

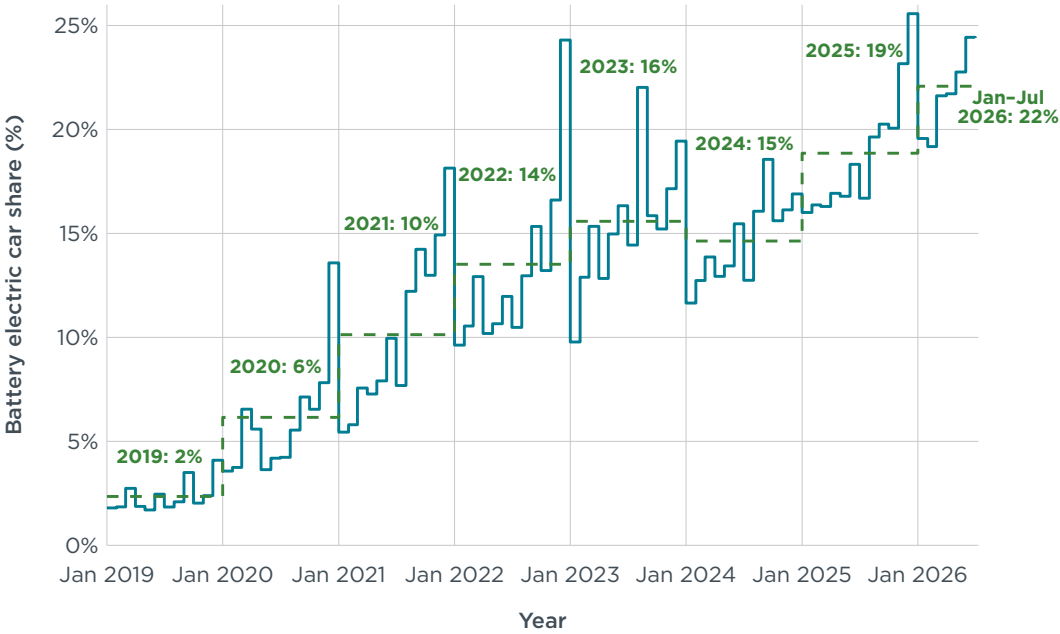
EUROPEAN CAR MARKET MONITOR: JULY 2026

AT A GLANCE

- » In January–July 2026, Europe’s battery electric car registrations recorded a 22% market share, up 5 percentage points from the same period in 2025.¹ 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 9 percentage points to a 29% market share in January–July 2026, while mild hybrids and full hybrids increased their shares to 24% and 14%, respectively, an increase of 1 percentage point for each vehicle type.
- » Germany and France, Europe’s largest car markets, registered battery electric market shares of 26% and 29%, respectively, representing increases of 8 and 11 percentage points compared with January–July 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–July 2025. In Poland, Europe’s fifth-largest market, the market share remained unchanged at 5%.
- » From January 2025 to July 2026, adjusted carbon dioxide (CO₂) emissions among manufacturer pools stood at approximately 94 g/km on average, 1 gram away from the average EU manufacturer 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–July 2026 at 29%. The Mercedes-Benz Group recorded a 9-percentage-point increase in battery electric car shares compared with January–July 2025, while the Hyundai and Renault groups recorded increases of 7 percentage points. Toyota more than doubled its share from 4% to 10%.

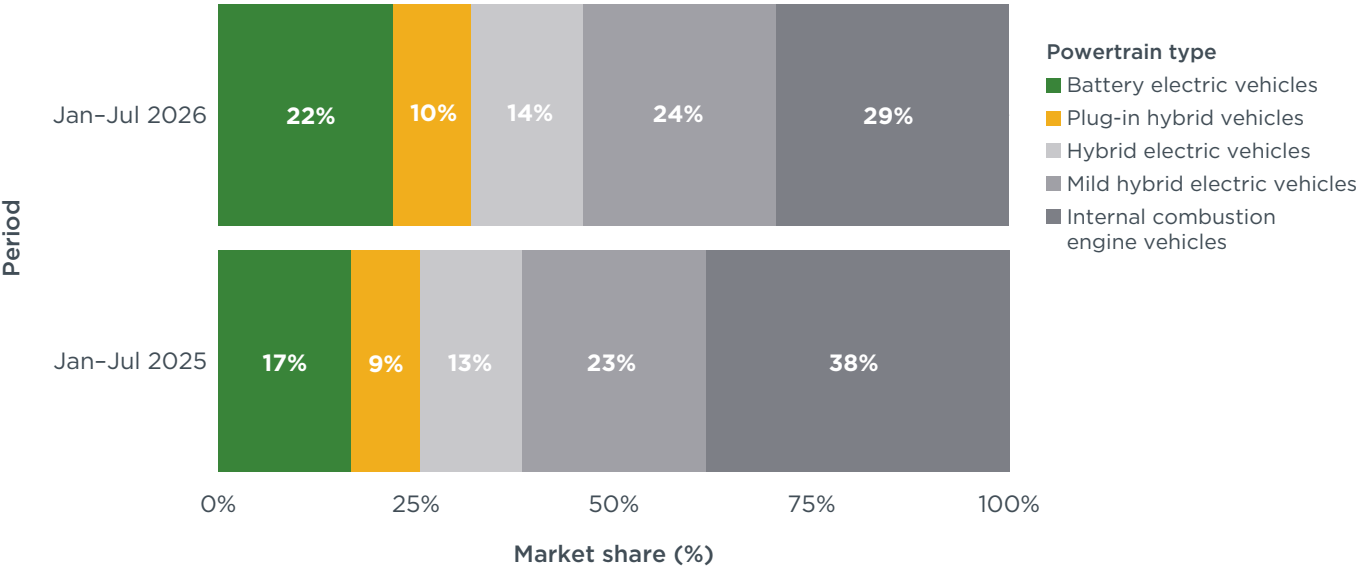
¹ Geographic scope: To the greatest extent permitted by data availability, the definition of Europe used in the ICCT’s Market Monitor reports aligns with EU regulations. The European CO₂ standards for cars and vans applies to the countries of the European Economic Area (EEA), excluding Liechtenstein.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

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



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



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PASSENGER CAR REGISTRATIONS IN EUROPE

In July 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–July 2026, surpassing the 2025 average by 3 percentage points and marking a 5-percentage-point increase compared with the same period in 2025 (see Figure 1). Growth in the market share of plug-in hybrid vehicles (PHEVs) was more modest. In January–July 2026, PHEVs accounted for an average of 10% of new car registrations in Europe, up 1 percentage point from January–July 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 percentage point each, respectively, reaching shares of 14% and 24% in January–July 2026. Meanwhile, conventional internal combustion engine vehicles (ICEVs) comprised 29% of new registrations in January–July 2026. This was 9 percentage points lower than the market share during the same period in 2025 (see Figure 2).

