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Electric Vehicle Sales Review Q3-2026



Foresight to drive the industry
October 2026

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High fuel prices push BEV registrations past ICEs in Q3 2026 for the first time in Europe*

28% vs 26%

BEV share ICE share

Executive summary

BEVs account for one in four registrations

BEVs continued to gain ground in Q3 2026, with registrations across the analysed markets rising 16% YoY to 4.3 million. Their market share reached 26%, up from 21% a year earlier, despite a 6% contraction in total vehicle registrations.

The shift towards electrification remained uneven across powertrains. PHEV registrations fell 15% YoY, largely reflecting weakness in China, while hybrids increased 15%. ICE registrations declined 18%, underscoring that BEVs were gaining share through both higher volumes and a shrinking conventional ICE vehicle market. Regional differences also remained pronounced, with strong BEV growth across Europe* contrasting with continued weakness in the US.

China remained the largest BEV market, with registrations increasing 7% YoY to 2.5 million despite a 25% decline in the overall market. BEVs captured 49% of registrations, up from 34% a year earlier. However, PHEV registrations fell 29%, leaving combined BEV and PHEV volumes down 6%. Their combined share nevertheless rose to a record 66%, as the ICE share fell below 30% for the first time.

Europe's five largest markets** recorded 612,000 BEV registrations, up 66% YoY, lifting their share to a record 27% and pushing them above pure ICEs for the first time. Germany and France drove the expansion, with BEV registrations rising 77% and 115%, respectively. Across the wider European* market, BEV registrations grew 55% to 941,000, substantially outpacing overall market growth of 7%.

The US moved in the opposite direction, with BEV registrations falling 42% YoY to 252,000 and PHEVs declining 27% to 53,000. This decline was largely due to the discontinuation of purchase tax credits in Q3 2025. Hybrid growth of 26% could not fully offset this weakness, leaving total electrified registrations down 7%, compared with a 1% decline in the overall market.

Diverging registration trends reinforce the need to examine the economics supporting BEV adoption. This edition's Analyst Insights section assesses how changing energy costs impact the BEV value proposition in Germany, the US and China. The findings indicate a strengthening energy-cost advantage, while highlighting the need for market- and customer-specific affordability narratives to inform purchasing decisions and industry communication.

*EU27+UK+EFTA; **France, Germany, Italy, Spain and UK

Energy costs are reshaping the vehicle buying decision

Energy costs have become one of the automotive industry's most persistent pressure points. For consumers, fuel and electricity prices are no longer background assumptions; they are part of the purchase decision, the leasing discussion and the day-to-day ownership experience. For OEMs, retailers, fleet operators and charging providers, the question is no longer simply whether BEVs are cheaper to run in theory, but where, for whom and under which charging conditions the economic case is strongest.

This analysis was designed to bring that question into sharper focus. Rather than developing a full total cost of ownership model, we focus on one highly visible aspect of vehicle economics: energy costs. The comparison looks at a compact SUV driven 15,000 km per year across Germany, the USA and China, using the 2026 energy-price snapshot*. It compares petrol, diesel and two BEV charging profiles: a home/office-access BEV driver in Scenario 1 (S1) and a public-dependent BEV driver in Scenario 2 (S2).

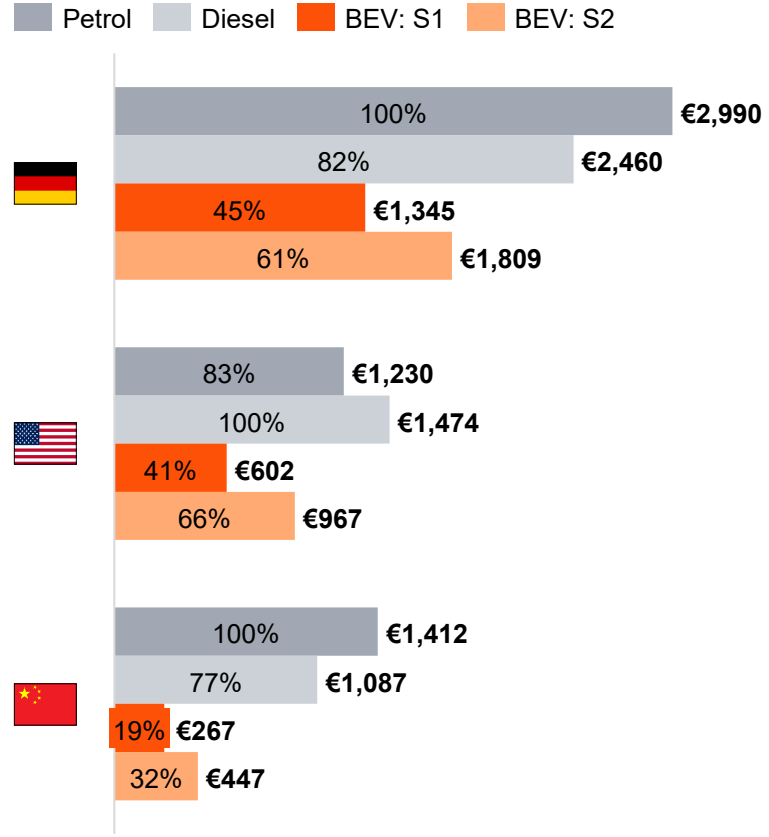
Charging profile	BEV: S1	BEV: S2
Home/office charging	80%	20%
Public AC charging	15%	50%
Public DC charging	5%	30%

The former assumes that most charging takes place at home or at the office, while the latter assumes higher reliance on generally more expensive ad hoc public AC and DC charging. The same charging profiles are applied across all three markets to ensure that the comparison reflects market energy-price differences rather than different assumed customer behaviours.

The headline finding is clear: in the 2026 snapshot, BEVs are cheaper to power than both petrol and diesel in all three markets. This holds under both BEV charging scenarios. In the annual-cost comparison, home-access BEV drivers have the lowest energy cost everywhere: €1,345 in Germany, €602 in the USA and €267 in China. Even the more expensive public-dependent BEV case remains below the petrol and diesel alternatives in each market, though the advantage narrows considerably.

That narrowing is one of the most important insights in the analysis. The BEV cost advantage is not only about the national electricity price; it is also about where the driver can charge their vehicle. A customer with reliable access to home or workplace charging can benefit from significantly lower running costs than a driver relying mostly on public infrastructure. In Germany, the BEV S1 annual energy cost is around €460 lower compared with BEV S2. In the USA, the gap is even more visible in relative terms, with BEV S1 around 38% cheaper than BEV S2.

Annual energy cost by powertrain
(2026 snapshot*, compact SUV, 15,000 km/year, in euros; indexed to highest cost per market = 100%)

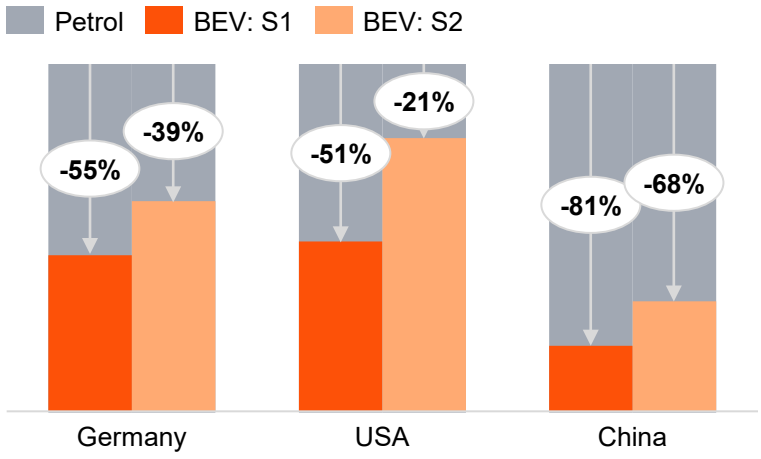


*Energy-price snapshots use the closest available 2026 and 2025 observations, mainly September for fuels and Q2-Q4 for electricity/charging
Source: ACE Auto Club Europa, BDEW, EU Directorate-General for Energy, GPP, Paren, U.S. Energy Information Administration

The BEV advantage is widening

Public charging does not erase the BEV advantage, but it changes the strength of the argument. The following chart makes this clearer. Against petrol, BEV S1 drivers achieve a 55% energy-cost advantage in Germany, 51% in the USA and 81% in China. For BEV S2 drivers, the advantage falls to 39% in Germany, 21% in the USA and 68% in China. This is a critical distinction for the industry. A BEV value proposition built around low running costs will resonate differently with a suburban homeowner, an urban apartment dweller, a fleet user with depot charging or a driver reliant on public fast charging.

