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Electric Vehicle Sales Review Q2 2025

Foresight to drive the industry

July 2025

This publication has been developed in collaboration between Strategy&, PwC's global strategy consulting business, alongside PwC Autofacts®' automotive industry and function experts. Together, we transform organizations by developing actionable strategies that deliver results.

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Global BEV market grows by more than a third in Q2

Global BEV sales enjoyed substantial growth year on year in the second quarter of 2025, increasing by 33% compared to Q2 2024. Almost one in five cars (19%) sold in all analyzed markets in the second quarter was a BEV.

Much of that growth was powered by China, which was responsible for almost two thirds of global BEV sales. Indeed, BEV sales in China in the first six months of the year (H1) increased by almost one half (47%) in relation to the same period in 2024.

Europe has also played a significant role in the growth of the global BEV market in 2025, with H1 sales in the top five European markets up by a quarter (25%) year on year. The performance in these European markets has been particularly welcome, given the temporary sales dip in 2024.

Germany's BEV market has bounced back especially strongly, growing by more than a third (35%) in H1 2025 vs. H1 2024. Germany and the UK are competing for the top spot in Europe for BEV units sold, with Germany taking the lead in the second quarter of the year. However, the UK had the highest BEV market share among the top five European markets in the first half of the year, at 22%.

The US BEV market did not fit with the global trend, falling 3% year on year in the second quarter of 2025. However, a significant uplift is expected in the third quarter as consumers seek to take advantage of the existing $7,500 tax credit before its termination at the end of September. As incentives end, OEMs operating in the US will need to pursue various strategies to maintain consumer interest in BEVs.

A more fundamental challenge is facing OEMs and governments worldwide – how to secure a sustainable supply of the rare earth elements (REEs) necessary to manufacture electric vehicles. The reserves and production of REEs are heavily concentrated in very few countries, making them a powerful potential weapon in geopolitical conflict. The strategies that OEMs and governments can adopt to safeguard their interests are set out in our Analyst Insights chapter.

After a difficult 2024, total BEV sales in the top five European markets grew by a quarter in the first half of 2025

25%

BEV sales growth in all the top five European markets in H1 2025 vs. H1 2024

Source: PwC Autofacts® analysis

The global battle for rare earth elements

Rare earth elements (REEs) play a crucial role in modern technology, serving as essential components in vehicles – particularly electric vehicles – and in a variety of other products, including smartphones and diverse military technologies.

REEs comprise a group of 17 heavy metals. Neodymium and samarium are particularly relevant for EV manufacturers as they facilitate the production of significantly stronger permanent magnets, resulting in powerful and efficient electric motors.

Although REEs are called rare, they are in fact comparatively plentiful – three times more common in the earth's crust than copper, and 200 times more than platinum or gold.[1]

Despite this abundance, however, REEs are found in relatively low concentrations compared to other metals, making them much more difficult to extract and refine, and raising concerns about environmental damage and sustainability.

Another challenge posed by REEs is that reserves are limited to few countries, while production is even more localized. Countries with sparse or non-existent reserves and production are therefore left highly vulnerable.

Almost half (48%) of known global REE reserves are located in China, more than double the amount found in the second most endowed country Brazil with 23%. Moreover, China dominates REE mining to an even greater extent, accounting for more than two thirds (69%) of global production.[2]

Such dominance presents a concentration risk for the rest of the world, with REE-rich countries able to use their resources as powerful leverage in trade negotiations. Other location-specific risks are also relevant: natural disasters, wars, social unrest, political or regulatory changes, and infrastructure failures could all lead to supply chain disruption.

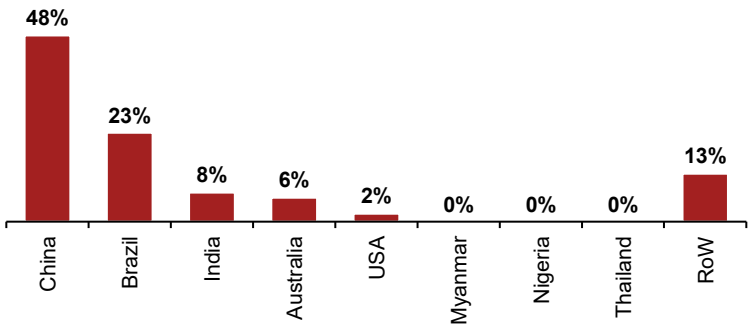
Using commodities as geopolitical clout is nothing new. In 2010, for example, China blocked the export to Japan of crucial minerals used in products such as EVs, wind turbines and guided missiles due to a diplomatic dispute.[3]

In February 2025, the Democratic Republic of Congo, responsible for 75% of global cobalt production, put in place an export ban for the vital EV battery material in a bid to curb global oversupply. As a result, the price of cobalt reached an all-time high of $33,600 per metric ton as companies stocked up on the commodity.[4]

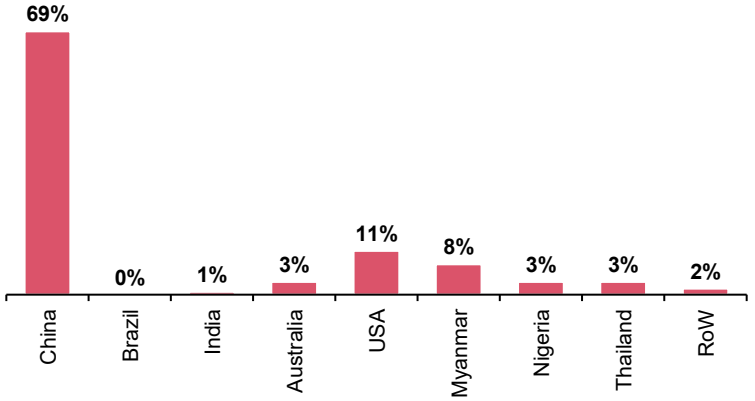
With trade tensions now intensifying once again, REEs and other critical raw materials (listed in page 6 for the EU, USA and China) represent a powerful tool in promoting the interests of certain states.

See the PwC Mine 2025 study for a deep dive into risks and potentials in sourcing critical elements.

Share of global reserves



Share of global mine production



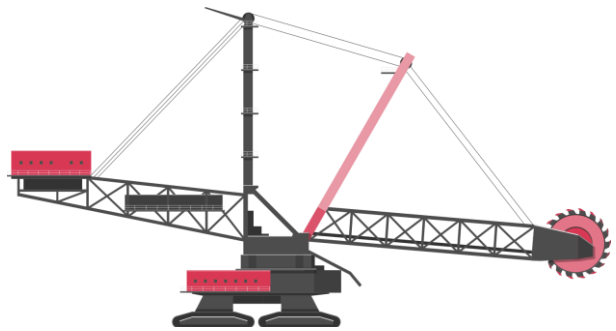
[1] Battery Power Tips; [2] US Geological Survey; [3] WE Forum; [4] Reuters
Source: PwC Autofacts® analysis

Minimizing REE risks: how countries and companies can respond

Current global trade tensions are having a significant impact on the automotive industry.

In response to the US government's imposition of hefty tariffs on Chinese exports, China limited the export of seven REEs and permanent magnets and thus laid bare US vulnerabilities. A survey by the American Chamber of Commerce in China revealed that without a solution 75% of US firms expected their REE stock to be exhausted within three months.[1] Ford was briefly forced to scale back its SUV production in Chicago as a result.[2] Although both sides reached a temporary agreement in late June, a formal trade deal is yet to be signed.[3]

The EU has also been exposed to the export restrictions, as it currently relies on China for 98% of the REEs it requires for auto components, fighter jets and medical imaging devices.[4] In June 2025, the European Association of Automotive Suppliers (CLEPA) warned that the sector was already experiencing significant disruption, reporting that several production lines and plants had already shut down in Europe as a result of the restrictions.[5]

