehicles-regulation-scope-and-relevance-for-germany-may26/>.

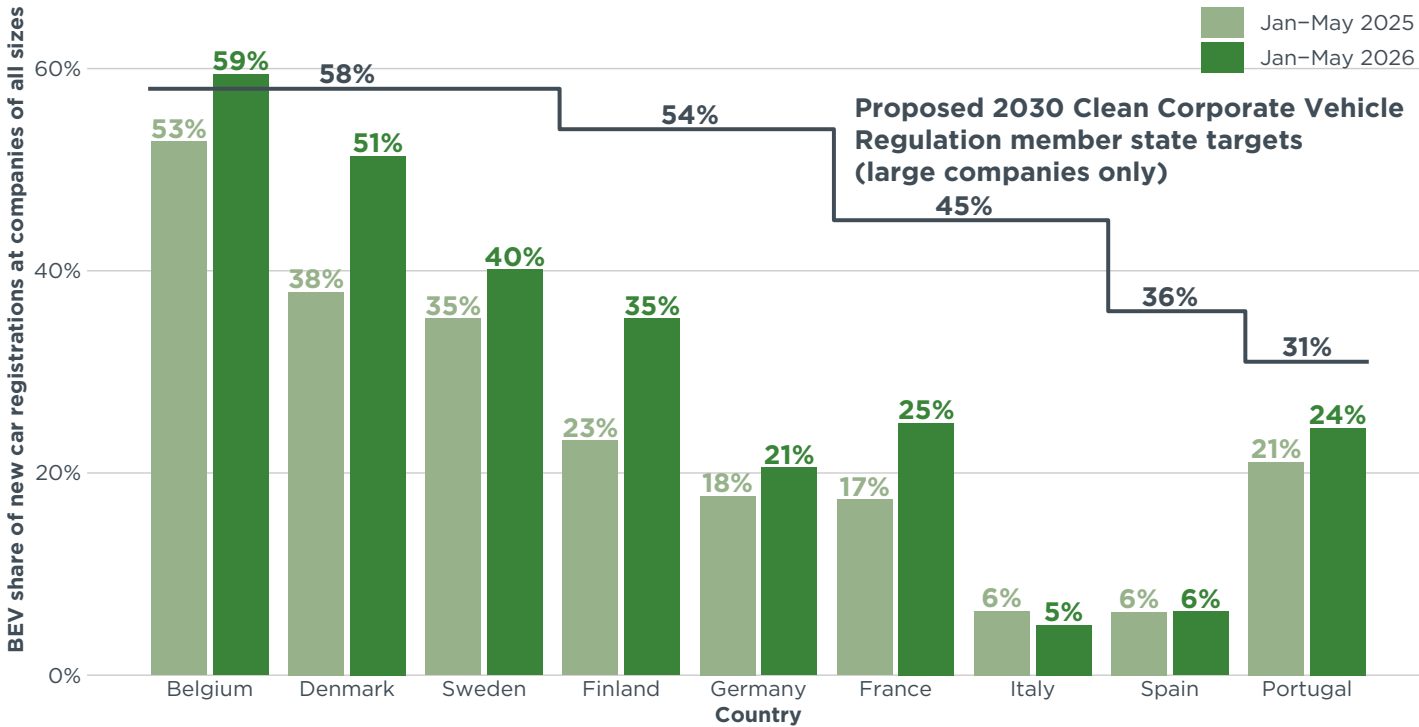
5 Sandra Wappelhorst and Sonsoles Díaz, *Decarbonization of Europe's Corporate Fleet* (International Council on Clean Transportation, 2025), <https://theicct.org/publication/decarbonization-of-europes-corporate-fleet-oct25>.

6 Proposal for a Regulation of the European Parliament and of the Council on Clean Corporate Vehicles, COM/2025/994 final, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2025:994:FIN>.

7 Under the CCVR, a corporate entity is classified as "large" if it meets at least two of the following conditions during the financial year: (a) the entity has 250 employees or more; (b) it has a net turnover of €40 million or more; or (c) it maintains a balance sheet total of €20 million or more.