PASSENGER CAR REGISTRATIONS BY COUNTRY

Compared with January–July 2025, total new registrations among the 10 largest European markets increased the most in Poland (+12%) and France (+9%) in January–July 2026, while the largest decreases were recorded in Belgium (–7%), Czechia (–3%) and the Netherlands (–2%; see Table A5 in the Appendix).

Looking at new BEV registrations in January–July 2026, Germany and France—Europe’s largest car markets—had BEV market shares of 26% and 29%, respectively. These represent increases of 8 and 11 percentage points, respectively, compared with the same period in 2025.

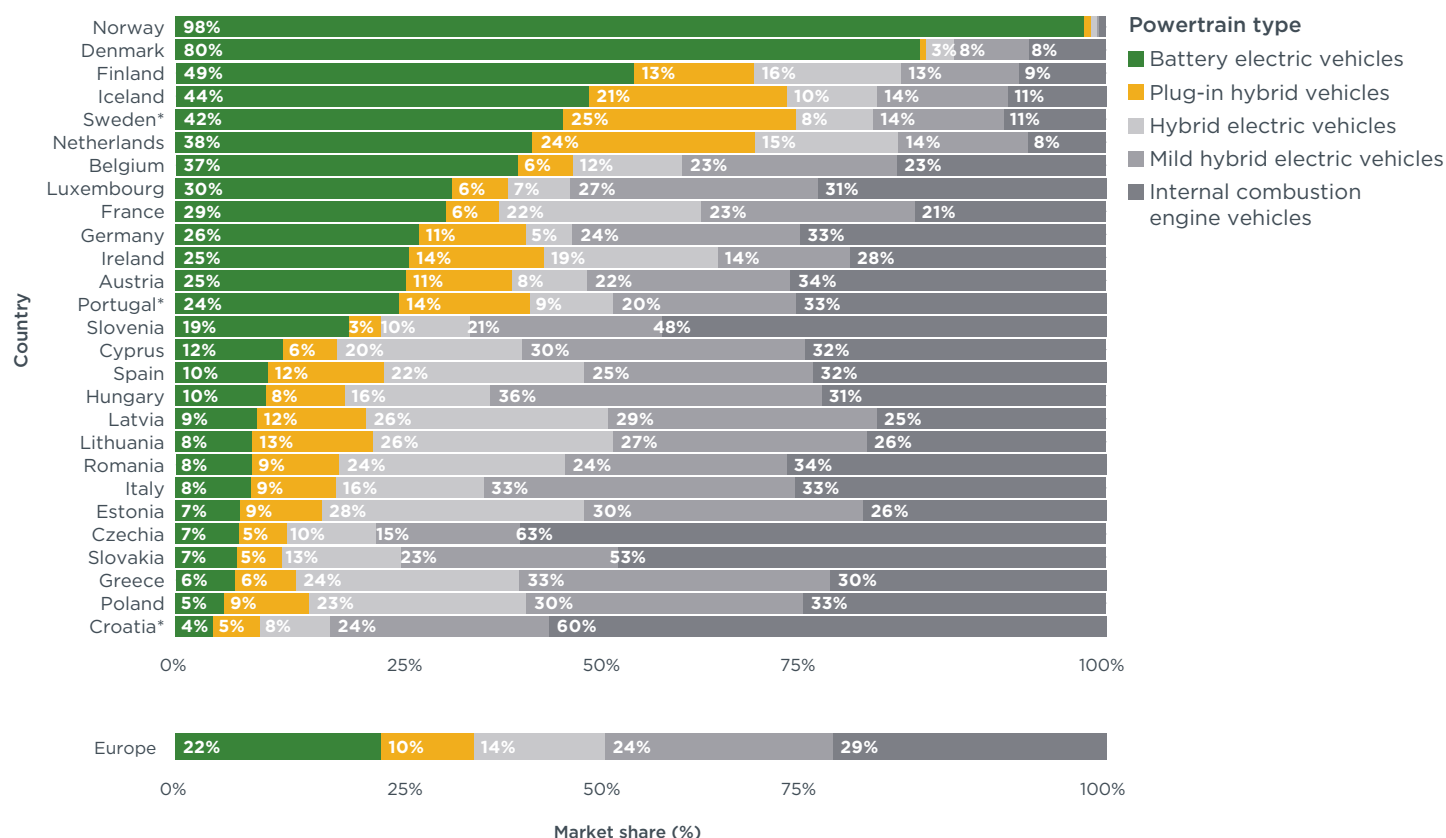
Italy and Spain, the third- and fourth-largest markets, had increases of 3 and 2 percentage points in January–July 2026, reaching BEV shares of 8% and 10%, respectively.

Nordic countries led Europe in BEV registration shares, with Norway and Denmark reaching shares of 98% and 80%, respectively, in January–July 2026, followed by Finland (49%) and Iceland (44%). Sweden (42%)², the Netherlands (38%), Belgium (37%), Luxembourg (30%), France (29%), Germany (26%), Ireland (25%), and Austria (25%) all had BEV shares of 25% or more (Figure 3). In January–July 2026, Denmark recorded the greatest increase in BEV market share (+16 percentage points) compared with the same period in 2025.

² Data for Sweden cover January to May 2026 only.

Figure 3

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



* Data for Croatia and Portugal cover January to June 2026 only, while data for Sweden only cover January to May 2026.

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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–July 2026.³ Poland (23%), France (22%), and Spain (22%) had the highest HEV shares, while MHEV shares were the highest in Italy, at 33%, 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.

