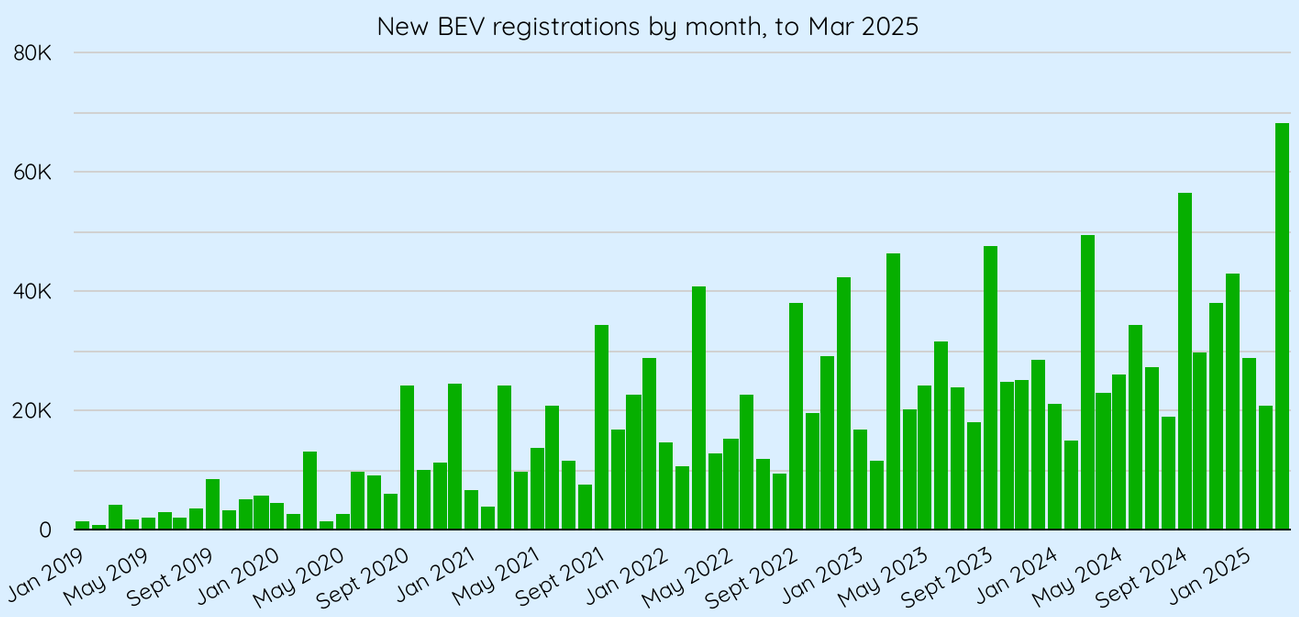
NEW AUTOMOTIVE

Mar 2025

UK sets new record for electric car sales in March



Electric Cars (BEV)
68,255
38.2%

Electric Vans
3,973
32.3%

Electric Motorbikes
314
-11.5%

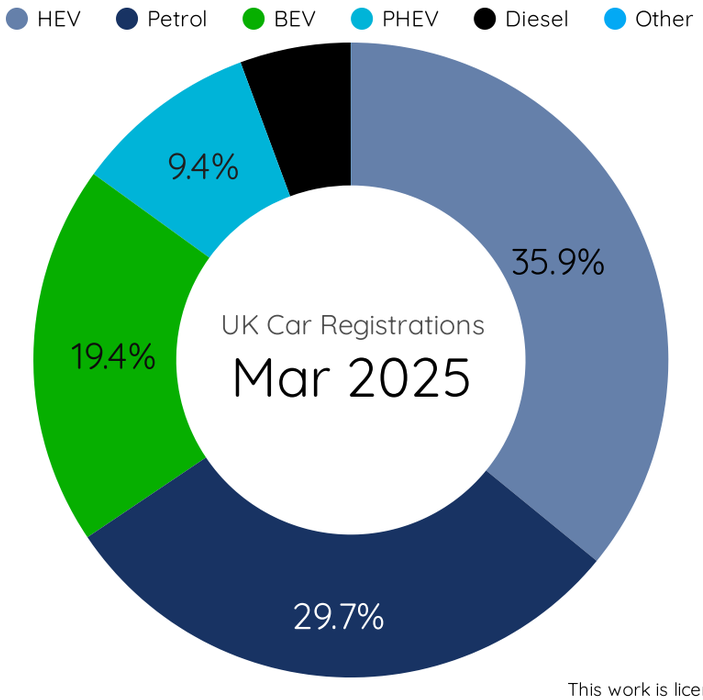
Electric HGVs (BEV)
44
158.8%

Key points

- Battery electric car sales topped out at just shy of 70,000 for the first time ever in a month in the UK in March, breaking a previous record set in September 2024.
- The bumper month for EV sales came amid a bumper month for car sales overall, perhaps in response to increases in first year VED rates in April 2025.
- We observed no increases in BEV registrations in response to impending VED charges on vehicles that cost over £40,000.
- Tariffs on US trade are unlikely to impact on ZEV mandate compliance
- Tesla shed 4pp of their share of UK BEV registrations, while VW and Vauxhall saw large rises in their share of the BEV market

Contents

Suggestions, feedback or requests for data? We'd love to hear from you: *data@newautomotive.org*



Ben Nelmes, CEO of New AutoMotive, said:

“March is a key month for car sales, and the data shows that demand is surging for electric cars with the biggest month ever for sales of clean cars.

"The UK's ZEV mandate is successfully driving up EV sales and enabling more drivers to go electric and benefit from cost savings and a better driving experience."

"As Ministers consider the future of the UK's ZEV mandate the message from the data is clear: don't mess with success."

NEW AUTOMOTIVE

Mar 2025

Cars summary

Battery EVs set a new all time monthly high, with more than 68,000 registrations, smashing the previous high of 56,000 scored last September. Volumes are up 38% in the year to date on the same period last year, and battery EV market share is 21%, within touching distance of the real 2025 target (see next page). PHEVs and HEVs both rose by more than 30%, whilst the death spiral of petrol (down 21%) and diesel (down 16%) continues,.

