

EUROPEAN CAR MARKET MONITOR: JUNE 2026

AT A GLANCE

- » In January–June 2026, Europe’s battery electric car registrations recorded a 22% market share, up 5 percentage points from the same period in 2025.¹ Battery electric car registrations grew by approximately 35% in the first half of 2026 compared with the first half of 2025. Meanwhile, the market share of plug-in hybrid cars increased 1 percentage point, reaching a 10% share.
- » Registrations of conventional combustion engine cars fell by 8 percentage points to a 30% market share in January–June 2026, while mild hybrids and full hybrids increased their shares to 25% and 14%, up 2 and 1 percentage points, respectively.
- » Germany and France, currently Europe’s largest car markets, registered battery electric market shares of 26% and 28%, respectively, representing increases of 8 and 10 percentage points compared with January–June 2025.
- » Italy and Spain, the third- and fourth-largest European markets, also saw growth, with battery electric shares reaching 8% and 10%, respectively, up 3 and 2 percentage points from January–June 2025. In Poland, Europe’s fifth-largest market, the market share remained unchanged at 5%.
- » From January 2025 to June 2026, adjusted carbon dioxide (CO₂) emissions among manufacturer pools stood at approximately 95 g/km on average, less than 2 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–June 2026 at 28%. The Mercedes-Benz Group recorded an 8-percentage-point increase in battery electric car shares compared with January–June 2025, while the Hyundai, Renault, and Toyota groups all recorded increases of 6 percentage points. Toyota more than doubled its share from 4% to 10%.
- » About 1.20 million public charging points had been installed in Europe by the end of June 2026. Belgium recorded the greatest increase in charging points between June 2025 and June 2026, with a 38% increase in direct current (DC) charging points and a 29% increase in alternating current (AC) charging points.

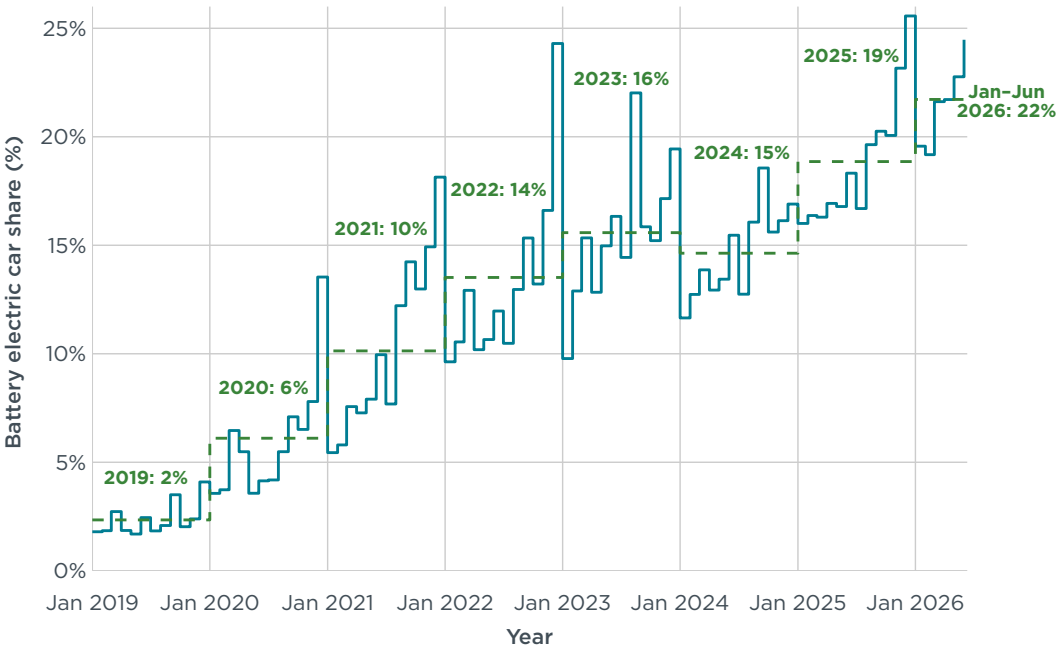
¹ Geographic scope: To the greatest extent permitted by data availability, the definition of Europe used in the ICCT’s Market Monitor reports aligns with EU regulations. The European CO₂ standards for cars and vans applies to the countries of the European Economic Area (EEA), excluding Liechtenstein.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



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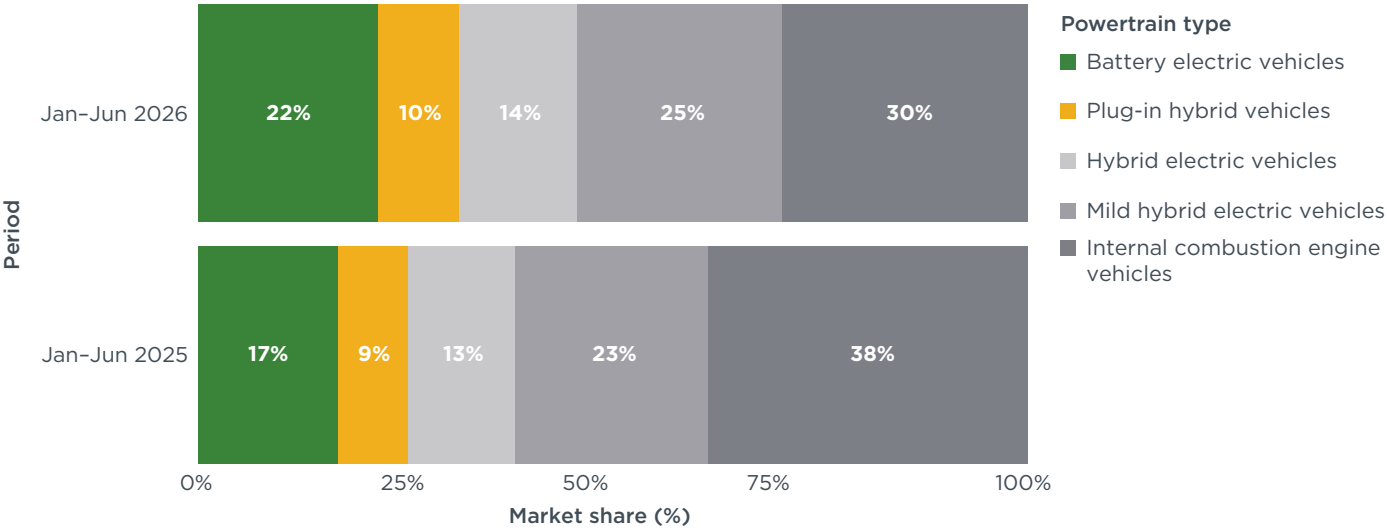


Figure 1
Share of battery electric vehicles among new passenger car registrations in Europe



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Figure 2
Europe’s new car market share by powertrain type, January–June 2026 versus January–June 2025



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PASSENGER CAR REGISTRATIONS IN EUROPE

In June 2026, new battery electric vehicle (BEV) registrations reached a 24% share of all newly registered vehicles. This brought the average share of BEVs among total new registrations in Europe to 22% in January–June 2026, surpassing the 2025 average and marking a 5-percentage-point increase compared with the same period in 2025 (see Figure 1). In absolute terms, BEV registrations grew by approximately 35% in the first half of 2026 compared with the first half of 2025.