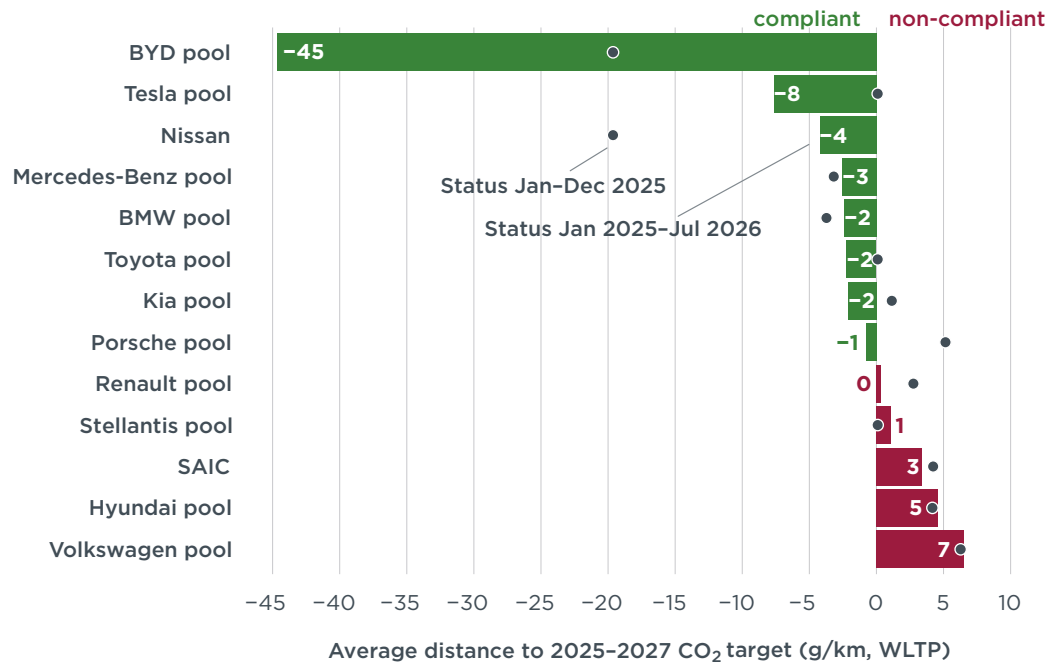
In January–July 2026, manufacturer CO₂ emissions averaged 93 g CO₂/km (excluding compliance credits). After accounting for compliance credits, manufacturers were,

³ Data for Sweden cover January to May 2026 only.

on average, in compliance with the 2026 target (see Table A2 of the Appendix). For the full reporting period from January 2025 to July 2026, adjusted emissions stood at around 94 g CO₂/km. When including compliance credits, manufacturing pools thus remained 1 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–July 2026 reporting period, the BYD pool (45 g CO₂/km below), the Tesla pool (8 g CO₂/km below), Nissan (4 g CO₂/km below), the Mercedes-Benz pool (3 g CO₂/km below), the Toyota, BMW, and Kia pools (each 2 g CO₂/km below), the newly formed Porsche pool (1 g CO₂/km below), and the Renault pool (at target) were all on track to meet their 2025–2027 targets. Together, these pools accounted for approximately 48% of new registrations in January–July 2026. 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. Its emissions did not change significantly with the departure of Porsche from the pool (see Figure 4): compared with a scenario in which Porsche remained in the pool in 2026, the pool’s CO₂ emissions in January–July 2026 were less than 1 g/km lower.

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 individual manufacturers with at least 1% market share in 2025 are shown. See the section on definitions, data sources, methodology, and assumptions for more information.

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The Porsche and BYD pools had the largest BEV registration shares in July 2026, at 70% and 37%, respectively. The Kia (35%), Mercedes-Benz (34%), BMW (34%), and Tesla (26%) pools also had shares above the European average of 24%. The Stellantis pool (18%) and Toyota pool (11%) had the lowest BEV shares in July (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 July 2026,

followed by Volvo (27 g CO₂/km below), Mini (17 g CO₂/km below), and Cupra (15 g CO₂/km below). Nissan (26 g CO₂/km above), SEAT (23 g CO₂/km above), Mazda (22 g CO₂/km above), Mercedes-Benz (15 g CO₂/km above), Audi (15 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–July 2026 at 29%. The Mercedes-Benz Group increased its BEV share by 9 percentage points compared with January–July 2025. The Hyundai and Renault groups recorded increases of 7 percentage points in each of their BEV shares, while the Toyota Group more than doubled its share from 4% to 10% (Table 1). Meanwhile, with a 26% total market share in January–July 2026, the Volkswagen Group increased its PHEV share by 2 percentage points relative to the same period in 2025, while the other carmakers recorded either marginal or no changes in their PHEV shares.

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

Manufacturer group	Battery electric car share		Plug-in hybrid car share		Market share Jan–Jul 2026
	Jan–Jul 2026	Change vs. Jan–Jul 2025	Jan–Jul 2026	Change vs. Jan–Jul 2025	
BMW Group	29%	+4 pp	13%	–2 pp	7%
Mercedes-Benz Group	25%	+9 pp	17%	–3 pp	5%
Hyundai Group	25%	+7 pp	4%	–2 pp	7%
Volkswagen Group	19%	+1 pp	12%	+2 pp	26%
Renault Group	19%	+7 pp	1%	0 pp	10%
Stellantis	15%	+4 pp	2%	0 pp	16%
Toyota Group	10%	+6 pp	6%	–2 pp	7%