Total vehicle sales had their highest March figures since 2019, as consumers rushed to beat upcoming tax changes. With effect from 1st April, Battery EVs above £40K are subject to the Expensive Car Supplement (introduced by the Tories), whilst first year VED rates are increasing by £100 for PHEVs, around £175-275 for hybrids and smaller petrol cars, and £1000 or more for the largest petrol vehicles, following Labour's budget.

EV demand remains strong - our analysis suggests that there hasn't been a spike in registrations of EVs with a list price of above £40K - EVs above this threshold accounted for two-thirds of sales, in line with the historical average. Registrations of cars below £40K - unaffected by the tax change - also surged on the same time last year.

Tesla remains top brand, but sales fell by 1% in a steeply rising market. Big risers include Peugeot (up 106% on January-March 2024), Skoda (up 127%) and Volkswagen (222%). Meanwhile BYD saw sales surge 354% on the same period, and joins the BEV top 10 for the first time, And just outside the top 10, ZEV mandate bellyachers Ford saw a rise of 311%.

Mazda, Honda and Suzuki bring up the rear, as consumers go cold on ZEV mandate ostriches Mazda and Honda's dated EV offerings whilst ZEV mandate zombie Suzuki have yet to sell an EV. It shows in their wider market position, as these once challenger firms' share across all fuel types is now just 4.4%.

YTD vs last year

Fuel Type	Re...	Δ	Mkt. Share	Δ
HEV	194,352	39,456	34.19%	6.21%
Petrol	172,125	-59,685	30.28%	-11.59%
BEV	118,146	32,359	20.79%	5.29%
PHEV	52,180	8,890	9.18%	1.36%
Diesel	31,535	-5,349	5.55%	-1.11%
Grand total	**568,403**	**14,839**	**100%**	**0%**

Latest month vs last year

Fuel Type	Regs.	Δ	Mkt. Share	Δ
HEV	126,443	32,381	35.96%	6.96%
Petrol	104,242	-28,062...	29.65%	-11.14%
BEV	68,255	18,854	19.41%	4.18%
PHEV	33,047	7,979	9.4%	1.67%
Diesel	19,598	-3,456	5.57%	-1.53%
Grand total	**351,625**	**27,233**	**100%**	**0%**

