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Electric Vehicle Sales Review Q3 2025

Foresight to drive the industry

October 2025

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More than one in five vehicles sold globally are BEVs

Total BEV sales in all analyzed markets grew by 35% in Q3 2025 in comparison with the same period last year. For the first time on record, more than one in five (21%) vehicles sold throughout the world were BEVs.

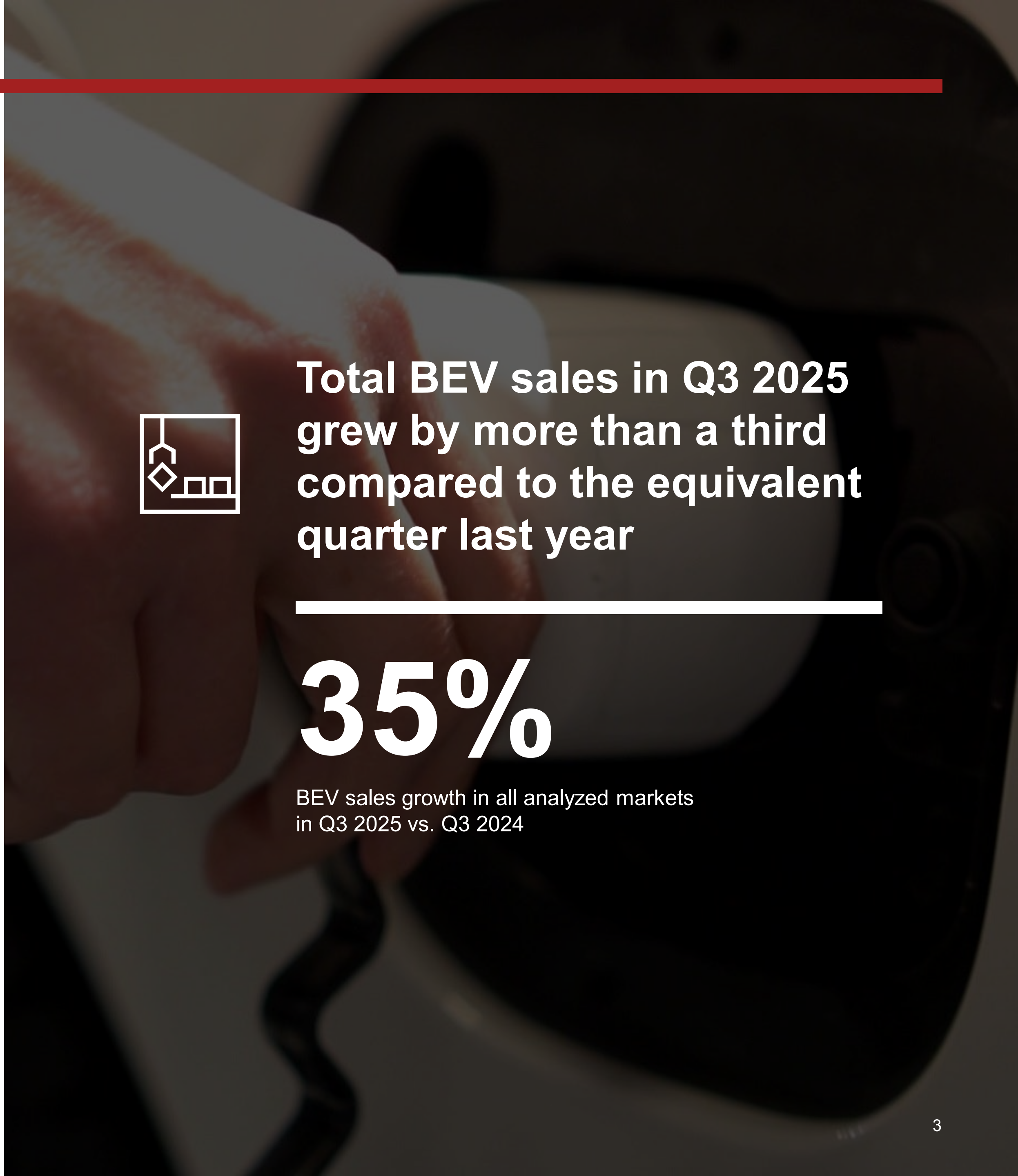
China, which is responsible for almost two in three global BEV sales, reflected the global trend. Sales in Q3 increased by 36% year on year, exceeding more than two million registrations and resulting in a BEV market share of 34%. This increasing popularity of BEVs, especially entry-level models, arguably came at the expense of the PHEV market, which declined by 6% year on year.