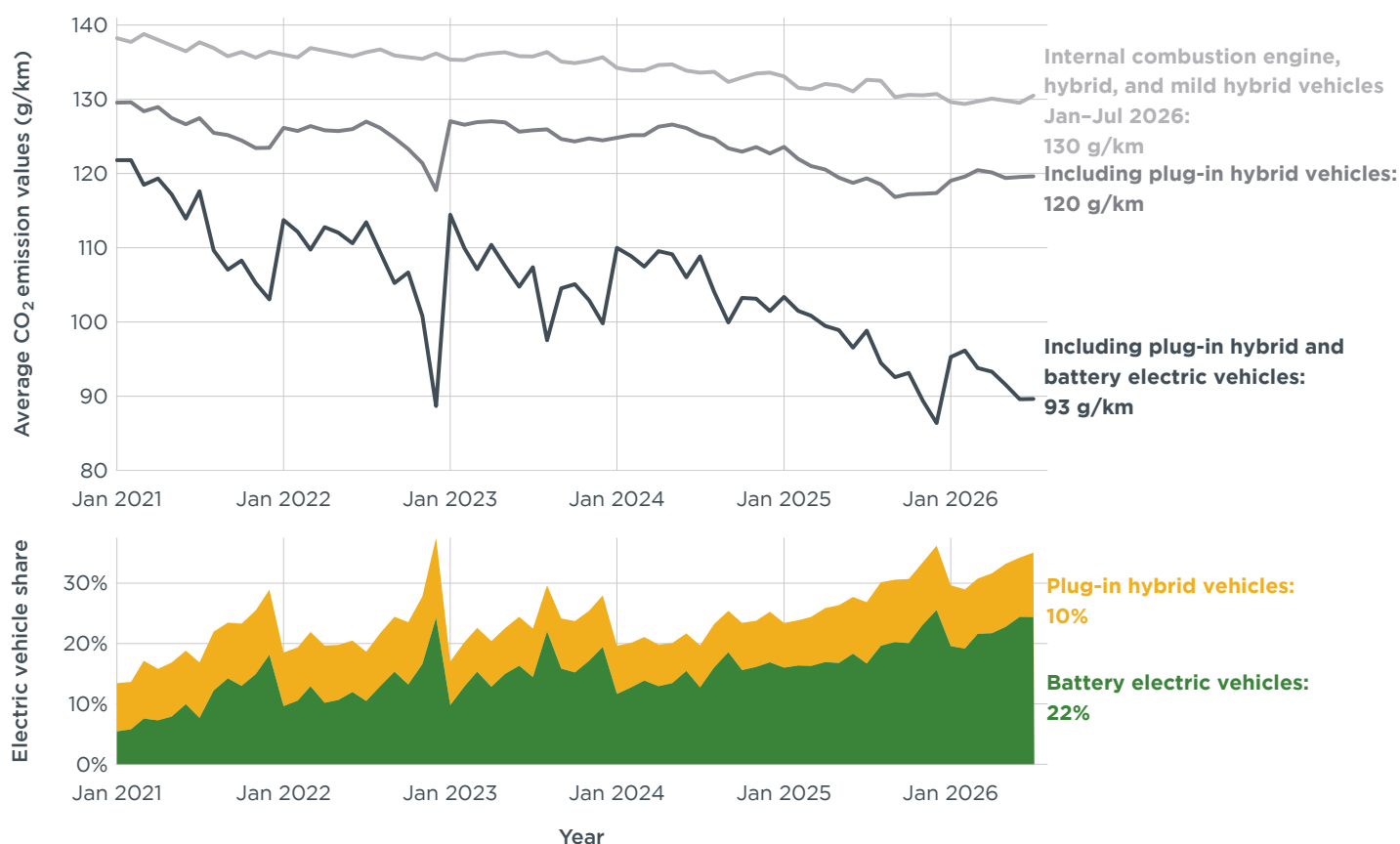
CO₂ EMISSIONS BY POWERTRAIN TYPE

Of all powertrain types, battery electric cars have the largest potential to reduce total CO₂ emissions.⁴ When looking at new registrations of ICEVs (including HEVs and MHEVs) alone, CO₂ emissions averaged 130 g CO₂/km in January–July 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–July 2026 (see Figure 5).

⁴ 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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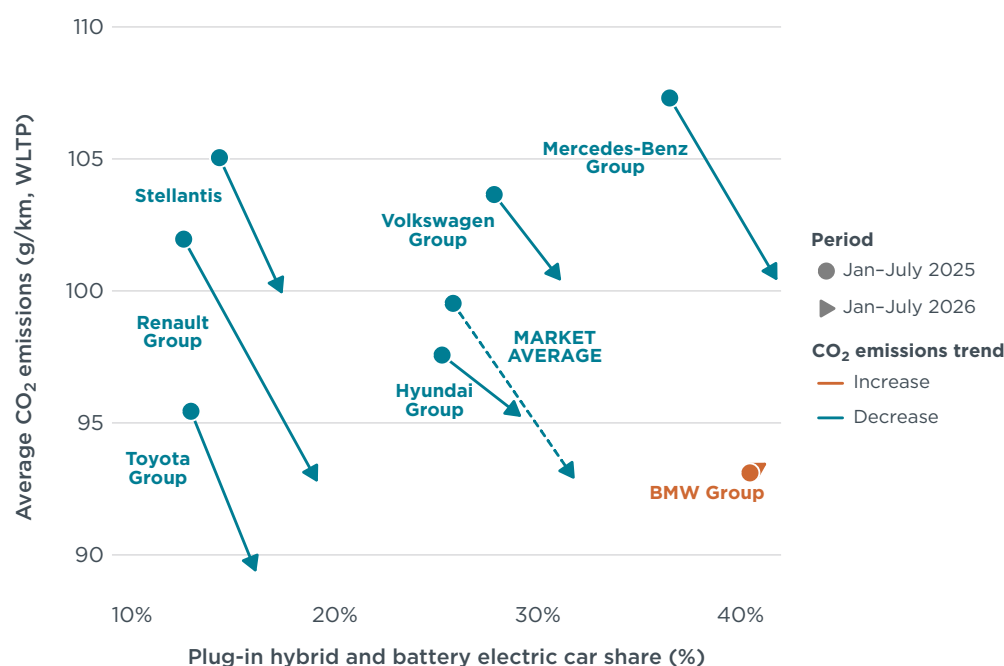
Looking at the relationship between electric car shares and average CO₂ emissions in January–July 2026, the Mercedes-Benz Group stood out among the top manufacturers in Europe with some of the highest average emissions despite also having the highest combined share of PHEVs and BEVs. This was largely driven by the high-average CO₂ emissions of the Group’s non-electrified powertrains, which stood at about 159 g CO₂/km in January–July 2026, the highest level among Europe’s largest carmaker groups. By contrast, the Toyota Group, which has a focus on hybrid powertrains, recorded average CO₂ emissions below its 2026 target in January–July 2026 despite maintaining the lowest electric vehicle share.

