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Electric Vehicle Sales Review Q2-2026

Foresight to drive the industry
July 2026

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BEV sales growth in all analysed markets in Q2 2026 vs Q2 2025

+18%

Executive summary

Global BEV sales reach record Q2 market share

Global BEV sales regained momentum in Q2 2026, reaching their highest second-quarter volume and market share on record across the analysed markets.

BEV sales rose by 18% year-on-year (YoY) to 3.9 million units, lifting the market share to 23%. However, the recovery was not evenly spread across all powertrains: PHEV sales declined by 13% YoY, while hybrids continued to gain and ICE volumes retreated. The result is a clearer split between markets where BEVs are now taking the lead in electrification and those where consumers are still favouring hybrids or delaying plug-in purchases.

China returned to BEV growth after a weaker first quarter, with sales up 6% YoY to 2.2 million units despite a 22% decline in the total market. BEV share reached 44%, while combined new energy vehicles (NEV), BEVs and PHEVs, accounted for more than 60% of sales for the first time. Newer model launches and higher fuel prices strengthened demand, particularly for BEVs, at the expense of PHEVs.

Europe's top five markets* continued to show strong momentum. BEV sales increased by 55% YoY to 562,000 units, passing the 500,000 mark in a single quarter for the first time and lifting the market share to a record 22%. Germany remained a key driver, with BEV sales exceeding 200,000 units for the first time and increasing 53% YoY. France and Italy also recorded particularly strong BEV growth, up by 75% and 90% YoY, respectively.

By contrast, the US market remained subdued. BEV sales declined 12% YoY in Q2, while hybrid sales rose 29%, highlighting the market's slower recovery following the withdrawal of tax incentives.

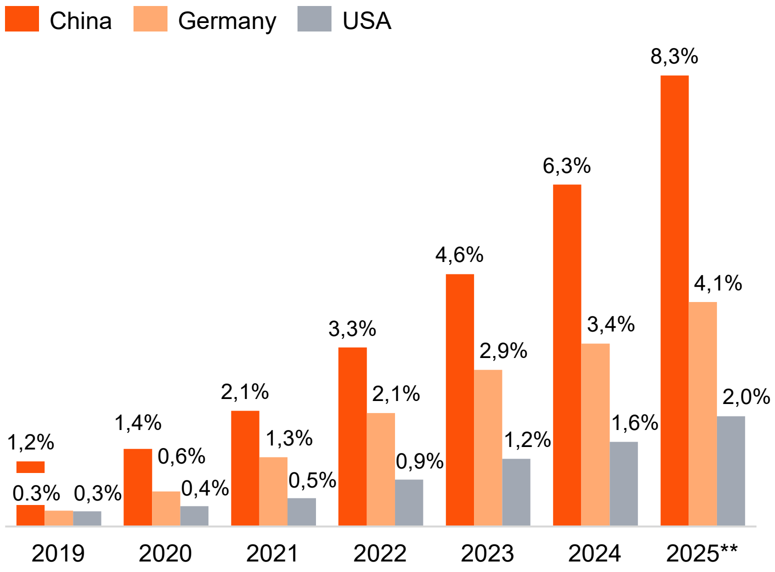
The Analyst Insights section widens the lens from new registrations to the emerging used BEV market. Greater model availability, steeper discounts on used BEVs compared with ICE equivalents and now rising fuel costs are supporting secondary-market demand. These dynamics link this quarter's sales performance to the longer-term questions of residual values and how affordability is shaping consumer preferences.

*France, Germany, Italy, Spain and UK

A bigger EV fleet is opening up the used market

As BEVs enter the global vehicle fleet in increasing numbers, their share of the overall vehicle population continues to grow. This structural shift is now visibly translating into the secondary market: used BEV sales – and in China's case, used NEV sales encompassing both BEVs and PHEVs – have steadily gained share as the installed base matures and early adopters bring their vehicles back to market.

BEV share in car parc



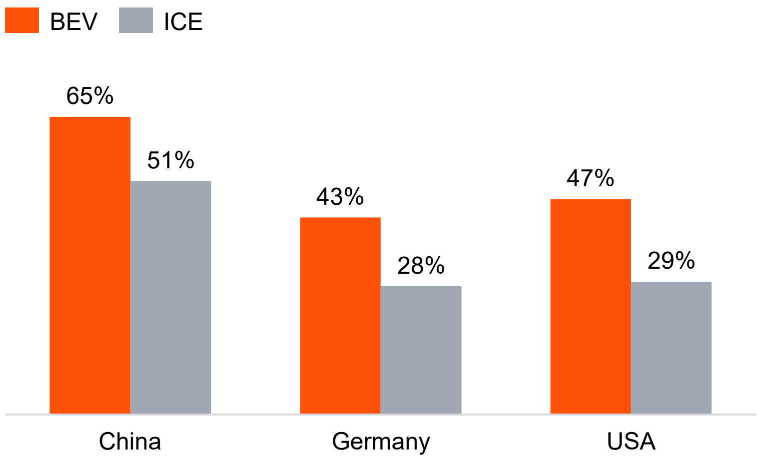
This growth has been driven by several mutually reinforcing factors. The first is a significant expansion in model availability since 2019, which has allowed consumers to choose the most suitable model from an increasingly diverse range of offerings.

In China, the number of different BEV models produced grew from 44 in 2019 to 174 in 2025, in Europe* from 5 to 58 and in the US from 5 to 19. This proliferation of choices has been a critical enabler in normalising EV ownership across all price points and vehicle segments, feeding directly into the used-car pipeline.

A second key structural factor accelerating this shift across all three regions is pricing. Used BEVs are being discounted more heavily from their original list price than their ICE counterparts, making them increasingly attractive for budget-conscious buyers. In Germany, used BEVs between 3–4 years of age saw a 43% average discount from list price compared to 28% for used ICE vehicles. Used prices in the US showed similar cuts to the list price, with BEVs discounted 47% on average vs 29% for ICEs. China also shows a notable gap, with used BEVs discounted by 65% compared with 51% for ICE vehicles, reflecting continued pressure on EV resale values amid rapid technological depreciation and intense competitive pricing in the world's largest EV market.

A third factor is shifting consumer sentiment. The Strategy& eReadiness 2025 study shows that the share of respondents willing to purchase an EV within the next five years rose from 62% in 2023 to 65% in 2025, with over 40% citing lower operating costs as a key benefit of EV ownership. Importantly, this openness extends directly into the used-car segment: over 60% of respondents now consider a used EV as their next vehicle, driven primarily by lower insurance fees, reduced overall costs and the immediate availability of the car compared to ordering new.