Figure 7

Battery electric share in new corporate car registrations (all company sizes) for nine selected European countries, January–May 2026 versus January–May 2025



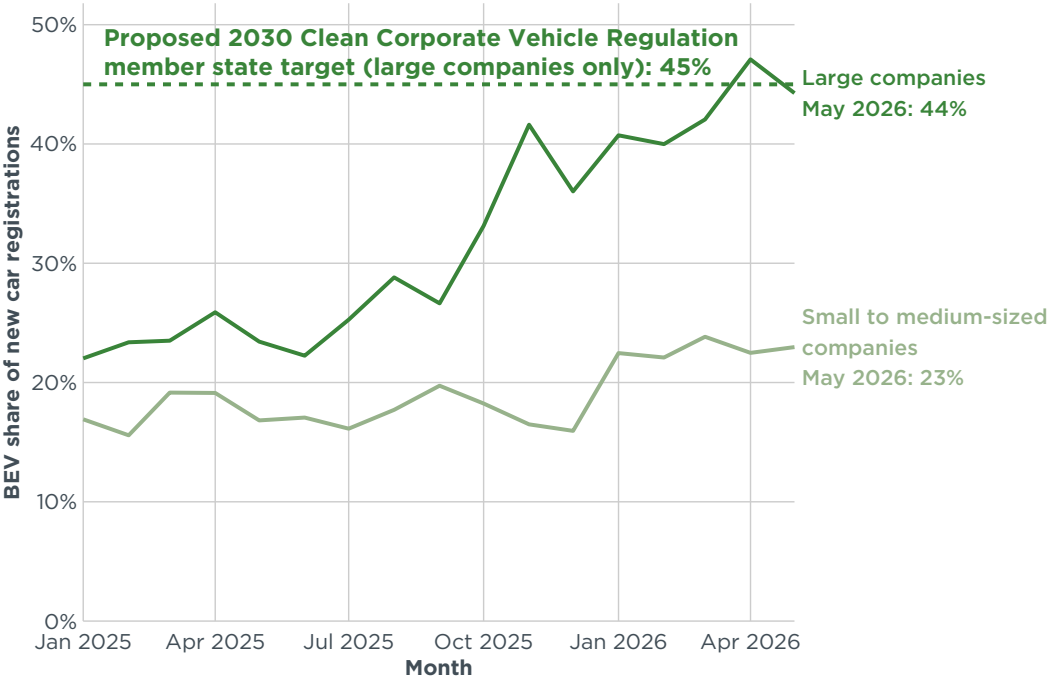
Note: Data for Belgium cover January–March only; proposed targets under the Clean Corporate Vehicles Regulation are calculated at the Member State level (for large companies only). For source information, see the section on definitions, data sources, methodology, and assumptions.

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Figure 8 illustrates the evolution of BEV shares in large-sized enterprises and small- to medium-sized enterprises (SMEs) in France, allowing for a differentiated analysis of corporate BEV uptake and a direct comparison with the national 2030 CCVR proposal target. SMEs are defined as those with fewer than 250 employees. Between January 2025 and May 2026, large companies, which represented about 27% of total corporate registrations in France over that period, saw a steady increase in their BEV share, reaching 44% in May 2026. April marked the first month in which the BEV share, at 47%, surpassed the 2030 target. For comparison, SMEs, which are not covered by the CCVR proposal, showed a slower rate of adoption, reaching a BEV share of 23% in May 2026. Based on the high BEV shares recorded by large companies in France, most countries are likely to be closer to their proposed CCVR targets than suggested in Figure 7.

Figure 8

Battery electric share in new corporate car registrations by company size, January 2025–May 2026



Note: Proposed targets under the Clean Corporate Vehicles Regulation are calculated at the Member State level (for large companies only). For source information, see the section on definitions, data sources, methodology, and assumptions.