BEV energy-cost advantage vs petrol
(2026 snapshot*, in % over petrol)

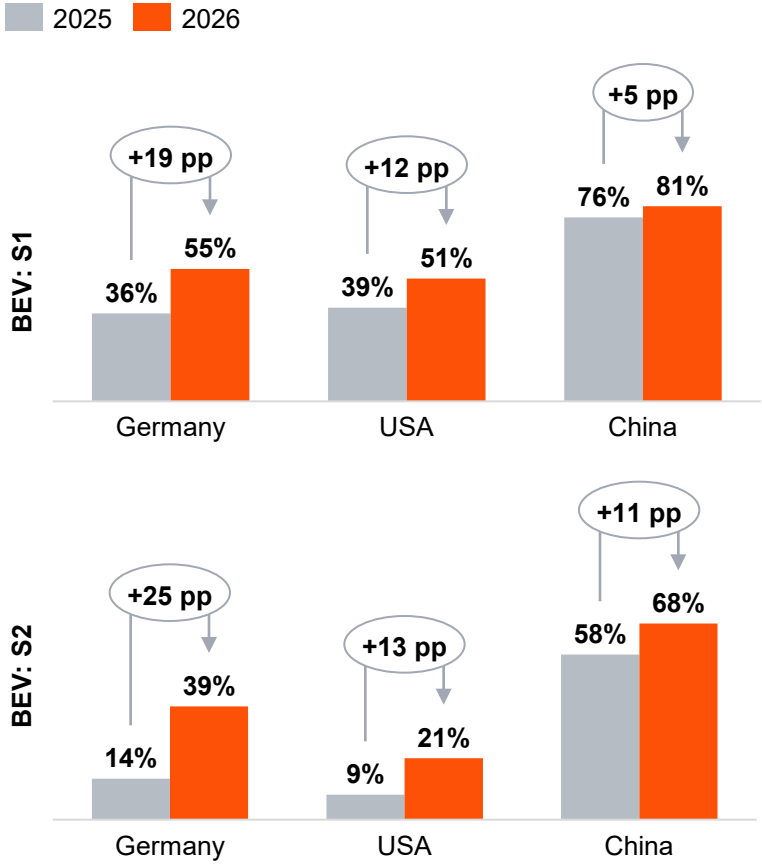


The regional differences are equally important. China shows the strongest BEV energy-cost advantage in both scenarios. Even for public-dependent BEV drivers, the cost advantage vs petrol remains high. This reflects the wide gap between electricity and fuel costs in the 2026 snapshot and reinforces the broader affordability story behind China's BEV market momentum. The USA shows a more nuanced picture. Home-access BEV drivers still benefit substantially, but the advantage narrows sharply for public-dependent drivers.

In Germany, diesel is a tighter benchmark than petrol because the assumed diesel SUV consumes less fuel per kilometre. Even though diesel is slightly pricier in the 2026 snapshot, its lower consumption makes it cheaper to run than petrol, reducing the BEV advantage vs diesel to 45% for BEV S1 and 26% for BEV S2. This matters mainly in Germany, where diesel powertrains remain more relevant as a passenger car alternative.

The year-on-year view reinforces the BEV case. Between the 2025 and 2026 snapshots, the BEV energy-cost advantage vs petrol widened in all three markets and under both charging scenarios. Germany illustrates the shift most clearly, with the advantage rising by 19 percentage points for home-access BEV S1 and 25 points for public-dependent BEV S2. This suggests that the BEV running-cost case has improved despite ongoing concerns around electricity and public charging costs.

Change in BEV energy-cost advantage vs petrol
(2025 vs 2026 change in percentage points)



*Energy-price snapshots use the closest available 2026 and 2025 observations, mainly September for fuels and Q2-Q4 for electricity/charging
Source: ACE Auto Club Europa, BDEW, EU Directorate-General for Energy, GPP, Paren, U.S. Energy Information Administration

€100 goes furthest in a BEV

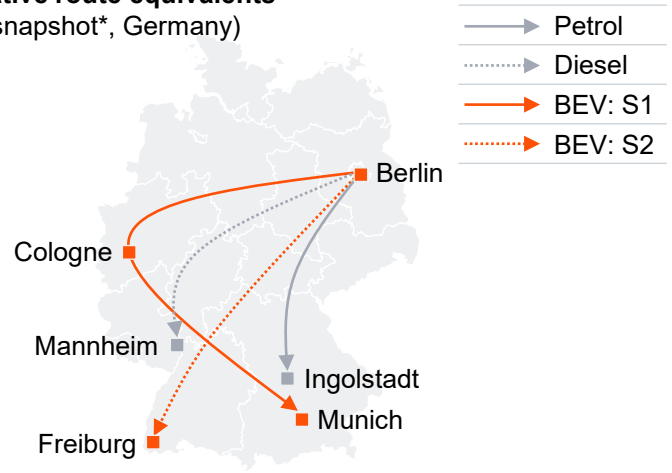
According to the PwC Strategy& eReadiness Study 2026, fuel economy and cost per mile are by far the leading reasons consumers say they would buy a BEV, underscoring the importance of running costs in purchase decisions. Therefore, energy costs support the economic case for BEVs, while purchase price, incentives, model availability, residual values, financing conditions and charging convenience also remain decisive. In other words, a strong energy-cost advantage can help to substantially narrow the persuasion gap to BEV uptake.

The next chart adds a more tangible layer to the analysis. By asking how far a compact SUV can travel on a €100-equivalent energy budget, it translates annual cost figures into a consumer-friendly mobility metric. In Germany, the range runs from around 500 km of driving for petrol to 1,120 km for the home-access BEV driver, reflecting high fuel prices and the lower cost of home/ office-focused charging. In the USA, diesel delivers the shortest distance possible, at around 1,020 km, while the S1 BEV reaches around 2,490 km. This is because the 2026 diesel price is materially higher than petrol despite lower assumed consumption. China shows the widest spread: petrol reaches around 1,060 km, while the S1 BEV reaches around 5,610 km, underlining the very large gap between fuel and electricity costs in the market. The illustrative route equivalents** on the map of Germany help visualise the scale of the difference.

Distance unlocked by a €100 energy budget
(2026 snapshot*, compact SUV)

	Petrol	Diesel	BEV: S1	BEV: S2
	500 km	610 km	1,120 km	830 km
	1,220 km	1,020 km	2,490 km	1,550 km
	1,060 km	1,380 km	5,610 km	3,350 km

Illustrative route equivalents**
(2026 snapshot*, Germany)



For automotive stakeholders, the conclusion is not simply that BEVs are cheaper to power. The more relevant message is that BEV economics are becoming more segmented. The strongest running-cost case belongs to customers with home or workplace charging. Public-dependent customers still benefit, but the margin is thinner and more sensitive to tariff levels at public chargers. This has direct implications for OEM communication, retailer sales training, leasing offers, charging partnerships and national infrastructure policy.

The industry therefore needs a more granular BEV cost narrative. A single global claim that “electric driving is cheaper” is no longer sufficient. The more credible message is conditional and customer-specific: BEVs offer a meaningful energy-cost advantage in major markets, but the strength of that advantage depends on charging access, local tariffs and the ICE benchmark used for comparison. It is also important to note that electricity prices tend to remain relatively stable, unlike fuel prices, which can fluctuate significantly.

Energy cost is not the whole ownership story, but it is one of the clearest levers through which BEVs can still make a compelling economic case.

*Energy-price snapshots use the closest available 2026 and 2025 observations, mainly September for fuels and Q2-Q4 for electricity/charging; **Do not reflect actual route conditions, charging availability, driving speed or other constraints. BEV results are based on defined charging scenarios (S1 & S2), not on charging along the illustrated route
Source: ACE Auto Club Europa, BDEW, EU Directorate-General for Energy, GPP, Paren, U.S. Energy Information Administration

Top-selling BEV OEMs during Q1-Q3 2026

Europe 5

	OEM	Sales	Δ*
1	Tesla	159,739	→ 0
2	Volkswagen	133,699	→ 0
3	Renault	133,496	→ 0
4	Skoda	100,305	→ 0
5	BMW	95,987	→ 0
6	Mercedes-Benz	84,023	→ 0
7	KIA	81,540	→ 2
8	BYD	77,972	→ 0
9	Audi	73,351	↓ 2
10	Leapmotor	63,556	→ 0

China**

OEM	Sales	Δ*
BYD	1,695,099	→ 0
Geely	914,115	→ 0
Leapmotor	506,967	↑ 1
Changan	501,180	↓ 1
Tesla	381,088	↑ 1
SAIC-GM-Wuling	370,341	↑ 1
HIMA	367,229	↓ 2
Nio	299,376	↑ 1
Li Auto	293,436	↓ 1
Chery	289,378	New

USA

OEM	Sales	Δ*
Tesla	386,194	→ 0
Hyundai	39,121	→ 0
Chevrolet	38,298	→ 0
Toyota	34,759	→ 0
Cadillac	34,125	→ 0
Rivian	25,324	↑ 1
Ford	22,653	↓ 1
Kia	22,202	→ 0
Lexus	16,659	New
BMW	15,753	↓ 1

*Ranking change vs H1 2026; **Top NEV (including BEV and PHEV) OEMs in China
Source: KBA, AAA, UNRAE, DGT, DVLA, DVSA, CPCA, KBB

Top-selling BEVs during Q1-Q3 2026

Europe 5

	Model	Sales	Δ*	Entry**
1	Tesla Model Y	99,725	→ 0	€33,600
2	Tesla Model 3	58,909	↑ 1	€31,100
3	Skoda Elroq	55,399	↑ 1	€31,800
4	Renault 5	52,913	→ 0	€22,100
5	Skoda Enyaq	43,469	↑ 3	€36,500
6	Citroen ë-C3	43,076	↑ 1	€16,900
7	VW ID.3	41,421	↓ 1	€28,600
8	VW ID.4, ID.5	40,683	↑ 1	€34,100
9	Leapmotor T03	36,992	↓ 4	€15,900
10	Mercedes-Benz CLA	33,702	→ 0	€41,500
	Weighted average price			**€29,600**