Among Europe’s top manufacturers, the BMW Group was the only manufacturing group to see an increase in emissions in 2026 compared with the previous year. This reversal was partly due to a change 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).⁵

⁵ 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–July 2026 versus January–July 2025



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SPOTLIGHT: BEV UPTAKE IN SELECTED GLOBAL MARKETS

Beyond the European countries included in this analysis, BEV market shares have grown substantially across a number of global markets in recent years.⁶ Among the four largest passenger car markets by new sales (China, Europe, India, and the United States), China has recorded the strongest increases, surpassing Europe's BEV share in 2021 and climbing to 35% in the first half of 2026 (see Figure 7). Although India remains a relatively small BEV market in terms of market share, its BEV share increased steadily from 2% in 2023 to 5% in January–June 2026. The country has set a non-binding target for 30% of new vehicle sales to be electric by 2030. This target aligns with the country's broader policy objectives to support BEV adoption and domestic production.⁷ By contrast, BEV uptake in the United States has weakened since 2024, with the BEV share declining from 8% to 6% in January–June 2026.⁸

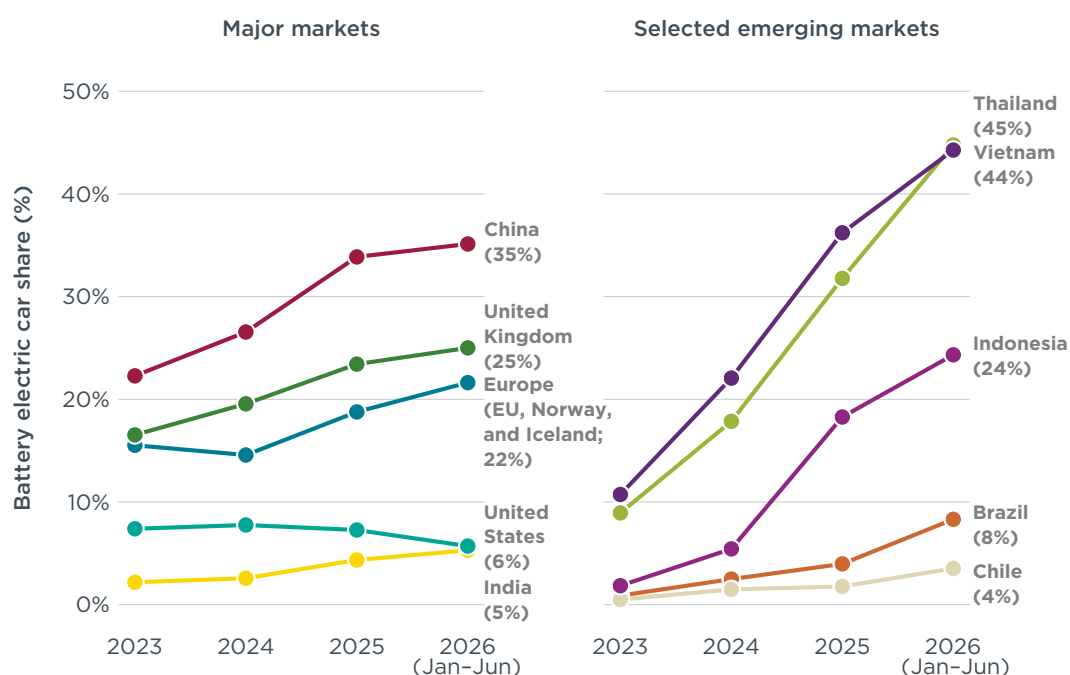
⁶ Ilma Fadhl and Chang Shen, *Global Electric Vehicle Market Monitor for Light-Duty Vehicles, 2025* (International Council on Clean Transportation, 2026), <https://theicct.org/publication/global-ev-market-monitor-for-l dvs-2025/>.

⁷ PIB Delhi, "Roads Reimagined: The Rise of India's Electric Vehicles Ecosystem," press release, August 5, 2026, <https://www.pib.gov.in/PressReleaseDetail.aspx?PRID=2294688®=6&lang=1>.

⁸ Chang Shen et al., *The Global Automaker Rating 2025: Who is Leading the Transition to Electric Vehicles?* (International Council on Clean Transportation, 2026), <https://theicct.org/global-automaker-rating-2025/>.

Figure 7

Share of battery electric passenger cars by country in selected global markets in 2023–2025 and January–June 2026



Note: For source information, see the section on definitions, data sources, methodology, and assumptions.

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Looking at the United Kingdom (UK), which is outside the scope of the EU's CO₂ regulation, it experienced faster growth in BEV uptake than the combined market average for the EU, Norway, and Iceland. Following its departure from the EU in 2020, the UK introduced its own CO₂ targets for new light-duty vehicles, together with a zero-emission vehicle mandate.⁹ In the first half of 2026, one in four new car registrations in the UK was a BEV.

Among global markets with smaller car markets and more recent BEV uptake, Thailand and Vietnam stood out with substantial BEV market growth: in each country, BEV shares more than quadrupled from about 10% in 2023 to about 45% in the first half of 2026. Indonesia, meanwhile, caught up with Europe's BEV market share: BEVs accounted for 24% of new car registrations in January–June 2026, up from 5% in 2024. Looking at South America, Brazil's battery electric car share reached 8% in January–June 2026, double the BEV share in 2025.¹⁰

⁹ Michelle Monteforte and Sonsoles Díaz, *European Market Monitor: Cars and Vans (August 2025)* (International Council on Clean Transportation, 2025), <https://theicct.org/publication/european-market-monitor-cars-and-vans-aug-2025/>.

¹⁰ Fadhil and Shen, *Global Electric Vehicle Market Monitor*.

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	Jul 2026				Jan-Jul 2026				Jan-Jul 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Porsche pool	70%	9%	0%	10%	60%	14%	0%	11%	46%	19%	0%	9%	50%	18%	0%	8%
BYD pool	37%	63%	0%	0%	40%	60%	0%	0%	59%	41%	0%	0%	58%	42%	0%	0%
Kia pool	35%	2%	19%	7%	29%	3%	18%	11%	20%	6%	16%	14%	22%	5%	16%	13%
Mercedes-Benz pool	34%	16%	0%	38%	31%	19%	0%	37%	23%	24%	0%	38%	26%	24%	0%	36%
BMW pool	34%	11%	0%	36%	29%	13%	0%	38%	25%	15%	0%	37%	27%	15%	0%	37%
Tesla pool	26%	9%	14%	40%	38%	6%	11%	36%	25%	7%	13%	41%	31%	7%	12%	38%
AVERAGE	24%	11%	14%	23%	22%	10%	14%	24%	17%	9%	13%	23%	19%	9%	13%	23%
SAIC	24%	11%	53%	0%	14%	8%	60%	0%	13%	8%	40%	0%	14%	10%	46%	0%
All other brands	24%	29%	19%	7%	25%	26%	17%	9%	13%	20%	2%	14%	16%	22%	4%	12%
Hyundai pool	24%	6%	24%	3%	21%	5%	25%	5%	17%	6%	21%	13%	18%	6%	22%	13%
Renault pool	24%	1%	27%	5%	18%	1%	32%	7%	11%	1%	29%	9%	13%	1%	29%	9%
Volkswagen pool	22%	12%	0%	20%	19%	12%	0%	19%	18%	9%	0%	15%	19%	10%	0%	15%
Nissan	19%	0%	38%	28%	10%	0%	37%	36%	7%	0%	38%	32%	7%	0%	40%	31%
Stellantis pool	18%	2%	0%	54%	15%	2%	0%	57%	12%	2%	0%	47%	13%	3%	0%	49%
Toyota pool	11%	8%	77%	0%	10%	6%	80%	0%	4%	8%	74%	0%	4%	9%	74%	0%