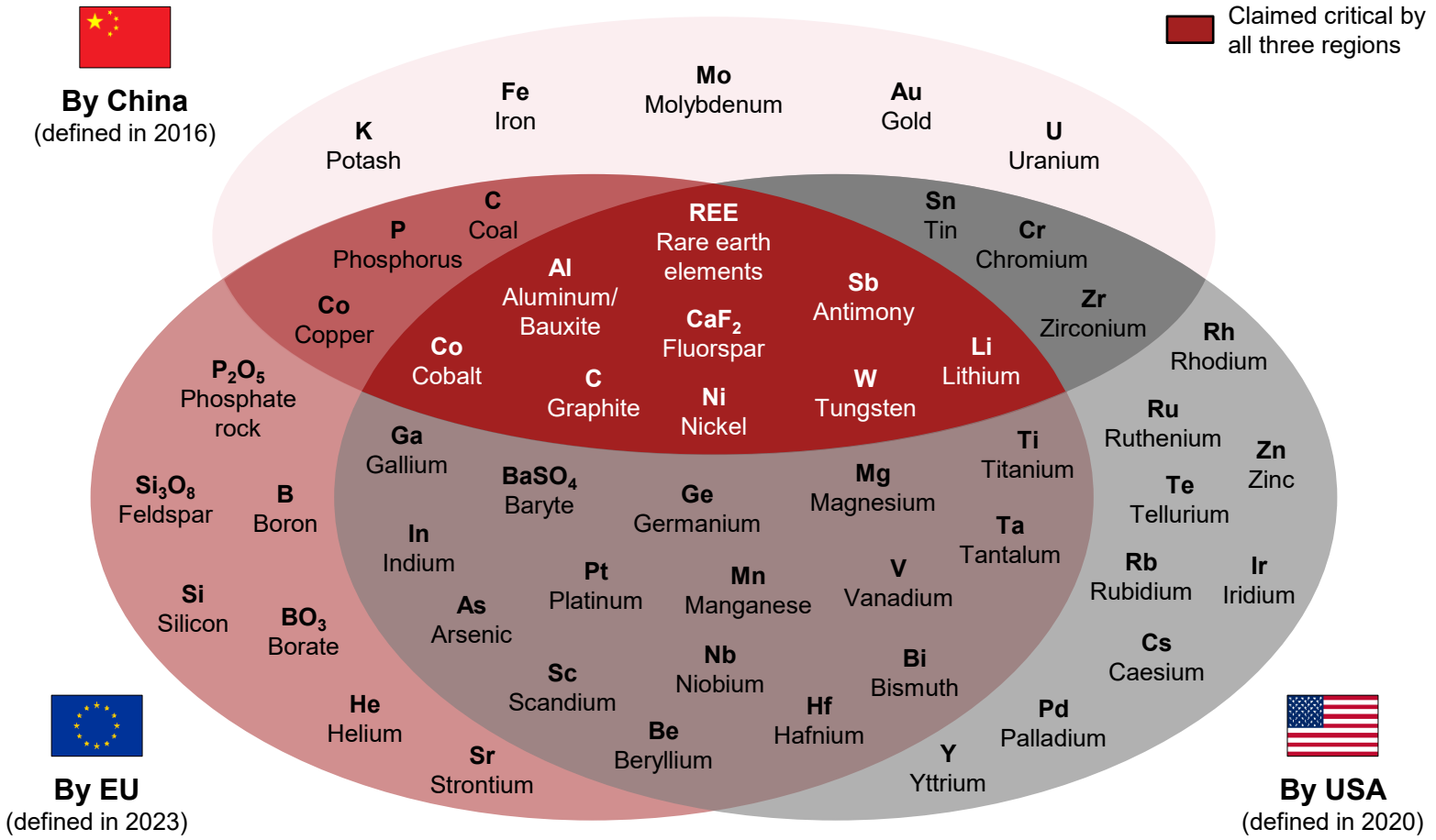


It is clear that countries and companies need to develop some of the below strategies to minimize concentration risks and boost diversification:

- **Secure supply:** Incentives for exploration activities – such as tax breaks, access to government funding, and simplified regimes have led to the discovery of various large REE deposits outside China (such as Ramaco Resources' deposit in Wyoming and LKAB's in Sweden). The EU's Critical Raw Materials Act, which aims to secure sustainable supply, has focused minds. A large REE processing plant is due to open in Poland later this year, while another substantial facility will commence operations in France by 2026.[6] However, increasing self-reliance is a long-term project – from the initial planning of a plant to full production takes at least five years.[7] Moreover, it is also difficult to compete economically against markets such as China, which enjoy significant state subsidies. Meanwhile, some companies are seeking to take matters into their own hands. Hyundai Motor Group recently announced that it has secured a supply of REEs, obtained through early procurement strategies and diversified sourcing, which will sustain EV production for about a year.[8]
- **Boost recycling and repurposing:** This strategy is particularly relevant in countries that are not able to engage in primary production. Less than 1% of REEs are currently recycled due to the immense energy and chemical resources required to separate REEs in the materials.[9] The EU funded the project REE4EU, which aims to recover 90% of in-process wastes from permanent magnet (PM) manufacturing,[10] and has demonstrated the technical and economical viability of recovering REEs from in-process waste and end-of-life PMs.[11]
- **Identify alternative sourcing:** The EU funded the SecREEts project, which seeks to ensure a sustainable, stable and safe extraction and processing of REEs in Europe. SecREEts researched methods to extract REEs from phosphate rocks in fertilizer production. It proved to be a viable way to enhance self-sufficiency. It leaves virtually no additional environmental footprint and caters for 10% of Europe's REE requirements.[12]
- **Pursue alternative materials:** Battery manufacturers have shown the way when confronted with similar challenges. They developed lithium iron phosphate (LFP) batteries which do not require the nickel and cobalt that have raised human rights and environmental pollution concerns. US auto suppliers Aptiv and BorgWarner have started developing electric motors with minimal or no REE content to counter supply constraints.[13] BMW already boasts REE-free electric motors in their EVs.[14]
- **Establish governmental contracts:** As a bulwark against more aggressively priced Asian countries, governments can forge friendshoring agreements with allies that possess significant REE reserves.[15] They can also accelerate regulatory approval for domestic mining and/or processing projects, and provide strategic financing to private companies to cover high costs (e.g., Apple signed a $500 million deal with Pentagon-backed MP Materials to bring REE magnets back to the US).[16, 17] Meanwhile, the European Commission selected 47 strategic projects across EU member states, with an overall investment of €22.5 billion, to ensure local extraction, processing and recycling of strategic raw materials.[18]

[1] AmCham China; [2] Reuters; [3] Reuters; [4] European Commission; [5] CLEPA; [6] European Commission; [7] Discovery Alert; [8] CBT News; [9] Reuters; [10] European Commission; [11] REE4EU; [12] European Commission; [13] Deutsche Welle; [14] BMW; [15] US International Trade Commission; [16] CBC; [17] Reuters; [18] European Commission
Source: PwC Autofacts® analysis

Elements defined as critical by key regions



Largest producers of critical minerals claimed by all three regions*

Rare earth elements	China 69%	USA 12%	Myanmar 8%
Aluminum	China 60%	India 6%	Russia 5%
Cobalt	DR Congo 76%	Indonesia 10%	Russia 3%
Graphite	China 79%	Madagascar 6%	Mozambique 5%
Lithium	Australia 37%	Chile 20%	China 17%
Nickel	Indonesia 59%	Philippines 9%	Russia 6%

*With production volumes >100,000 metric tons in 2024
Source: PwC Autofacts® analysis, European Commission, US Department of Energy, International Energy Agency, US Geological Survey

Domestic brands are increasingly dominating

Top-selling BEVs in H1 2025 (ranking change vs. Q1 2025)

Europe Top 4*

	Model	Sales H1 2025	
1	Renault R5	23,404	↑ 9
2	Tesla Model Y	21,302	↑ 3
3	VW ID.3	19,811	↑ 1
4	VW ID.4, ID.5	19,231	↓ 2
5	VW ID.7	18,635	↓ 4
6	Citroen e-C3	15,967	New
7	Skoda Enyaq	15,685	↓ 4
8	Cupra Born	13,401	↓ 1
9	BMW iX1	13,378	New
10	Skoda Elroq	12,771	New