Average price cut from original list price***



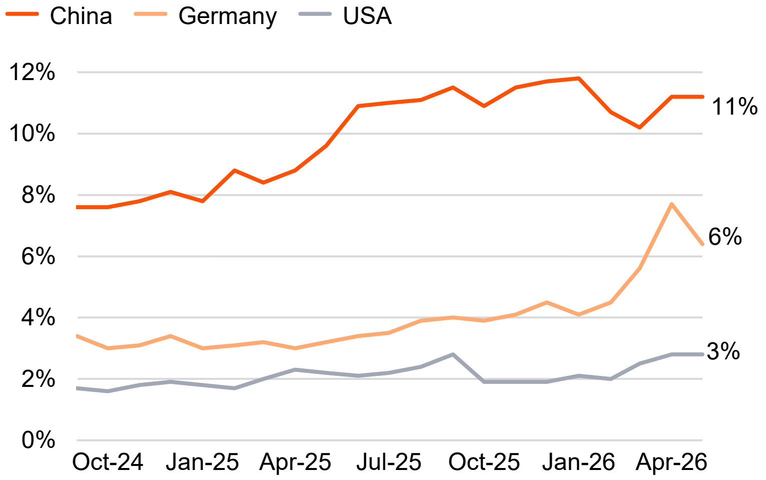
*EU27+UK+EFTA; **USA BEV share partially estimated; ***As of July 2026 for vehicles of 3–4 years of age and around 25,000 km runtime across 10 BEV/ICE pairings
Source: Autohome, People's Daily, KBA, mobile.de, Cox Automotive, Edmunds, Autotrader, AFDC

Used EV sales rise as buyers respond to price and fuel pressures

Against this backdrop of expanding choice, attractive pricing and growing consumer openness, the data confirms a clear upward trajectory. Between September 2024 and May 2026, our analysis shows that the EV* share of used-car sales grew YoY across all three markets studied – China, Germany and the US. Notably, this growth trajectory received an additional boost following the outbreak of the conflict in the Gulf region at the end of February 2026. The closure of the Strait of Hormuz, a critical chokepoint through which roughly 25% of global oil trade flows, sent oil prices sharply higher, reaching a peak of $118 per barrel by late March. While prices have since eased to around $85 per barrel by mid-July, they remain 18% above the pre-war baseline of $72 per barrel, keeping fuel-cost considerations firmly on consumers' minds when evaluating a used-vehicle purchase. Furthermore, unlike new BEVs, which take time to order and be produced, used BEVs are already available.

Germany has emerged as the standout market in response to this dynamic. Used BEV share crossed the 5% threshold for the first time in March, climbed further to 8% in April, before settling at 6% in May, representing a striking 73% YoY increase. This suggests German used-car buyers are reacting swiftly and decisively to elevated fuel costs, pivoting towards electric alternatives at a pace that outstrips the other markets analysed.

EV* share in used-car sales



The US market has also registered an uptick in used BEV share since the conflict in the Gulf region, though the pace of adoption remains considerably more measured. Share rose from 2% in February to 3% in May, equating to 17% YoY sales growth. While directionally consistent with global trends, the magnitude of the US response underscores the market's comparatively lower sensitivity to fuel-price shocks, likely reflecting structural factors such as lower fuel taxes, greater average driving distances and an EV charging infrastructure that remains less developed in some regions. Notably, this also aligns closely with the far more limited expansion of the US BEV model line-up compared with Europe and China, potentially constraining consumer choice and, by extension, adoption in the used BEV market.

China continues to lead all three markets in absolute terms, with the used NEV share exceeding 10% consistently since June 2025. However, growth has moderated somewhat, reaching 11% in May 2026. This deceleration relative to Germany's surge suggests that China's used EV market – being more mature – is now operating from a higher base, with incremental gains naturally harder to sustain. This is reinforced by broader market data: in the first five months of the year, used NEV transactions in China surged nearly 26%, while new NEV sales plunged over 16% following the rollback of purchase tax rebates, which has made new vehicles comparatively more expensive and pushed a meaningful share of buyers towards the used market instead.

Taken together, these dynamics point to a resilient and accelerating used BEV market. The increasing demand for BEVs – driven by consumers seeking to avoid higher fuel prices and by newer models offering longer ranges – should, over time, help improve residual values, further strengthening the case for used electric vehicles across all three markets.

*BEV for Germany and USA, NEV for China
Source: CADA, CAAM, KBA, mobile.de, Cox Automotive, Edmunds, Autotrader, AFDC

Top-selling BEV OEMs during H1 2026

Europe 5

	OEM	Sales	Δ*
1	Tesla	102,345	↑ 3
2	Volkswagen	85,953	↓ 1
3	Renault	81,934	↓ 1
4	Skoda	64,043	↑ 2
5	BMW	60,630	↓ 2
6	Mercedes-Benz	49,621	↑ 3
7	Audi	48,617	↓ 2
8	BYD	48,222	New
9	Kia	44,613	New
10	Leapmotor	42,227	New

China**

OEM	Sales	Δ*
BYD	990,879	→ 0
Geely	578,347	→ 0
Changan	321,667	→ 0
Leapmotor	260,193	New
HIMA	242,216	→ 0
Tesla	238,955	↓ 2
SAIC-GM-Wuling	202,350	↑ 2
Li Auto	193,472	↓ 2
Nio	190,648	↓ 2
Xiaomi Auto	185,055	↓ 2

USA

OEM	Sales	Δ*
Tesla	242,100	→ 0
Hyundai	26,936	↑ 2
Chevrolet	24,043	↓ 1
Toyota	21,855	New
Rivian	21,770	↑ 1
Cadillac	17,864	↑ 1
Ford	16,606	↓ 4
Kia	12,627	↑ 2
BMW	10,790	↓ 4
Subaru	10,064	New

*Ranking change vs Q1 2026; **Top NEV (BEV+PHEV) OEMs in China
Source: KBA, AAA, UNRAE, DGT, DVLA, DVSA, CPCA, KBB

Top-selling BEVs during H1 2026

Europe 5

	Model	Sales	Δ*	Entry**
1	Tesla Model Y	61,379	→ 0	€33,600
2	Skoda Elroq	34,008	→ 0	€31,400
3	Tesla Model 3	33,638	→ 0	€31,100
4	Renault 5	33,536	→ 0	€23,500
5	Leapmotor T03	29,912	↑ 2	€15,900
6	VW ID.3	29,132	→ 0	€28,600
7	Citroen E-C3	28,476	↓ 2	€16,900
8	Skoda Enyaq	26,733	→ 0	€36,100
9	VW ID.4, ID.5	23,392	→ 0	€35,300
10	Mercedes-Benz CLA	19,528	New	€50,900
	Weighted average price			**€29,800**

China

Model	Sales	Δ*	Entry**
Geely EX2	194,159	→ 0	€7,400
Tesla Model Y	172,513	→ 0	€30,100
Li i6	120,443	↑ 1	€28,500
Xiaomi YU7	104,559	↓ 1	€26,700
BYD Yuan Up	82,670	↑ 1	€8,500
Xiaomi SU7	80,496	New	€25,100
Nio ES8	78,618	↓ 2	€43,700
Wuling Hongguang Mini EV	72,799	↑ 1	€4,100
Changan Nevo Q05	71,582	New	€9,100
MG 4	70,753	→ 0	€7,900
Weighted average price			**€19,600**

USA

Model	Sales	Δ*	Entry**
Tesla Model Y	163,454	→ 0	€36,500
Tesla Model 3	66,616	→ 0	€33,800
Hyundai Ioniq5	20,730	↑ 2	€30,700
Toyota BZ	17,553	New	€32,000
Chevrolet Equinox	16,249	↓ 2	€27,100
Rivian R1S	11,677	New	€73,600
Ford Mustang Mach-E	11,632	↓ 3	€35,500
Honda Prologue	8,407	↓ 2	€36,300
Lexus RZ	7,814	New	€41,500
Cadillac Lyriq	7,578	New	€56,500
Weighted average price			**€36,700**

*Ranking change vs Q1 2026; **Entry prices as of July 2026 excluding VAT; Europe prices are taken from Germany
Source: KBA, AAA, UNRAE, DGT, DVLA, DVSA, CPCA, KBB, OEM websites