Note: Only 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-July 2026

Manufacturer or manufacturer pool	New car fleet-average CO ₂ (in g/km, per WLTP)								Market share Jan-Jul 2026
	Jul 2026	Jan-Jul 2026	Compliance credits - Eco-innovations	Adj. Jan-Jul 2026	Reference target 2026	Compliance credits - ZLEV factor	Target 2026	Target gap	
BYD pool	28	26	0	26	87	1.05	92	-66	2%
Tesla pool	90	76	0.7	76	92	1.05	96	-20	8%
Porsche pool	61	79	0.2	79	84	1.05	88	-10	1%
Kia pool	85	90	0.1	90	93	1.05	98	-7	4%
Toyota pool	87	89	0.4	89	95	1	95	-6	7%
Renault pool	86	93	1.1	92	96	1	96	-4	10%
Mercedes-Benz pool	89	89	0.4	89	86	1.05	90	-1	7%
AVERAGE	90	93	0.8	92	92	1	92	0	
BMW pool	89	94	1.1	93	88	1.05	93	0	7%
SAIC	82	96	0	96	94	1	94	2	2%
Stellantis pool	97	100	1.3	98	96	1	96	3	16%
Hyundai pool	97	100	0	100	94	1	94	5	3%
Volkswagen pool	95	99	0.8	99	92	1	92	7	26%
Nissan	102	115	1.1	114	93	1	93	21	2%

Note: Only 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-July 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–July 2026

Manufacturer or manufacturer pool	New registrations		New car fleet-average CO ₂ (in g/km, per WLTP)						
	2025	Jan–Jul 2026	Adj. 2025	Target 2025	Adj. Jan–Jul 2026	Target 2026	Adj. Jan 2025–Jul 2026	Target 2025–2027	Target gap
BYD pool	134,901	157,046	76	95	26	92	49	93	–45
Tesla pool	855,802	523,390	95	95	76	96	88	95	–8
Nissan	197,221	120,794	76	95	114	93	90	95	–4
Mercedes-Benz pool	883,883	503,419	87	91	89	90	88	91	–3
BMW pool	775,616	471,771	89	93	93	93	91	93	–2
Toyota pool	815,319	484,492	95	95	89	95	92	95	–2
Kia pool	395,814	239,919	96	94	90	98	94	96	–2
Porsche pool	88,280	59,859	97	92	79	88	90	91	–1
Renault pool	1,230,811	701,928	99	96	92	96	96	96	0
Stellantis pool	1,627,254	1,066,720	95	95	98	96	96	95	1
TOTAL AVERAGE	10,596,081	6,462,349	95	93	92	92	94	93	1
SAIC	218,438	148,977	98	94	96	94	98	94	3
Hyundai pool	431,698	225,834	99	95	100	94	99	94	5
Volkswagen pool	2,941,044	1,758,200	100	93	99	92	99	93	7

Note: Only 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–July 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–July 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 July 2026