Growth in the market share of plug-in hybrid vehicles (PHEVs) was more modest. In January–June 2026, PHEVs accounted for an average of 10% of new car registrations in Europe, up 1 percentage point from January–June 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–June 2026. Meanwhile, conventional internal combustion engine vehicles (ICEVs) comprised 30% of new registrations in January–June 2026. This is 8 percentage points lower than the market share during the same period in 2025 (see Figure 2).

PASSENGER CAR REGISTRATIONS BY COUNTRY

Compared with January–June 2025, total new registrations increased in most of the 10 largest European markets in January–June 2026. Austria and Denmark reported the largest increases, with new registrations growing by 15% and 13%, respectively (see Table A5 in the Appendix).

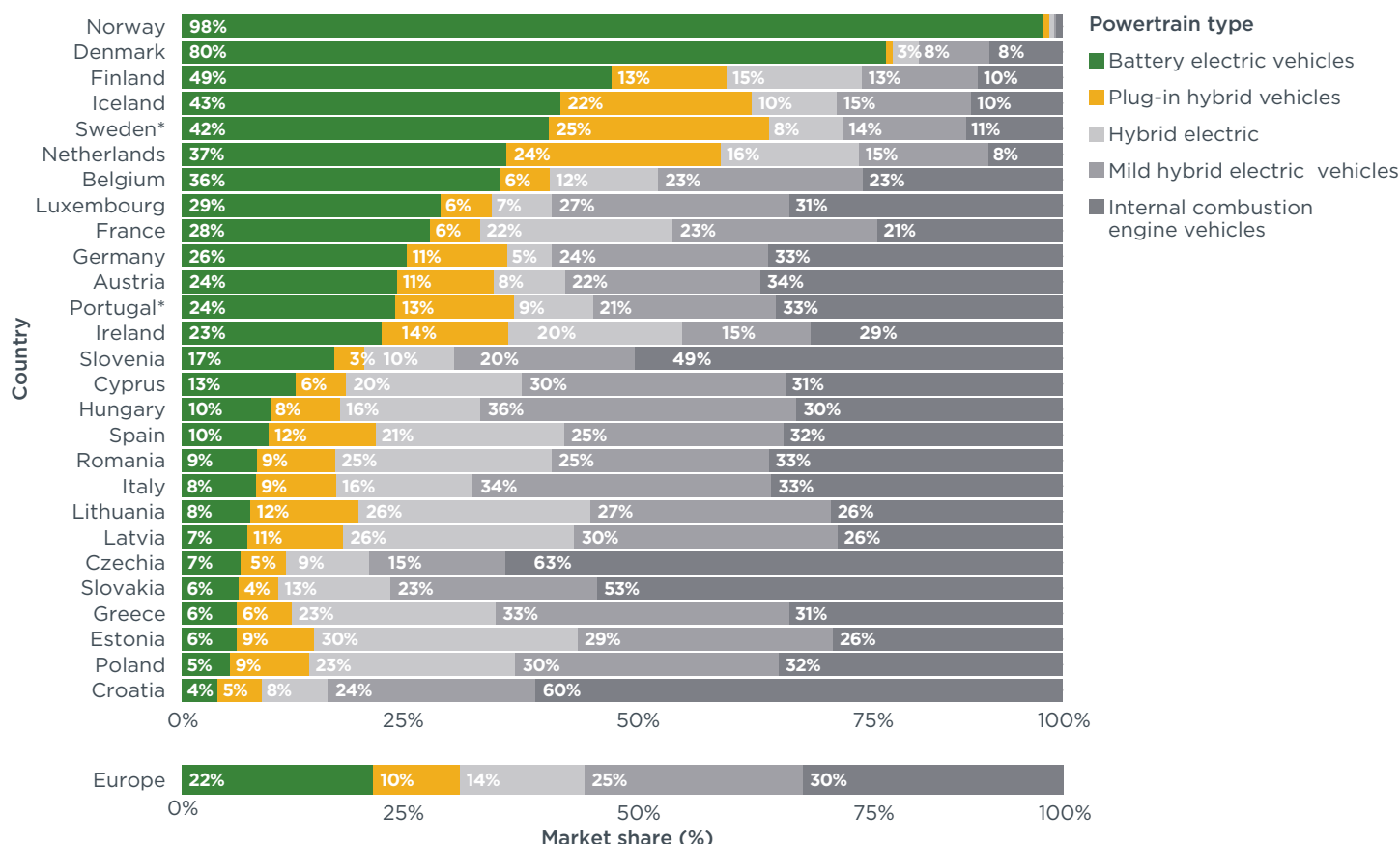
Looking at new BEV registrations in January–June 2026, Germany and France—currently Europe’s largest car markets—had BEV market shares of 26% and 28%, respectively. These represent increases of 8 and 10 percentage points, respectively, compared with the same period in 2025.

Italy and Spain, the third- and fourth-largest markets, had increases of 3 and 2 percentage points in January–June 2026, reaching BEV shares of 8% and 10%, respectively.

Nordic countries led Europe in BEV registration shares, with Norway and Denmark already reaching shares of 98% and 80%, respectively, in January–June 2026, followed by Finland (49%) and Iceland (43%). Sweden (42%), the Netherlands (37%), Belgium (36%), Luxembourg (29%), France (28%), and Germany (26%) all had BEV shares of 25% or more (Figure 3). In January–June 2026, Denmark recorded the greatest increase in BEV market share (+16 percentage points) compared with the same period in 2025.

Figure 3

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



* Data for Portugal and Sweden cover January to May 2026 only.

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Looking at other powertrains in the 10 largest European markets, PHEV shares were the highest in Sweden (25%) and the Netherlands (24%) in January–June 2026. Poland (23%), France (22%), and Spain (21%) had the highest HEV shares, while MHEV shares were the highest in Italy, at 34%, followed by Poland with 30%.