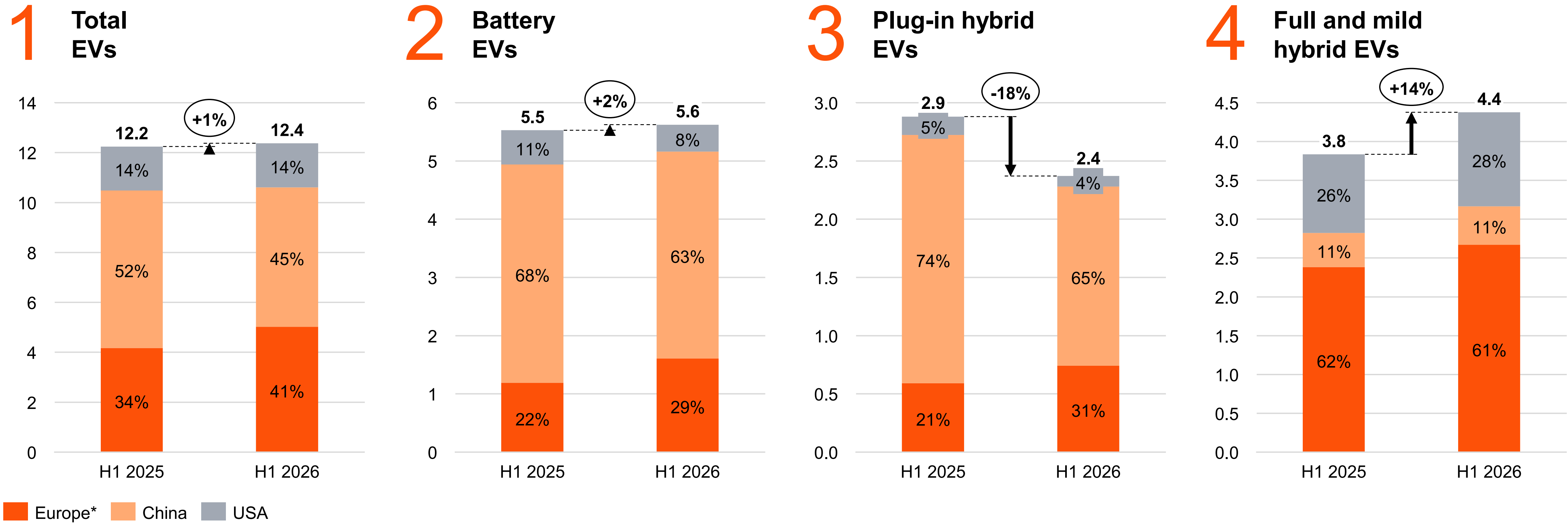
2026 BEV model launches (selection)

Q1 2026	Q2 2026	Q3 2026	Q4 2026
Toyota bZ7	**BMW** iX1	**BYD** Atto 2	**BMW** iX4
Mercedes-Benz GLC EQ	**Audi** E7X	**Fiat** Grizzly	**Denza** N8
Chery QQ3	**Volvo** EX60	**Mercedes-Benz** C-Class EQ	**Nissan** Wave

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

Electric vehicle sales in core regions

H1 2025 vs H1 2026
(in million)



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

European Union, UK and EFTA

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

Electrification in the Europe 5 markets reached a new high in Q2 2026, with BEV volumes rising to 562,000 sales and the BEV share reaching 22%, both record levels. This pushed ICEs to their lowest level on record, at 713,000 registrations and a 28% share, following a 22% YoY decline. The shift was not driven solely by lower ICE volumes: total registrations increased by 8% YoY to 2.6 million units, while every electrified powertrain recorded double-digit growth.

BEVs delivered the strongest growth in Europe 5 in Q2, up 55% YoY, ahead of PHEVs at 24% and hybrids at 16%. PHEVs also set a new quarterly volume record at 272,000, although their 11% share remained below the historical peak. Hybrids remained the largest electrified category by volume, at 1.0 million registrations and a 40% share, reinforcing that the overall market shift is towards electrification rather than BEVs alone.

Momentum was supported by France and Germany, where BEV sales have benefitted from government purchase subsidies this year. Germany recorded 208,000 BEV sales in Q2, the highest level on record, with the BEV share reaching 27%. France recorded 129,000 BEV sales and a 28% share, also a record. In both markets, BEV growth substantially outpaced the overall market: BEV sales rose 75% YoY in France vs total market growth of 5%, while Germany's BEV sales increased 54% vs total market growth of 6%.

The UK remained the second-largest BEV market by share among the five countries at 28%, while France recorded its lowest ICE share on record, at 14%. Italy and Spain also saw BEV growth outpace PHEV growth in Q2, with BEV sales rising 90% in Italy and 33% in Spain, although PHEV market share remained higher than BEV share in both markets.

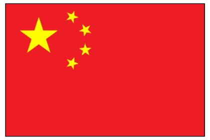
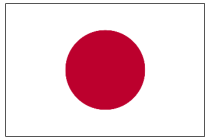
Europe*	Q2 2026	Market share	vs Q2 2025
BEV	885,000	24%	+43%
PHEV	388,000	10%	+20%
Hybrid	1,317,000	35%	+13%
Total EV	**2,590,000**	**70%**	**+23%**
Total registrations	**3,712,000**	**–**	**+8%**

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

BEV adoption in Q2 2026 was led by Norway, with a 97% share, followed by Denmark at 79% and Finland at 49%. By volume, Denmark ranked first with 46,000 sales, slightly ahead of Norway's 45,000, while also growing 40% YoY. Among the other European* markets, Portugal posted the strongest increase, up 52% YoY to 20,000 sales and a 27% market share.

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

China, Japan and South Korea


China

BEV sales returned to growth in Q2 2026, rising by 6% YoY to 2.2 million units, even as the overall market was down by 22% over the same period. BEV market share therefore climbed sharply to 44%, up almost 12 percentage points vs Q2 2025, underlining the extent to which demand has shifted towards fully electric models after the weaker first quarter. The NEV market, defined here as BEVs and PHEVs combined, reached 3.1 million units in Q2 2026. Although this was still 5% below the same quarter last year, NEV market share rose to over 60%, helped by the far steeper decline in ICE market share (down 12 percentage points YoY in Q2). This partly reflects the continuing substitution away from fuel vehicles, with high fuel prices adding to the appeal of electrified options, as well as the strong pull of new BEV launches. PHEVs remained under pressure, with sales down by 26% YoY to 847,000 units and market share slipping by 1 percentage point to 17%. The segment is still sizeable, but its recent momentum has been constrained by the stronger BEV appeal and a more cautious consumer environment.

China	Q2 2026	Market share	vs Q2 2025
BEV	2,235,000	44%	+6%
PHEV	847,000	17%	-26%
Hybrid	266,000	5%	+17%
Total EV	**3,348,000**	**66%**	**-4%**
Total registrations	**5,097,000**	**–**	**-22%**

Japan*

BEV sales rose sharply in Q2 2026, up 205% YoY to 28,000 units, taking share to a record-high 4% amid stronger national and local incentives. PHEVs were broadly stable, up 4% to 11,000 units, with share at nearly 2%. Hybrids remained the dominant EV category, increasing 9% to 376,000 units, though share eased to 57% as BEVs grew faster.

South Korea

BEV sales almost doubled YoY in Q2 2026 to 113,000 units, lifting market share to a record high of 26%, supported by a broader model line-up and quicker subsidy disbursement. PHEVs remained marginal, down 18% to 3,000 units and holding less than 1% share. Hybrids softened by 6% to 145,000 units, although the combined BEV, PHEV and hybrid share still reached nearly 60%, the highest quarterly level ever.

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

United States, Brazil and Mexico



USA

The market returned to slight growth in Q2 2026, but only because hybrids offset weakness elsewhere. Total sales rose by less than 1% YoY to 4.2 million units, while hybrid sales increased by 29% to 691,000 units. That lifted the hybrid share to 16%, the highest quarterly level ever recorded and continued a consistent run of YoY gains since Q4 2022.