China

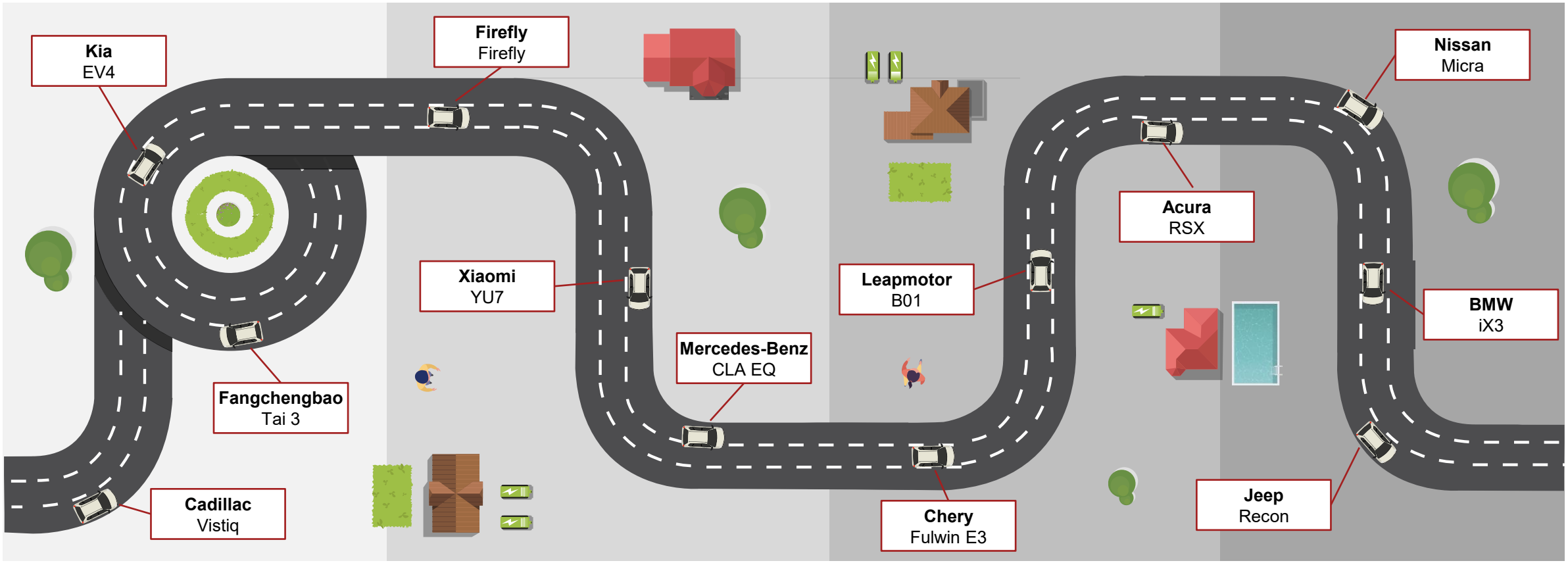
Model	Sales H1 2025	
Geely (Geome) Xingyuan	204,940	→ 0
BYD Seagull	174,912	↑ 2
Tesla Model Y	171,491	→ 0
Wuling Hongguang Mini EV	171,064	↓ 2
Xiaomi SU7	155,692	→ 0
Tesla Model 3	91,919	→ 0
Geely Panda	91,249	↑ 1
XPeng Mona M03	86,351	↓ 1
Wuling Bingo	78,262	↑ 1
BYD Yuan Plus	77,548	↓ 1

USA

Model	Sales H1 2025	
Tesla Model Y	150,171	→ 0
Tesla Model 3	101,323	→ 0
Chevrolet Equinox	27,749	↑ 1
Ford Mustang Mach-E	21,785	↓ 1
Hyundai IONIQ 5	19,092	↑ 1
Honda Prologue	16,317	↓ 1
Ford F-150 Lightning	13,029	↑ 1
BMW i4	12,849	↑ 1
Chevrolet Blazer	12,736	New
Nissan Ariya	11,619	New

*Ranking change affected by missing France Q1 2025 data
Source: PwC Autofacts® analysis, KBA, AAA, UNRAE, DGT, CPCA, KBB

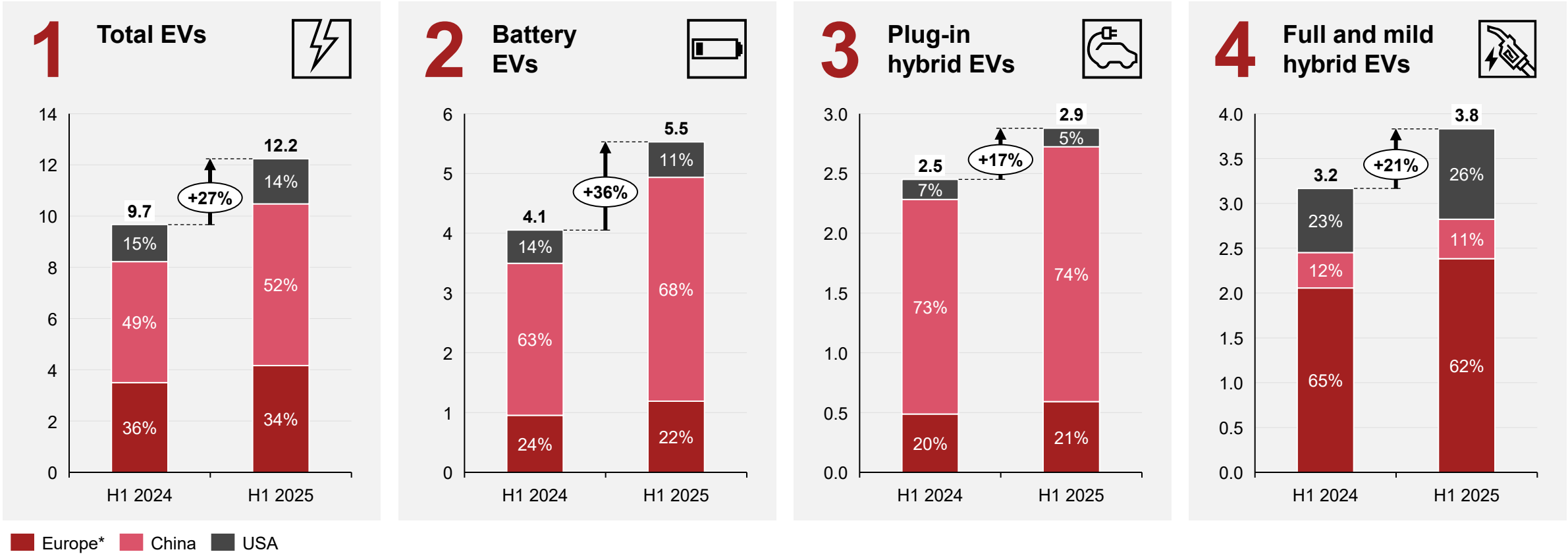
Upcoming BEVs to drive market growth



Source: S&P Global Mobility Light Vehicle Powertrain Production Forecast June 2025 release

Electric vehicle sales growth continues

H1 2024 vs. H1 2025 (in million)



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*EU27+UK+EFTA
Source: PwC Autofacts® analysis, local governmental or car association data

European Union, UK and EFTA

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

After a small decline in BEV sales in the top five European markets over the course of 2024, performance has bounced back in the first half of this year. BEV sales have increased by 25% in H1 2025 in comparison with the corresponding period last year, with market share now at an all-time high of 15%.

Germany's BEV market, which suffered last year due to the withdrawal of incentives, has recovered strongly. It has grown by 35% in H1 2025 vs. H1 2024, boasting the highest number of unit sales of any European market during this period (249,000). That figure pips the UK BEV market, which also grew by 35% YoY in the first half of 2025. On the other hand, France has fallen back this year, down by 6% YoY in the first six months of the year which is nonetheless better than the overall market decline of 8%.

The strongest growth in the European top 5 this year has been seen in Spain, up by 84% YoY in the first six months of 2025. This growth comes from a relatively low base, but its BEV market share is starting to pull away from Italy, where the market trends have previously tended to be similar. Spain's BEV market share now stands at 8%, in comparison with Italy's 5%. In the first half of the year, the UK had the highest BEV share among the top five markets at 22%, with Germany and France at 18%.

PHEV growth was also strong in the top five markets, up by 30% in H1 2025 vs. H1 2024. Hybrid sales were up by 18%. Total EV market share (BEV, PHEV and hybrid combined) for the first half of the year was 61%.

When we look at figures for the top five and all the other analyzed European markets combined, we can see that more than one million BEVs were sold in the region for the first time in the first half of the year.