Europe’s BEV market also rose sharply. Sales in the top five European markets combined grew by 32% in Q3 2025 vs. Q3 2024. The German BEV market performed particularly strongly, continuing a trend that has been evident throughout 2025. BEV sales in Germany increased by 45% in the third quarter year on year. However, the BEV market share in the UK is still higher than in both France and Germany, at 23%. This impressive performance is largely attributed to the UK’s ZEV Mandate, which requires a 28% share of Zero Emission Vehicles (ZEVs).

The BEV markets in Spain and Italy were in lockstep for several years, both slow to develop. However, Spain has recently been pulling away from its Southern European peer. Spanish BEV sales doubled in the third quarter relative to the same period last year, resulting in a market share of 11%.

The US BEV market grew by 22% year on year in the third quarter, with consumers seeking to utilize the available tax credit before its expiry at the end of September. US BEV market share reached 10% for the first time.

While China and Europe are both aspiring to reduce emissions, they have adopted different strategies to achieve this aim. While Europe has effectively banned the sale of new ICE vehicles from 2035 with a current mandate for a 0 g CO_2 emission limit, China focused instead on providing various incentives for consumers and targets for OEMs. As we discuss in our Analyst Insights, the success of this approach may render rigid bans unnecessary.



Total BEV sales in Q3 2025 grew by more than a third compared to the equivalent quarter last year

35%

BEV sales growth in all analyzed markets in Q3 2025 vs. Q3 2024

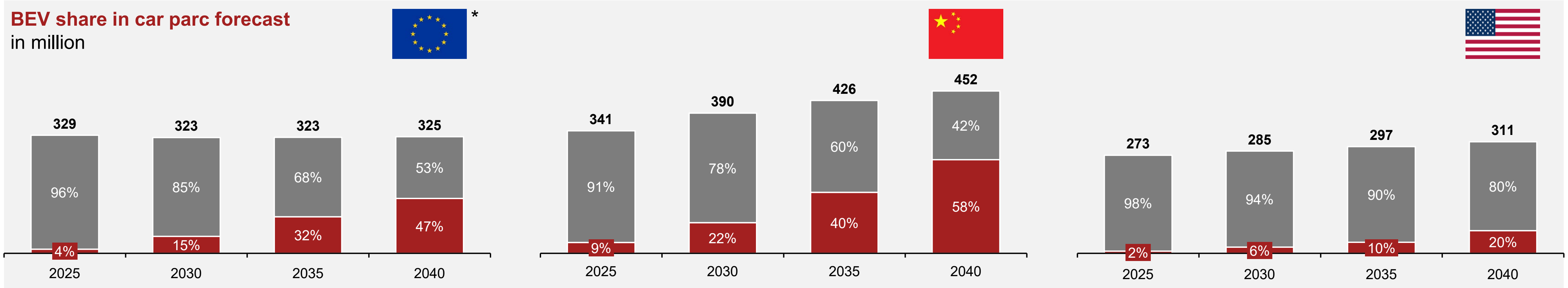
Source: PwC Autofacts® analysis

How can governments best promote the EV market?

In the quest to expand the BEV market, major regions worldwide have adopted varied strategies. The European Union (EU) has put in place a stringent government approach by effectively banning the sale of new ICE vehicles from 2035 with a current mandate for a 0 g CO_2 emission limit. Given that the EU relies on consensus among its member states, a process that can delay decision-making, and faces a saturated car market with high vehicle ownership per capita, it needs a clear vision and a well-defined path to accelerate the transition to EVs. Finally, reopening this discussion introduced greater uncertainty for consumers.

China, in contrast, has chosen a different path. Instead of implementing a hard-and-fast ban, it has focused on strategic incentives, government subsidies for NEVs, tax exemptions, and conditional restrictions on ICE license plates. Unlike the EU, China employs state-led and state-funded industrial policies, enhancing efficiency in a market characterized by low vehicle ownership per capita, inexpensive electricity and a growing number of first-time buyers, open for EV powertrains.