BEVs remained under pressure, with sales down 12% YoY in Q2 2026. The decline was less severe than in Q4 2025 and Q1 2026, when volumes fell by 38% and 32%, respectively. The timing aligns with the end of BEV and PHEV purchase tax credits at the end of September 2025, after which BEV volumes contracted sharply before partially stabilising.

PHEVs showed weaker momentum, falling 23% YoY in Q2 2026 and recording YoY declines in every quarter since Q3 2024. ICE sales also fell, but the decline eased to 3% YoY from 5% YoY in Q1, despite high fuel prices linked to the conflict in the Gulf region. ICEs still represented 76% of Q2 sales.

USA	Q2 2026	Market share	vs Q2 2025
BEV	254,000	6%	-12%
PHEV	58,000	1%	-23%
Hybrid	691,000	16%	+29%
Total EV	**1,003,000**	**24%**	**+11%**
Total registrations	**4,201,000**	**–**	**+0%**

Brazil

Registrations reached a record high of 763,000 in Q2 2026, up 24% YoY. Electrified growth intensified: BEV sales rose 238% to 60,000, PHEV 116% to 47,000 and hybrid 79% to 43,000. BEV and PHEV shares also reached historical highs, at 8% and 6%, while ICE powertrains fell to 80%, the lowest level ever recorded.

Mexico

The Q2 2026 mix reached its most electrified point to date, with ICE at a historic-low 86% share and electrified powertrains at 14%. BEV, PHEV and hybrid volumes all hit new milestones, at 7,000, 9,000 and 35,000, respectively. Sales totalled 373,000, up 7% YoY, still below the historical peak of 435,000 in Q4 2025.

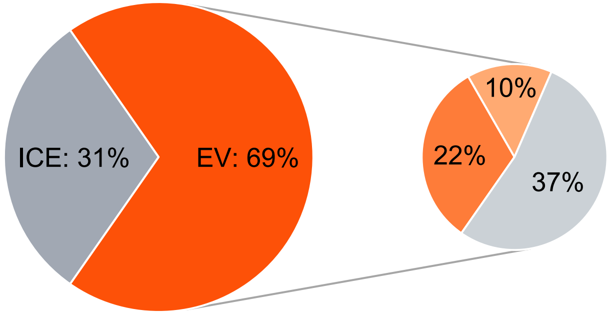
Source: Local governmental or car association data

Powertrain distribution in core regions

Electric vehicle sales in H1 2026

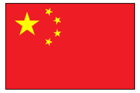
1 Europe*

Total sales: 7,234,000
EV sales: 5,022,000**

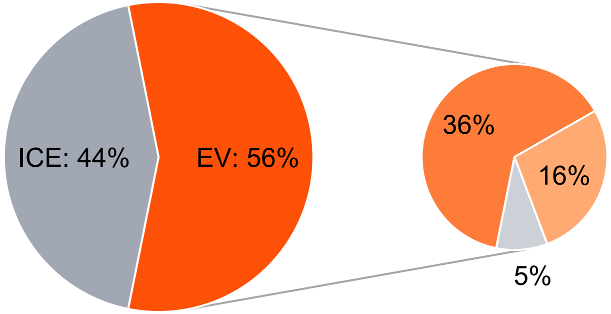


of which **BEVs:** 1,608,000
PHEVs: 742,000
Hybrids: 2,671,000

2 China

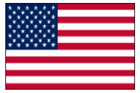


Total sales: 9,919,000
EV sales: 5,585,000

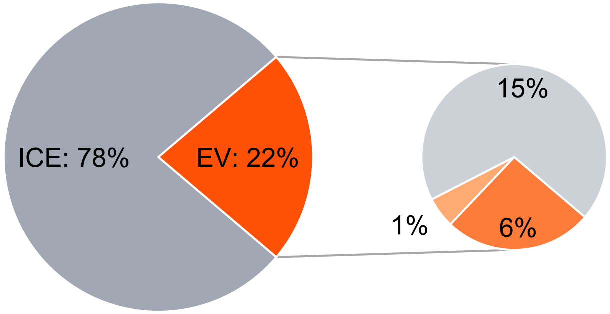


of which **BEVs:** 3,554,000
PHEVs: 1,537,000
Hybrids: 494,000

3 USA



Total sales: 7,873,000
EV sales: 1,765,000



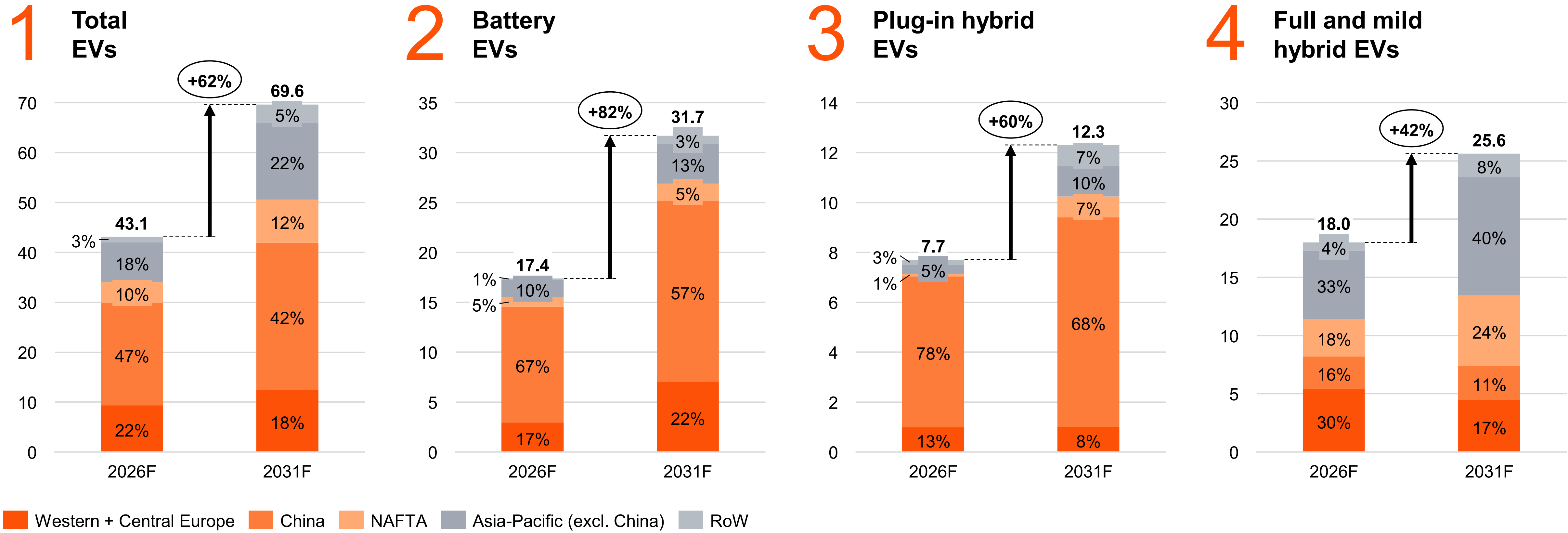
of which **BEVs:** 460,000
PHEVs: 92,000
Hybrids: 1,213,000

ICE EV BEV PHEV Hybrid

*EU27+UK+EFTA; **Numbers do not add up due to rounding
Source: Local governmental or car association data

Regional electric vehicle* assembly forecast

2026F vs 2031F
(in million)