CO₂ EMISSIONS PERFORMANCE BY MANUFACTURER POOL AND GROUP

Under EU regulation, carmakers are required to reduce 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–June 2026, manufacturer CO₂ emissions averaged 94 g CO₂/km. After accounting for compliance credits, manufacturers were, on average, in compliance with the 2026 target (see Table A2 of the Appendix). For the full reporting period from

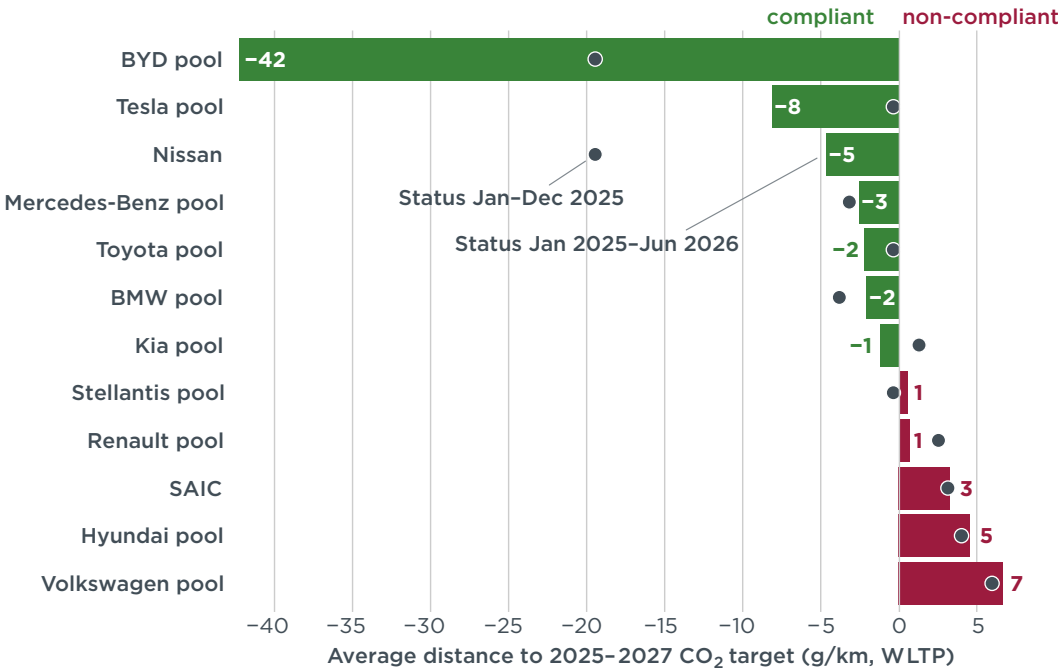
January 2025 to June 2026, adjusted emissions stood at around 95 g CO₂/km. When including compliance credits, manufacturing pools thus remained less than 2 g CO₂/km short of the average target of 93 g CO₂/km for the 2025–2027 period (see Table A3 in the Appendix).

For the full January 2025–June 2026 reporting period, the BYD pool (42 g CO₂/km below), the Tesla pool (8 g CO₂/km below), Nissan (5 g CO₂/km below), the Mercedes-Benz pool (3 g CO₂/km below), the Toyota pool (2 g CO₂/km below), the BMW pool (2 g CO₂/km below), and the Kia pool (1 g CO₂/km below) were all on track to meet their 2025–2027 targets. Together, these pools accounted for approximately 36% of new registrations in January–June 2026.

The Tesla pool increased its target overcompliance by 4 g CO₂/km compared with May 2026. This recorded increase is partly the result of removing special purpose vehicles (SPVs) from the dataset, because these vehicles are not subject to CO₂ standards. This correction had a large impact on Ford, a member of the Tesla pool, which saw a reduction in the estimated CO₂ emissions for 2026 of about 7 g CO₂/km. Overall, however, excluding SPVs only reduced fleet-wide average CO₂ emissions in 2026 by about 1 g CO₂/km.

At the other end of the spectrum, the Volkswagen pool, which accounted for the largest market share (26%), remained the furthest from its target, exceeding it by 7 g CO₂/km. Stellantis, the second largest pool by market share, reduced its target gap by 3 g CO₂/km relative to the average gap as of May 2026, again partly due to the removal of SPVs from the dataset. This correction had the greatest impact on Fiat, part of the Stellantis pool, reducing its estimated CO₂ emission values for 2026 by approximately 17 g CO₂/km (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.

The Tesla and BYD pools had the largest BEV registration shares in June 2026, at 46% and 35%, respectively. The Mercedes-Benz (34%), Kia (34%), and BMW (33%) pools also had shares above the European average of 24%. Nissan and the Toyota pool (each at 13%) had the lowest BEV shares in June (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 74 g CO₂/km, respectively, below their projected brand-level average targets for 2025–2027 at the end of June 2026, followed by Volvo (28 g CO₂/km below), Mini (17 g CO₂/km below), and Cupra (16 g CO₂/km below). Nissan (26 g CO₂/km above), SEAT (24 g CO₂/km above), Mazda (20 g CO₂/km above), Mercedes-Benz (16 g CO₂/km above), and Dacia (14 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–June 2026 at 28%. The Mercedes-Benz Group increased its BEV share by 8 percentage points compared with January–June 2025, and the Hyundai, Renault, and Toyota groups all recorded increases in BEV shares of 6 percentage points, with Toyota more than doubling its share from 4% to 10% (Table 1). With a 26% market share in January–June 2026, the Volkswagen Group increased its PHEV share by 3 percentage points relative to the same period in 2025, while the other carmakers either reduced their PHEV shares or saw no growth.

Table 1
Share of battery electric and plug-in hybrid cars for the top seven manufacturer groups, January–June 2026

Manufacturer group	Battery electric car share		Plug-in hybrid car share		Market share Jan–June 2026
	Jan–June 2026	Change vs. Jan–June 2025	Jan–June 2026	Change vs. Jan–June 2025	
BMW Group	28%	+4 pp	13%	–2 pp	7%
Hyundai Group	25%	+6 pp	4%	–1 pp	7%
Mercedes-Benz Group	25%	+8 pp	17%	–3 pp	5%
Volkswagen Group	19%	+1 pp	12%	+3 pp	26%
Renault Group	18%	+6 pp	1%	0 pp	10%
Stellantis	15%	+3 pp	2%	0 pp	16%
Toyota Group	10%	+6 pp	6%	–3 pp	7%