Top Brands' Electrification YTD vs last year

Marque	Total	BEVs	BEV (%)	Δ
VOLKSWAGEN	52,061	8,728	16.76%	10.39%
FORD	35,269	4,311	12.22%	9.09%
BMW	34,254	10,244	29.91%	6.17%
KIA	33,982	6,836	20.12%	5.59%
PEUGEOT	28,407	5,950	20.95%	7.84%
NISSAN	27,343	1,542	5.64%	-3.47%
VAUXHALL	27,284	5,051	18.51%	4.63%
AUDI	26,550	7,532	28.37%	11.01%
MERCEDES-B...	26,345	5,981	22.7%	2.85%
TOYOTA	25,616	1,715	6.7%	-6.21%
HYUNDAI	24,291	4,068	16.75%	0.67%
MG	24,130	4,132	17.12%	-8.3%
SKODA	22,058	4,670	21.17%	9.98%
LAND ROVER	19,717	0	0%	0%
VOLVO	18,477	3,495	18.92%	-12.86%
RENAULT	17,605	3,161	17.96%	9.76%
TESLA	12,632	12,632	100%	0%
MINI	12,254	3,983	32.5%	29.32%

BEV market share, YTD, vs last year

Marque	BEV reg.s	Δ	% of UK BEVs	Δ
TESLA	12,632	427	10.69%	-3.54%
BMW	10,244	1,240	8.67%	-1.83%
VOLKSWAGEN	8,728	6,022	7.39%	4.23%
AUDI	7,532	1,835	6.38%	-0.27%
KIA	6,836	2,010	5.79%	0.16%
MERCEDES-BE...	5,981	146	5.06%	-1.74%
PEUGEOT	5,950	3,075	5.04%	1.68%
BYD	5,232	3,946	4.43%	2.93%
VAUXHALL	5,051	1,023	4.28%	-0.42%
SKODA	4,670	2,614	3.95%	1.56%

NEW AUTOMOTIVE

Mar 2025

Car ZEV Mandate Tracker

Figures shown are based on GB car sales in the current calendar year

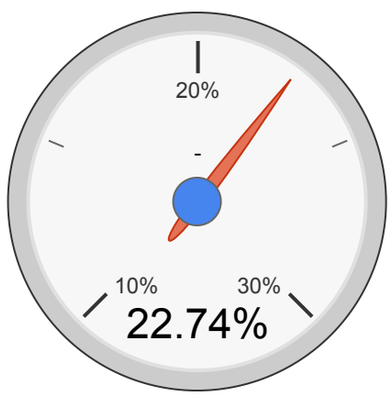
Parent	Car sales	Est real ZEV sales target	BEV % of car sales	ZEV credit shortfall/sur...
VW	122,849	21.7%	22.0%	451
STELLANTIS	71,124	26.2%	21.8%	-3,088
HYUNDAI	58,679	22.6%	18.9%	-2,134
BMW	46,616	25.7%	30.6%	2,287
FORD	35,271	24.1%	15.2%	-3,140
TOYOTA	29,721	15.4%	7.6%	-2,328
NISSAN	27,343	22.1%	5.6%	-4,488
MERCEDES	26,841	28.0%	24.3%	-985
RENAULT	26,680	22.6%	17.0%	-1,493
SAIC	24,130	17.8%	17.1%	-170
GEELY	23,139	26.6%	33.6%	1,636
TATA	21,491	15.4%	7.6%	-1,683
TESLA	12,632	28.0%	100.0%	9,095
MAZDA	10,717	16.4%	1.4%	-1,614
BYD	9,097	23.9%	57.5%	3,059
HONDA	8,568	18.5%	0.5%	-1,543
CHERY AUTOMOBILE	6,177	26.8%	12.9%	-859
SUZUKI	5,773	22.6%	0.0%	-1,307

The estimated real ZEV sales target - the headline ZEV mandate target for 2025 is 28%. But firms generate additional credits by exceeding CO2 emissions targets on their ICE vehicle sales (including hybrids and plug-in hybrids). We calculate the real target - 22.74% - by estimating the number of credits that each manufacturer is expected to generate based on the CO2 ratings of newly registered ICE cars in the year to date, using - like the rest of this bulletin - publicly available information from the DVLA.

2025 story so far - Amongst the top 10, VW Group (including Audi, Cupra, Skoda, and VW itself) as well as BMW Group (including Mini) are in credit. Now that the March madness in the petrol vehicle market prompted by changes to VED is subsiding, we anticipate more firms will move into credit.