Manufacturer group/ brand	New car fleet-average CO ₂ (in g/km)									Market share Jan- Jul 2026
	Jul 2026	Jan 2026- Jul 2026	Jan 2025- Jul 2026	Compliance credits - Eco- innovations	Adj. Jan 2025-Jul 2026	Reference target 2025-2027*	Compliance credits - ZLEV factor	Target 2025- 2027*	Target gap*	
Tesla	0	0	0	0	0	87	1.05	92	-92	2%
Tesla	0	0	0	0	0	87	1.05	92	-92	2%
BYD	28	26	18	0	18	87	1.05	92	-74	2%
BYD	28	26	18	0	18	87	1.05	92	-74	2%
Volvo Cars	66	65	57	0	57	86	1.05	90	-33	2%
Volvo	72	72	64	0	64	86	1.05	91	-27	2%
SAIC Motor	82	96	98	0	98	94	1	94	3	2%
MG	82	96	98	0	98	94	1	94	3	2%
Renault Group	85	93	97	1.1	96	96	1	96	0	10%
Renault	66	80	86	1	85	95	1	95	-10	6%
Dacia	111	111	113	1.3	111	97	1	97	14	4%
Toyota Group	87	89	93	0.4	93	95	1	95	-2	7%
Toyota	87	89	93	0.4	93	96	1	96	-3	7%
Ford	88	97	100	0.8	99	91	1.01	92	7	3%
Ford	88	97	100	0.8	99	91	1.01	92	7	3%
BMW Group	89	94	92	1.1	90	89	1.05	93	-2	7%
BMW	91	95	93	1.1	92	88	1.05	92	0	6%
Mini	83	86	82	1.1	81	93	1.05	97	-17	1%
Hyundai Group	91	95	96	0	96	94	1	94	2	7%
Kia	85	90	94	0.1	94	93	1.02	95	-2	4%
Hyundai	97	100	99	0	99	94	1	94	5	3%
Volkswagen Group	96	100	100	0.8	100	92	1.01	92	7	26%
VW	96	101	100	0.7	99	92	1.01	93	6	10%
Škoda	96	97	97	1	96	93	1	93	4	7%
Audi	94	100	105	0.6	104	89	1.01	90	15	5%
Cupra	74	83	81	0.6	80	91	1.05	95	-15	2%
SEAT	122	123	123	1.7	121	97	1	97	23	2%
Mercedes-Benz Group	97	100	103	0.6	102	86	1.05	91	11	5%
Mercedes-Benz	100	103	105	0.6	104	86	1.04	90	15	5%
Stellantis	98	100	102	1.3	100	96	1	96	5	16%
Peugeot	94	96	99	1.3	98	95	1	95	3	5%
Citroën	95	96	101	1.4	99	95	1	95	4	3%
Opel/Vauxhall	99	101	104	1.5	102	96	1	96	6	3%
Fiat	104	105	102	1.1	101	99	1	99	2	3%
Jeep	101	106	107	1.5	106	95	1	95	11	1%
Nissan	102	115	120	1.1	119	93	1	93	26	2%
Nissan	102	115	120	1.1	119	93	1	93	26	2%
Suzuki	107	109	111	1.7	110	99	1	99	11	1%
Suzuki	107	109	111	1.7	110	99	1	99	11	1%
Mazda	121	118	115	0.4	114	92	1	92	22	1%
Mazda	121	118	115	0.4	114	92	1	92	22	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	Jul 2026	Percentage change vs. Jul 2025	Jan-Jul 2026	Percentage change vs. Jan-Jul 2025
Germany	262,027	2%	1,703,791	5%
France	126,809	9%	983,974	3%
Italy	124,262	4%	1,070,375	9%
Spain	104,524	3%	766,255	6%
Poland	55,540	12%	363,311	9%
Ireland	30,261	8%	119,473	6%
Belgium	29,277	-7%	259,962	-2%
Netherlands	27,724	-2%	199,907	-4%
Austria	25,813	4%	190,178	13%
Czechia	19,963	-3%	148,395	4%
Denmark	14,549	6%	115,402	12%
Greece	13,146	7%	94,541	7%
Romania	11,741	-28%	76,592	-6%
Hungary	11,584	8%	86,062	12%
Norway	9,602	1%	82,922	-2%
Slovakia	6,952	-18%	51,634	-4%
Finland	5,907	12%	42,388	1%
Slovenia	5,695	12%	40,757	17%
Lithuania	5,120	44%	28,766	19%
Bulgaria	4,906	6%	30,731	7%
Luxembourg	4,307	-4%	30,704	3%
Latvia	2,427	9%	13,630	2%
Estonia	1,609	46%	11,528	60%
Cyprus	1,368	-5%	8,612	-11%
Iceland	1,139	-14%	8,532	-6%
Croatia	-	-	-	-
Portugal	-	-	-	-
Sweden	-	-	-	-

Note: Data for Croatia, Portugal, and Sweden are not available.

Table A6

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

Country	Jul 2026				Percentage change vs. Jul 2025				Jan-Jul 2026				Percentage change vs. Jan-Jul 2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Germany	78,594	30,632	11,543	62,967	62%	12%	-14%	2%	446,475	194,603	85,722	415,818	50%	17%	9%	5%
France	44,379	7,666	25,899	26,921	127%	-9%	-1%	0%	285,940	55,856	214,498	225,433	70%	-3%	-4%	10%
Netherlands	13,206	6,004	3,361	2,975	48%	-15%	-11%	-26%	76,696	47,821	30,759	27,873	5%	12%	7%	-12%
Belgium	12,528	2,034	2,305	6,383	23%	-43%	-35%	-7%	95,811	15,127	30,647	59,855	10%	-36%	0%	4%
Denmark	11,668	25	440	1,248	26%	-94%	-2%	20%	92,277	719	3,509	9,260	39%	-76%	-19%	17%
Spain	11,077	14,896	23,760	23,723	24%	18%	33%	7%	75,903	95,301	165,704	187,956	34%	37%	36%	10%
Ireland	9,741	4,491	4,644	3,944	99%	5%	-13%	25%	30,017	17,264	22,316	16,918	61%	4%	4%	29%
Norway	9,379	56	91	7	1%	-45%	60%	-56%	81,033	542	544	110	1%	-72%	-68%	-47%
Italy	7,257	12,919	21,322	37,424	23%	43%	32%	2%	86,748	97,542	170,032	357,617	71%	77%	36%	16%
Austria	7,134	3,532	1,985	5,143	45%	27%	-4%	-3%	47,275	21,492	15,407	41,464	30%	35%	20%	19%
Finland	3,113	710	1,058	579	58%	-38%	25%	-1%	20,906	5,462	6,685	5,347	42%	-40%	-8%	20%
Poland	2,341	5,605	12,487	16,202	-39%	116%	18%	20%	19,152	33,035	84,722	108,105	6%	103%	15%	16%
Czechia	1,537	1,086	2,095	3,127	44%	14%	3%	5%	10,171	7,588	14,271	22,919	28%	28%	18%	13%
Slovenia	1,522	194	527	1,029	187%	26%	56%	5%	7,593	1,377	3,934	8,399	135%	41%	61%	23%
Luxembourg	1,406	292	236	1,069	61%	-25%	-31%	-6%	9,146	1,823	2,067	8,164	23%	-28%	-1%	20%
Greece	987	1,093	3,931	4,397	86%	14%	52%	13%	6,088	6,104	22,793	31,496	30%	7%	43%	15%
Hungary	917	1,395	1,587	3,927	-7%	135%	3%	5%	8,374	7,252	13,517	30,617	35%	110%	15%	12%
Romania	825	1,424	2,599	2,221	57%	42%	-22%	-43%	6,338	7,145	18,577	18,192	70%	60%	32%	-16%
Iceland	617	204	113	79	14%	-24%	-5%	-60%	3,795	1,807	831	1,199	34%	-9%	-29%	6%
Slovakia	552	477	871	1,570	25%	33%	2%	-12%	3,432	2,488	6,580	12,006	25%	5%	6%	7%
Lithuania	538	810	1,205	1,390	93%	71%	31%	74%	2,383	3,713	7,426	7,832	62%	74%	13%	40%
Latvia	355	385	610	585	103%	26%	-1%	25%	1,192	1,596	3,549	3,929	31%	5%	2%	25%
Estonia	177	146	293	573	77%	29%	23%	86%	798	1,010	3,263	3,445	53%	36%	71%	78%
Cyprus	59	86	263	450	-64%	1%	-21%	24%	996	497	1,716	2,613	11%	4%	-14%	7%
Croatia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Portugal	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sweden	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Note: Data for Croatia, 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	Jul 2026				Jan-Jul 2026				Jan-Jul 2025				2025			
	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV	BEV	PHEV	HEV	MHEV
Norway	98%	1%	1%	0%	98%	1%	1%	0%	94%	2%	2%	0%	96%	2%	1%	0%
Denmark	80%	0%	3%	9%	80%	1%	3%	8%	64%	3%	4%	8%	69%	3%	4%	7%
Iceland	54%	18%	10%	7%	44%	21%	10%	14%	31%	22%	13%	12%	42%	20%	11%	11%
Finland	53%	12%	18%	10%	49%	13%	16%	13%	35%	22%	17%	11%	38%	21%	17%	11%
Netherlands	48%	22%	12%	11%	38%	24%	15%	14%	35%	21%	14%	15%	41%	19%	13%	13%
Belgium	43%	7%	8%	22%	37%	6%	12%	23%	33%	9%	12%	22%	35%	9%	11%	21%
France	35%	6%	20%	21%	29%	6%	22%	23%	18%	6%	23%	21%	20%	7%	23%	21%
Luxembourg	33%	7%	5%	25%	30%	6%	7%	27%	25%	8%	7%	23%	27%	8%	7%	23%
Ireland	32%	15%	15%	13%	25%	14%	19%	14%	17%	15%	19%	12%	18%	15%	18%	11%
Germany	30%	12%	4%	24%	26%	11%	5%	24%	18%	10%	5%	25%	20%	11%	5%	24%
Austria	28%	14%	8%	20%	25%	11%	8%	22%	22%	9%	8%	21%	21%	10%	8%	21%
Slovenia	27%	3%	9%	18%	19%	3%	10%	21%	9%	3%	7%	20%	11%	3%	8%	19%
Latvia	15%	16%	25%	24%	9%	12%	26%	29%	7%	11%	26%	23%	7%	12%	24%	24%
Estonia	11%	9%	18%	36%	7%	9%	28%	30%	7%	10%	26%	27%	7%	11%	23%	29%
Spain	11%	14%	23%	23%	10%	12%	22%	25%	8%	10%	17%	24%	9%	11%	18%	23%
Lithuania	11%	16%	24%	27%	8%	13%	26%	27%	6%	9%	27%	23%	8%	11%	25%	22%
Slovakia	8%	7%	13%	23%	7%	5%	13%	23%	5%	4%	11%	21%	5%	5%	13%	22%
Hungary	8%	12%	14%	34%	10%	8%	16%	36%	8%	5%	15%	36%	9%	6%	15%	35%
Czechia	8%	5%	10%	16%	7%	5%	10%	15%	6%	4%	8%	14%	6%	4%	9%	14%
Greece	8%	8%	30%	33%	6%	6%	24%	33%	5%	6%	18%	31%	6%	8%	20%	31%
Romania	7%	12%	22%	19%	8%	9%	24%	24%	5%	5%	17%	27%	6%	6%	19%	24%
Italy	6%	10%	17%	30%	8%	9%	16%	33%	5%	6%	13%	31%	6%	6%	13%	31%
Cyprus	4%	6%	19%	33%	12%	6%	20%	30%	9%	5%	21%	25%	10%	5%	21%	26%
Poland	4%	10%	22%	29%	5%	9%	23%	30%	5%	5%	22%	28%	7%	6%	22%	27%
Croatia	-	-	-	-	-	-	-	-	1%	2%	5%	20%	2%	3%	6%	20%
Portugal	-	-	-	-	-	-	-	-	21%	13%	6%	16%	24%	15%	6%	16%
Sweden	-	-	-	-	-	-	-	-	36%	27%	8%	14%	37%	27%	9%	13%