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	May 2026				Jan–May 2026				Jan–May 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Tesla pool	41%	6%	9%	33%	36%	6%	11%	36%	22%	7%	13%	41%	31%	7%	12%	37%
BYD pool	35%	65%	0%	0%	42%	58%	0%	0%	60%	40%	0%	0%	58%	42%	0%	0%
Kia pool	32%	4%	18%	11%	27%	4%	18%	13%	21%	6%	15%	14%	22%	5%	16%	13%
Mercedes-Benz pool	32%	20%	0%	36%	29%	20%	0%	36%	23%	24%	0%	37%	26%	24%	0%	36%
All other brands	31%	25%	16%	7%	29%	24%	14%	9%	17%	17%	2%	14%	21%	21%	4%	11%
BMW pool	29%	12%	0%	39%	27%	13%	0%	38%	24%	14%	0%	37%	27%	15%	0%	37%
AVERAGE	22%	10%	14%	23%	21%	10%	14%	25%	16%	8%	13%	23%	19%	9%	13%	22%
Hyundai pool	21%	5%	29%	4%	21%	6%	26%	6%	17%	6%	21%	13%	18%	6%	21%	13%
Volkswagen pool	19%	12%	0%	20%	19%	12%	0%	19%	18%	9%	0%	15%	19%	11%	0%	14%
Renault pool	17%	1%	30%	7%	16%	1%	33%	7%	11%	1%	29%	9%	13%	1%	29%	9%
Nissan	15%	0%	38%	30%	8%	0%	37%	37%	8%	0%	37%	31%	7%	0%	40%	31%
Stellantis pool	14%	2%	0%	52%	14%	2%	0%	56%	12%	2%	0%	45%	13%	3%	0%	47%
SAIC	13%	7%	61%	0%	11%	7%	62%	0%	12%	7%	40%	0%	14%	10%	46%	0%
Toyota pool	12%	5%	79%	0%	10%	6%	80%	0%	4%	8%	74%	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 CO₂ emissions of new passenger cars and market share by manufacturer pool or manufacturer, January–May 2026

Manufacturer or manufacturer pool	New car fleet-average CO ₂ (in g/km, per WLTP)								Market share Jan–May 2026
	May 2026	Jan–May 2026	Compliance credits – Eco-innovations	Adj. Jan–May 2026	Reference target 2026	Compliance credits – ZLEV factor	Target 2026	Target gap	
BYD pool	31	24	0	24	87	1.05	91	–67	2%
Tesla pool	74	80	0.7	79	92	1.05	97	–17	8%
Toyota pool	88	90	0.5	90	95	1	95	–5	7%
Kia pool	86	92	0.3	92	93	1.03	96	–4	3%
Renault pool	95	96	1.2	94	96	1	96	–2	10%
Mercedes-Benz pool	88	92	0.2	92	86	1.05	91	1	7%
AVERAGE	93	96	0.7	95	93	1	93	2	
BMW pool	94	96	1	95	89	1.03	91	3	7%
SAIC	97	100	0	100	95	1	95	5	2%
Hyundai pool	100	100	0.3	100	94	1	94	5	3%
Stellantis pool	105	104	1.3	103	97	1	97	6	17%
Volkswagen pool	101	101	0.6	101	92	1	92	8	26%
Nissan	109	118	0.9	117	93	1	93	24	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–May 2026 CO₂ value equals the average CO₂ 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 CO₂ emissions of new passenger cars and market share by manufacturer pool or manufacturer, January 2025–May 2026