We expect Trump's tariffs to have limited impact on the ZEV mandate. The UK barely imports EVs from the US - Teslas are made in Germany and China - and new EVs are price competitive with other fuel types, so the economic damage will be seen through stagnating car sales across all fuel types. Tariffs don't move the economics of driving electric, which continue to favour making the switch.

Est. real market-wide ZEV target



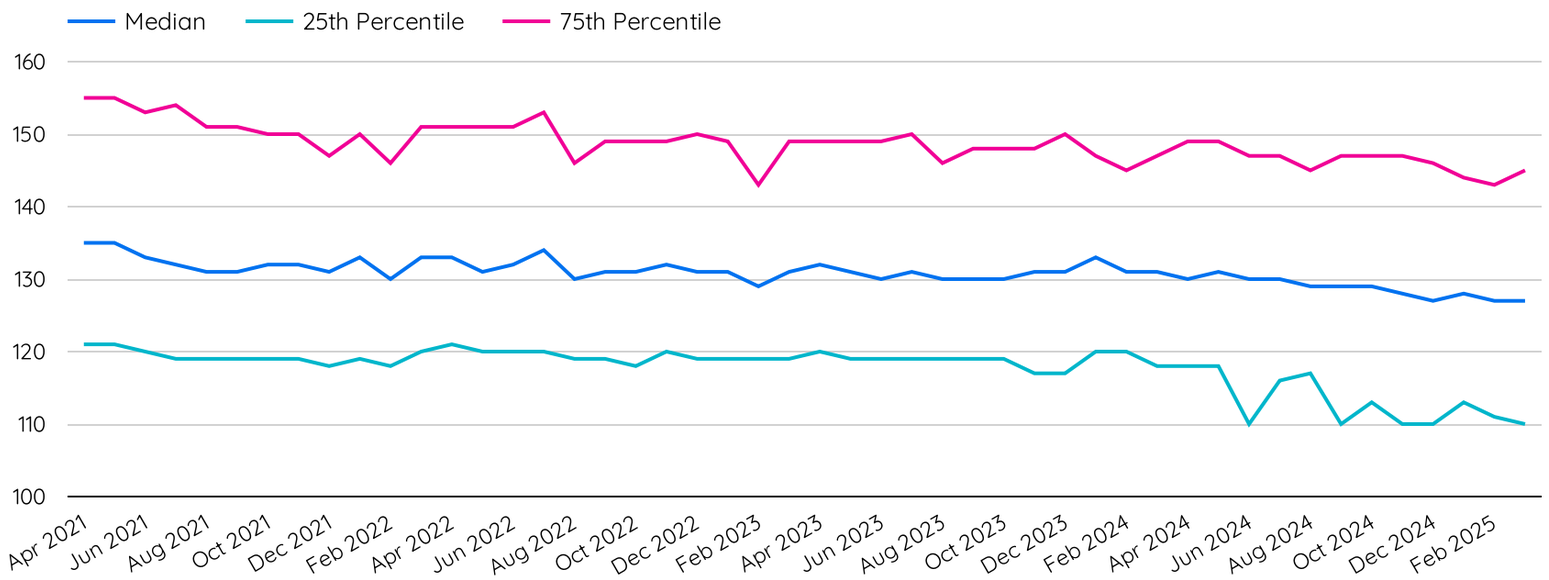
The real market-wide ZEV target represents the percentage of GB car sales that need to be fully electric for carmakers to meet their mandated EV sales targets.