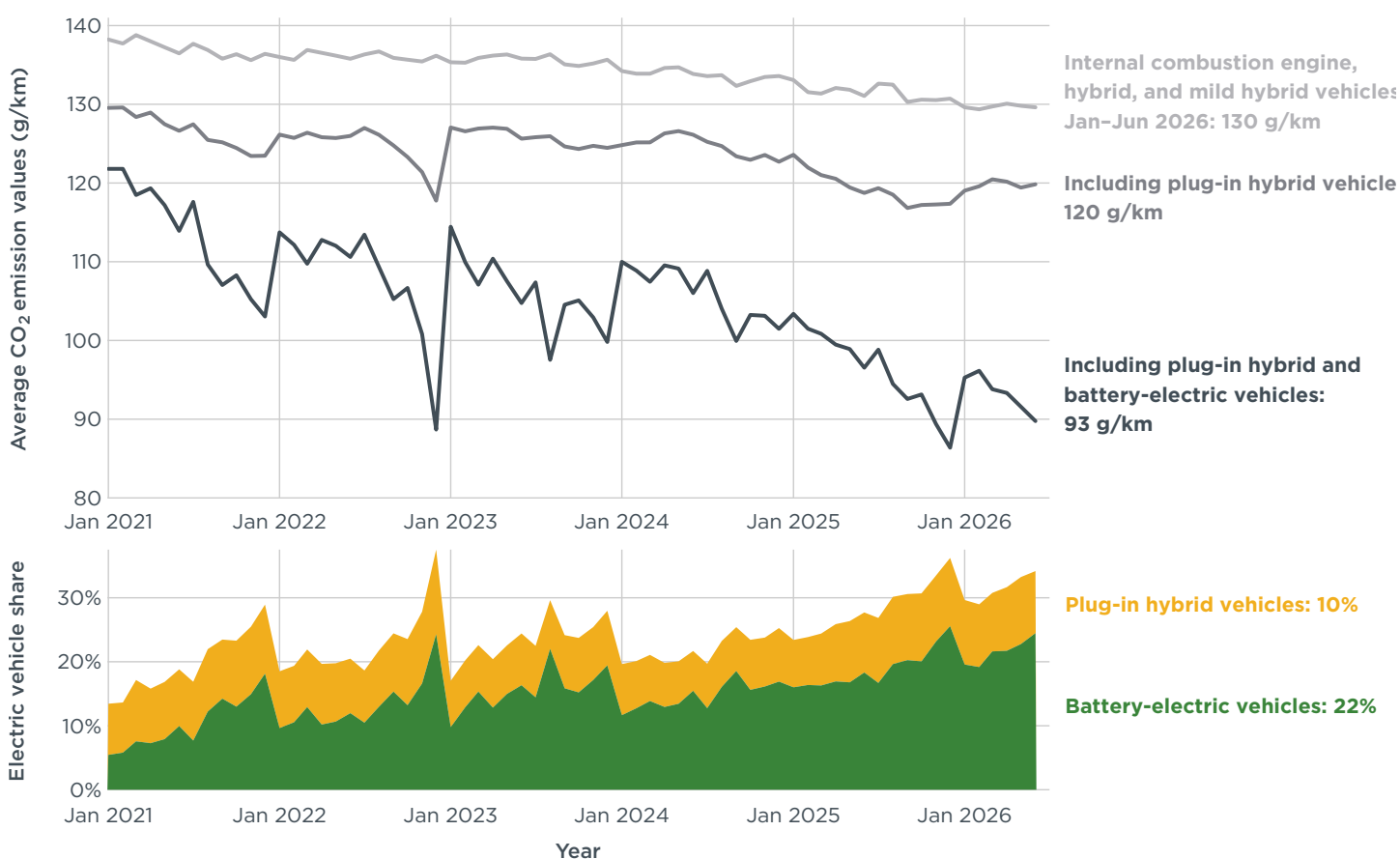
CO₂ EMISSIONS BY POWERTRAIN TYPE

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 130 g CO₂/km in January–June 2026. Including PHEVs reduced the average to 120 g CO₂/km, while the increasing market share of BEVs reduced average CO₂ emissions by an additional 27 g CO₂/km in January–June (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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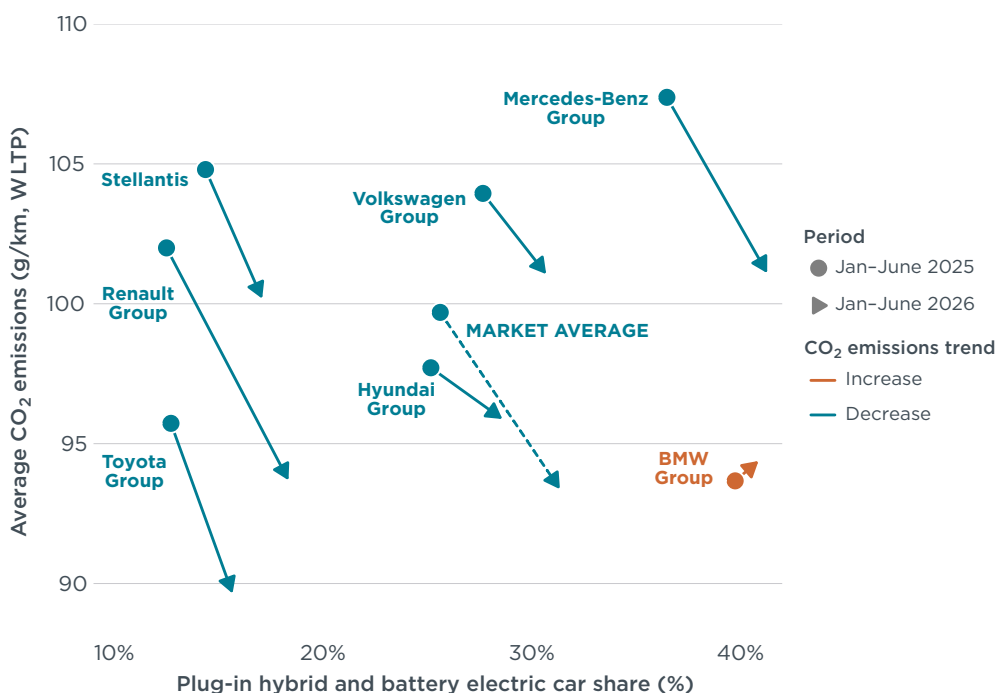
Looking at the relationship between electric car shares and average CO₂ emissions in January–June 2026, the Mercedes-Benz Group had among the highest average emissions of the top manufacturers in Europe. At the same time, it recorded the highest combined share of PHEVs and BEVs among these manufacturers. This was largely driven by the high average CO₂ emissions of the Group's non-electrified powertrains, which stood at about 159 g CO₂/km in January–June 2026, the highest level among Europe's largest carmaker groups. By contrast, Toyota, which has a focus on hybrid powertrains, recorded average CO₂ emissions below its 2026 target in January–June despite maintaining the lowest electric vehicle share.