China

Model	Sales	Δ*	Entry**
Geely EX2 (Xingyuan)	310,391	→ 0	€7,600
Tesla Model Y	277,290	→ 0	€31,100
Li Auto i6	160,221	→ 0	€29,400
BYD Atto 2 (Yuan Up)	148,670	↑ 1	€8,800
Leapmotor B03X (A10)	144,359	New	€7,800
Xiaomi YU7	140,237	↓ 2	€27,500
Xiaomi SU7	133,809	↓ 1	€25,900
Changan Nevo Q05	125,845	↑ 1	€9,400
BYD Dolphin	116,606	New	€11,800
MG 4	110,965	→ 0	€8,100
Weighted average price			**€17,300**

USA

Model	Sales	Δ*	Entry**
Tesla Model Y	262,491	→ 0	€41,100
Tesla Model 3	106,962	→ 0	€33,100
Hyundai Ioniq 5	31,112	→ 0	€31,500
Toyota BZ	24,944	→ 0	€31,300
Chevrolet Equinox	18,154	→ 0	€31,300
Rivian R1S	17,259	→ 0	€75,100
Ford Mustang Mach-E	17,206	→ 0	€33,800
Honda Prologue	13,289	→ 0	€35,700
Kia EV9	12,429	New	€49,100
Cadillac Optiq	12,429	→ 0	€44,700
Weighted average price			**€39,100**

*Ranking change vs H1 2026; **Entry prices as of October 2026 excluding VAT; Europe prices are taken from Germany
Source: KBA, AAA, UNRAE, DGT, DVLA, DVSA, CPCA, KBB, OEM websites

2026 BEV model launches (selection)

Q1 2026	Q2 2026	Q3 2026	Q4 2026
Toyota bZ7	**Volkswagen** ID. Polo	**Chery** Omoda 4	**BMW** iX4
Mercedes-Benz GLC EQ	**Audi** E7X	**Fiat** Grizzly	**Denza** N8
Chery QQ3	**Volvo** EX60	**Mercedes-Benz** C-Class EQ	**BYD** Atto 2

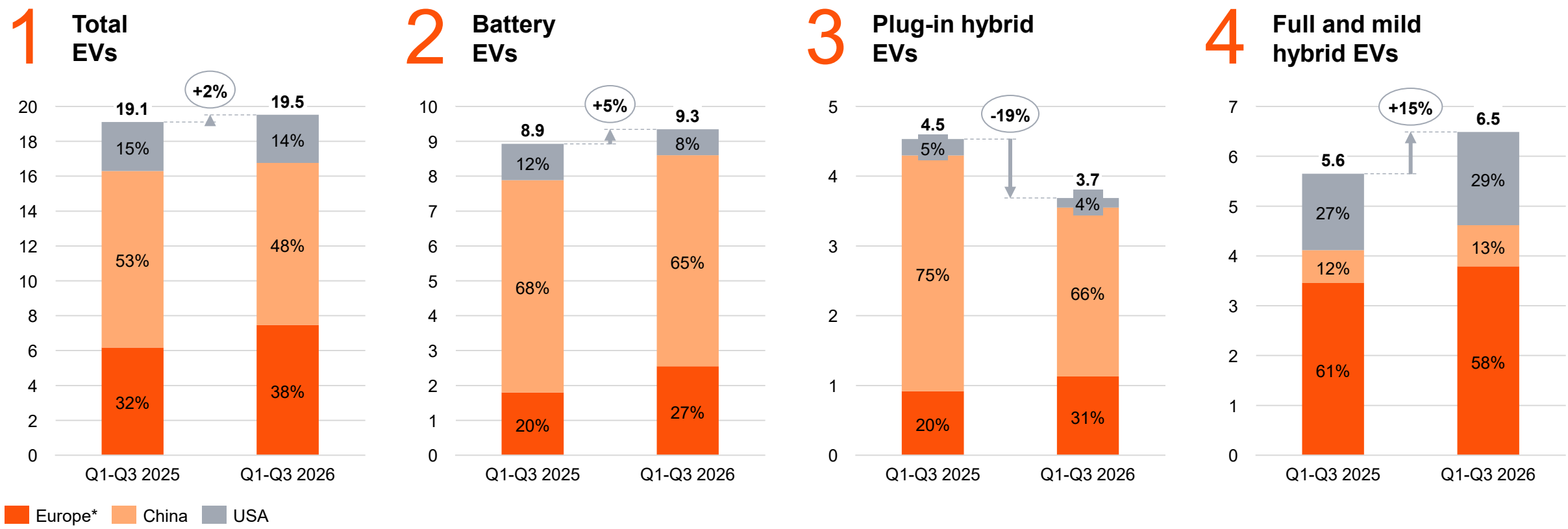


Source: IHS Mobility Global Light Vehicle Powertrain Production Forecast September 2026 release

Electric vehicle sales in core regions

Q1–Q3 2025 vs Q1-Q3 2026

(in millions)



*EU27+UK+EFTA

Source: Local governmental or car association data

European Union, UK and EFTA



Europe 5: France, Germany, Italy, Spain and UK

Electrified powertrains captured a record 76% of Europe 5 registrations in Q3 2026 by growing 27% YoY, outperforming the 8% growth of the overall market. BEV registrations climbed 66% to a record 612,000, lifting their share to 27%. In contrast, ICE registrations fell 28% to 545,000, taking their share to a new low of 24%. BEVs therefore overtook pure ICEs for the first time, marking a further shift in the region's powertrain mix.

Growth extended across electrified powertrains, although BEVs continued to set the pace. PHEV registrations rose 25% YoY to a quarterly record of 280,000, representing 12% of the market. Hybrids grew 10% to 876,000 and remained the largest category with a 38% share. The combined strength of these powertrains shows that electrification continued to advance through a broader change in the market, rather than BEV growth alone.

Germany and France drove the BEV expansion, with registrations reaching record highs of 236,000 and 146,000, up 77% and 115% YoY, respectively, well ahead of overall market growth. France led BEV adoption at 39%, followed by Germany at 32% and the UK at 28%. The UK remained second by BEV volume, with 170,000 registrations, up 37%. Growth also extended to Italy and Spain, where BEV registrations rose 37% and 44%, respectively, although PHEVs retained a higher share in both markets.

Across the wider European* market, registrations increased 7% YoY to 3.3 million in Q3. BEVs led electrified growth, rising 55% to 941,000 registrations and a 28% share. PHEVs grew 18% to 387,000, while hybrids increased 5% to 1.1 million. Together, electrified powertrains represented 74% of the market, up from 64% a year earlier, while ICE registrations declined 21%.

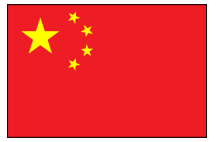
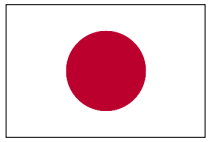
Europe*	Q3 2026	Market share	vs Q3 2025
BEV	941,000	28%	+55%
PHEV	387,000	12%	+18%
Hybrid	1,121,000	34%	+5%
Total EV	**2,449,000**	**74%**	**+22%**
Total registrations	**3,322,000**	**-**	**+7%**

Other Europe*: Austria, Belgium, Denmark, Finland, Netherlands, Norway, Poland, Portugal, Sweden, Switzerland

Norway remained the leader in BEV adoption in Q3 2026, with a 99% share, followed by Denmark at 85% and Finland at 55%. The Netherlands led by volume, with 45,000 BEV registrations, up 51% YoY, surpassing Denmark's 43,000 and Norway's 41,000. Portugal recorded the strongest BEV growth among these markets, up 71% to 20,000 registrations and a 39% share. The expansion was not universal, however: Poland's BEV registrations fell 32%, while PHEVs and hybrids continued to grow by 83% YoY.

*EU27+UK+EFTA
Source: Local governmental or car association data

China, Japan and South Korea


China

China's powertrain mix shifted further towards electrification in Q3 2026, even as total registrations fell 25% YoY to 5.1 million. BEVs continued to grow against this weaker backdrop, rising 7% to 2.5 million registrations and capturing a record 49% market share, the biggest growth on record with 14 percentage points. Volumes also increased from Q2, extending the recovery from the weaker first quarter. The NEV market, defined here as BEVs and PHEVs combined, reached 3.4 million registrations. Although volumes declined 6% YoY, their combined share climbed to 66%, up 13 percentage points, as ICE registrations contracted much more sharply. ICE volumes fell 53% to 1.4 million, reducing their share to a record low of 28%. The growing NEV share therefore reflected both BEV resilience and the accelerating decline of conventional powertrains. PHEVs remained the main area of weakness within the electrified market. Registrations fell for the fifth consecutive quarter by 29% YoY to 883,000 units in Q3, leaving their share at 17%, down from 18% a year earlier. Hybrids, by contrast, grew 48% to a record 329,000 registrations and a 6% share. This growth helped cushion the PHEV decline, limiting the fall in total electrified registrations to 3% and lifting their combined market share to a record 72%.