NEW AUTOMOTIVE

Mar 2025

ICE Car CO2 Emissions Ratings

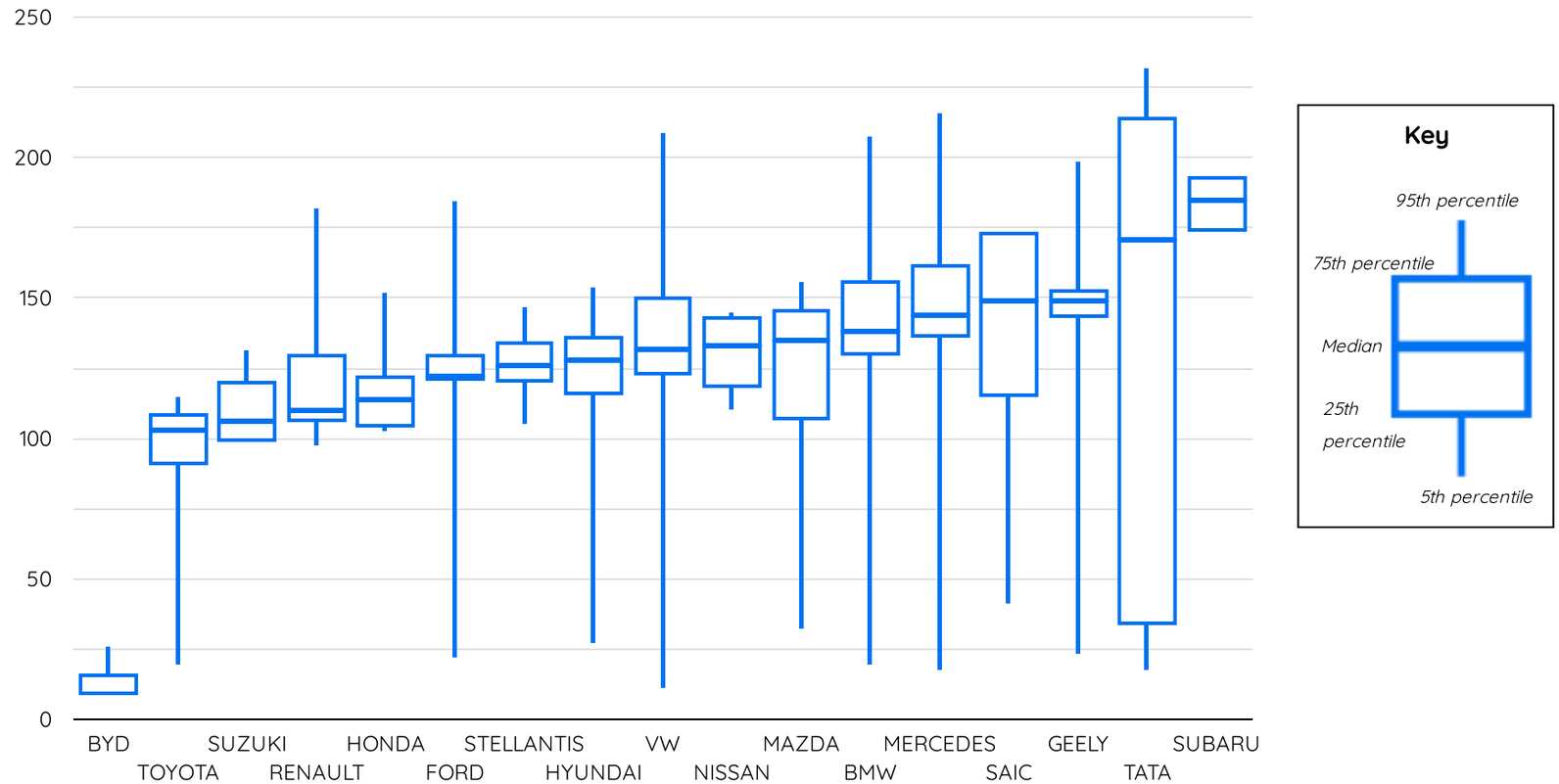
Average CO2 ratings of newly registered internal combustion engine cars by month of registration, gCO2/km



As the UK transitions to zero emissions vehicles, it is important that the new petrol and diesel cars that are sold between now and their phase-out in 2035 do not become less fuel efficient and more polluting. This page provides a way of tracking this trend, with metrics based on the WLTP emissions ratings of new passenger cars in the UK, which have been mandatory for new cars registered in the UK since April 2020.

There has been a steady trend of improvements in WLTP emissions ratings. This is likely to be driven by the flexibilities in the ZEV mandate, which rewards car makers who sell more fuel efficient/lower emission vehicles.

CO2 emissions ratings of new cars registered in the last 12 months, by manufacturer



NEW AUTOMOTIVE

Mar 2025

Vans Summary

While total new van registrations fell 5% against March 2024, this was the result of decreased demand for diesel vans, which saw registrations fall 10%, which was notably in contrast to BEV van registrations which saw a record number of registrations seeing the total BEV vans registered in 2025 more than double.

Ford once again dominated new van registrations, however it continues to struggle to match the rate at which its competitors are able to sell BEVs and only registering a 4.8% market share for its electric models.