Europe*	Q2 2025	Comparison to Q2 2024
BEV	617,000	+22%
PHEV	325,000	+38%
Hybrid	1,169,000	+12%
Total EV	**2,111,000**	**+18%**

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

Denmark boasted the strongest BEV growth among the other European markets in the first half of the year, up by 47% in H1 2025 vs. H1 2024. Norway's BEV market also grew strongly in this period, up by 36% to reach an almost total market share of 94%. ICE sales in all these other European markets combined were down by 21% YoY in H1 2025, showing the increasing dominance of electric vehicles.

*EU27+UK+EFTA; **Numbers may not add up due to rounding
Source: PwC Autofacts® analysis, local governmental or car association data

China and other Asian countries

China

BEV sales stormed past the two million mark in the second quarter of 2025, increasing by 42% in comparison to the same period last year. The substantial growth can be attributed in large part to the launch of popular BEV models, such as the Geely Xingyuan. The consumer appetite for BEVs undoubtedly took sales away from the PHEV and hybrid markets, which both grew by a more modest 6% YoY in Q2.

As a result of this surge in sales, BEV market share in China reached almost a third (32%) in the second quarter. Total EV market share (BEV, PHEV and hybrid combined) was 53%. EV market share also reached more than 50% for the first half of a calendar year for the first time.

The EV market is expected to continue to flourish over the course of the rest of the year, as consumers act before the anticipated curtailment of two government incentives at the end of 2025 – a reduction in the NEV* purchase tax exemption and the scaling back of the trade-in scheme which offers financial inducements that encourage consumers to upgrade to newer vehicles.

China	Q2 2025	Comparison to Q2 2024
BEV	2,107,000	+42%
PHEV	1,137,000	+6%
Hybrid	227,000	+6%
Total EV	**3,471,000**	**+25%**

Japan

The Japanese EV market continues to be dominated by the sale of hybrids, with a market share of 59% during Q2 2025. However, both the BEV and PHEV markets are showing signs of life, up by 27% and 29% respectively YoY, albeit from a very low base.

South Korea

BEV sales grew by 41% in the second quarter compared to the same period last year, bringing BEV market share to 13%. With the continuing dominance of hybrids, combined EV market share has almost reached 50% for the first time.

*New Energy Vehicle (incl. BEV and PHEV)
Source: PwC Autofacts® analysis, local governmental or car association data

United States

BEV sales fell by 3% in the second quarter of 2025 when compared with the equivalent quarter last year, the first quarterly fall year-on-year since COVID-affected 2020. However, it is widely anticipated that the third quarter will see significant growth, as consumers look to take advantage of the existing tax credit of up to $7,500 before its termination at the end of September. BEV market share stands at 7%.

PHEV sales declined by 4%, the fourth successive quarterly year-on-year fall. This performance can partly be explained by the fact that some popular PHEV models have recently become ineligible for tax credits due to battery sourcing requirements. PHEV market share for the second quarter was just 2%.

Hybrid sales increased by 36%, continuing the impressive growth of recent years, and reaching a market share of 13%. The expansion is fueled by increased product availability and rising consumer interest in electrified powertrains. Despite this trend, ICE vehicles remain much more dominant than in Europe or China, with a market share of 78%.

As incentives disappear, OEMs are likely to adopt various strategies to maintain EVs' attractiveness to the consumer, such as introducing innovative new models and optimizing battery technology to keep prices down.

USA	Q2 2025	Comparison to Q2 2024
BEV	292,000	-3%
PHEV	76,000	-4%
Hybrid	535,000	+36%
Total EV	**903,000**	**+17%**

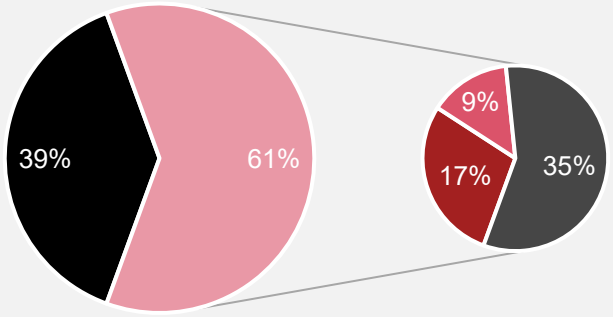
Source: PwC Autofacts® analysis, local governmental or car association data

Shares of electric vehicle registrations

Electric vehicle sales in H1 2025

1 Europe*

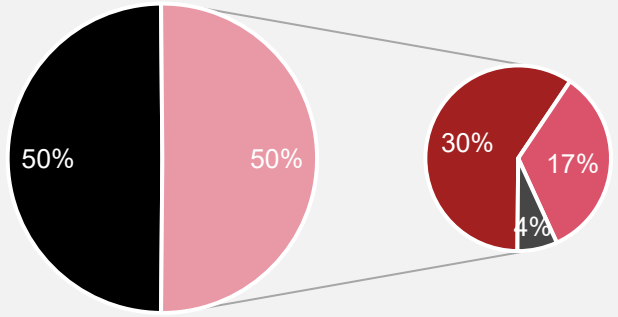
Total sales: 6,816,000
EV sales: 4,167,000



of which **BEVs:** 1,191,000
PHEVs: 592,000
Hybrids: 2,384,000

2 China

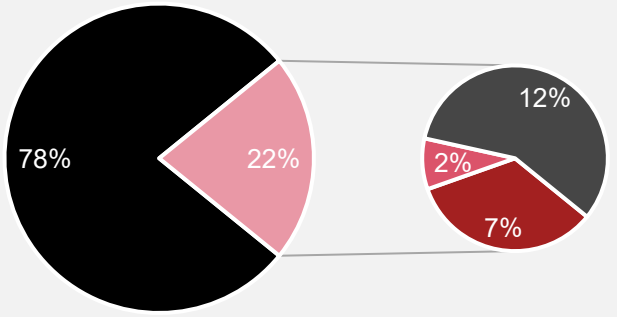
Total sales: 12,569,000
EV sales: 6,318,000



of which **BEVs:** 3,747,000
PHEVs: 2,131,000
Hybrids: 440,000

3 USA

Total sales: 8,090,000
EV sales: 1,756,000



of which **BEVs:** 592,000
PHEVs: 156,000
Hybrids: 1,008,000

ICE EV BEV PHEV Hybrid

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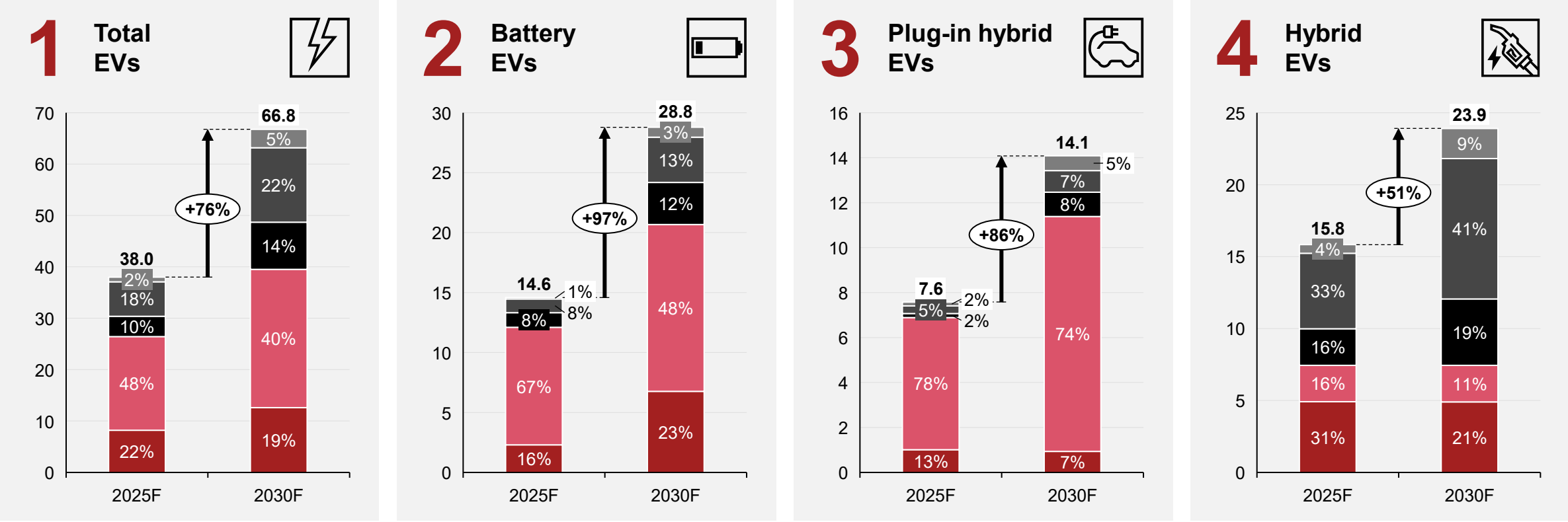
*EU27+UK+EFTA; **Numbers may not add up due to rounding
Source: PwC Autofacts® analysis, local governmental or car association data