China	Q3 2026	Market share	vs Q3 2025
BEV	2,495,000	49%	+7%
PHEV	883,000	17%	-29%
Hybrid	329,000	6%	+48%
Total EV	**3,707,000**	**72%**	**-3%**
Total registrations	**5,146,000**	**–**	**-25%**

Japan*

Hybrids continued to anchor Japan's electrified market in Q3 2026, with registrations rising 11% YoY to 407,000 and accounting for 62% of the total market. BEVs grew much faster, albeit from a smaller base, more than tripling to a record 32,000 registrations and lifting their market share to a new high of 5%. PHEVs increased 11% to 12,000, retaining a market share of around 2%. Together, electrified powertrains represented 69% of registrations, outpacing overall market growth by 10 percentage points with +17% YoY.

*Excluding kei cars
Source: Local governmental or car association data

South Korea

BEV registrations grew 26% YoY to 99,000 in Q3 2026, despite a 12% contraction in the overall market. Their market share remained at 26%, although volumes eased slightly from Q2's record 113,000. Hybrids remained the largest electrified category, but registrations fell 11% to 128,000, slightly underperforming the overall market decline. PHEVs returned to growth, up 9% to 4,000 registrations, but still represented only 1% of the total market. Electrified powertrains reached a record 60% share, with BEV growth offsetting the decline in hybrids.

United States, Brazil and Mexico



USA

The market returned to a slight decline in Q3 2026, as hybrid growth could not fully offset weakness elsewhere. Total registrations fell 1% YoY to 4.1 million units, while hybrid registrations increased by 26% to 649,000 units. Hybrids maintained a 16% market share and extended an uninterrupted run of quarterly YoY gains dating back to Q4 2022, although volumes eased from the record 701,000 reached in Q2.

BEVs remained under pressure, with registrations down 42% YoY to 252,000 in Q3 2026. The decline steepened from -7% in Q2 and -32% in Q1, against a record-high comparison base in Q3 2025. Following the end of purchase tax credits for BEVs and PHEVs in September 2025, BEV volumes declined sharply and have yet to benefit fully from elevated fuel prices since the Iran crisis began. BEVs accounted for just 6% of Q3 registrations.

PHEVs also remained weak, falling 27% YoY to 53,000 units and recording YoY declines in every quarter since Q3 2024. Volumes were broadly stable vs Q2, with a 1% market share. ICE registrations returned to marginal growth, rising less than 1% YoY after declines of 2% in Q2 and 5% in Q1. ICEs represented 77% of Q3 registrations.

USA	Q3 2026	Market share	vs Q3 2025
BEV	252,000	6%	-42%
PHEV	53,000	1%	-27%
Hybrid	649,000	16%	+26%
Total EV	**954,000**	**23%**	**-7%**
Total registrations	**4,066,000**	**–**	**-1%**

Brazil

Registrations reached a record high of 642,000 in Q3 2026, up 21% YoY. Electrified growth remained strong: BEV registrations rose 232% to 75,000, PHEV 153% to 61,000 and hybrid 56% to 47,000. BEV and PHEV shares also reached new highs of 12% and 10%, respectively, while ICE powertrains fell to 71%, the lowest share recorded.

Mexico

Electrified powertrains retained a modest share in Q3 2026, accounting for 13% of registrations despite robust 47% YoY growth. BEV and PHEV volumes reached new quarterly highs of 8,000 and 10,000, respectively, while hybrid registrations eased to 33,000 from 35,000 in Q2. Total registrations reached 389,000, up 4% YoY, but remained below the historical peak of 435,000 in Q4 2025.

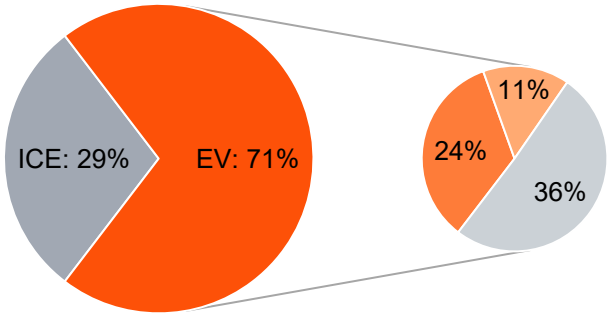
Source: Local governmental or car association data

Powertrain distribution in core regions

Electric vehicle sales in Q1-Q3 2026

1 Europe*

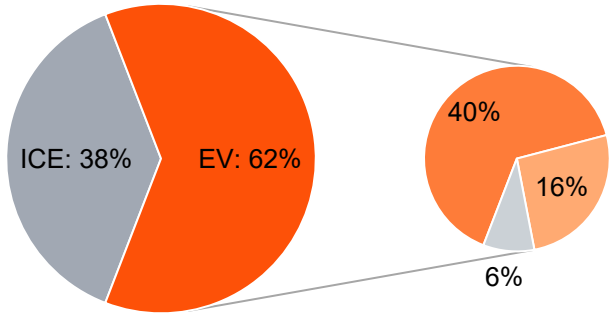
Total registrations: 10,556,000
EV registrations: 7,471,000



of which **BEVs:** 2,550,000
PHEVs: 1,129,000
Hybrids: 3,792,000

2 China

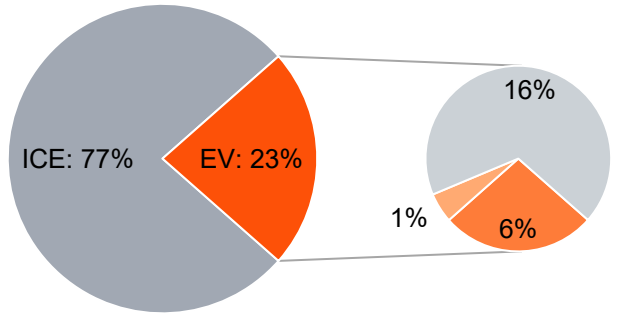
Total registrations: 15,065,000
EV registrations: 9,292,000



of which **BEVs:** 6,049,000
PHEVs: 2,420,000
Hybrids: 823,000

3 USA

Total registrations: 11,995,000
EV registrations: 2,757,000



of which **BEVs:** 746,000
PHEVs: 139,000
Hybrids: 1,872,000

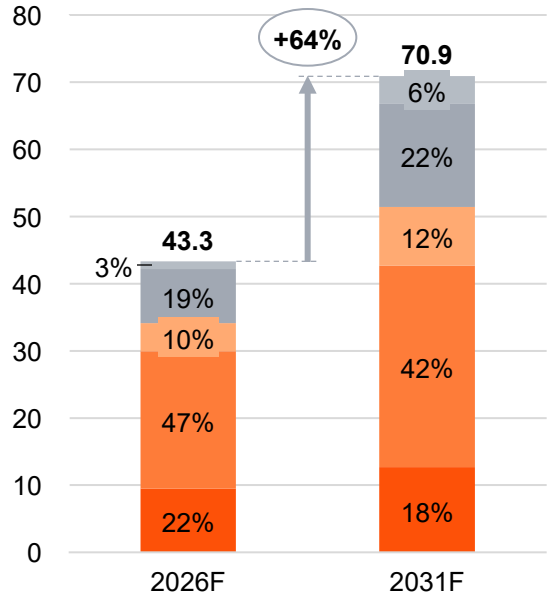
ICE EV BEV PHEV Hybrid

*EU27+UK+EFTA
Source: Local governmental or car association data

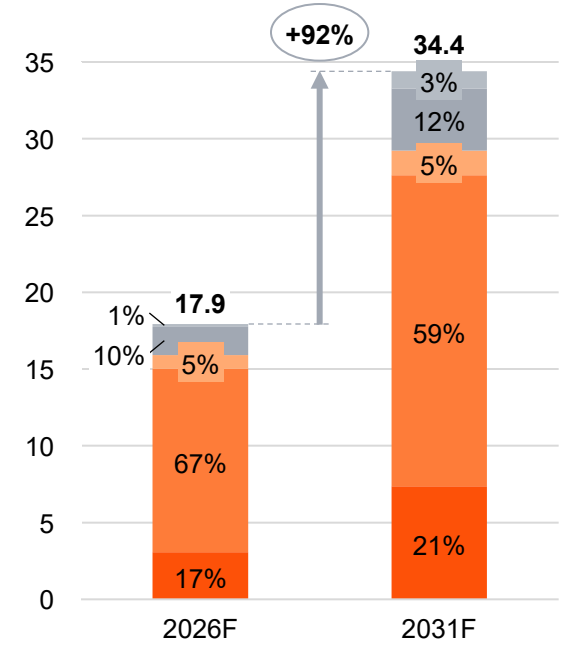
Regional electric vehicle* assembly forecast

2026F vs 2031F
(in millions)