However, as we close out Q1, March certainly helps cement that 2025 could very much be a story of winners rather than losers - but more on this on the next page.

March saw Vauxhall comfortably flying past the 2026 target of 24% with a 27% BEV share of new registrations, with Nissan also showing that they are in a position to sleep-walk into 2026 with 25.2% of their new registrations being BEVs.

With the Plug-in Van and Truck Grant being extended in February to carry on through to April 2026 this continued assistance from the government can only help the electrification of the UK van market - acting as an additional help beyond the generous flexibilities in the ZEV Mandate itself.

BEV Van Market Shares (YTD)

Make	BEVs	BEVs
FORD	1,621	24%
VOLKSWAGEN	1,286	19.04%
VAUXHALL	1,252	18.53%
PEUGEOT	468	6.93%
CITROEN	214	3.17%
RENAULT	427	6.32%
MERCEDES-BENZ	466	6.9%
NISSAN	403	5.97%
LAND ROVER	0	0%
MAXUS	262	3.88%
IVECO	171	2.53%
FIAT	30	0.44%
ISUZU	0	0%
MAN	11	0.16%
Grand total	**6,755**	**100%**

Sales by fuel type, YTD vs last year

Fuel Type	Regs.	% Δ	Share	% Δ
Diesel	67,229	-17.2%	86.35%	-6.5%
BEV	6,755	28.6%	8.68%	45.2%
Others	3,868	172.2%	4.97%	207.4%
Grand total	**77,852**	**-11.4%**	**100%**	**0.0%**

Sales by fuel type, latest month vs last year

Fuel Type	Regs.	% Δ	Share	% Δ
Diesel	40,943	-10.2%	86.72%	-5.5%
BEV	3,986	23.6%	8.44%	30.2%
Others	2,286	164.9%	4.84%	178.9%
Grand total	**47,215**	**-5.0%**	**100%**	**0.0%**

Top van sellers' sales: BEV vs non-BEV (YTD)

Make	Total	BEVs	BEV %
FORD	31,245	1,621	5.19%
VOLKSWAGEN	7,313	1,286	17.59%
VAUXHALL	6,901	1,252	18.14%
PEUGEOT	5,811	468	8.05%
CITROEN	5,490	214	3.9%
RENAULT	5,472	427	7.8%
MERCEDES-B...	4,631	466	10.06%
NISSAN	2,156	403	18.69%
LAND ROVER	1,914	0	0%
MAXUS	1,788	262	14.65%
IVECO	1,186	171	14.42%
FIAT	1,085	30	2.76%
ISUZU	1,015	0	0%
MAN	828	11	1.33%
RENAULT TRU...	432	23	5.32%
ISUZU TRUCKS	293	0	0%
INEOS	96	0	0%
TOYOTA	56	26	46.43%
MITSUBISHI F...	33	0	0%
SKODA	22	22	100%
Grand total	**77,852**	**6,755**	**8.68%**

NEW AUTOMOTIVE

Mar 2025

Van ZEV Mandate Tracker

Figures shown are based on GB van sales in current calendar year.

Entities	Total Registrations ▾	Est. Real ZEV Sales Target	ZEV Share	Credit Balance
FORD	30,582	15.21%	4.84%	-3,171
STELLANTIS	18,884	8.8%	10.19%	263
VOLKSWAGEN	7,774	16%	16.32%	25
RENAULT	5,331	12.61%	7.5%	-272
TOYOTA	4,918	10.74%	8.54%	-108
MERCEDES-BENZ	4,062	12.01%	7.04%	-202
NISSAN	2,142	8.8%	18.81%	215
JLR	1,871	10.36%	0%	-194
SAIC	1,610	16%	16.21%	3
ISUZU	949	8.8%	0%	-84

The estimated real ZEV registrations target - the ZEV Mandate requires manufacturers to meet an increasing percentage target of electric vans (16% in 2025) by selling more electric vans as a proportion of sales. They can also generate additional credits by exceeding easy-to-meet CO_2 emissions targets on their ICE van registrations. We calculate the implied target by estimating the number of credits that each manufacturer is expected to generate based on the CO_2 ratings of newly registered ICE vans in 2025.