Note: July 2026 data for Croatia, Portugal, and Sweden are not available.

DEFINITIONS, DATA SOURCES, METHODOLOGY, AND ASSUMPTIONS

- » **Manufacturer pools:** Automakers are allowed to form pools to jointly comply with CO₂ targets. For this publication, the pools are defined according to the European Commission's "M1 pooling list" version from 18 May 2026 as well as the "Declarations of intent to form Open Pools" version from 5 August 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 and a third, the Porsche pool, has been declared for 2026–2027. 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 except Porsche 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), Porsche pool (Porsche, XPeng), 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, SEAT, Škoda, VW). Nissan and SAIC are large passenger car manufacturers that are not part of a pool.
- » **Abbreviations:** CO₂ = carbon dioxide; g/km = grams per kilometer; 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 decreases: Fiat (with a decrease of 17 g CO₂/km), Ford (a decrease of 7 g CO₂/km), and Citroën (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 BEVs in this publication cover all of these countries, with the exception of Malta. Data on BEV market shares are also unavailable for Bulgaria. Data for CO₂ emission levels additionally omit Bulgaria, Hungary, Romania, and Slovenia. In addition, July 2026 data are not available for Croatia, Portugal, and Sweden, and June 2026 data are not available for Sweden as well.
- » **Data sources:** Dataforce (new vehicle registrations) and European Environment Agency (vehicle mass and eco-innovation credits). Historical values are regularly updated to reflect the latest data available. Dataforce data used in the Market Monitor analyses may deviate from the official CO₂ monitoring data published by the European Environment Agency.

Data on global BEV uptake were obtained from the following sources: Associação Brasileira do Veículo Elétrico (Brazil), Asociación Nacional Automotriz de Chile A.G. (Chile), Gasgoo (China), Dataforce (Europe, United Kingdom), Segment Y (India), Gaikindo (Indonesia), EV Volumes (United States), Thailand Automotive Industry Association (Thailand), Hyundai Thanh Cong (Vietnam), Vietnamese Automobile Manufacturer's Association (Vietnam), and VinFast (Vietnam).

- » **Results may change over time:** Registrations and/or CO₂ data may be retrospectively updated by national type-approval authorities.
- » **Test procedures:** CO₂ values are provided according to the **Worldwide harmonized Light vehicles Test Procedure** (WLTP).
- » **Flexible compliance mechanisms:** To facilitate meeting the CO₂ targets, manufacturers can make use of a number of compliance mechanisms, including (1) **eco-innovation technologies** and (2) **ZLEV factors**. First, manufacturers can reduce their CO₂ level by up to 6 g/km by deploying eco-innovation technologies. As a conservative estimate, we applied the 2025 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 2025. The average 2025 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 share. 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/>.



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