Regional electric vehicle* assembly forecast

2025F vs. 2030F (in million, light vehicles**)

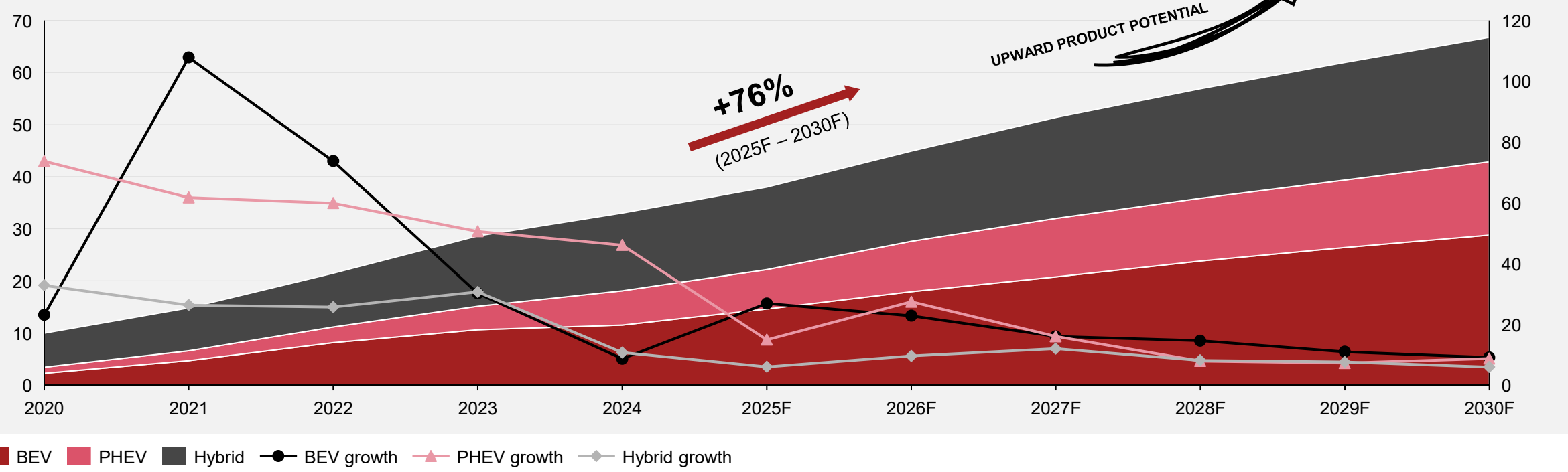


*Electric vehicles = BEV, PHEV (incl. REEV) and hybrid (incl. FHEV, MHEV and Series-Hybrid); **Incl. passenger cars and light commercial vehicles
Source: S&P Global Mobility Light Vehicle Powertrain Production Forecast June 2025 release

Electric vehicle* assembly forecast

2020 – 2030F (in million (lhs), growth rate in % (rhs), light vehicles**)

5 **Global EV production by powertrain**



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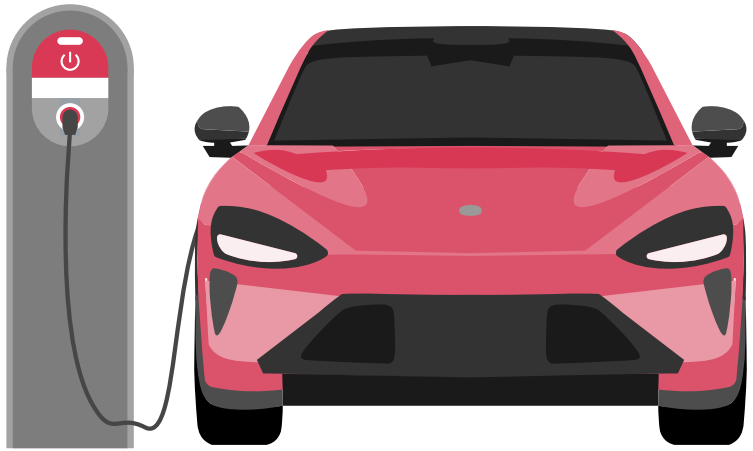
*Electric vehicles = BEV, PHEV (incl. REEV) and hybrid (incl. FHEV, MHEV and Series-Hybrid); **Incl. passenger cars and light commercial vehicles
Source: S&P Global Mobility Light Vehicle Powertrain Production Forecast June 2025 release

Overview: BEV model launches

2025 (not exhaustive)

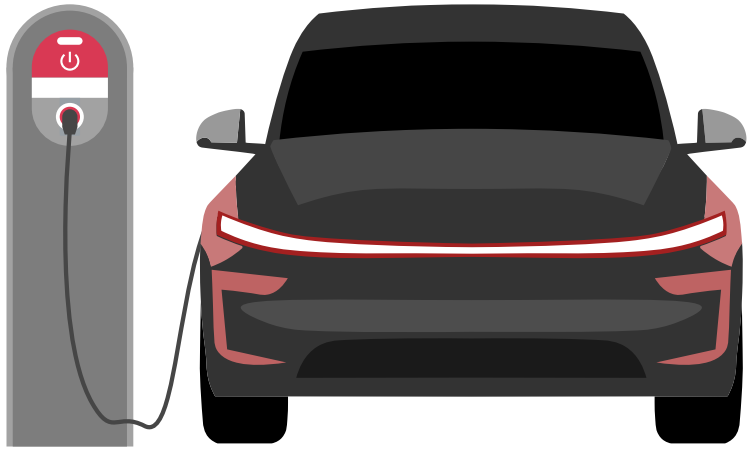


Brand	Model	Launch	Quarter
Acura	RSX	2025	Q3
Alpine	A390	2025	Q3
Audi	E5 Sportback	2025	Q3
BMW	iX3	2025	Q4
Chery	Fulwin E3	2025	Q3
Citroen	C5 Aircross	2025	Q3
Deepal	L05	2025	Q3
Denza	N8	2025	Q3
Hyundai	Elexio	2025	Q4
Jeep	Recon	2025	Q4
Leapmotor	B01	2025	Q3
Li	i8	2025	Q3
MG	Starlight S	2025	Q4
Nissan	Micra	2025	Q4
Volvo	ES90	2025	Q4

Source: S&P Global Mobility Light Vehicle Powertrain Production Forecast June 2025 release

Overview: BEV model launches

2026 – 2029 (not exhaustive)

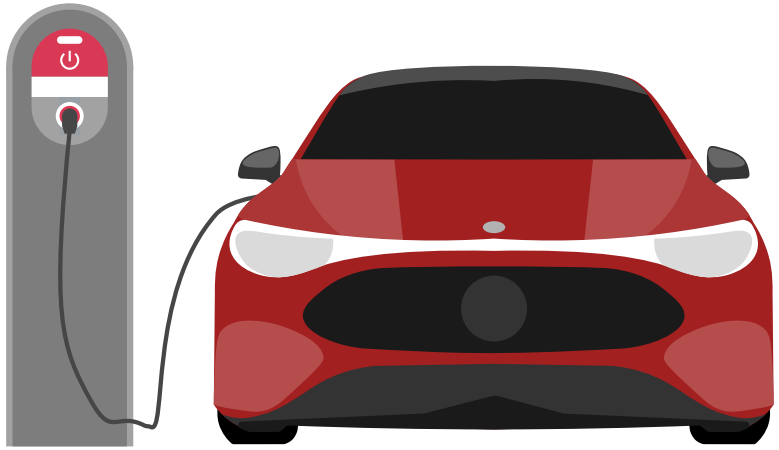


Brand	Model	Launch
Audi	A4 e-tron	2029
BMW	i1	2029
Deepal	Qiyuan E07	2027
Ford	Bronco Lightning	2028
Honda	Elevate	2029
Jaguar	GT	2026
Kia	Morning	2027
Lancia	Gamma	2026
Land Rover	Defender	2028
Li	i7	2026
Lucid	Earth	2027
Mercedes-Benz	C-Class EQ	2026
Mercedes-Benz	GLC EQ	2026
Mitsubishi	eK X EV	2028
NIO	ET5	2027