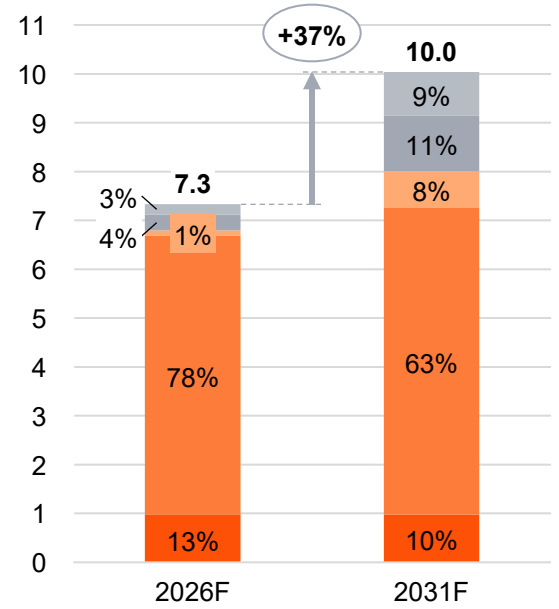
1 Total EVs



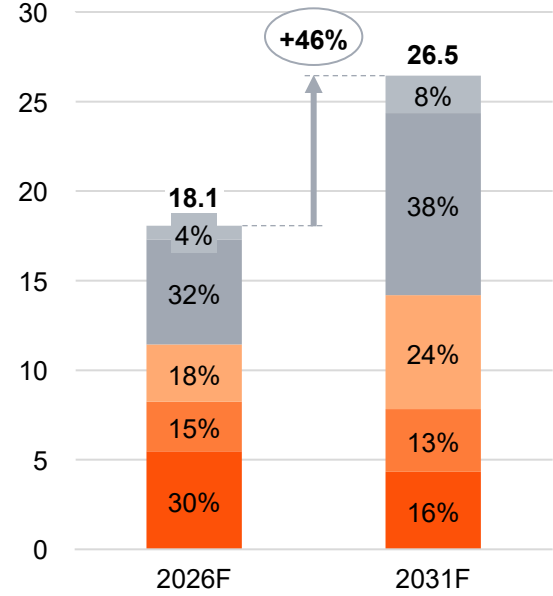
2 Battery EVs



3 Plug-in hybrid EVs



4 Full and mild hybrid EVs



Western + Central Europe | China | NAFTA | Asia-Pacific (excl. China) | RoW

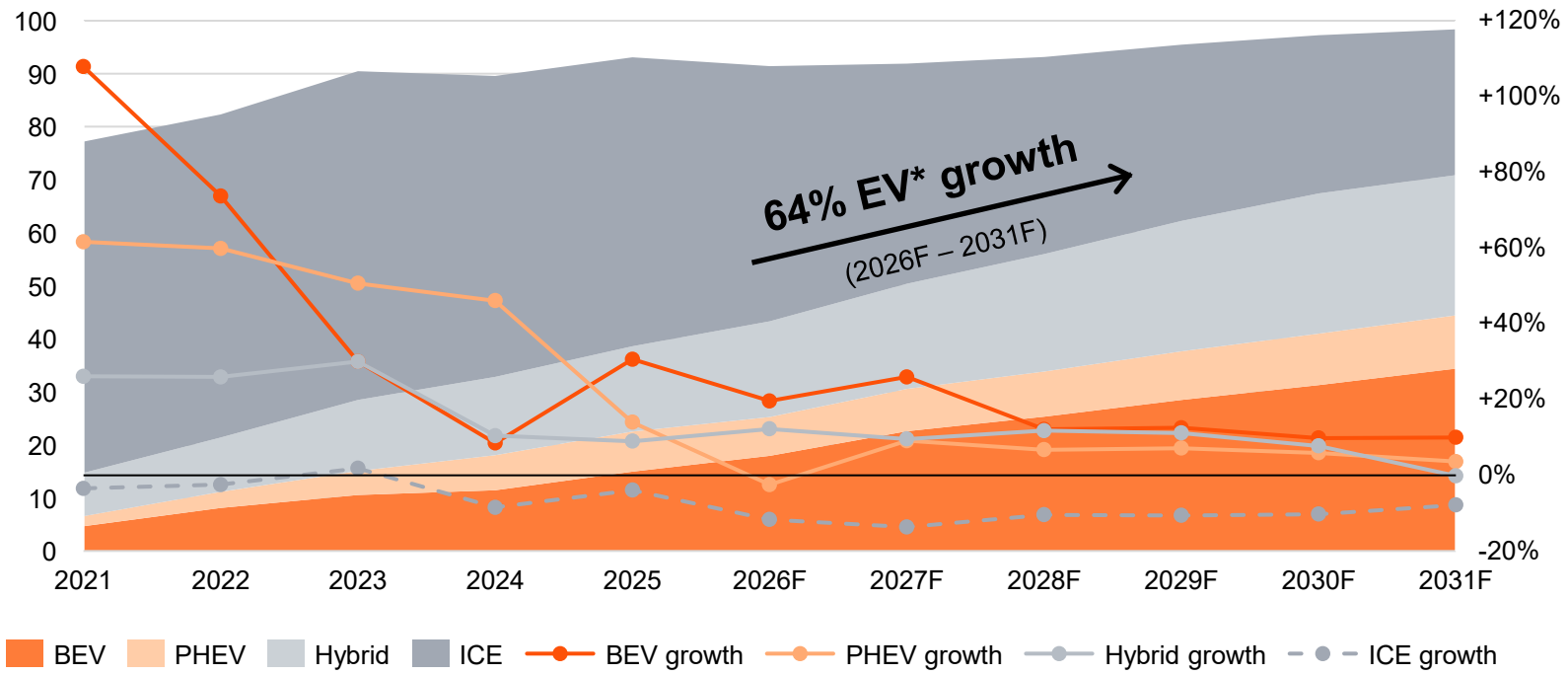
*Electric vehicles = BEV, PHEV (including REEV) and hybrid (including FHEV, MHEV and Series-Hybrid)
Source: IHS Mobility Global Light Vehicle Powertrain Production Forecast September 2026 release

Global electric vehicle* assembly forecast

2021 – 2031F

(in millions (lhs), growth rate in % (rhs))

5 Global light vehicle production by powertrain



Global EV* production is forecast to exceed ICE vehicle production by 2027. By 2031, EVs* are projected to account for 72% of global light vehicle production, underscoring that electrification is becoming the dominant propulsion type.

However, post-COVID growth rates are forecast to normalise as the global EV* market matures, with annual growth rates across BEVs, PHEVs and hybrids moderating from the elevated levels seen from 2021 to 2024. This reflects the transition from rapid growth off a low base to sustained growth at scale.

BEVs are expected to be the main driver of this shift, growing faster than the other electrified powertrains and overtaking hybrids as the largest EV* powertrain as soon as 2027. Between 2026 and 2031, BEV production is forecast to grow by 92%, compared with 37% for PHEVs and 46% for hybrids.

*Electric vehicles = BEV, PHEV (including REEV) and hybrid (including FHEV, MHEV and Series-Hybrid)
Source: IHS Mobility Global Light Vehicle Powertrain Production Forecast September 2026 release

Overview: BEV model launches

2026
(not exhaustive)

Brand	Model	Segment	Launch
Dacia	Spring	A	Q4 2026
Nissan	Pixo	A	Q4 2026
Audi	A2 e-tron	C	Q4 2026
Jaecoo	J6	C	Q4 2026
Honda	0 Alpha	B	Q4 2026
Suzuki	e-Sky	A	Q4 2026
Smart	#6	D	Q4 2026
Kia	Carens Clavis	C	Q4 2026
Tata	Nexon	B	Q4 2026
LI	I9	E	Q4 2026
BMW	iX5	E	Q4 2026
Ferrari	Luce	E	Q4 2026
Mahindra	BE.07	C	Q4 2026
Jetta	M6	C	Q4 2026
VinFast	VF7	C	Q4 2026

Source: IHS Mobility Global Light Vehicle Powertrain Production Forecast September 2026 release



Overview: BEV model launches

2027 – 2030
(not exhaustive)

Brand	Model	Segment	Launch
BMW	iX7	E	2027
Nissan	Juke	B	2027
Mercedes-Benz	G-Class EQ	D	2027
Chery	QQ5	B	2027
Peugeot	8008	D	2027
Jaguar	Type 01	E	2027
Kia	PV7	D	2027
Porsche	Boxster	D	2027
Volkswagen	ID. Up!	A	2027
Volvo	EX40	C	2027
Ford	Fiesta	B	2027
Mercedes-Benz	A-Class EQ	C	2028
Hyundai	IONIQ 2	A	2028
Scout	Traveler	D	2028
Leapmotor	B03	B	2028

Source: IHS Mobility Global Light Vehicle Powertrain Production Forecast September 2026 release



Overview: BEV model launches

2027 – 2030
(not exhaustive)

Brand	Model	Segment	Launch
Polestar	7	D	2028
Toyota	Yaris Cross	B	2028
Citroen	E-C3	B	2029
Audi	A4 e-tron	D	2029
Kia	EV7	D	2029
Renault	Scenic	C	2029
Fiat	Pandina	A	2029
Maserati	Levante	E	2029
BYD	Sealion 7	D	2030
Honda	N BOX	A	2030
Geely	Starray	D	2030
Rivian	R3	C	2030
Skoda	Octavia	C	2030
Tesla	Model Y	D	2030
Volkswagen	ID.Golf	C	2030

Source: IHS Mobility Global Light Vehicle Powertrain Production Forecast September 2026 release