Among Europe's top manufacturers, the BMW Group is the only manufacturing group to see an increase in emissions in 2026 compared with the previous year. This reversal is partly due 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 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–June 2026 versus January–June 2025



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SPOTLIGHT: CHARGING INFRASTRUCTURE DEVELOPMENT

The deployment of public charging infrastructure is expanding steadily in Europe. About 1.20 million public charging points had been installed in Europe by the end of the second quarter (Q2) of 2026, up from around 1.04 million at the end of Q2 2025. For AC charging, this represents a 12% increase since the end of Q2 2025, while DC charging points showed even greater growth, increasing 29% since the end of Q2 2025. By the end of June 2026, approximately 79% of Europe's public charging points supplied AC, while the remaining 21% supplied DC.

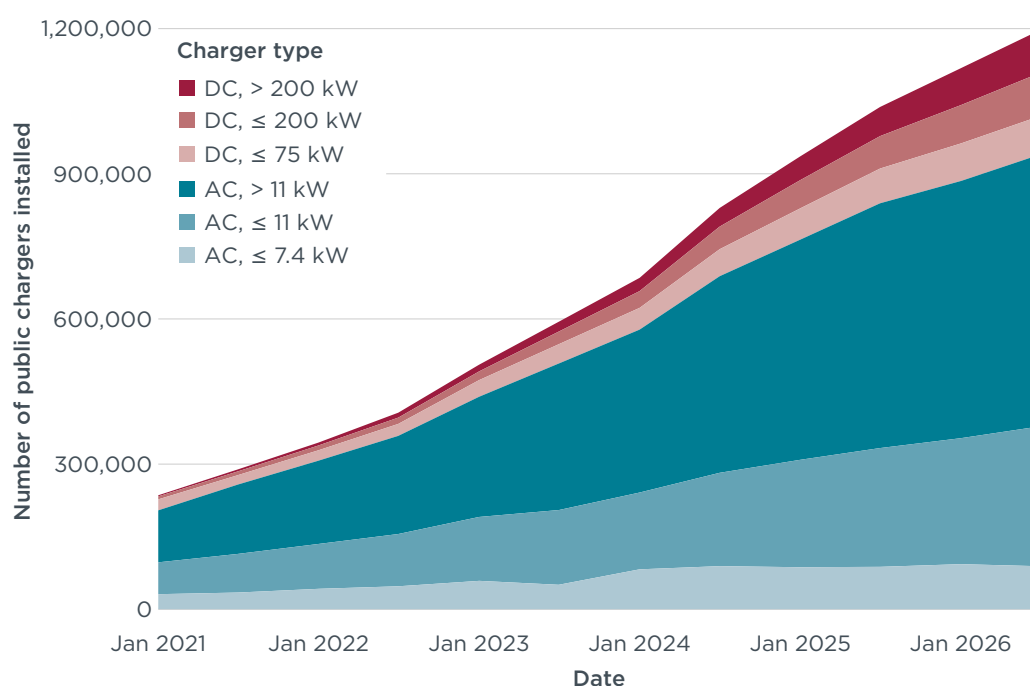
Among the 10 markets with the highest number of installed chargers, Belgium recorded the largest growth in DC chargers by the end of Q2 2026 (+38%) compared with the end of Q2 2025, followed by Italy (+37%) and Denmark (+35%). At +29%, Belgium saw the largest growth in AC chargers (Table 2).

Table 2**Number of publicly accessible charging points by country and power output**

Country	End of Q2 2026		versus end of Q2 2025	
	AC	DC	AC	DC
Netherlands	226,867	8,187	19%	20%
Germany	157,529	58,605	12%	32%
France	119,866	44,224	-3%	21%
Belgium	106,484	8,765	29%	38%
Italy	63,723	20,952	13%	37%
Sweden	54,805	12,802	-3%	22%
Spain	39,152	17,597	9%	29%
Denmark	46,253	10,159	21%	35%
Austria	27,248	10,324	3%	27%
Norway	15,375	14,699	-13%	12%
Other	82,091	50,383	18%	39%
Total	939,393	256,697	12%	29%

Note: See the section on definitions, data sources, methodology, and assumptions for details.

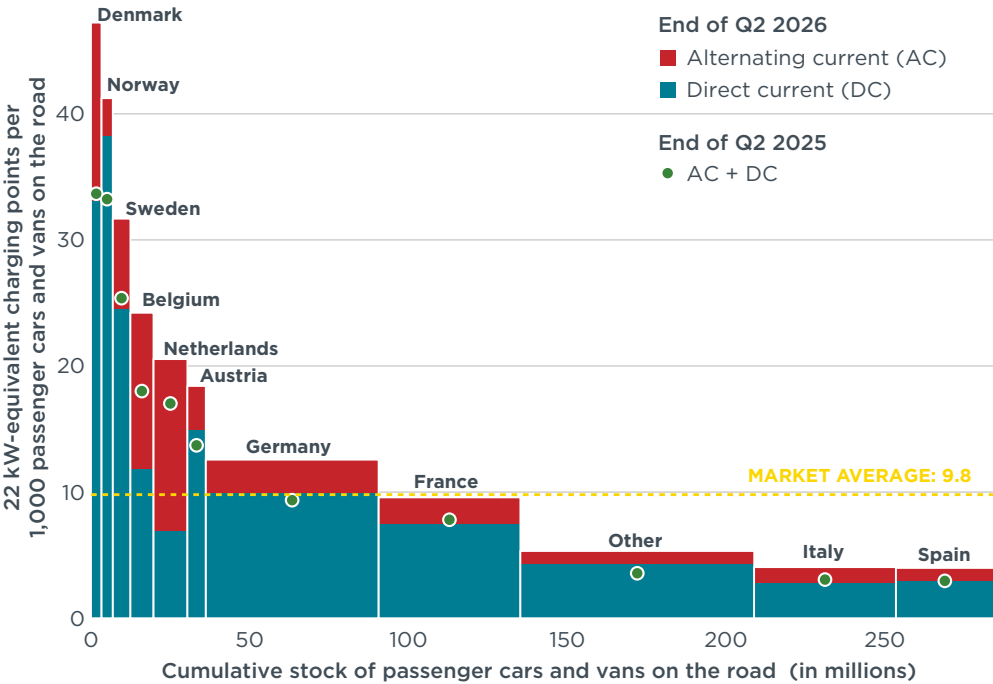
Europe's public charging network is expanding not only in size but also in charging capacity, with the average power rating of public chargers doubling from 25 kW as of January 2021 to 51 kW as of June 2026 (Figure 7). This trend reflects the increase in the charging capacity of electric vehicles. However, the shift toward higher power chargers is not uniform across Europe. In the Netherlands and Belgium, DC chargers accounted for just 3% and 8% of the network, respectively, at the end of Q2 2026. Meanwhile, although growth in Norway's public charging network has slowed, the share of fast chargers has continued to increase, reaching 49% as of June 2026. As a result, Norway had the highest-average charging power output in Europe at 107 kW at the end of Q2 2026.