Source: S&P Global Mobility Light Vehicle Powertrain Production Forecast June 2025 release

Overview: BEV model launches

2026 – 2029 (not exhaustive)



Brand	Model	Launch
Nissan	Juke	2026
Opel	Corsa	2028
Peugeot	408	2029
Polestar	6	2026
Porsche	Cayenne	2026
Renault	Megane	2029
Rivian	R3	2027
Skoda	Epiq	2026
Suzuki	Hustler	2028
Toyota	Corolla Cross	2028
Volkswagen	ID.1	2027
Volkswagen	ID.2	2026
Volvo	EX40	2027
Xpeng	P5	2027
Zeekr	007	2029

Source: S&P Global Mobility Light Vehicle Powertrain Production Forecast June 2025 release

Electric vehicle sales data

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

		H1 2025	Market share	H1 2024	YTD YoY	Q2-25	Quarter YoY	Jun-25	Month YoY	May-25	Month YoY	Apr-25	Month YoY
	BEV	148,333	17.6%	158,398	-6.4%	73,814	-6.1%	28,858	-3.3%	19,414	-18.7%	25,542	+2.6%
	PHEV	49,149	5.8%	73,687	-33.3%	29,557	-15.8%	11,784	-16.1%	8,180	-19.8%	9,593	-11.7%
	Hybrid	376,239	44.7%	280,511	+34.1%	191,972	+23.4%	74,359	+19.2%	54,553	+15.1%	63,060	+37.7%
	Total EV	573,721	68.1%	512,596	+11.9%	295,343	+9.7%	115,001	+8.2%	82,147	+0.8%	98,195	+20.4%
France	Other	268,484	31.9%	402,298	-33.3%	136,777	-31.8%	54,503	-27.8%	41,772	-30.1%	40,502	-38.1%
	BEV	248,726	17.7%	184,125	+35.1%	135,758	+32.1%	47,163	+8.6%	43,060	+44.9%	45,535	+53.5%
	PHEV	138,905	9.9%	89,549	+55.1%	75,106	+68.5%	25,608	+66.4%	25,181	+79.4%	24,317	+60.7%
	Hybrid	399,966	28.5%	363,966	+9.9%	207,701	+9.3%	73,332	+1.0%	66,990	+16.7%	67,379	+12.2%
	Total EV	787,597	56.1%	637,640	+23.5%	418,565	+24.1%	146,103	+11.2%	135,231	+33.7%	137,231	+30.9%
Germany	Other	615,192	43.9%	834,001	-26.2%	319,653	-27.3%	110,090	-33.7%	104,066	-23.1%	105,497	-23.7%
	BEV	44,726	5.2%	34,942	+28.0%	21,732	+0.6%	7,973	-40.4%	7,119	+40.9%	6,640	+108.2%
	PHEV	44,697	5.2%	28,602	+56.3%	26,082	+81.4%	9,528	+74.2%	8,737	+94.5%	7,817	+76.9%
	Hybrid	377,611	44.2%	343,222	+10.0%	178,929	+4.7%	57,102	-7.2%	60,616	+8.7%	61,211	+14.2%
	Total EV	467,034	54.6%	406,766	+14.8%	226,743	+9.6%	74,603	-7.2%	76,472	+17.1%	75,668	+23.6%
Italy	Other	387,994	45.4%	479,858	-19.1%	184,216	-19.4%	57,717	-27.7%	63,020	-15.3%	63,479	-14.5%
	BEV	46,268	7.6%	25,148	+84.0%	27,043	+96.4%	11,243	+103.3%	8,965	+104.1%	6,835	+77.9%
	PHEV	56,067	9.2%	30,751	+82.3%	35,551	+136.2%	13,533	+160.0%	12,896	+169.4%	9,122	+80.3%
	Hybrid	253,914	41.6%	191,017	+32.9%	132,357	+29.7%	46,639	+24.3%	44,982	+32.0%	40,736	+33.8%
	Total EV	356,249	58.4%	246,916	+44.3%	194,951	+49.0%	71,415	+48.0%	66,843	+54.5%	56,693	+44.1%
Spain	Other	253,592	41.6%	288,472	-12.1%	135,516	-15.1%	47,710	-13.4%	45,977	-11.4%	41,829	-20.6%
	BEV	224,841	21.6%	167,096	+34.6%	104,650	+26.4%	47,354	+39.1%	32,738	+25.8%	24,558	+8.1%
	PHEV	107,039	10.3%	81,522	+31.3%	53,353	+36.9%	21,382	+28.8%	17,898	+50.8%	14,073	+34.1%
	Hybrid	396,232	38.0%	351,640	+12.7%	166,667	+3.3%	67,039	+4.8%	55,140	+6.6%	44,488	-2.6%
	Total EV	728,112	69.9%	600,258	+21.3%	324,670	+14.7%	135,775	+18.5%	105,776	+18.0%	83,119	+5.4%
UK	Other	314,107	30.1%	406,505	-22.7%	137,047	-23.0%	55,541	-14.1%	44,294	-23.7%	37,212	-32.8%
	BEV	712,894	15.0%	569,709	+25.1%	362,997	+21.2%	142,591	+13.0%	111,296	+24.9%	109,110	+29.4%
	PHEV	395,857	8.3%	304,111	+30.2%	219,649	+48.3%	81,835	+44.3%	72,892	+60.6%	64,922	+41.2%
	Hybrid	1,803,962	38.0%	1,530,356	+17.9%	877,626	+12.5%	318,471	+6.9%	282,281	+14.6%	276,874	+17.5%
	Total EV	2,912,713	61.3%	2,404,176	+21.2%	1,460,272	+19.0%	542,897	+12.9%	466,469	+22.5%	450,906	+23.3%
Europe 5	Other	1,839,369	38.7%	2,411,134	-23.7%	913,209	-24.3%	325,561	-26.2%	299,129	-21.2%	288,519	-25.2%