Electric vehicle sales data

Europe 5: France, Germany, Italy, Spain, UK

		Q1-Q3 2026	Market share	Q1-Q3 2025	YTD YoY	Q3 2026	Quarter YoY	Sept-26	Month YoY	Aug-26	Month YoY	Jul-26	Month YoY
	BEV	387,345	31%	216,311	+79%	145,780	+115%	65,243	+108%	36,159	+113%	44,378	+127%
	PHEV	71,360	6%	72,537	-2%	23,495	+1%	10,101	+11%	5,867	+0%	7,527	-11%
	Hybrid	596,113	48%	531,166	+12%	172,265	+11%	63,115	+2%	43,772	+10%	65,378	+23%
	Total EV	1,054,818	85%	820,014	+29%	341,540	+39%	138,459	+35%	85,798	+37%	117,283	+45%
France	Other	180,136	15%	366,481	-51%	36,248	-63%	18,170	-52%	8,553	-66%	9,525	-73%
	BEV	604,144	27%	382,202	+58%	236,138	+77%	88,599	+95%	68,930	+75%	78,609	+62%
	PHEV	247,489	11%	217,760	+14%	83,696	+6%	27,681	0%	25,406	+6%	30,609	+13%
	Hybrid	632,695	29%	603,270	+5%	205,062	+1%	71,190	+2%	59,197	+1%	74,675	-1%
	Total EV	1,484,328	67%	1,203,232	+23%	524,896	+26%	187,470	+31%	153,533	+26%	183,893	+22%
Germany	Other	737,470	33%	907,116	-19%	212,509	-27%	69,304	-25%	59,030	-31%	84,175	-26%
	BEV	101,714	8%	61,018	+67%	22,280	+37%	10,552	+47%	4,434	+35%	7,294	+25%
	PHEV	121,601	10%	70,573	+72%	37,074	+50%	15,636	+44%	8,429	+74%	13,009	+45%
	Hybrid	623,445	49%	516,042	+21%	160,520	+15%	70,188	+23%	32,319	+7%	58,013	+11%
	Total EV	846,760	67%	647,633	+31%	219,874	+22%	96,376	+28%	45,182	+18%	78,316	+17%
Italy	Other	421,005	33%	519,523	-19%	111,846	-15%	42,790	-17%	24,222	-16%	44,834	-13%
	BEV	100,507	11%	72,101	+39%	37,287	+44%	17,366	+72%	9,199	+31%	10,722	+23%
	PHEV	116,891	13%	86,654	+35%	38,854	+27%	14,579	+41%	9,768	+24%	14,507	+18%
	Hybrid	427,602	47%	354,705	+21%	120,934	+20%	40,996	+16%	32,302	+27%	47,636	+19%
	Total EV	645,000	71%	513,460	+26%	197,075	+25%	72,941	+31%	51,269	+27%	72,865	+19%
Spain	Other	267,058	29%	341,200	-22%	67,276	-23%	20,917	-29%	17,275	-17%	29,084	-22%
	BEV	454,949	26%	349,414	+30%	170,370	+37%	99,201	+36%	28,063	+28%	43,106	+45%
	PHEV	244,769	14%	172,639	+42%	96,637	+47%	59,571	+56%	13,707	+40%	23,359	+34%
	Hybrid	636,138	37%	596,046	+7%	207,139	+4%	120,141	+0%	32,190	+14%	54,808	+6%
	Total EV	1,335,856	77%	1,118,099	+20%	474,146	+22%	278,913	+21%	73,960	+23%	121,273	+23%
UK	Other	403,416	23%	460,073	-12%	127,197	-13%	71,623	-13%	20,276	-11%	35,298	-15%
	BEV	1,648,659	22%	1,081,046	+53%	611,855	+66%	280,961	+68%	146,785	+66%	184,109	+64%
	PHEV	802,110	11%	620,163	+29%	279,756	+25%	127,568	+32%	63,177	+21%	89,011	+20%
	Hybrid	2,915,993	40%	2,601,229	+12%	865,920	+9%	365,630	+6%	199,780	+10%	300,510	+10%
	Total EV	5,366,762	73%	4,302,438	+25%	1,757,531	+27%	774,159	+28%	409,742	+27%	573,630	+25%
Europe 5	Other	2,009,085	27%	2,594,393	-23%	555,076	-27%	222,804	-24%	129,356	-29%	202,916	-27%

Legend
FY = Full year
YoY = Year-on-year
YTD = Year-to-date

Source: ABVE, ACEA, ANFAC, ANFIA, ANL, auto-schweiz, CAAM, CPCA, FCAI, FEBIAC, GAIKINDO, JADA, KBA, MoRTH, MOTIE, ODMD, OFV, PFA, PZPM, RAI, SCB, SMMT, Statistik Austria

Electric vehicle sales data

Other Europe*: Austria, Belgium, Denmark, Finland, Netherlands, Norway

		Q1-Q3 2026	Market share	Q1-Q3 2025	YTD YoY	Q3 2026	Quarter YoY	Sept-26	Month YoY	Aug-26	Month YoY	Jul-26	Month YoY
	BEV	63,172	26%	46,151	+37%	23,112	+58%	9,723	+81%	6,316	+46%	7,073	+44%
	PHEV	27,226	11%	20,793	+31%	9,203	+20%	2,993	+20%	2,680	+11%	3,530	+27%
	Hybrid	70,751	29%	61,715	+15%	21,000	-2%	7,642	+1%	6,166	-6%	7,192	-2%
	Total EV	161,149	67%	128,659	+25%	53,315	+22%	20,358	+32%	15,162	+14%	17,795	+18%
Austria	Other	79,959	33%	86,456	-8%	23,264	-18%	8,610	-16%	6,626	-19%	8,028	-18%
	BEV	125,220	39%	108,221	+16%	41,938	+34%	16,341	+37%	13,069	+44%	12,528	+23%
	PHEV	19,054	6%	30,060	-37%	6,390	-34%	2,014	-38%	1,952	-32%	2,424	-32%
	Hybrid	36,498	11%	36,562	-0%	7,839	-18%	3,215	-4%	2,720	+5%	1,904	-47%
	Total EV	180,772	56%	174,843	+3%	56,167	+11%	21,570	+16%	17,741	+22%	16,856	-3%
Belgium	Other	139,602	44%	149,026	-6%	33,526	-14%	10,554	-18%	10,554	-9%	12,418	-13%
	BEV	123,983	81%	88,349	+40%	43,323	+39%	17,778	+37%	13,876	+55%	11,669	+26%
	PHEV	780	0.5%	3,828	-80%	67	-94%	22	-93%	18	-95%	27	-94%
	Hybrid	16,400	11%	18,672	-12%	4,698	-19%	1,427	-38%	1,461	-12%	1,810	-2%
	Total EV	141,163	93%	110,849	+27%	48,088	+26%	19,227	+23%	15,355	+39%	13,506	+17%
Denmark	Other	11,357	7%	23,926	-53%	2,875	-56%	837	-62%	863	-58%	1,175	-50%
	BEV	28,675	50%	19,229	+49%	10,879	+67%	4,338	+67%	3,427	+77%	3,114	+58%
	PHEV	6,853	12%	11,290	-39%	2,101	-38%	765	-31%	624	-46%	712	-38%
	Hybrid	15,262	27%	14,605	+5%	4,888	+13%	1,234	-21%	2,020	+50%	1,634	+15%
	Total EV	50,790	89%	45,124	+13%	17,868	+26%	6,337	+21%	6,071	+37%	5,460	+20%
Finland	Other	6,133	11%	8,818	-30%	1,804	-26%	647	-13%	572	-30%	585	-34%
	BEV	109,024	41%	93,825	+16%	45,400	+51%	19,149	+59%	13,007	+44%	13,244	+49%
	PHEV	59,206	22%	55,151	+7%	17,367	-11%	6,409	-2%	4,983	-14%	5,975	-16%
	Hybrid	73,242	28%	76,298	-4%	21,177	-11%	8,601	-2%	6,332	-12%	6,244	-20%
	Total EV	241,472	91%	225,274	+7%	83,944	+15%	34,159	+25%	24,322	+11%	25,463	+7%
Netherlands	Other	23,229	9%	44,615	-48%	6,525	-54%	2,100	-56%	1,986	-56%	2,439	-51%
	BEV	112,818	98%	107,605	+5%	41,164	+12%	18,511	+31%	13,274	-2%	9,379	+1%
	PHEV	625	0.5%	2,198	-72%	139	-65%	32	-62%	51	-76%	56	-45%
	Hybrid	709	0.6%	1,801	-61%	227	+60%	99	+230%	32	-39%	96	+60%
	Total EV	114,152	99%	111,604	+2%	41,530	+11%	18,642	+31%	13,357	-3%	9,531	+1%
Norway	Other	1,037	0.9%	1,718	-40%	263	-36%	91	-30%	94	-45%	78	-30%

Legend
FY = Full year
YoY = Year-on-year
YTD = Year-to-date

*EU27+UK+EFTA
Source: ABVE, ACEA, ANFAC, ANFIA, ANL, auto-schweiz, CAAM, CPCA, FCAI, FEBIAC, GAIKINDO, JADA, KBA, MoRTH, MOTIE, ODMD, OFV, PFA, PZPM, RAI, SCB, SMMT, Statistik Austria