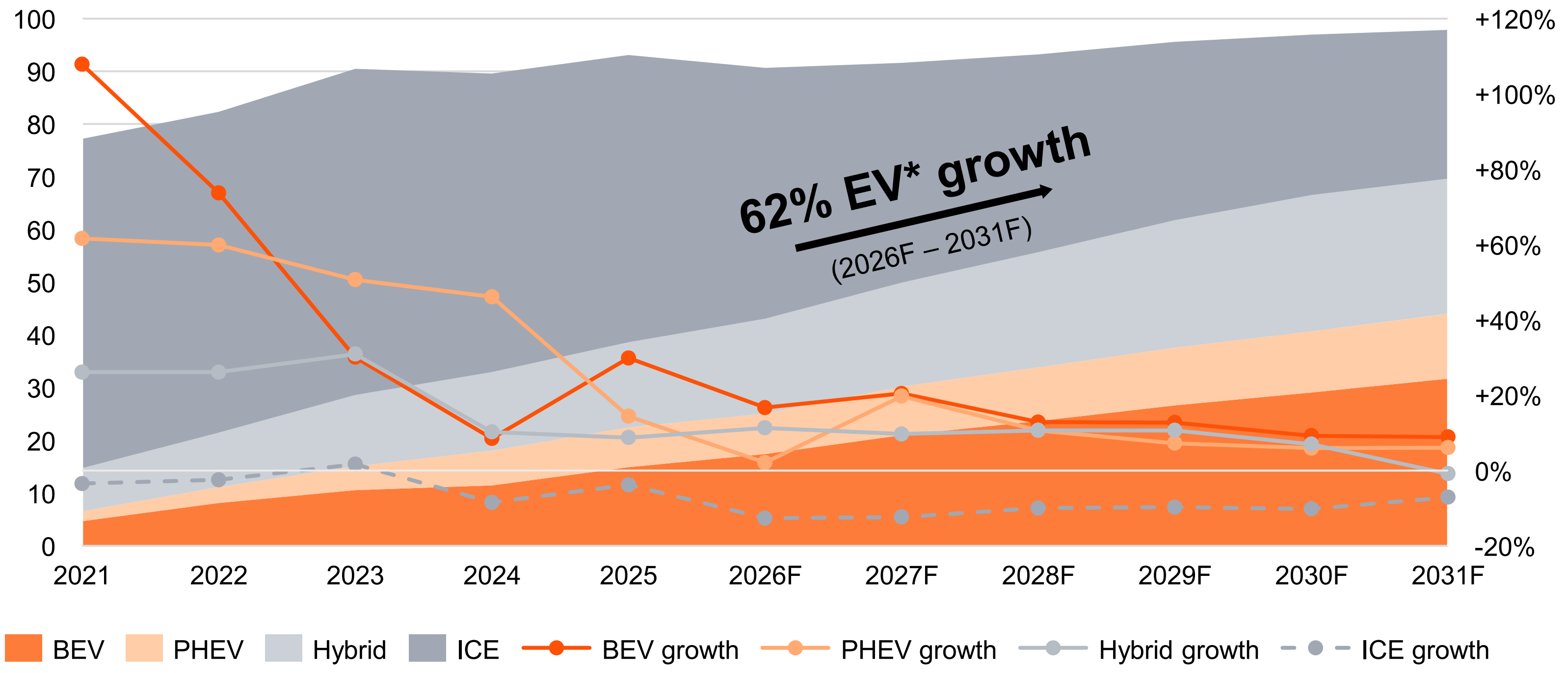
*Electric vehicles = BEV, PHEV (including REEV) and hybrid (including FHEV, MHEV and Series-Hybrid)
Source: IHS Mobility Global Light Vehicle Powertrain Production Forecast June 2026 release

Global electric vehicle* assembly forecast

2021 – 2031F

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

5 **Global light vehicle production by powertrain**



*Electric vehicles = BEV, PHEV (including REEV) and hybrid (including FHEV, MHEV and Series-Hybrid)

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

Global EV* production is expected to exceed ICE vehicle production by 2027. By 2031, EVs* are projected to account for more than 70% of global light vehicle production, signalling that electrification is becoming the dominant production model.

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 in 2021–2024. 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 82%, compared with 60% for PHEVs and 42% for hybrids.

Overview: BEV model launches

2026
(not exhaustive)

Brand	Model	Segment	Launch
Denza	N9	E	Q3 2026
Leapmotor	A05	C	Q3 2026
Mercedes-Benz	AMG GT-4	E	Q3 2026
Mercedes-Benz	GLA EQ	C	Q3 2026
NIO	ES7	E	Q3 2026
Roewe	M7	E	Q3 2026
Smart	#6	D	Q3 2026
Toyota	Highlander	D	Q3 2026
Volkswagen	ID. Cross	B	Q3 2026
Xpeng	L05	D	Q3 2026
BMW	iX5	E	Q4 2026
Ferrari	Luce	E	Q4 2026
Honda	0 Alpha	B	Q4 2026
Jetta	M6	C	Q4 2026
MG	Cyber X	C	Q4 2026

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

Overview: BEV model launches

2027 – 2030

(not exhaustive)

Brand	Model	Segment	Launch
BMW	iX7	E	2027
BYD	Sealion 7	D	2027
Changan	Lumin	A	2027
Chery	QQ5	B	2027
Honda	N BOX	A	2027
Jaguar	Type 01	E	2027
Kia	Sonet	B	2027
Porsche	Boxster	D	2027
Volkswagen	ID. Up!	A	2027
Volvo	EX40	C	2027
Zeekr	8X	E	2027
Alfa Romeo	Alfetta	C	2028
Hyundai	Ioniq 2	A	2028
Kia	EV1	B	2028
Leapmotor	B03	B	2028

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

Overview: BEV model launches

2027 – 2030

(not exhaustive)

Brand	Model	Segment	Launch
Polestar	Polestar 7	D	2028
Toyota	Yaris Cross	B	2028
Aston Martin	DB13	F	2029
Audi	A4 e-tron	D	2029
Kia	EV7	D	2029
Lexus	GX	E	2029
Nissan	Qashqai	C	2029
Scout	Traveler	D	2029
BYD	Seal U	D	2030
Ford	Escape	C	2030
Geely	Starray EM-i	D	2030
Rivian	R3	C	2030
Skoda	Octavia	C	2030
Toyota	Yaris	B	2030
Volkswagen	ID. Golf	C	2030