Legend

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

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

Electric vehicle sales data

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

		H1 2025	Market share	H1 2024	YTD YoY	Q2-25	Quarter YoY	Jun-25	Month YoY	May-25	Month YoY	Apr-25	Month YoY
	BEV	31,534	22.0%	22,178	+42.2%	17,357	+52.6%	6,239	+32.9%	5,428	+57.4%	5,690	+76.1%
	PHEV	13,104	9.2%	8,695	+50.7%	7,574	+71.6%	2,574	+42.4%	2,479	+96.3%	2,521	+87.6%
	Hybrid	40,213	28.1%	31,163	+29.0%	22,035	+36.0%	8,035	+10.6%	6,865	+54.5%	7,135	+58.8%
	Total EV	84,851	59.3%	62,036	+36.8%	46,966	+46.8%	16,848	+22.4%	14,772	+61.4%	15,346	+69.2%
Austria	Other	58,200	40.7%	73,077	-20.4%	30,068	-24.6%	11,020	-34.9%	9,539	-10.6%	9,509	-22.5%
	BEV	76,980	32.8%	64,404	+19.5%	36,578	+9.8%	12,762	-6.9%	11,347	+8.9%	12,469	+35.8%
	PHEV	20,386	8.7%	45,495	-55.2%	9,921	-44.8%	3,497	-41.2%	3,142	-44.1%	3,282	-48.8%
	Hybrid	27,048	11.5%	24,280	+11.4%	12,752	+10.8%	4,573	-4.8%	3,856	+24.0%	4,323	+20.3%
	Total EV	124,414	53.0%	134,179	-7.3%	59,251	-5.6%	20,832	-14.9%	18,345	-4.2%	20,074	+4.7%
Belgium	Other	110,203	47.0%	129,230	-14.7%	54,426	-16.9%	20,695	-17.9%	15,993	-19.0%	17,738	-13.6%
	BEV	57,136	63.5%	38,891	+46.9%	32,631	+37.5%	12,121	+22.0%	10,948	+51.4%	9,562	+45.5%
	PHEV	2,708	3.0%	3,749	-27.8%	1,625	-19.3%	643	+4.2%	458	-27.1%	524	-31.8%
	Hybrid	12,866	14.3%	16,342	-21.3%	7,813	-9.5%	2,625	-27.5%	2,899	+13.4%	2,289	-6.9%
	Total EV	72,710	80.8%	58,982	+23.3%	42,069	+22.4%	15,389	+8.6%	14,305	+37.4%	12,375	+26.3%
Denmark	Other	17,331	19.2%	27,695	-37.4%	10,371	-31.8%	3,741	-30.9%	3,765	-11.1%	2,865	-48.5%
	BEV	12,724	34.2%	10,569	+20.4%	7,088	+22.2%	2,491	+31.0%	2,296	+3.3%	2,301	+37.2%
	PHEV	7,891	21.2%	7,817	+0.9%	4,284	+18.0%	1,551	+45.4%	1,435	+5.4%	1,298	+8.2%
	Hybrid	10,268	27.6%	13,110	-21.7%	5,468	-22.4%	2,005	-8.4%	1,814	-33.5%	1,649	-22.5%
	Total EV	30,883	82.9%	31,496	-1.9%	16,840	+2.2%	6,047	+17.2%	5,545	-12.2%	5,248	+4.9%
Finland	Other	6,367	17.1%	7,658	-16.9%	3,711	-12.3%	1,402	-12.8%	1,306	-11.1%	1,003	-13.2%
	BEV	63,877	35.0%	60,276	+6.0%	31,482	+4.2%	12,205	+6.3%	10,113	+4.6%	9,164	+1.0%
	PHEV	35,743	19.6%	27,567	+29.7%	19,779	+48.3%	7,429	+41.2%	6,690	+63.9%	5,660	+41.8%
	Hybrid	52,533	28.8%	56,318	-6.7%	25,816	-4.0%	10,175	-0.5%	8,062	-0.6%	7,579	-11.2%
	Total EV	152,153	83.3%	144,161	+5.5%	77,077	+9.4%	29,809	+10.5%	24,865	+13.8%	22,403	+3.7%
Netherlands	Other	30,527	16.7%	49,138	-37.9%	14,273	-32.5%	4,832	-41.0%	4,857	-22.6%	4,584	-31.5%
	BEV	70,748	93.7%	52,026	+36.0%	42,125	+31.8%	17,799	+27.1%	13,384	+69.6%	10,942	+8.9%
	PHEV	1,801	2.4%	2,112	-14.7%	360	-78.2%	152	-83.7%	152	-72.1%	56	-68.9%
	Hybrid	1,659	2.2%	4,853	-65.8%	818	-78.6%	223	-89.1%	497	-60.2%	98	-81.2%
	Total EV	74,208	98.3%	58,991	+25.8%	43,303	+15.7%	18,174	+7.0%	14,033	+44.9%	11,096	+3.2%
Norway	Other	1,307	1.7%	2,267	-42.3%	616	-61.0%	199	-61.9%	227	-59.9%	190	-61.2%

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*: Portugal, Sweden, Switzerland, Rest of Europe*, total Europe*

		H1 2025	Market share	H1 2024	YTD YoY	Q2-25	Quarter YoY	Jun-25	Month YoY	May-25	Month YoY	Apr-25	Month YoY
	BEV	25,017	20.2%	19,371	+29.1%	12,842	+31.2%	4,642	+21.5%	4,478	+42.3%	3,722	+31.8%
	PHEV	16,004	12.9%	14,371	+11.4%	9,244	+30.1%	3,313	+43.0%	3,295	+26.7%	2,636	+20.4%
	Hybrid	29,762	24.0%	17,536	+69.7%	15,435	+67.5%	4,845	+77.1%	5,810	+75.7%	4,780	+50.7%
	Total EV	70,783	57.1%	51,278	+38.0%	37,521	+43.7%	12,800	+44.3%	13,583	+50.0%	11,138	+36.1%
Portugal	Other	53,243	42.9%	65,119	-18.2%	27,960	-10.6%	10,384	-8.3%	9,962	-7.7%	7,614	-16.7%
	BEV	50,062	34.3%	42,321	+18.3%	28,977	+22.6%	10,845	+18.7%	9,526	+24.6%	8,606	+25.7%
	PHEV	36,943	25.3%	30,989	+19.2%	20,958	+24.5%	7,298	+39.0%	6,811	+16.6%	6,849	+19.2%
	Hybrid	11,438	7.8%	13,499	-15.3%	5,867	-18.6%	1,773	-20.9%	2,209	-18.6%	1,885	-16.4%
	Total EV	98,443	67.4%	86,809	+13.4%	55,802	+17.0%	19,916	+19.8%	18,546	+14.5%	17,340	+16.8%
Sweden	Other	47,509	32.6%	49,500	-4.0%	24,674	-8.9%	8,721	-7.9%	8,061	-17.3%	7,892	+0.1%
	BEV	23,203	20.5%	21,387	+8.5%	12,470	+13.7%	4,813	+14.2%	4,177	+17.1%	3,480	+9.5%
	PHEV	11,592	10.2%	10,623	+9.1%	6,692	+26.4%	2,413	+33.9%	2,304	+29.5%	1,975	+15.3%
	Hybrid	41,666	36.8%	38,573	+8.0%	21,929	+4.9%	7,899	-0.3%	7,189	+9.0%	6,841	+7.2%
	Total EV	76,461	67.6%	70,583	+8.3%	41,091	+10.6%	15,125	+8.5%	13,670	+14.5%	12,296	+9.1%
Switzerland	Other	36,672	32.4%	50,635	-27.6%	19,352	-27.9%	6,685	-23.6%	6,299	-32.4%	6,368	-27.4%
	BEV	66,700	7.3%	52,924	+26.0%	32,704	+30.0%	12,565	+28.4%	10,500	+37.3%	9,639	+24.8%
	PHEV	50,311	5.5%	31,701	+58.7%	24,671	+72.7%	7,842	+79.2%	8,489	+82.7%	8,340	+58.5%
	Hybrid	352,534	38.4%	310,636	+13.5%	173,573	+10.8%	56,807	+2.7%	57,668	+11.9%	59,098	+18.8%
Rest of	Total EV	469,545	51.2%	395,261	+18.8%	230,948	+17.8%	77,214	+11.2%	76,657	+20.1%	77,077	+22.9%
Europe*	Other	447,659	48.8%	515,248	-13.1%	224,312	-13.0%	75,441	-17.4%	73,266	-10.9%	75,605	-10.2%
	BEV	1,190,875	17.5%	954,056	+24.8%	617,251	+22.1%	239,073	+14.5%	193,493	+27.3%	184,685	+27.7%
	PHEV	592,340	8.7%	487,230	+21.6%	324,757	+38.4%	118,547	+37.7%	108,147	+46.6%	98,063	+31.2%
	Hybrid	2,383,949	35.0%	2,056,666	+15.9%	1,169,132	+11.6%	417,431	+5.3%	379,150	+13.9%	372,551	+16.8%
	Total EV	4,167,164	61.1%	3,497,952	+19.1%	2,111,140	+18.1%	775,051	+12.1%	680,790	+21.9%	655,299	+21.7%
Europe*	Other	2,648,387	38.9%	3,380,701	-21.7%	1,322,972	-22.0%	468,681	-24.4%	432,404	-19.1%	421,887	-22.3%