Manufacturer or manufacturer pool	New registrations		New car fleet-average CO ₂ (in g/km, per WLTP)						
	2025	Jan–May 2026	Adj. 2025	Target 2025	Adj. Jan–May 2026	Target 2026	Adj. Jan 2025–May 2026	Target 2025–2027	Target gap
BYD pool	134,886	100,125	76	95	24	91	54	94	–40
Nissan	197,056	90,758	76	95	117	93	89	95	–6
Tesla pool	871,140	376,514	97	95	79	97	92	96	–4
BMW pool	774,937	322,578	89	93	95	91	91	93	–2
Mercedes-Benz pool	896,219	357,818	90	91	92	91	91	91	0
Kia pool	395,669	164,279	96	94	92	96	95	95	0
Toyota pool	815,957	343,443	97	95	90	95	95	95	0
Renault pool	1,234,444	479,744	99	96	94	96	98	96	2
AVERAGE	11,043,733	4,557,935	97	93	95	93	96	93	3
Stellantis pool	1,681,985	798,584	97	95	103	97	99	96	4
SAIC	218,661	100,627	99	95	100	95	99	95	4
Hyundai pool	431,436	156,162	99	94	100	94	99	94	5
Volkswagen pool	3,017,974	1,267,303	101	94	101	92	101	93	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–May 2026 CO₂ values are calculated as the average CO₂ 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 CO₂ emissions in 2025 and January–May 2026. If a manufacturer was part of a pool in 2025, the pool's average CO₂ 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 CO₂ emissions of new passenger cars and market share by manufacturer group and brand, January 2025 to May 2026

Manufacturer group/brand	New car fleet-average CO ₂ (in g/km)									Market share Jan–May 2026
	May 2026	Jan 2026–May 2026	Jan 2025–May 2026	Compliance credits – Eco-innovations	Adj. Jan 2025–May 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	31	24	16	0	16	87	1.05	91	–76	2%
BYD	31	24	16	0	16	87	1.05	91	–76	2%
Volvo Cars	62	64	56	0.1	56	87	1.05	91	–35	2%
Volvo	69	71	63	0.1	63	87	1.05	91	–29	2%
Toyota Group	88	90	95	0.5	94	95	1	95	–1	7%
Toyota	87	90	95	0.5	94	96	1	96	–1	7%
Hyundai Group	92	96	97	0.3	97	94	1	94	3	7%
Kia	86	92	95	0.3	95	93	1.02	95	0	3%
Hyundai	100	100	99	0.3	99	94	1	94	5	3%
BMW Group	94	96	92	1	91	89	1.05	93	–2	7%
BMW	95	97	94	1	93	88	1.05	92	0	6%
Mini	86	88	82	1	81	93	1.05	98	–17	1%
Renault Group	94	95	99	1.2	97	96	1	96	1	10%
Renault	81	84	89	1.1	88	95	1	95	–7	6%
Dacia	111	113	113	1.4	112	98	1	98	14	4%
SAIC Motor	97	100	99	0	99	95	1	95	4	2%
MG	97	100	99	0	99	95	1	95	4	2%
Mercedes-Benz Group	101	105	106	0.2	106	86	1.05	90	16	5%
Mercedes-Benz	105	107	109	0.2	108	86	1.03	89	19	5%
Volkswagen Group	101	101	102	0.6	101	92	1.01	93	8	26%
VW	102	102	101	0.4	100	93	1.01	94	7	11%
Škoda	94	96	99	0.4	98	93	1	93	6	7%
Audi	101	101	106	0.7	105	89	1.01	91	15	5%
Cupra	86	87	82	0.8	81	92	1.05	97	–16	2%
SEAT	124	123	123	1.7	121	97	1	97	24	2%
Stellantis	105	104	106	1.3	104	96	1	96	8	17%
Peugeot	95	96	100	1.2	99	96	1	96	3	5%
Fiat	123	121	119	0.9	118	100	1	100	18	3%
Citroën	102	100	104	1.6	103	96	1	96	6	3%
Opel/Vauxhall	103	101	104	1.6	103	97	1	97	6	3%
Jeep	106	108	108	1.4	106	95	1	95	12	1%
Suzuki	107	110	113	1.5	111	99	1	99	12	1%
Suzuki	107	110	113	1.5	111	99	1	99	12	1%
Nissan	109	118	121	0.9	120	93	1	93	27	2%
Nissan	109	118	121	0.9	120	93	1	93	27	2%
Ford	113	107	107	1	106	92	1	92	14	3%
Ford	113	107	107	1	106	92	1	92	14	3%
Mazda	119	117	114	0.5	114	93	1	93	20	1%
Mazda	119	117	114	0.5	114	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 CO₂ emissions. See the section on definitions, data sources, methodology, and assumptions for details.