Figure 7**Number of publicly accessible charging points installed in Europe by charger type, January 2021–June 2026**

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At the end of Q2 2026, there were on average roughly 9.8 22 kW-equivalent publicly accessible charging points installed per thousand passenger cars and vans on the road in Europe, up from 7.5 at the end of Q2 2025 (Figure 8). With about 47 22 kW-equivalent publicly accessible charging points per thousand passenger cars and vans, Denmark led Europe in charging infrastructure, followed by Norway (41), Sweden (32), and Belgium (24). Italy (4) and Spain (4) fell below the European average for publicly accessible charging points.

Figure 8
22 kW-equivalent publicly accessible charging points installed per thousand passenger cars and vans, by power output and country, end of Q2 2026



Note: The width of the bars corresponds to estimated passenger car and van stock sizes as of the end of 2025. The term “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	June 2026				Jan–June 2026				Jan–June 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Tesla pool	46%	5%	9%	32%	39%	6%	11%	35%	25%	7%	13%	41%	31%	7%	12%	38%
BYD pool	35%	65%	0%	0%	40%	60%	0%	0%	60%	40%	0%	0%	58%	42%	0%	0%
Mercedes-Benz pool	34%	17%	0%	37%	30%	20%	0%	37%	23%	24%	0%	38%	26%	24%	0%	36%
Kia pool	34%	2%	19%	9%	28%	4%	18%	12%	20%	6%	15%	14%	22%	5%	16%	13%
BMW pool	33%	11%	0%	37%	28%	13%	0%	38%	25%	15%	0%	37%	27%	15%	0%	37%
All other brands	31%	24%	17%	8%	30%	24%	15%	8%	17%	18%	2%	14%	21%	21%	4%	11%
AVERAGE	24%	10%	14%	23%	22%	10%	14%	25%	17%	9%	13%	23%	19%	9%	13%	23%
Hyundai pool	22%	4%	25%	4%	21%	5%	26%	5%	17%	6%	21%	13%	18%	6%	22%	13%
Renault pool	21%	1%	31%	7%	17%	1%	33%	7%	11%	1%	30%	9%	13%	1%	29%	9%
Volkswagen pool	19%	12%	0%	20%	19%	12%	0%	19%	18%	9%	0%	15%	20%	11%	0%	14%
Stellantis pool	16%	2%	0%	54%	15%	2%	0%	57%	12%	2%	0%	47%	13%	3%	0%	49%
SAIC	16%	8%	62%	0%	12%	7%	62%	0%	13%	8%	40%	0%	14%	10%	46%	0%
Toyota pool	13%	6%	78%	0%	10%	6%	80%	0%	4%	8%	74%	0%	4%	9%	74%	0%
Nissan	13%	0%	37%	35%	9%	0%	37%	37%	8%	0%	37%	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 CO₂ emissions of new passenger cars and market share by manufacturer pool or manufacturer, January–June 2026

Manufacturer or manufacturer pool	New car fleet-average CO ₂ (in g/km, per WLTP)								Market share Jan–June 2026
	June 2026	Jan–June 2026	Compliance credits – Eco-innovations	Adj. Jan–June 2026	Reference target 2026	Compliance credits – ZLEV factor	Target 2026	Target gap	
BYD pool	32	26	0	26	87	1.05	91	–66	2%
Tesla pool	67	75	0.7	74	92	1.05	97	–22	8%
Kia pool	85	91	0.3	91	93	1.05	97	–6	3%
Toyota pool	86	89	0.5	89	95	1	95	–6	7%
Renault pool	89	94	1.2	93	96	1	96	–3	10%
Mercedes-Benz pool	87	90	0.2	89	86	1.05	91	–1	7%
AVERAGE	90	94	0.7	93	93	1	93	0	
BMW pool	89	95	1	94	89	1.04	92	1	7%
Stellantis pool	100	100	1.3	99	96	1	96	2	16%
SAIC	94	99	0	99	95	1	95	4	2%
Hyundai pool	101	100	0.3	100	94	1	94	6	3%
Volkswagen pool	100	101	0.6	100	92	1	92	8	26%
Nissan	109	117	0.9	116	93	1	93	23	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–June 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–June 2026

Manufacturer or manufacturer pool	New registrations		New car fleet-average CO ₂ (in g/km, per WLTP)						
	2025	Jan–June 2026	Adj. 2025	Target 2025	Adj. Jan–June 2026	Target 2026	Adj. Jan 2025–June 2026	Target 2025–2027	Target gap
BYD pool	134,901	131,175	76	95	26	91	51	93	–42
Tesla pool	855,809	468,917	95	95	74	97	87	96	–8
Nissan	197,221	107,436	76	95	116	93	90	95	–5
Mercedes-Benz pool	883,900	430,345	88	91	89	91	88	91	–3
Toyota pool	815,319	416,003	95	95	89	95	93	95	–2
BMW pool	775,614	403,378	89	93	94	92	91	93	–2
Kia pool	395,815	203,210	95	94	91	97	94	95	–1
Stellantis pool	1,627,258	932,102	95	95	99	96	96	95	1
Renault pool	1,230,816	607,707	99	96	93	96	97	96	1
AVERAGE	10,576,253	5,568,695	95	93	93	93	95	93	1
SAIC	218,441	128,289	98	95	99	95	98	95	3
Hyundai pool	431,702	193,209	98	94	100	94	99	94	5
Volkswagen pool	3,009,457	1,546,924	100	94	100	92	100	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–June 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–June 2026. If a manufacturer was part of a pool in 2025, the pool's average CO₂ emissions for that year were 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 June 2026