2025 so far: Although it is still early in 2025, a narrative is becoming increasingly clear: Ford may be able to vastly outsell its closest competition (once again nearly outselling Stellantis, Volkswagen, and Renault combined, or more significantly outselling all its competitors combined, excluding Stellantis), however its lack of traction on BEVs at a 4.8% share of new registrations so far this year and an underwhelming performance against its CO2 target leaves the company in a significant credit deficit - with Ford nearly halfway to its more than 7,000 credit deficit of 2024 by the end of Q1 2025 alone.

March, however, also saw a number of manufacturers further cement their positions as complying with the ZEV Mandate for 2025 either by already hitting the 16% base target outright, or by a combination of strong ZEV registrations and out-performing their CO2 target.

Nissan are flying ahead by not only already out-performing the base target by nearly 3% at the end of Q1, but also over-achieving on their CO2 emissions target meaning they are in line to out-perform their “real world” ZEV target by a whopping 10%!

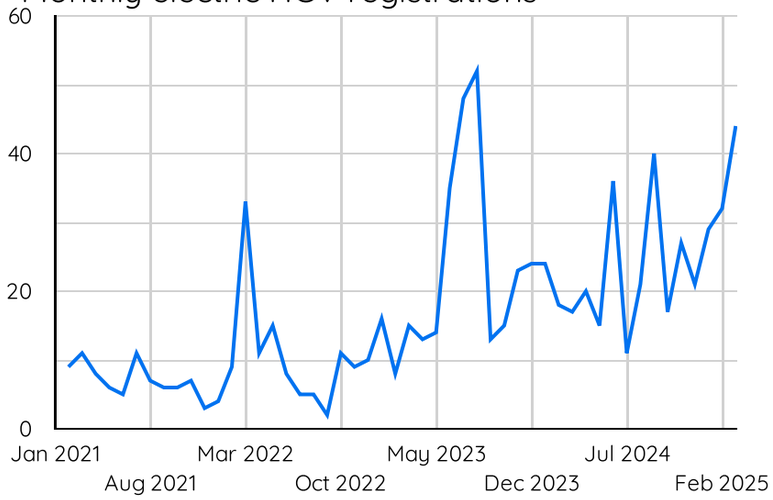
In addition to Nissan, SAIC and Volkswagen are both set to beat the ZEV Mandate target by registrations alone. Stellantis are also on track to comply with the target this year making use of the generous flexibilities available to them under the ZEV Mandate.

NEW AUTOMOTIVE

Mar 2025

HGVs

Monthly electric HGV registrations



HGVs by fuel type, last 12 months vs previous

Fuel Type	Regs.	Δ	Mkt. Share	Δ
Diesel	43,964	-2,394	99.29%	-0.07%
BEV	313	17	0.71%	0.07%
Grand total	**44,277**	**-2,377**	**100%**	**0%**

HGVs latest month vs last year

Fuel Type	Regs.	% Δ	Mkt. Share	Δ
Diesel	4,456	-6.6%	99.02%	-0.62%
BEV	44	158.8%	0.98%	0.62%
Grand total	**4,500**	**-6.0%**	**100%**	**0%**

HGVs saw their third highest registrations to date, with 44 new lorries coming onto the road. Representing just under 1% of the HGV market, there is still a long way to go. However, work has begun on an HGV charging hub at the Port of Tilbury, expected to be completed in December 2025, and Moto has announced its plans to build 300 charging bays for HGVs at 23 strategic locations by 2030. The government needs to play catch up and release the long overdue HGV and coach infrastructure strategy.

Motorbikes

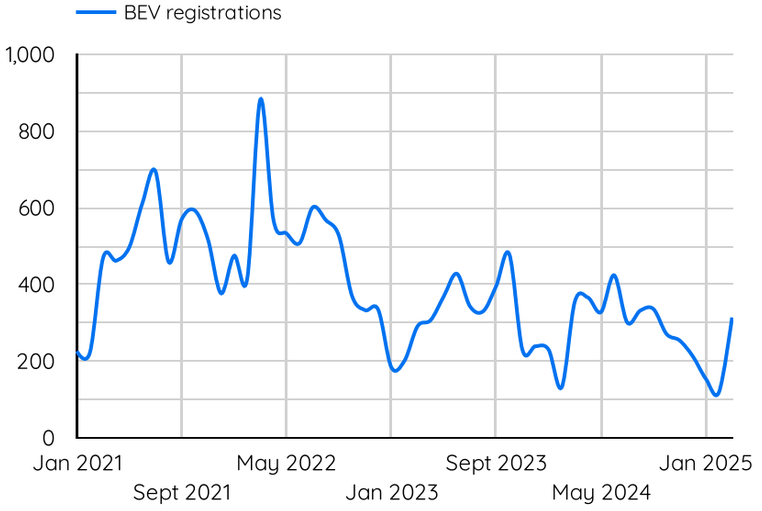
Motorbikes by fuel type, YTD vs previous year