Electric vehicle sales data

Other Europe*: Poland, Portugal, Sweden, Switzerland

		Q1-Q3 2026	Market share	Q1-Q3 2025	YTD YoY	Q3 2026	Quarter YoY	Sept-26	Month YoY	Aug-26	Month YoY	Jul-26	Month YoY
	BEV	24,404	5%	25,828	-6%	7,847	-32%	3,478	-22%	2,189	-34%	2,180	-43%
	PHEV	41,526	9%	21,524	+93%	14,923	+83%	4,958	+55%	4,687	+96%	5,278	+106%
	Hybrid	233,853	50%	203,754	+15%	79,108	+22%	27,361	+25%	22,377	+10%	29,370	+29%
	Total EV	299,783	64%	251,106	+19%	101,878	+20%	35,797	+21%	29,253	+13%	36,828	+26%
Poland	Other	170,705	36%	176,802	-3%	56,577	-2%	20,548	+1%	16,654	+1%	19,375	-8%
	BEV	54,726	29%	36,707	+49%	20,020	+71%	9,338	+87%	5,079	+65%	5,603	+54%
	PHEV	28,328	15%	24,924	+14%	8,697	-3%	3,022	-3%	2,465	-9%	3,210	+4%
	Hybrid	49,431	26%	40,048	+23%	10,502	+2%	3,446	+0%	2,847	+0%	4,209	+5%
	Total EV	132,485	70%	101,679	+30%	39,219	+27%	15,806	+37%	10,391	+21%	13,022	+21%
Portugal	Other	56,427	30%	69,885	-19%	12,613	-24%	3,783	-31%	3,695	-15%	5,135	-25%
	BEV	91,298	41%	72,734	+26%	32,218	+42%	14,096	+46%	10,118	+49%	8,004	+29%
	PHEV	51,108	23%	54,634	-7%	15,882	-10%	6,356	-17%	5,037	-2%	4,489	-8%
	Hybrid	17,004	8%	16,988	+0%	5,700	+3%	2,047	+2%	2,132	-6%	1,521	+18%
	Total EV	159,410	72%	144,356	+10%	53,800	+17%	22,499	+16%	17,287	+22%	14,014	+13%
Sweden	Other	61,039	28%	67,190	-9%	19,139	-3%	7,351	+8%	6,115	-7%	5,673	-9%
	BEV	45,464	26%	35,725	+27%	17,575	+40%	7,833	+51%	4,843	+49%	4,899	+20%
	PHEV	21,483	12%	18,540	+16%	7,027	+1%	2,529	-1%	1,903	-4%	2,595	+8%
	Hybrid	62,426	36%	61,208	+2%	19,938	+2%	7,007	+3%	5,981	+2%	6,950	+1%
	Total EV	129,373	75%	115,473	+12%	44,540	+14%	17,369	+20%	12,727	+15%	14,444	+8%
Switzerland	Other	44,164	25%	53,454	-17%	12,449	-26%	4,579	-17%	3,320	-34%	4,550	-27%
	BEV	1,931,450	23%	1,300,808	+49%	710,317	+65%	290,117	+73%	196,486	+63%	223,714	+57%
	PHEV	860,349	10%	723,003	+19%	282,590	+12%	102,267	+12%	78,426	+11%	101,897	+12%
	Hybrid	3,090,411	36%	2,793,574	+11%	893,330	+5%	330,693	+7%	234,980	+2%	327,657	+5%
	Total EV	5,882,210	69%	4,817,385	+22%	1,886,237	+23%	723,077	+28%	509,892	+21%	653,268	+19%
EU27	Other	2,635,235	31%	3,240,225	-19%	732,541	-23%	247,971	-23%	198,319	-23%	286,251	-22%
	BEV	2,549,797	24%	1,797,381	+42%	941,362	+55%	416,433	+60%	243,207	+52%	281,722	+51%
	PHEV	1,128,967	11%	918,674	+23%	386,532	+18%	164,470	+24%	94,133	+14%	127,929	+15%
	Hybrid	3,792,070	36%	3,455,239	+10%	1,121,182	+5%	458,031	+5%	273,266	+3%	389,885	+5%
EU27+UK	Total EV	7,470,834	71%	6,171,294	+21%	2,449,076	+22%	1,038,934	+26%	610,606	+21%	799,536	+19%
+EFTA	Other	3,084,904	29%	3,757,838	-18%	872,620	-21%	324,276	-21%	222,031	-22%	326,313	-22%

Legend
FY = Full year
YoY = Year-on-year
YTD = Year-to-date

*EU27+UK+EFTA
Source: ABVE, ACEA, ANFAC, ANFIA, ANL, auto-schweiz, CAAM, CPCA, FCAI, FEBIAC, GAIKINDO, JADA, KBA, MoRTH, MOTIE, ODMD, OFV, PFA, PZPM, RAI, SCB, SMMT, Statistik Austria

Electric vehicle sales data

Americas: Mexico, USA, Brazil

		Q1-Q3 2026	Market share	Q1-Q3 2025	YTD YoY	Q3 2026	Quarter YoY	Sept-26	Month YoY	Aug-26	Month YoY	Jul-26	Month YoY
	BEV	21,794	2%	15,369	+42%	8,026	+36%	2,494	+22%	2,695	+11%	2,837	+97%
	PHEV	25,242	2%	7,798	+224%	9,704	+252%	3,267	+222%	3,205	+225%	3,232	+324%
	Hybrid	99,147	9%	77,599	+28%	33,416	+28%	11,063	+21%	11,146	+32%	11,207	+32%
	Total EV	146,183	13%	100,766	+45%	51,146	+47%	16,824	+38%	17,046	+44%	17,276	+62%
Mexico	Other	997,805	87%	988,385	+1%	338,324	+0%	112,450	+5%	112,315	-2%	113,559	-2%
	BEV	746,159	6%	1,045,326	-29%	251,742	-42%	90,213	-44%	85,999	-42%	75,530	-40%
	PHEV	139,474	1%	233,989	-40%	52,974	-27%	18,172	-17%	17,092	-38%	17,710	-23%
	Hybrid	1,871,785	16%	1,531,687	+22%	648,825	+26%	205,034	+32%	226,311	+21%	217,480	+26%
	Total EV	2,757,418	23%	2,811,002	-2%	953,541	-7%	313,419	-7%	329,402	-9%	310,720	-3%
USA	Other	9,237,407	77%	9,422,183	-2%	3,112,497	+0%	1,006,244	+8%	1,051,274	-5%	1,054,979	-1%
	BEV	165,343	10%	53,115	+211%	75,038	+232%	22,204	+176%	27,104	+256%	25,730	+270%
	PHEV	137,251	8%	65,139	+111%	61,228	+153%	20,186	+155%	20,592	+164%	20,450	+142%
	Hybrid	123,743	7%	71,932	+72%	47,164	+56%	17,839	+62%	14,811	+53%	14,514	+52%
	Total EV	426,337	25%	190,186	+124%	183,430	+138%	60,229	+123%	62,507	+149%	60,694	+143%
Brazil	Other	1,303,203	75%	1,221,442	+7%	459,006	+1%	156,349	+3%	150,598	+2%	152,059	-3%
	BEV	933,296	6%	1,113,810	-16%	334,806	-28%	114,911	-33%	115,798	-27%	104,097	-23%
	PHEV	301,967	2%	306,926	-2%	123,906	+25%	41,625	+36%	40,889	+12%	41,392	+29%
	Hybrid	2,094,675	14%	1,681,218	+25%	729,405	+28%	233,936	+33%	252,268	+23%	243,201	+28%
	Total EV	3,329,938	22%	3,101,954	+7%	1,188,117	+5%	390,472	+4%	408,955	+2%	388,690	+9%
Americas	Other	11,538,415	78%	11,632,010	-1%	3,909,827	+0%	1,275,043	+7%	1,314,187	-4%	1,320,597	-2%

Legend
FY = Full year
YoY = Year-on-year
YTD = Year-to-date

Source: ABVE, ACEA, ANFAC, ANFIA, ANL, auto-schweiz, CAAM, CPCA, FCAI, FEBIAC, GAIKINDO, JADA, KBA, MoRTH, MOTIE, ODMD, OFV, PFA, PZPM, RAI, SCB, SMMT, Statistik Austria