Manufacturer group/brand	New car fleet-average CO ₂ (in g/km)									Market share Jan–June 2026
	June 2026	Jan 2026–June 2026	Jan 2025–June 2026	Compliance credits – Eco-innovations	Adj. Jan 2025–June 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	32	26	17	0	17	87	1.05	91	–74	2%
BYD	32	26	17	0	17	87	1.05	91	–74	2%
Volvo Cars	64	64	57	0.1	57	87	1.05	91	–34	2%
Volvo	73	72	64	0.1	63	87	1.05	91	–28	2%
Toyota Group	86	89	94	0.5	93	95	1	95	–2	7%
Toyota	85	89	94	0.5	93	95	1	95	–2	7%
Renault Group	89	93	97	1.2	96	96	1	96	0	10%
Renault	76	82	87	1.1	86	95	1	95	–9	6%
Dacia	107	111	113	1.4	111	98	1	98	14	4%
BMW Group	89	95	92	1	91	89	1.05	93	–2	7%
BMW	91	96	94	1	93	88	1.05	92	0	6%
Mini	80	86	82	1	81	93	1.05	98	–17	1%
Hyundai Group	93	96	97	0.3	96	94	1	94	3	7%
Kia	85	91	94	0.3	94	93	1.02	95	–1	3%
Hyundai	102	101	99	0.3	99	94	1	94	5	3%
SAIC Motor	94	99	98	0	98	95	1	95	3	2%
MG	94	99	98	0	98	95	1	95	3	2%
Ford	97	99	100	1	99	91	1.01	92	7	3%
Ford	97	99	100	1	99	91	1.01	92	7	3%
Mercedes-Benz Group	97	101	103	0.2	103	86	1.05	91	12	5%
Mercedes-Benz	101	104	105	0.2	105	86	1.04	89	16	5%
Stellantis	100	100	102	1.3	101	96	1	96	4	16%
Peugeot	98	96	99	1.2	98	96	1	96	2	5%
Citroën	96	96	101	1.6	99	96	1	96	3	3%
Opel/Vauxhall	101	101	104	1.6	102	97	1	97	6	3%
Fiat	104	105	102	0.9	101	99	1	99	1	3%
Jeep	102	107	108	1.4	106	95	1	95	12	1%
Volkswagen Group	100	101	101	0.6	100	92	1.01	93	7	26%
VW	103	101	100	0.4	99	93	1.01	94	6	10%
Škoda	99	97	97	0.4	97	93	1	93	4	7%
Audi	97	101	105	0.7	105	89	1.01	90	14	5%
Cupra	76	84	81	0.8	80	92	1.05	97	–16	2%
SEAT	123	123	123	1.7	121	97	1	97	24	2%
Suzuki	107	110	112	1.5	110	99	1	99	11	1%
Suzuki	107	110	112	1.5	110	99	1	99	11	1%
Nissan	109	117	121	0.9	120	93	1	93	26	2%
Nissan	109	117	121	0.9	120	93	1	93	26	2%
Mazda	122	118	114	0.5	114	93	1	93	20	1%
Mazda	122	118	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	June 2026	Percentage change vs. June 2025	Jan-June 2026	Percentage change vs. Jan-June 2025
Germany	289,733	17%	1,441,764	6%
France	188,787	11%	857,167	2%
Italy	147,713	11%	945,919	10%
Spain	130,992	8%	661,427	6%
Poland	58,074	19%	307,771	9%
Belgium	45,451	9%	230,685	-2%
Netherlands	38,682	14%	172,582	-4%
Austria	34,215	23%	164,365	15%
Czechia	26,068	19%	128,433	6%
Denmark	21,467	13%	100,865	13%
Norway	19,542	6%	73,320	-3%
Greece	17,109	21%	81,388	7%
Romania	16,120	52%	64,851	0%
Hungary	15,015	32%	74,512	13%
Slovakia	9,536	5%	44,471	-2%
Croatia	8,816	-3%	43,163	2%
Finland	7,418	2%	36,481	0%
Slovenia	6,627	30%	35,062	18%
Bulgaria	5,428	18%	25,825	8%
Luxembourg	5,093	22%	26,397	5%
Lithuania	4,909	33%	23,646	15%
Ireland	2,398	-6%	89,296	5%
Latvia	2,369	7%	11,203	0%
Estonia	1,920	24%	9,919	62%
Iceland	1,419	-29%	7,393	-5%
Cyprus	1,133	-16%	7,244	-12%
Portugal	-	-	-	-
Sweden	-	-	-	-

Note: Data for Portugal and Sweden are not available.

Table A6

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

Country	June 2026				Percentage change vs. June 2025				Jan-June 2026				Percentage change vs. Jan-June 2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	84,042	32,222	15,101	68,034	78%	26%	23%	11%	367,881	163,971	74,179	352,836	48%	18%	14%	5%
France	55,851	12,416	39,559	39,905	94%	5%	3%	11%	241,561	47,974	188,599	198,729	63%	-2%	-4%	11%
Norway	18,875	175	329	14	6%	15%	51%	-53%	71,654	486	453	103	1%	-73%	-73%	-47%
Belgium	17,256	2,773	5,973	9,679	35%	-25%	40%	-8%	83,283	13,093	28,342	53,471	8%	-34%	4%	5%
Netherlands	17,234	8,110	5,993	4,892	42%	10%	19%	-5%	63,604	41,864	27,229	25,251	0%	17%	9%	-8%
Denmark	16,986	84	700	1,898	40%	-87%	-9%	30%	80,620	694	3,069	8,012	41%	-74%	-21%	16%
Italy	14,867	15,995	23,254	44,179	86%	65%	36%	9%	79,488	85,729	147,561	320,140	77%	87%	35%	18%
Spain	14,558	16,041	27,311	31,383	26%	16%	50%	11%	64,826	80,387	141,882	164,159	36%	41%	36%	10%
Austria	9,043	4,007	3,012	7,444	45%	56%	24%	32%	40,141	17,960	13,422	36,321	27%	37%	25%	23%
Finland	3,641	912	1,290	814	46%	-41%	7%	1%	17,793	4,752	5,627	4,768	40%	-40%	-12%	23%
Poland	3,158	5,704	12,734	17,500	-16%	110%	32%	35%	16,811	27,430	72,235	91,903	18%	100%	14%	16%
Czechia	2,151	1,546	2,693	3,799	59%	55%	39%	23%	8,634	6,502	12,170	19,792	25%	31%	21%	14%
Slovenia	1,691	190	726	1,078	206%	71%	110%	1%	6,071	1,183	3,592	7,185	124%	44%	68%	24%
Luxembourg	1,578	317	314	1,454	68%	-7%	49%	30%	7,740	1,531	1,831	7,095	18%	-28%	5%	25%
Hungary	1,561	1,314	2,273	5,102	19%	131%	39%	32%	7,491	5,857	11,930	26,686	44%	105%	17%	13%
Romania	1,494	1,315	3,798	3,669	283%	90%	106%	20%	5,513	5,721	15,978	15,971	72%	65%	48%	-10%
Greece	1,221	962	4,114	5,269	46%	0%	76%	16%	5,101	5,011	18,862	27,097	23%	6%	41%	15%
Ireland	1,136	328	282	214	-12%	41%	23%	-37%	20,288	12,774	17,673	12,983	48%	4%	9%	31%
Iceland	809	145	115	144	31%	-66%	-43%	-40%	3,178	1,603	718	1,120	39%	-7%	-31%	20%
Slovakia	721	509	1,132	1,996	32%	14%	22%	-4%	2,863	2,000	5,684	10,406	24%	-1%	7%	10%
Lithuania	472	636	1,497	1,006	70%	82%	40%	23%	1,845	2,903	6,221	6,442	55%	75%	10%	35%
Croatia	350	494	626	2,060	322%	213%	59%	31%	1,750	2,150	3,267	10,150	318%	142%	43%	17%
Latvia	287	387	615	590	98%	60%	-13%	20%	837	1,211	2,939	3,344	14%	-1%	2%	25%
Cyprus	196	64	258	291	19%	2%	-7%	-18%	937	411	1,453	2,163	27%	5%	-12%	4%
Estonia	147	161	543	527	63%	-8%	49%	13%	621	864	2,970	2,872	48%	37%	78%	77%
Portugal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sweden	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Note: Data for Portugal and Sweden are not available.