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

Electric vehicle sales data

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

		H1 2026	Market share	H1 2025	YTD YoY	Q2 2026	Quarter YoY	Jun-26	Month YoY	May-26	Month YoY	Apr-26	Month YoY
France	BEV	241,565	28%	148,333	+63%	129,479	+75%	55,851	+94%	37,412	+93%	36,216	+42%
	PHEV	47,865	6%	49,149	-3%	28,281	-4%	12,300	+4%	7,648	-7%	8,333	-13%
	Hybrid	423,848	49%	376,239	+13%	236,025	+23%	91,093	+23%	82,691	+52%	62,241	-1%
	Total EV	713,278	83%	573,721	+24%	393,785	+33%	159,244	+38%	127,751	+56%	106,790	+9%
	Other	143,888	17%	268,484	-46%	61,825	-55%	29,543	-46%	733	-98%	31,549	-22%
Germany	BEV	368,006	25%	248,726	+48%	208,376	+53%	84,057	+78%	59,969	+39%	64,350	+41%
	PHEV	163,793	11%	138,905	+18%	87,679	+17%	32,212	+26%	27,921	+11%	27,546	+13%
	Hybrid	427,633	29%	399,966	+7%	221,067	+6%	83,315	+14%	67,545	+1%	70,207	+4%
	Total EV	959,432	65%	787,597	+22%	517,122	+24%	199,584	+37%	155,435	+15%	162,103	+18%
	Other	524,961	35%	615,192	-15%	267,867	-16%	96,794	-12%	84,013	-19%	87,060	-17%
Italy	BEV	79,434	8%	44,710	+78%	41,344	+90%	14,869	+87%	13,271	+86%	13,204	+99%
	PHEV	84,527	9%	45,875	+84%	44,442	+66%	15,627	+61%	15,336	+70%	13,479	+67%
	Hybrid	462,925	49%	376,483	+23%	213,564	+20%	67,147	+18%	70,179	+16%	76,238	+25%
	Total EV	626,886	67%	467,068	+34%	299,350	+32%	97,643	+31%	98,786	+29%	102,921	+36%
	Other	309,159	33%	387,556	-20%	152,239	-17%	48,708	-16%	51,273	-19%	52,258	-18%
Spain	BEV	63,220	10%	46,268	+37%	35,996	+33%	14,224	+27%	12,049	+34%	9,723	+42%
	PHEV	78,037	12%	56,067	+39%	42,343	+19%	15,567	+15%	13,741	+7%	13,035	+43%
	Hybrid	306,668	47%	253,914	+21%	162,541	+23%	58,890	+26%	53,414	+19%	50,237	+23%
	Total EV	447,925	69%	356,249	+26%	240,880	+24%	88,681	+24%	79,204	+18%	72,995	+29%
	Other	199,782	31%	253,592	-21%	106,302	-22%	39,745	-17%	32,690	-29%	33,867	-19%
UK	BEV	284,579	25%	224,841	+27%	146,965	+40%	63,950	+35%	43,931	+34%	39,084	+59%
	PHEV	148,132	13%	107,039	+38%	69,466	+30%	26,702	+25%	22,167	+24%	20,597	+46%
	Hybrid	428,999	38%	396,232	+8%	184,803	+11%	74,830	+12%	56,321	+2%	53,652	+21%
	Total EV	861,710	76%	728,112	+18%	401,234	+24%	165,482	+22%	122,419	+16%	113,333	+36%
	Other	276,219	24%	314,107	-12%	121,841	-11%	47,684	-14%	38,243	-14%	35,914	-3%
Europe 5	BEV	1,036,804	20%	712,878	+45%	562,160	+55%	232,951	+63%	166,632	+50%	162,577	+49%
	PHEV	522,354	10%	397,035	+32%	272,211	+24%	102,408	+25%	86,813	+19%	82,990	+27%
	Hybrid	2,050,073	40%	1,802,834	+14%	1,018,000	+16%	375,275	+18%	330,150	+17%	312,575	+13%
	Total EV	3,609,231	71%	2,912,747	+24%	1,852,371	+27%	710,634	+31%	583,595	+25%	558,142	+24%
	Other	1,454,009	29%	1,838,931	-21%	710,074	-22%	262,474	-19%	206,952	-31%	240,648	-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

Electric vehicle sales data

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

		H1 2026	Market share	H1 2025	YTD YoY	Q2 2026	Quarter YoY	Jun-26	Month YoY	May-26	Month YoY	Apr-26	Month YoY
	BEV	40,060	24%	31,534	+27%	22,713	+31%	8,993	+44%	6,598	+22%	7,122	+25%
	PHEV	18,023	11%	13,104	+38%	9,969	+32%	4,040	+57%	2,932	+18%	2,997	+19%
	Hybrid	49,751	30%	40,213	+24%	26,077	+18%	10,472	+30%	7,239	+5%	8,366	+17%
	Total EV	107,834	66%	84,851	+27%	58,759	+25%	23,505	+40%	16,769	+14%	18,485	+20%
Austria	Other	56,695	34%	58,200	-3%	28,535	-5%	10,751	-2%	8,760	-8%	9,024	-5%
	BEV	83,282	36%	76,980	+8%	43,813	+20%	17,256	+35%	12,586	+11%	13,971	+12%
	PHEV	12,664	5%	20,386	-38%	6,214	-37%	2,788	-20%	1,596	-49%	1,830	-44%
	Hybrid	28,659	12%	27,048	+6%	14,571	+14%	5,935	+30%	4,130	+7%	4,506	+4%
	Total EV	124,605	54%	124,414	+0%	64,598	+9%	25,979	+25%	18,312	-0%	20,307	+1%
Belgium	Other	106,076	46%	110,203	-4%	52,278	-4%	19,470	-6%	15,313	-4%	17,495	-1%
	BEV	80,634	79%	57,113	+41%	45,724	+40%	16,992	+40%	15,017	+37%	13,715	+43%
	PHEV	708	0.7%	2,707	-74%	303	-81%	85	-87%	99	-78%	119	-77%
	Hybrid	11,702	12%	12,866	-9%	6,573	-16%	2,653	+1%	2,265	-22%	1,655	-28%
	Total EV	93,044	92%	72,686	+28%	52,600	+25%	19,730	+28%	17,381	+22%	15,489	+25%
Denmark	Other	8,513	8%	17,331	-51%	4,992	-52%	1,854	-50%	1,792	-52%	1,346	-53%
	BEV	17,796	48%	12,726	+40%	9,734	+37%	3,642	+46%	3,309	+44%	2,783	+21%
	PHEV	4,752	13%	7,894	-40%	2,270	-47%	911	-41%	722	-50%	637	-51%
	Hybrid	10,374	28%	10,270	+1%	5,753	+5%	2,103	+5%	2,041	+13%	1,609	-2%
	Total EV	32,922	88%	30,890	+7%	17,757	+5%	6,656	+10%	6,072	+10%	5,029	-4%
Finland	Other	4,329	12%	6,369	-32%	2,294	-38%	909	-35%	710	-46%	675	-33%
	BEV	63,776	36%	63,822	-0%	38,987	+24%	17,257	+42%	12,219	+21%	9,511	+4%
	PHEV	41,942	24%	35,709	+17%	20,935	+6%	8,128	+10%	6,773	+1%	6,034	+7%
	Hybrid	52,312	30%	52,503	-0%	26,296	+2%	10,854	+7%	8,150	+2%	7,292	-4%
	Total EV	158,030	90%	152,034	+4%	86,218	+12%	36,239	+22%	27,142	+9%	22,837	+2%
Netherlands	Other	16,759	10%	30,344	-45%	7,816	-44%	2,776	-41%	2,525	-47%	2,515	-45%
	BEV	71,654	98%	70,748	+1%	45,037	+7%	18,875	+6%	15,210	+14%	10,952	+0%
	PHEV	486	0.7%	1,801	-73%	297	-18%	175	+15%	97	-36%	25	-55%
	Hybrid	482	0.7%	1,659	-71%	445	-46%	334	+50%	103	-79%	8	-92%
	Total EV	72,622	99%	74,208	-2%	45,779	+6%	19,384	+7%	15,410	+10%	10,985	-1%
Norway	Other	774	1%	1,307	-41%	442	-28%	174	-13%	150	-34%	118	-38%