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

China, Japan, South Korea, USA, Australia, Brazil

		H1 2025	Market share	H1 2024	YTD YoY	Q2-25	Quarter YoY	Jun-25	Month YoY	May-25	Month YoY	Apr-25	Month YoY
	BEV	3,747,000	29.8%	2,542,000	+47.4%	2,107,000	+41.9%	729,000	+32.8%	696,000	+37.5%	682,000	+58.6%
	PHEV	2,131,000	17.0%	1,795,000	+18.7%	1,137,000	+6.4%	395,000	-4.6%	399,000	+14.3%	343,000	+12.1%
	Hybrid	440,100	3.5%	394,700	+11.5%	227,400	+6.0%	86,000	+13.8%	72,000	-4.0%	69,400	+8.4%
	Total EV	6,318,100	50.3%	4,731,700	+33.5%	3,471,400	+25.4%	1,210,000	+16.5%	1,167,000	+25.5%	1,094,400	+36.8%
China*	Other	6,250,900	49.7%	6,521,300	-4.1%	3,048,600	-1.3%	1,102,000	+7.2%	968,000	-3.8%	978,600	-7.2%
	BEV	17,627	1.3%	15,742	+12.0%	9,223	+27.2%	4,264	+29.1%	2,848	+36.7%	2,111	+13.4%
	PHEV	22,578	1.7%	21,580	+4.6%	10,565	+28.9%	4,082	+54.0%	3,137	+25.2%	3,346	+10.1%
	Hybrid	800,406	60.4%	761,939	+5.0%	345,509	+2.5%	127,460	+4.3%	104,875	+0.4%	113,174	+2.6%
	Total EV	840,611	63.4%	799,261	+5.2%	365,297	+3.7%	135,806	+6.0%	110,860	+1.7%	118,631	+3.0%
Japan	Other	484,923	36.6%	434,841	+11.5%	221,082	+1.8%	81,527	-1.7%	67,120	-0.8%	72,435	+9.0%
	BEV	92,731	11.2%	66,518	+39.4%	58,133	+41.0%	20,307	+18.1%	21,445	+62.2%	16,381	+51.5%
	PHEV	7,287	0.9%	3,410	+113.7%	3,689	+118.0%	1,000	+101.2%	1,360	+115.9%	1,329	+135.2%
	Hybrid	283,912	34.3%	226,479	+25.4%	153,715	+34.0%	51,239	+38.5%	50,614	+32.7%	51,862	+31.0%
	Total EV	383,930	46.4%	296,407	+29.5%	215,537	+36.7%	72,546	+32.6%	73,419	+41.2%	69,572	+36.5%
South Korea	Other	442,694	53.6%	501,833	-11.8%	222,792	-15.2%	73,296	-11.9%	68,446	-23.4%	81,050	-10.1%
	BEV	592,315	7.3%	557,138	+6.3%	291,724	-3.3%	93,717	-6.8%	101,857	-2.8%	96,150	-0.2%
	PHEV	155,596	1.9%	169,130	-8.0%	76,171	-4.3%	19,716	-11.7%	25,452	-12.0%	31,003	+9.6%
	Hybrid	1,007,592	12.5%	715,202	+40.9%	534,751	+35.9%	153,660	+13.3%	192,226	+38.2%	188,865	+58.9%
	Total EV	1,755,503	21.7%	1,441,470	+21.8%	902,646	+16.5%	267,093	+3.3%	319,535	+17.2%	316,018	+29.8%
USA	Other	6,334,931	78.3%	6,372,853	-0.6%	3,278,583	-0.5%	987,325	-6.3%	1,142,976	-1.8%	1,148,282	+6.5%
	BEV	47,145	7.6%	50,219	-6.1%	29,244	+18.2%	13,169	+37.4%	10,065	+12.2%	6,010	-3.0%
	PHEV	25,613	4.1%	8,048	+218.3%	11,902	+157.5%	6,220	+219.1%	3,081	+124.4%	2,601	+100.1%
	Hybrid	93,746	15.0%	83,223	+12.6%	46,732	-2.7%	15,355	+0.1%	17,089	+5.4%	14,288	-13.2%
	Total EV	166,504	26.7%	141,490	+17.7%	87,878	+13.5%	34,744	+29.3%	30,235	+13.8%	22,899	-4.4%
Australia	Other	456,924	73.3%	485,922	-6.0%	239,598	-2.4%	92,693	-0.1%	79,190	-6.3%	67,715	-0.8%
	BEV	30,483	2.7%	31,169	-2.2%	17,503	+2.7%	5,847	+12.8%	6,958	+34.6%	4,698	-29.9%
	PHEV	40,575	3.6%	22,459	+80.7%	21,673	+78.6%	7,081	+47.2%	7,155	+92.3%	7,437	+106.1%
	Hybrid	43,727	3.9%	25,641	+70.5%	24,976	+78.3%	8,448	+92.2%	8,840	+87.4%	7,688	+57.1%
	Total EV	114,785	10.1%	79,269	+44.8%	64,152	+48.5%	21,376	+48.6%	22,953	+68.7%	19,823	+30.4%
Brazil	Other	1,018,595	89.9%	999,077	+2.0%	550,761	-0.1%	181,082	-3.8%	192,344	+13.3%	177,335	-8.2%

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
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

India, Indonesia, Turkey, total analyzed markets

		H1 2025	Market share	H1 2024	YTD YoY	Q2-25	Quarter YoY	Jun-25	Month YoY	May-25	Month YoY	Apr-25	Month YoY
	BEV	71,296	3.7%	48,975	+45.6%	38,781	+67.6%	13,204	+80.6%	12,628	+57.3%	12,949	+66.2%
	PHEV	50	0.0%	1	+4900.0%	19	+1800.0%	6	0.0%	5	+400.0%	8	0.0%
	Hybrid	173,693	8.9%	174,213	-0.3%	79,443	-3.7%	24,236	-3.4%	25,365	-5.9%	29,842	-1.9%
	Total EV	245,039	12.6%	223,189	+9.8%	118,243	+12.0%	37,446	+15.6%	37,998	+8.6%	42,799	+12.0%
India	Other	1,700,455	87.4%	1,768,166	-3.8%	773,807	-6.7%	239,249	-6.1%	245,884	-9.9%	288,674	-4.4%
	BEV	36,611	12.5%	13,631	+168.6%	20,061	+162.7%	6,266	+64.3%	6,393	+221.6%	7,402	+303.2%
	PHEV	1,719	0.6%	41	+4093.7%	1,677	+13875%	1,232	+61500%	407	+5714.3%	38	+1166.7%
	Hybrid	27,220	9.3%	24,771	+9.9%	14,090	+22.2%	5,722	+41.0%	4,125	+1.8%	4,243	+24.0%
	Total EV	65,550	22.4%	38,443	+70.5%	35,828	+86.8%	13,220	+67.9%	10,925	+80.6%	11,683	+122.1%
Indonesia	Other	227,132	77.6%	280,949	-19.2%	94,463	-27.2%	30,566	-37.5%	35,247	-28.1%	28,650	-9.8%
	BEV	84,738	17.4%	36,540	+131.9%	55,639	+148.4%	25,646	+207.7%	16,802	+110.9%	13,191	+116.4%
	PHEV	26,879	5.5%	5,421	+395.8%	16,949	+568.9%	5,311	+831.8%	5,152	+392.5%	6,486	+606.5%
	Hybrid	106,349	21.8%	63,170	+68.4%	51,900	+69.5%	17,377	+64.1%	15,825	+61.6%	18,698	+82.5%
	Total EV	217,966	44.7%	105,131	+107.3%	124,488	+124.1%	48,334	+147.9%	37,779	+100.9%	38,375	+122.3%
Turkey	Other	270,037	55.3%	357,824	-24.5%	139,722	-19.7%	45,342	-33.7%	47,344	-23.0%	47,036	+6.4%
	BEV	5,910,821	17.3%	4,315,988	+37.0%	3,244,559	+33.2%	1,150,493	+26.0%	1,068,489	+31.9%	1,025,577	+44.0%
	PHEV	3,003,637	8.8%	2,512,320	+19.6%	1,604,402	+13.6%	558,195	+4.7%	552,896	+19.9%	493,311	+17.9%
	Hybrid	5,360,694	15.7%	4,526,004	+18.4%	2,647,648	+15.4%	906,928	+9.8%	870,109	+15.8%	870,611	+21.4%
Analyzed	Total EV	14,275,152	41.9%	11,354,312	+25.7%	7,496,609	+22.0%	2,615,616	+15.1%	2,491,494	+23.2%	2,389,499	+29.3%
markets	Other	19,834,978	58.1%	21,103,466	-6.0%	9,892,380	-5.7%	3,301,761	-6.2%	3,278,955	-6.3%	3,311,664	-4.6%

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

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
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 ranger extender or extended-range electric vehicle (EREV)
YoY	Year-on-year
YTD	Year-to-date

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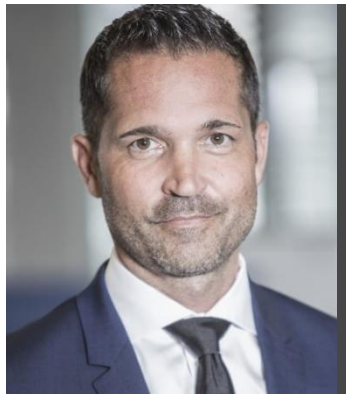

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