* The CO₂ 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	May 2026	Percentage change vs. May 2025	Jan-May 2026	Percentage change vs. Jan-May 2025
Germany	239,448	0%	1,188,015	4%
Italy	149,934	7%	791,963	9%
France	128,488	4%	668,384	-1%
Spain	114,291	-1%	530,458	6%
Poland	49,666	6%	253,457	7%
Belgium	34,081	-2%	188,131	-4%
Netherlands	29,915	1%	136,091	-8%
Sweden	26,128	1%	112,687	-1%
Austria	25,716	5%	131,068	13%
Czechia	20,463	5%	103,410	3%
Denmark	19,173	6%	79,973	13%
Greece	15,611	4%	64,286	4%
Norway	15,560	9%	53,838	-6%
Hungary	11,518	6%	59,809	10%
Romania	11,351	7%	49,245	-10%
Croatia	9,374	5%	34,443	3%
Ireland	8,759	42%	87,405	6%
Slovakia	7,104	-9%	35,165	-4%
Finland	6,783	-1%	29,690	0%
Slovenia	6,182	20%	28,766	15%
Lithuania	4,822	18%	19,068	12%
Bulgaria	4,285	11%	20,449	5%
Luxembourg	3,965	-3%	21,540	1%
Latvia	2,046	-6%	8,865	-2%
Estonia	1,893	34%	8,090	76%
Iceland	1,547	-33%	6,061	-5%
Cyprus	-	-	-	-
Portugal	-	-	-	-

Note: Data for Cyprus and Portugal are not available.