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

		H1 2026	Market share	H1 2025	YTD YoY	Q2 2026	Quarter YoY	Jun-26	Month YoY	May-26	Month YoY	Apr-26	Month YoY
	BEV	16,557	5%	14,256	+16%	7,716	-16%	3,050	-19%	2,015	-28%	2,651	+4%
	PHEV	26,603	9%	13,382	+99%	15,030	+98%	5,377	+103%	4,601	+95%	5,052	+97%
	Hybrid	154,745	50%	138,725	+12%	79,306	+20%	28,369	+30%	24,818	+15%	26,119	+15%
	Total EV	197,905	63%	166,363	+19%	102,052	+23%	36,796	+31%	31,434	+17%	33,822	+21%
Poland	Other	114,128	37%	118,948	-4%	58,342	-3%	22,183	+4%	18,157	-8%	18,002	-6%
	BEV	34,706	25%	25,017	+39%	19,570	+52%	7,572	+63%	6,988	+56%	5,010	+35%
	PHEV	19,631	14%	16,004	+23%	11,047	+20%	3,917	+18%	3,896	+18%	3,234	+23%
	Hybrid	38,929	28%	29,762	+31%	18,165	+18%	6,435	+33%	5,999	+3%	5,731	+20%
	Total EV	93,266	68%	70,783	+32%	48,782	+30%	17,924	+40%	16,883	+24%	13,975	+25%
Portugal	Other	43,814	32%	53,243	-18%	24,239	-13%	8,425	-19%	8,197	-18%	7,617	+0%
	BEV	59,080	40%	50,062	+18%	33,718	+16%	13,062	+20%	10,770	+13%	9,886	+15%
	PHEV	35,226	24%	36,943	-5%	20,103	-4%	7,580	+4%	6,680	-2%	5,843	-15%
	Hybrid	11,304	8%	11,438	-1%	6,095	+4%	1,837	+4%	2,001	-9%	2,257	+20%
	Total EV	105,610	72%	98,443	+7%	59,916	+7%	22,479	+13%	19,451	+5%	17,986	+4%
Sweden	Other	41,900	28%	47,509	-12%	23,343	-5%	8,604	-1%	7,556	-6%	7,183	-9%
	BEV	27,889	24%	23,203	+20%	16,475	+32%	6,652	+38%	5,140	+23%	4,683	+35%
	PHEV	14,456	12%	11,592	+25%	8,024	+20%	3,432	+42%	2,293	-0%	2,299	+16%
	Hybrid	42,488	36%	41,666	+2%	22,038	+0%	8,609	+9%	6,818	-5%	6,611	-3%
	Total EV	84,833	73%	76,461	+11%	46,537	+13%	18,693	+24%	14,251	+4%	13,593	+11%
Switzerland	Other	31,715	27%	36,672	-14%	17,029	-12%	6,514	-3%	5,490	-13%	5,025	-21%
	BEV	1,221,133	21%	869,726	+40%	674,091	+48%	270,557	+61%	203,417	+42%	200,117	+38%
	PHEV	577,759	10%	470,120	+23%	309,832	+18%	115,714	+23%	98,553	+13%	95,565	+17%
	Hybrid	2,197,081	37%	1,942,346	+13%	1,109,091	+13%	404,608	+18%	345,427	+9%	359,056	+12%
	Total EV	3,995,973	68%	3,282,192	+22%	2,093,014	+23%	790,879	+31%	647,397	+19%	654,738	+20%
EU27	Other	1,902,694	32%	2,294,280	-17%	982,275	-16%	357,083	-12%	307,616	-19%	317,576	-16%
	BEV	1,608,435	22%	1,190,875	+35%	884,626	+43%	360,843	+51%	268,487	+39%	255,296	+38%
	PHEV	742,435	10%	592,340	+25%	388,152	+20%	146,168	+23%	123,339	+14%	118,645	+21%
	Hybrid	2,670,888	37%	2,383,949	+12%	1,317,202	+13%	488,640	+17%	409,006	+8%	419,556	+13%
EU27+UK	Total EV	5,021,758	69%	4,167,164	+21%	2,589,980	+23%	995,651	+28%	800,832	+18%	793,497	+21%
+EFTA	Other	2,212,284	31%	2,648,387	-16%	1,122,190	-15%	411,681	-12%	351,691	-19%	358,818	-15%

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

		H1 2026	Market share	H1 2025	YTD YoY	Q2 2026	Quarter YoY	Jun-26	Month YoY	May-26	Month YoY	Apr-26	Month YoY
	BEV	13,768	2%	9,447	+46%	7,077	+38%	2,202	+32%	2,479	+40%	2,396	+42%
	PHEV	15,464	2%	5,037	+207%	8,815	+252%	3,401	+273%	2,770	+264%	2,644	+218%
	Hybrid	65,805	9%	51,507	+28%	34,962	+40%	11,732	+34%	12,051	+40%	11,179	+46%
	Total EV	95,037	13%	65,991	+44%	50,854	+56%	17,335	+53%	17,300	+55%	16,219	+59%
Mexico	Other	659,481	87%	650,308	+1%	322,014	+2%	109,567	+3%	109,807	-0%	102,640	+3%
	BEV	459,960	6%	590,802	-22%	254,295	-12%	84,163	-9%	81,019	-20%	89,113	-7%
	PHEV	91,956	1%	156,923	-41%	57,675	-23%	20,468	+12%	20,416	-19%	16,791	-46%
	Hybrid	1,213,375	15%	1,012,629	+20%	691,182	+29%	212,187	+37%	255,611	+33%	223,384	+18%
	Total EV	1,765,291	22%	1,760,354	+0%	1,003,152	+11%	316,818	+19%	357,046	+12%	329,288	+4%
USA	Other	6,107,217	78%	6,334,476	-4%	3,197,498	-3%	1,047,600	+6%	1,109,230	-3%	1,040,668	-9%
	BEV	90,730	7%	30,676	+196%	59,650	+238%	21,148	+256%	21,002	+201%	17,500	+271%
	PHEV	76,261	6%	40,884	+87%	47,118	+116%	18,065	+159%	15,838	+120%	13,215	+73%
	Hybrid	78,322	6%	42,611	+84%	42,924	+79%	15,308	+81%	14,874	+84%	12,742	+71%
	Total EV	245,313	18%	114,171	+115%	149,692	+136%	54,521	+155%	51,714	+132%	43,457	+119%
Brazil	Other	1,116,077	82%	1,018,537	+10%	612,957	+11%	206,007	+14%	212,945	+11%	194,005	+9%
	BEV	564,458	6%	630,925	-11%	321,022	+3%	107,513	+7%	104,500	-5%	109,009	+6%
	PHEV	183,681	2%	202,844	-9%	113,608	+15%	41,934	+60%	39,024	+17%	32,650	-17%
	Hybrid	1,357,502	14%	1,106,747	+23%	769,068	+31%	239,227	+39%	282,536	+35%	247,305	+21%
	Total EV	2,105,641	21%	1,940,516	+9%	1,203,698	+21%	388,674	+30%	426,060	+21%	388,964	+12%
Americas	Other	7,882,775	79%	8,003,321	-2%	4,132,469	-0%	1,363,174	+7%	1,431,982	-1%	1,337,313	-6%