Table A7

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

Country	June 2026				Jan–June 2026				Jan–June 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Norway	97%	1%	2%	0%	98%	1%	1%	0%	94%	2%	2%	0%	96%	2%	1%	0%
Denmark	79%	0%	3%	9%	80%	1%	3%	8%	64%	3%	4%	8%	69%	3%	4%	7%
Iceland	57%	10%	8%	10%	43%	22%	10%	15%	29%	22%	13%	12%	42%	20%	11%	11%
Finland	49%	12%	17%	11%	49%	13%	15%	13%	35%	22%	18%	11%	38%	21%	17%	11%
Ireland	47%	14%	12%	9%	23%	14%	20%	15%	16%	14%	19%	12%	18%	15%	18%	11%
Netherlands	45%	21%	15%	13%	37%	24%	16%	15%	35%	20%	14%	15%	41%	19%	13%	13%
Belgium	38%	6%	13%	21%	36%	6%	12%	23%	33%	8%	12%	22%	35%	9%	11%	21%
Luxembourg	31%	6%	6%	29%	29%	6%	7%	27%	26%	8%	7%	22%	27%	8%	7%	23%
France	30%	7%	21%	21%	28%	6%	22%	23%	18%	6%	23%	21%	20%	7%	23%	21%
Germany	29%	11%	5%	23%	26%	11%	5%	24%	18%	10%	5%	25%	20%	11%	5%	24%
Austria	26%	12%	9%	22%	24%	11%	8%	22%	22%	9%	8%	21%	21%	10%	8%	21%
Slovenia	26%	3%	11%	16%	17%	3%	10%	20%	9%	3%	7%	19%	11%	3%	8%	19%
Cyprus	17%	6%	23%	26%	13%	6%	20%	30%	9%	5%	20%	25%	10%	5%	21%	26%
Latvia	12%	16%	26%	25%	7%	11%	26%	30%	7%	11%	26%	24%	7%	12%	24%	24%
Spain	11%	12%	21%	24%	10%	12%	21%	25%	8%	9%	17%	24%	9%	11%	18%	23%
Hungary	10%	9%	15%	34%	10%	8%	16%	36%	8%	4%	15%	36%	9%	6%	15%	35%
Italy	10%	11%	16%	30%	8%	9%	16%	34%	5%	5%	13%	31%	6%	6%	13%	31%
Lithuania	10%	13%	30%	20%	8%	12%	26%	27%	6%	8%	28%	23%	8%	11%	25%	22%
Romania	9%	8%	24%	23%	9%	9%	25%	25%	5%	5%	17%	27%	6%	6%	19%	24%
Czechia	8%	6%	10%	15%	7%	5%	9%	15%	6%	4%	8%	14%	6%	4%	9%	14%
Estonia	8%	8%	28%	27%	6%	9%	30%	29%	7%	10%	27%	27%	7%	11%	23%	29%
Slovakia	8%	5%	12%	21%	6%	4%	13%	23%	5%	4%	12%	21%	5%	5%	13%	22%
Greece	7%	6%	24%	31%	6%	6%	23%	33%	5%	6%	18%	31%	6%	8%	20%	31%
Poland	5%	10%	22%	30%	5%	9%	23%	30%	5%	5%	22%	28%	7%	6%	22%	27%
Croatia	4%	6%	7%	23%	4%	5%	8%	24%	1%	2%	5%	21%	2%	3%	6%	20%
Portugal	-	-	-	-	24%	13%	9%	21%	21%	12%	6%	17%	24%	15%	6%	16%
Sweden	-	-	-	-	42%	25%	8%	14%	36%	26%	8%	14%	37%	27%	9%	13%

Note: Data for Portugal and Sweden cover January to May 2026 only.

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:** **AC** = alternating current; **CO₂** = carbon dioxide; **DC** = direct current; **g/km** = grams per kilometer; **SPV** = special purpose vehicle; **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/>.
- » **Special purpose vehicles:** SPVs, such as motor caravans, ambulances, or wheelchair accessible vehicles, are outside the scope of the CO₂ regulation for cars and vans. However, they were inadvertently included in the Market Monitor analyses up to and including the January–May 2026 report. Starting with the January–June 2026 report, SPVs have been excluded from the analysis. Their removal reduced estimated fleet-wide average 2026 CO₂ emissions by about 1 g/km. At the make level, excluding SPVs reduced estimated 2026 CO₂ emissions by a maximum of 2 g/km, with the exception of three makes that saw larger decrease: for Fiat (with a decrease of 17 g CO₂/km), Ford (a decrease of 7 g CO₂/km), and Citroën (with a decrease of 3 g CO₂/km).
- » **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, June 2026 data are not available for Portugal and Sweden.
- » **Data sources:** Dataforce (new vehicle registrations), Eco-Movement (charging points), 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.
- » **Results may change over time:** Registrations and/or CO₂ 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:** 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/>.
- » **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." AC chargers, often referred to as normal chargers, are slow or semi-fast chargers that deliver up to 43 kW of power in the form of alternating current from the electrical grid. By contrast, DC chargers, or fast chargers, supply power directly to the vehicle's battery, bypassing the onboard converter. These chargers typically supply power of 50 kW or greater, enabling faster charging.



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