Table A6

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

Country	May 2026				Percentage change vs. May 2025				Jan-May 2026				Percentage change vs. Jan-May 2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	59,956	27,952	11,780	55,647	39%	11%	8%	-1%	283,862	131,785	59,077	284,808	41%	16%	12%	4%
France	37,414	8,221	25,868	29,065	93%	0%	-7%	9%	185,713	36,649	149,743	157,030	55%	-2%	-6%	10%
Norway	15,210	97	95	29	14%	-36%	-81%	-26%	52,779	311	124	89	0%	-81%	-91%	-45%
Denmark	15,017	98	669	1,358	37%	-79%	-41%	32%	63,644	622	2,369	6,114	41%	-70%	-24%	28%
Italy	13,164	15,160	23,899	45,951	85%	69%	32%	9%	64,102	67,706	123,994	272,360	74%	87%	35%	20%
Belgium	12,587	1,795	3,919	8,180	11%	-45%	8%	6%	66,029	10,325	22,373	43,792	3%	-36%	-2%	8%
Netherlands	12,362	6,816	4,494	3,750	22%	2%	10%	-4%	46,668	33,881	21,281	20,389	-10%	20%	7%	-9%
Spain	12,354	14,400	26,232	26,952	34%	9%	48%	-1%	50,268	64,564	114,354	132,776	39%	49%	32%	10%
Sweden	10,731	6,654	1,934	3,593	13%	-2%	-11%	3%	45,854	27,490	9,156	15,420	18%	-7%	-5%	-5%
Austria	6,629	2,905	1,843	5,395	22%	17%	-1%	8%	31,098	13,965	10,410	28,877	23%	32%	25%	21%
Finland	3,309	721	1,211	832	44%	-50%	2%	32%	14,155	3,842	4,337	3,954	38%	-39%	-17%	29%
Ireland	2,356	1,182	1,471	1,048	113%	5%	89%	67%	19,177	12,452	17,389	12,787	54%	6%	7%	35%
Poland	2,079	4,878	11,629	14,724	-26%	103%	20%	16%	13,662	21,732	59,501	74,405	30%	98%	11%	12%
Czechia	1,356	1,096	2,078	3,135	12%	16%	14%	12%	6,483	4,959	9,477	15,993	17%	25%	16%	13%
Hungary	1,319	1,110	1,694	3,666	65%	112%	-11%	-5%	5,936	4,544	9,657	21,584	52%	98%	13%	9%
Luxembourg	1,248	238	301	1,072	41%	-38%	4%	10%	6,162	1,219	1,517	5,641	10%	-32%	-1%	24%
Slovenia	1,039	198	591	1,190	125%	-2%	47%	28%	4,380	993	2,866	6,098	103%	39%	60%	29%
Greece	919	904	3,557	5,160	26%	-13%	14%	25%	3,880	4,069	14,778	21,778	17%	-9%	27%	23%
Romania	796	1,191	3,015	2,715	83%	86%	65%	-7%	4,025	4,406	12,180	12,302	40%	59%	36%	-16%
Iceland	789	229	140	197	89%	-52%	-61%	-48%	2,369	1,458	603	976	28%	2%	-33%	28%
Slovakia	483	384	930	1,488	11%	4%	1%	-6%	2,142	1,492	4,547	8,412	21%	-5%	3%	14%
Croatia	330	552	769	2,218	459%	205%	210%	174%	1,401	1,660	2,524	8,131	299%	143%	113%	143%
Lithuania	288	539	1,490	1,312	32%	67%	43%	42%	1,373	2,267	4,720	5,440	50%	73%	3%	37%
Latvia	106	148	639	625	-35%	-42%	9%	27%	550	824	2,324	2,754	-6%	-16%	7%	27%
Estonia	98	146	699	537	63%	10%	72%	46%	474	703	2,427	2,345	43%	54%	86%	103%
Cyprus	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Portugal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Note: Data for Cyprus 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	May 2026				Jan-May 2026				Jan-May 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Norway	98%	1%	1%	0%	98%	1%	0%	0%	93%	3%	2%	0%	96%	2%	1%	0%
Denmark	78%	1%	3%	7%	80%	1%	3%	8%	63%	3%	4%	7%	68%	3%	4%	7%
Iceland	51%	15%	9%	13%	39%	24%	10%	16%	29%	22%	14%	12%	41%	20%	12%	10%
Finland	49%	11%	18%	12%	48%	13%	15%	13%	34%	21%	17%	10%	37%	20%	17%	10%
Netherlands	41%	23%	15%	13%	34%	25%	16%	15%	35%	19%	13%	15%	40%	19%	13%	13%
Sweden	41%	25%	7%	14%	41%	24%	8%	14%	34%	26%	8%	14%	36%	27%	9%	13%
Belgium	37%	5%	11%	24%	35%	5%	12%	23%	33%	8%	12%	21%	34%	9%	11%	21%
Luxembourg	31%	6%	8%	27%	29%	6%	7%	26%	26%	8%	7%	21%	27%	8%	7%	23%
France	29%	6%	20%	23%	28%	5%	22%	23%	18%	6%	24%	21%	20%	7%	22%	21%
Ireland	27%	13%	17%	12%	22%	14%	20%	15%	15%	14%	20%	11%	18%	14%	19%	11%
Austria	26%	11%	7%	21%	24%	11%	8%	22%	22%	9%	7%	21%	21%	10%	8%	21%
Germany	25%	12%	5%	23%	24%	11%	5%	24%	18%	10%	5%	24%	19%	11%	5%	24%
Slovenia	17%	3%	10%	19%	15%	3%	10%	21%	9%	3%	7%	19%	11%	3%	8%	19%
Hungary	11%	10%	15%	32%	10%	8%	16%	36%	7%	4%	16%	36%	9%	6%	15%	35%
Spain	11%	13%	23%	24%	9%	12%	22%	25%	7%	9%	17%	24%	9%	11%	18%	23%
Italy	9%	10%	16%	31%	8%	9%	16%	34%	5%	5%	13%	31%	6%	6%	13%	31%
Romania	7%	10%	27%	24%	8%	9%	25%	25%	5%	5%	16%	27%	6%	6%	19%	24%
Slovakia	7%	5%	13%	21%	6%	4%	13%	24%	5%	4%	12%	20%	5%	5%	13%	22%
Czechia	7%	5%	10%	15%	6%	5%	9%	15%	6%	4%	8%	14%	6%	4%	9%	14%
Lithuania	6%	11%	31%	27%	7%	12%	25%	29%	5%	8%	27%	23%	7%	11%	25%	22%
Greece	6%	6%	23%	33%	6%	6%	23%	34%	5%	7%	19%	28%	6%	8%	20%	30%
Latvia	5%	7%	31%	31%	6%	9%	26%	31%	7%	11%	24%	24%	7%	12%	25%	24%
Estonia	5%	8%	37%	28%	6%	9%	30%	29%	7%	10%	28%	25%	6%	11%	23%	28%
Poland	4%	10%	23%	30%	5%	9%	23%	29%	4%	5%	23%	28%	7%	6%	22%	26%
Croatia	4%	6%	8%	24%	4%	5%	7%	24%	1%	2%	4%	10%	2%	3%	5%	12%
Cyprus	-	-	-	-	-	-	-	-	8%	5%	20%	25%	10%	5%	21%	26%
Portugal	-	-	-	-	-	-	-	-	21%	12%	6%	16%	24%	15%	6%	16%