Electric vehicle sales data

APAC: Australia, China*, India, Indonesia, Japan**, South Korea

		Q1-Q3 2026	Market share	Q1-Q3 2025	YTD YoY	Q3 2026	Quarter YoY	Sept-26	Month YoY	Aug-26	Month YoY	Jul-26	Month YoY
	BEV	180,539	19%	76,473	+136%	76,825	+162%	26,287	+118%	27,028	+169%	23,510	+226%
	PHEV	85,263	9%	38,041	+124%	31,022	+150%	10,072	+124%	10,591	+171%	10,359	+157%
	Hybrid	160,068	17%	143,695	+11%	55,189	+11%	17,843	+21%	18,662	+7%	18,684	+5%
	Total EV	425,870	45%	258,209	+65%	163,036	+78%	54,202	+73%	56,281	+80%	52,553	+81%
Australia	Other	531,826	56%	676,893	-21%	163,079	-26%	54,576	-28%	52,479	-24%	56,024	-26%
	BEV	6,049,000	40%	6,087,000	-1%	2,495,000	+7%	925,000	+2%	829,000	+8%	741,000	+11%
	PHEV	2,420,000	16%	3,380,000	-28%	883,000	-29%	327,000	-31%	289,000	-29%	267,000	-27%
	Hybrid	823,000	6%	662,100	+24%	329,000	+48%	125,000	+52%	107,000	+53%	97,000	+39%
	Total EV	9,292,000	62%	10,129,100	-8%	3,707,000	-3%	1,377,000	-6%	1,225,000	-1%	1,105,000	-0%
China*	Other	5,773,000	38%	9,277,900	-38%	1,439,000	-53%	526,000	-53%	477,000	-53%	436,000	-52%
	BEV	245,354	7%	121,519	+102%	103,719	+108%	36,473	+127%	32,481	+80%	34,765	+120%
	PHEV	24	0.0%	65	-63%	11	-27%	3	+200%	6	+50%	2	-80%
	Hybrid	331,000	9%	250,887	+32%	112,601	+47%	40,620	+77%	37,512	+40%	34,469	+29%
	Total EV	576,378	15%	372,471	+55%	216,331	+71%	77,096	+97%	69,999	+56%	69,236	+62%
India	Other	3,222,524	85%	2,470,620	+30%	1,054,035	+38%	351,503	+43%	344,177	+34%	358,355	+37%
	BEV	116,233	24%	54,859	+112%	46,042	+183%	14,520	+253%	17,460	+175%	14,062	+141%
	PHEV	10,219	2%	3,285	+211%	5,240	+235%	1,291	+138%	1,982	+189%	1,967	+480%
	Hybrid	63,492	13%	45,797	+39%	23,084	+33%	7,859	+33%	7,485	+40%	7,740	+26%
	Total EV	189,944	39%	103,941	+83%	74,366	+111%	23,670	+124%	26,927	+118%	23,769	+93%
Indonesia	Other	302,291	61%	326,739	-8%	95,408	-5%	31,203	-10%	31,527	-3%	32,678	-3%
	BEV	82,881	4%	27,668	+200%	31,853	+217%	13,440	+200%	8,351	+215%	10,062	+246%
	PHEV	33,792	2%	32,979	+3%	11,571	+11%	4,660	+16%	3,218	+16%	3,693	+3%
	Hybrid	1,216,604	61%	1,166,359	+4%	406,536	+11%	147,496	+10%	107,134	+9%	151,906	+14%
	Total EV	1,333,277	67%	1,227,006	+9%	449,960	+17%	165,596	+16%	118,703	+15%	165,661	+19%
Japan**	Other	654,091	33%	708,436	-8%	201,750	-10%	70,697	-18%	54,136	-4%	76,917	-5%
	BEV	299,800	24%	171,378	+75%	98,764	+26%	31,768	+11%	31,060	+28%	35,936	+41%
	PHEV	9,562	0.8%	10,680	-11%	3,710	+9%	1,303	+7%	1,334	+34%	1,073	-9%
	Hybrid	412,733	34%	428,542	-4%	128,423	-11%	46,229	-11%	36,102	-18%	46,092	-6%
	Total EV	722,095	59%	610,600	+18%	230,897	+2%	79,300	-3%	68,496	-1%	83,101	+10%
South Korea	Other	510,085	41%	651,234	-22%	153,675	-26%	56,096	-26%	41,424	-41%	56,155	-11%

Legend
FY = Full year
YoY = Year-on-year
YTD = Year-to-date

*BEV and PHEV numbers include commercial vehicles, hybrid numbers include only passenger cars; **Excluding kei cars
Source: ABVE, ACEA, ANFAC, ANFIA, ANL, auto-schweiz, CAAM, CPCA, FCAI, FEBIAC, GAIKINDO, JADA, KBA, MoRTH, MOTIE, ODMD, OFV, PFA, PZPM, RAI, SCB, SMMT, Statistik Austria

Electric vehicle sales data

APAC: Thailand, Turkey, Vietnam

		Q1-Q3 2026	Market share	Q1-Q3 2025	YTD YoY	Q3 2026	Quarter YoY	Sept-26	Month YoY	Aug-26	Month YoY	Jul-26	Month YoY
	BEV	168,746	30%	87,716	+92%	63,165	+109%	19,710	+100%	22,086	+123%	21,369	+105%
	PHEV	16,000	3%	15,011	+7%	5,780	+57%	2,078	+53%	1,747	+69%	1,955	+52%
	Hybrid	130,352	23%	105,426	+24%	40,443	+20%	14,793	+28%	13,772	+31%	11,878	+2%
	Total EV	315,098	56%	208,153	+51%	109,388	+62%	36,581	+61%	37,605	+75%	35,202	+50%
Thailand	Other	244,457	44%	328,845	-26%	72,020	-29%	23,836	-16%	24,812	-16%	23,372	-46%
	BEV	120,392	19%	132,149	-9%	39,646	-16%	15,074	+19%	11,878	-32%	12,694	-26%
	PHEV	4,277	0.7%	36,749	-88%	787	-92%	229	-94%	245	-88%	313	-93%
	Hybrid	197,487	31%	163,442	+21%	58,449	+2%	17,736	-21%	20,885	+23%	19,828	+13%
	Total EV	322,156	51%	332,340	-3%	98,882	-14%	33,039	-15%	33,008	-10%	32,835	-16%
Turkey	Other	305,821	49%	410,347	-26%	88,861	-37%	30,697	-38%	28,521	-38%	29,643	-34%
	BEV	181,564	47%	103,897	+75%	65,578	+81%	23,627	+70%	20,164	+85%	21,787	+90%
	PHEV	0	0.0%	68	-100%	0	-100%	0	-100%	0	-100%	0	-100%
	Hybrid	16,173	4%	9,717	+66%	5,308	+39%	2,284	+68%	1,388	+8%	1,636	+39%
	Total EV	197,737	51%	113,682	+74%	70,886	+76%	25,911	+69%	21,552	+76%	23,423	+85%
Vietnam	Other	192,061	49%	184,229	+4%	60,716	-7%	22,432	-5%	16,258	-12%	22,026	-5%
	BEV	7,444,509	30%	6,862,659	+9%	3,020,592	+15%	1,105,899	+10%	999,508	+16%	915,185	+19%
	PHEV	2,579,137	10%	3,516,878	-27%	941,121	-27%	346,636	-30%	308,123	-26%	286,362	-25%
	Hybrid	3,350,909	13%	2,975,965	+13%	1,159,033	+19%	419,860	+21%	349,940	+21%	389,233	+17%
	Total EV	13,374,555	53%	13,355,502	+0%	5,120,746	+5%	1,872,395	+1%	1,657,571	+5%	1,590,780	+8%
APAC	Other	11,736,156	47%	15,035,243	-22%	3,328,544	-31%	1,167,040	-33%	1,070,334	-32%	1,091,170	-29%
	BEV	10,927,602	22%	9,773,850	+12%	4,296,760	+16%	1,637,243	+14%	1,358,513	+15%	1,301,004	+20%
	PHEV	4,010,071	8%	4,742,478	-15%	1,451,559	-15%	552,731	-16%	443,145	-17%	455,683	-13%
	Hybrid	9,237,654	18%	8,112,422	+14%	3,009,620	+15%	1,111,827	+16%	875,474	+15%	1,022,319	+14%
Analysed	Total EV	24,175,327	48%	22,628,750	+7%	8,757,939	+9%	3,301,801	+8%	2,677,132	+8%	2,779,006	+11%
markets	Other	26,359,475	52%	30,425,091	-13%	8,110,991	-18%	2,766,359	-17%	2,606,552	-19%	2,738,080	-17%

Legend
FY = Full year
YoY = Year-on-year
YTD = Year-to-date

Source: ABVE, ACEA, ANFAC, ANFIA, ANL, auto-schweiz, CAAM, CPCA, FCAI, FEBIAC, GAIKINDO, JADA, KBA, MoRTH, MOTIE, ODMD, OFV, PFA, PZPM, RAI, SCB, SMMT, Statistik Austria

Glossary of terms and abbreviations

Abbreviation	Full description
BEV	Battery electric vehicle
EFTA	European Free Trade Association (incl. Iceland, Liechtenstein, Norway and Switzerland)
EU	European Union
Europe	EU27+UK+EFTA
EV	Electric vehicle (incl. BEV, PHEV and HEV)
FCEV	Fuel cell electric vehicle
FHEV	Full-hybrid electric vehicle
FY	Full year
HEV/hybrid	Hybrid electric vehicle
ICE	Internal combustion engine
LHS	Left-hand side
MHEV	Mild-hybrid electric vehicle
NEV	New energy vehicle (incl. BEV and PHEV)
PHEV	Plug-in hybrid electric vehicle
REEV	Range-extended electric vehicle, also referred to as range extender or extended-range electric vehicle (EREV)
RHS	Right-hand side
YoY	Year-on-year
YTD	Year-to-date

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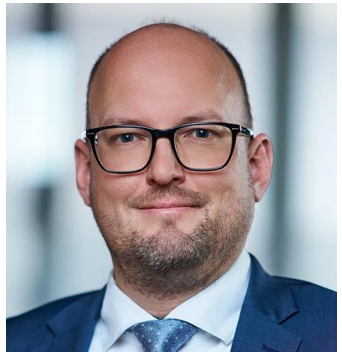

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