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

		H1 2026	Market share	H1 2025	YTD YoY	Q2 2026	Quarter YoY	Jun-26	Month YoY	May-26	Month YoY	Apr-26	Month YoY
	BEV	103,714	16%	47,145	+120%	69,332	+137%	32,570	+147%	21,303	+112%	15,459	+157%
	PHEV	54,241	9%	25,613	+112%	35,011	+194%	16,068	+158%	9,315	+202%	9,628	+270%
	Hybrid	104,879	17%	93,746	+12%	57,927	+24%	20,741	+35%	19,024	+11%	18,162	+27%
	Total EV	262,834	42%	166,504	+58%	162,270	+85%	69,379	+100%	49,642	+64%	43,249	+89%
Australia	Other	368,747	58%	456,924	-19%	178,724	-25%	70,679	-24%	57,245	-28%	50,800	-25%
	BEV	3,554,000	36%	3,747,000	-5%	2,235,000	+6%	833,000	+14%	757,000	+9%	645,000	-5%
	PHEV	1,537,000	15%	2,131,000	-28%	847,000	-26%	286,000	-28%	292,000	-27%	269,000	-22%
	Hybrid	494,000	5%	440,100	+12%	266,000	+17%	102,000	+19%	92,000	+28%	72,000	+4%
	Total EV	5,585,000	56%	6,318,100	-12%	3,348,000	-4%	1,221,000	+1%	1,141,000	-2%	986,000	-10%
China*	Other	4,334,000	44%	6,250,900	-31%	1,749,000	-43%	552,000	-50%	558,000	-42%	639,000	-35%
	BEV	141,635	6%	71,620	+98%	84,281	+115%	31,585	+133%	27,447	+115%	25,249	+94%
	PHEV	13	0.0%	50	-74%	3	-84%	1	-83%	1	-80%	1	-88%
	Hybrid	218,399	9%	174,200	+25%	101,202	+26%	33,806	+37%	32,678	+28%	34,718	+16%
	Total EV	360,047	14%	245,870	+46%	185,486	+55%	65,392	+71%	60,126	+57%	59,968	+40%
India	Other	2,168,489	86%	1,704,537	+27%	976,850	+26%	318,007	+31%	323,264	+31%	335,579	+16%
	BEV	70,093	22%	38,576	+82%	36,947	+71%	12,695	+85%	9,351	+44%	14,901	+79%
	PHEV	4,978	2%	1,719	+190%	3,460	+106%	2,397	+95%	503	+24%	560	+1374%
	Hybrid	40,405	13%	28,421	+42%	23,512	+61%	7,882	+34%	7,507	+74%	8,123	+84%
	Total EV	115,476	36%	68,716	+68%	63,919	+68%	22,974	+64%	17,361	+55%	23,584	+85%
Indonesia	Other	206,934	64%	225,932	-8%	101,593	+8%	33,434	+10%	33,373	-5%	34,786	+22%
	BEV	51,028	4%	17,627	+189%	28,119	+205%	12,225	+187%	8,957	+215%	6,937	+229%
	PHEV	22,221	2%	22,578	-2%	11,039	+4%	4,558	+12%	3,733	+19%	2,748	-18%
	Hybrid	810,068	61%	800,406	+1%	375,650	+9%	150,345	+18%	110,251	+5%	115,054	+2%
	Total EV	883,317	66%	840,611	+5%	414,808	+14%	167,128	+23%	122,941	+11%	124,739	+5%
Japan**	Other	452,341	34%	484,923	-7%	244,003	+10%	80,828	-1%	64,545	-4%	98,630	+36%
	BEV	201,036	24%	92,731	+117%	113,374	+95%	39,031	+92%	35,416	+65%	38,927	+138%
	PHEV	5,852	0.7%	7,287	-20%	3,040	-18%	1,113	+11%	976	-28%	951	-28%
	Hybrid	284,310	34%	283,912	+0%	144,837	-6%	53,578	+5%	40,387	-20%	50,872	-2%
	Total EV	491,198	58%	383,930	+28%	261,251	+21%	93,722	+29%	76,779	+5%	90,750	+30%
South Korea	Other	356,410	42%	442,694	-19%	177,482	-20%	66,003	-10%	50,536	-26%	60,943	-25%

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

		H1 2026	Market share	H1 2025	YTD YoY	Q2 2026	Quarter YoY	Jun-26	Month YoY	May-26	Month YoY	Apr-26	Month YoY
	BEV	105,581	28%	57,541	+83%	48,389	+52%	19,987	+48%	18,372	+52%	10,030	+59%
	PHEV	10,220	3%	11,333	-10%	6,046	-16%	2,329	+53%	2,437	+2%	1,280	-61%
	Hybrid	89,909	24%	71,643	+25%	42,006	+25%	14,247	+26%	15,102	+26%	12,657	+22%
	Total EV	205,710	54%	140,517	+46%	96,441	+32%	36,563	+39%	35,911	+36%	23,967	+20%
Thailand	Other	172,437	46%	227,659	-24%	76,950	-24%	25,891	-26%	25,919	-18%	25,140	-28%
	BEV	80,746	18%	84,738	-5%	42,718	-23%	14,904	-42%	11,342	-32%	16,472	+25%
	PHEV	3,490	0.8%	26,879	-87%	1,480	-91%	390	-93%	393	-92%	697	-89%
	Hybrid	139,038	32%	106,349	+31%	71,152	+37%	26,466	+52%	20,497	+30%	24,189	+29%
	Total EV	223,274	51%	217,966	+2%	115,350	-7%	41,760	-14%	32,232	-15%	41,358	+8%
Turkey	Other	216,960	49%	270,037	-20%	114,196	-18%	42,218	-7%	33,154	-30%	38,824	-17%
	BEV	115,986	45%	67,569	+72%	62,301	+92%	17,961	+58%	19,517	+70%	24,823	+159%
	PHEV	0	0.0%	38	-100%	0	-100%	0	-100%	0	-100%	0	-100%
	Hybrid	10,865	4%	5,888	+85%	5,740	+72%	2,347	+99%	1,670	+60%	1,723	+54%
	Total EV	126,851	49%	73,495	+73%	68,041	+90%	20,308	+62%	21,187	+69%	26,546	+148%
Vietnam	Other	131,345	51%	118,998	+10%	61,396	-4%	20,215	-12%	20,420	+1%	20,761	-1%
	BEV	4,423,819	27%	4,224,547	+5%	2,720,461	+14%	1,013,958	+21%	908,705	+15%	797,798	+5%
	PHEV	1,638,015	10%	2,226,497	-26%	907,079	-24%	312,856	-25%	309,358	-25%	284,865	-21%
	Hybrid	2,191,873	13%	2,004,665	+9%	1,088,026	+14%	411,412	+21%	339,116	+12%	337,498	+8%
	Total EV	8,253,707	50%	8,455,709	-2%	4,715,566	+4%	1,738,226	+9%	1,557,179	+3%	1,420,161	-1%
APAC	Other	8,407,663	50%	10,182,604	-17%	3,680,194	-25%	1,209,275	-30%	1,166,456	-25%	1,304,463	-19%
	BEV	6,593,532	19%	6,043,990	+9%	3,924,051	+18%	1,481,505	+26%	1,280,903	+17%	1,161,643	+11%
	PHEV	2,562,529	8%	3,019,893	-15%	1,408,306	-13%	500,813	-10%	471,492	-15%	436,001	-12%
	Hybrid	6,218,425	18%	5,493,315	+13%	3,173,471	+17%	1,139,020	+23%	1,030,321	+16%	1,004,130	+13%
Analysed	Total EV	15,374,486	45%	14,557,198	+6%	8,505,828	+11%	3,121,338	+17%	2,782,716	+10%	2,601,774	+7%
markets	Other	18,501,840	55%	20,832,291	-11%	8,934,250	-14%	2,983,904	-14%	2,949,937	-14%	3,000,409	-13%

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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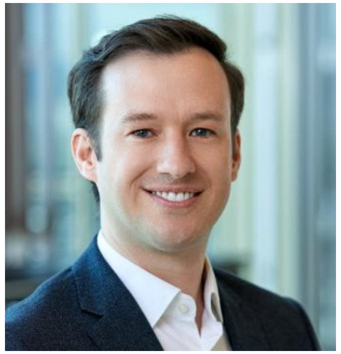

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Thank you

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