Note: Data for Cyprus and Portugal are not available.

DEFINITIONS, DATA SOURCES, METHODOLOGY, AND ASSUMPTIONS

- » **Manufacturer pools:** Automakers are allowed to form pools to jointly comply with CO₂ 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 CO₂ 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:** CO₂ = carbon dioxide; g/km = grams per kilometer; SME = small- and medium-sized enterprises; 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 CO₂ Emissions Reduction* (International Council on Clean Transportation, 2022), <https://theicct.org/publication/mild-hybrid-emissions-jul22/>.
- » **Geographic scope:** The European CO₂ 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 CO₂ emission levels additionally omit Bulgaria, Hungary, Romania, and Slovenia. In addition, May 2026 data are not available for Cyprus 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 CO₂ 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 CO₂ 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 CO₂ 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 CO₂ regulation. Data on corporate fleets were obtained from the following sources: Belgium: Fédération de l'Automobile et du Cycle en Belgique et au Grand-Duché du Luxembourg (FEBIAC); Denmark: Statistics Denmark—StatBank.dk/BIL53; Finland: Statistics Finland; France: C-Ways; Système d'Immatriculation des Véhicules (SIV); Germany: Kraftfahrt-Bundesamt, FZ 28, May 2026; DL-DE BY 2.0; figures based on own calculations; Italy: Unione Nazionale Rappresentanti Autoveicoli Esteri (UNRAE); Portugal: Associação Automóvel de Portugal (ACAP); Observatório da Mobilidade Elétrica; Spain: Dirección General de Tráfico, Microdatos de Matriculaciones de Vehículos (mensual), May 2026; Sweden: Transport Analysis.

- » **Results may change over time:** Registrations and/or CO₂ data may be retrospectively updated by some of the national type-approval authorities.
- » **Test procedures:** CO₂ values are provided according to the **Worldwide harmonized Light vehicles Test Procedure** (WLTP).
- » **Flexible compliance mechanisms:** To facilitate meeting the CO₂ 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 CO₂ level by up to 6 g/km by deploying eco-innovation technologies. As a conservative estimate, we applied the 2024 level of eco-innovation CO₂ 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 CO₂ 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 CO₂ 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 CO₂ emissions of 50 g/km or less (per WLTP). For details on the ZLEV factor mechanism, see: Jan Dornoff, *CO₂ 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 CO₂ 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., *CO₂ 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 CO₂ target applying from 2025 onward, manufacturers were granted the flexibility to comply based on their average CO₂ emissions over the 3-year period 2025–2027. This means that manufacturers may exceed their CO₂ 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 CO₂ 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/>.
- » **Corporate fleets:** We define a corporate fleet as any group of vehicles owned or leased by a legal entity instead of an individual (e.g., a business or organization). Corporate fleets include vehicles from traditional company fleets, such as leasing and long-term rentals, public administration, and taxi and chauffeur services, as well as vehicles registered by car dealers and manufacturers and those operated by short-term rental companies. Corporate vehicle registration data used in this report also cover vehicles registered by individuals in their capacity as legal entities.



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