Fuel Type	Regs.	% Δ	Mkt. Share	Δ
Petrol	18,667	-29.4%	96.95%	-0.41%
BEV	587	-18.1%	3.05%	0.41%
Grand total	**19,254**	**-29.1%**	**100%**	**0%**

Motorbikes by fuel type, latest month vs previous year

Fuel Type	Regs.	% Δ	Mkt. Share	Δ
Petrol	11,991	-25.8%...	97.45%	-0.4%
BEV	314	-11.5%	2.55%	0.4%
Grand total	**12,305**	**-25.5...**	**100%**	**0%**

Monthly electric motorbike registrations



An all too familiar site with motorbikes still failing to make any significant inroads into petrols dominance. The market has not been able to recover since the government pulled incentives and it looks unable to do so without some sort of government intervention, such as a ZEV mandate. Motorcycles should be one of the easiest vehicles to electrify, the UK should look to markets such as India which have seen a huge increase in electric motorcycle registrations. Government incentives and investment into technology such as battery swapping stations have helped registrations grow in India, they may well work in the UK.

Back to home page

About this bulletin

Introduction

Electric Car Count is a monthly data series from New AutoMotive, a not-for-profit independent transport research organisation with a mission to accelerate and support the UK's transition to electric vehicles. You can find out more about New AutoMotive by visiting www.newautomotive.org/mission

Terms of Use

Data Sources & Methodology

The data we present comes from a mixture of sources. Data on vehicle registrations comes from the DVLA, and is based on a snapshot of the vehicle licensing database taken in the first few days of each month to gain a view of the last month's new registrations of vehicles. We also obtain some information from the DVSA's MOT database.

November 2024 methodological change: From November 2024 we have changed our approach to obtaining the snapshot of the UK car market, as part of our efforts to improve the quality of our data. This has boosted the volume of registrations in our historical dataset, which is used for comparisons with past periods. This will mean that the numbers in bulletins from December 2024 may not entirely accord with bulletins published prior to this point.

Terminology

Fuel Types

In our view, a vehicle's fuel type refers to its *primary* form of propulsion. Most vehicles are straightforwardly propelled by a diesel-fuelled engine, petrol-fuelled engine, or an electrically powered motor. Fuel types become complicated when vehicles have multiple forms of propulsion, for instance in the case of hybrid electric vehicles. Except in some rare cases, our view is that hybrids are just more efficient petrol or diesel vehicles, since the electric power is not the primary energy source for propulsion. Therefore we refer to the following fuel types:

Pure electric, or *Electricity* - these are battery-electric vehicles which are propelled exclusively by an electric motor and have no tailpipe emissions, to which the DVLA assigns an 'ELECTRICITY' fuel type classification. They do not include fuel cells. In some very rare cases, these vehicles can carry a fossil-fuelled range extender.

Hybrid, or *hybrid electric* - these are primarily petrol or (less commonly) diesel-fuelled vehicles that have some kind of electric motor to assist in reducing fuel consumption.

PHEV - these are hybrids as above, but they have a plug to take external charge.

Other fuel type terminology in this bulletin is hopefully self explanatory.

Vehicle Types

We refer to four main categories of vehicles. They are as follows, with an explanation of what is included in each category:

Cars - vehicles with a type approval of 'M1' and 'M2', indicating that they are light vehicles for the purpose of carrying passengers.
Vans - vehicles with a type approval of 'N1', or with a type approval of 'N2' that are also zero emissions up to 4,250kg, in line with the DfT's proposed definition for the ZEV mandate, to recognise the heavier weight of zero emissions light goods vehicles.
HGVs - vehicles with a type approval of 'N3' or 'N2' that are also not zero emissions and with a weight of less than 4,250kg.
Motorbikes - vehicles with a type approval of 'L1' or 'L3'.