We believe that this more adaptable approach may achieve CO_2 reduction targets more swiftly and effectively than a fixed date ban. **The increasing popularity of BEVs, coupled with smart incentives, subsidies, improved infrastructure, and lower charging costs, might render an absolute ICE ban unnecessary.** The EU's CO_2 target for 2035 aligns with its broader goal of achieving climate neutrality by 2050. However, the complete removal of CO_2-emitting vehicles from the roads will extend beyond 2035. This shows the importance of continued progress.



*) EU27+UK+EFTA
Source: PwC Autofacts® analysis

Smart approach can render hard bans unnecessary

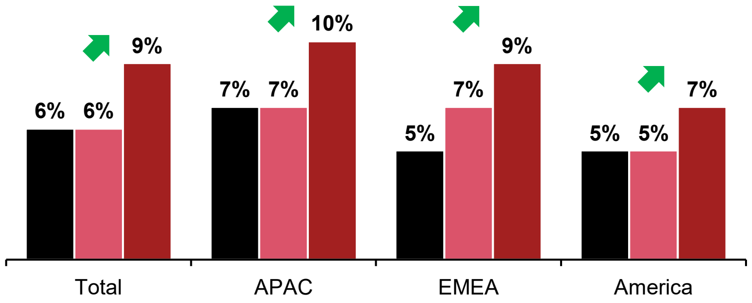
The 2025 Strategy& eReadiness Study revealed that approximately two-thirds of global consumers are interested in purchasing an EV within the next five years.

This enthusiasm for EVs is consistent across various regions, suggesting that it transcends differing governmental policies. A key driver of this growing consumer interest is the rapid advancement in EV technology, which has led to shorter charging times, extended driving ranges, and more affordable options. Crucially, EVs are now also winning over pragmatic, cost-conscious consumers who run the numbers, as improving total cost of ownership make EVs an increasingly rational choice.

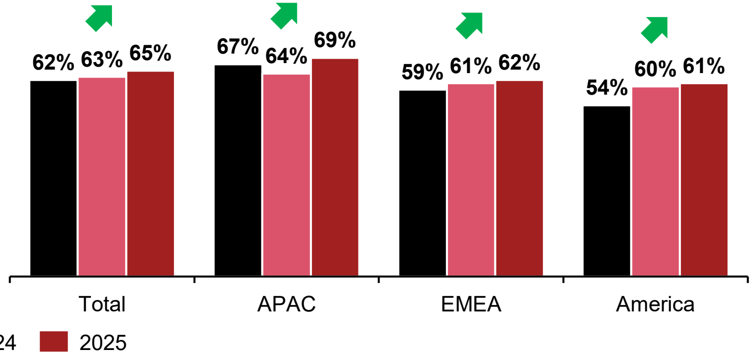
Furthermore, the vast majority of current EV owners express satisfaction with their vehicles, and it is probable that they will encourage friends and family to make similar purchases. This organic growth in consumer demand highlights an already evolving trend, that governments can play a role in supporting.

In the short term, well-designed incentives can have a greater impact than simply threatening future bans. By enhancing infrastructure, governments can increase convenience and alleviate potential buyers' concerns. Additionally, reducing electricity prices can significantly lower the operating costs, a critical consideration for those contemplating an EV purchase.

People who currently own an EV



Intend to buy an EV in the next 5 years



Harald Wimmer, PwC Partner and Global Automotive Leader

"BEVs are becoming **increasingly better, more attractive, and more affordable**. This is also reflected in the current growth of an impressive **25 percent in Europe*** during the first three quarters of 2025. Therefore, at the latest by 2035, switching to **electric cars is likely to be a given for the majority** of drivers, and electric cars will be **the most suitable option for all personal usage requirements** (long-distance, rural areas, rental apartments). **ICEs** will then only be relevant for **enthusiasts and niche applications**."

*) EU27+UK+EFTA
Source: PwC Autofacts® analysis, Strategy& analysis

Model Y leads European* sales once again

Top-selling BEVs during Q1-Q3 2025 (ranking change vs. H1 2025)

Europe Top 4*

Rank	Model	Sales Q1-Q3 2025	Change
1	Tesla Model Y	34,373	↑ 1
2	Renault 5	32,569	↓ 1
3	VW ID.3	30,341	→ 0
4	VW ID.4, ID.5	27,427	→ 0
5	VW ID.7	25,980	→ 0
6	Citroen e-C3	22,807	→ 0
7	Skoda Elroq	22,460	↑ 3
8	Skoda Enyaq	22,142	↓ 1
9	BMW iX1	22,030	→ 0
10	Tesla Model 3	19,636	New

China

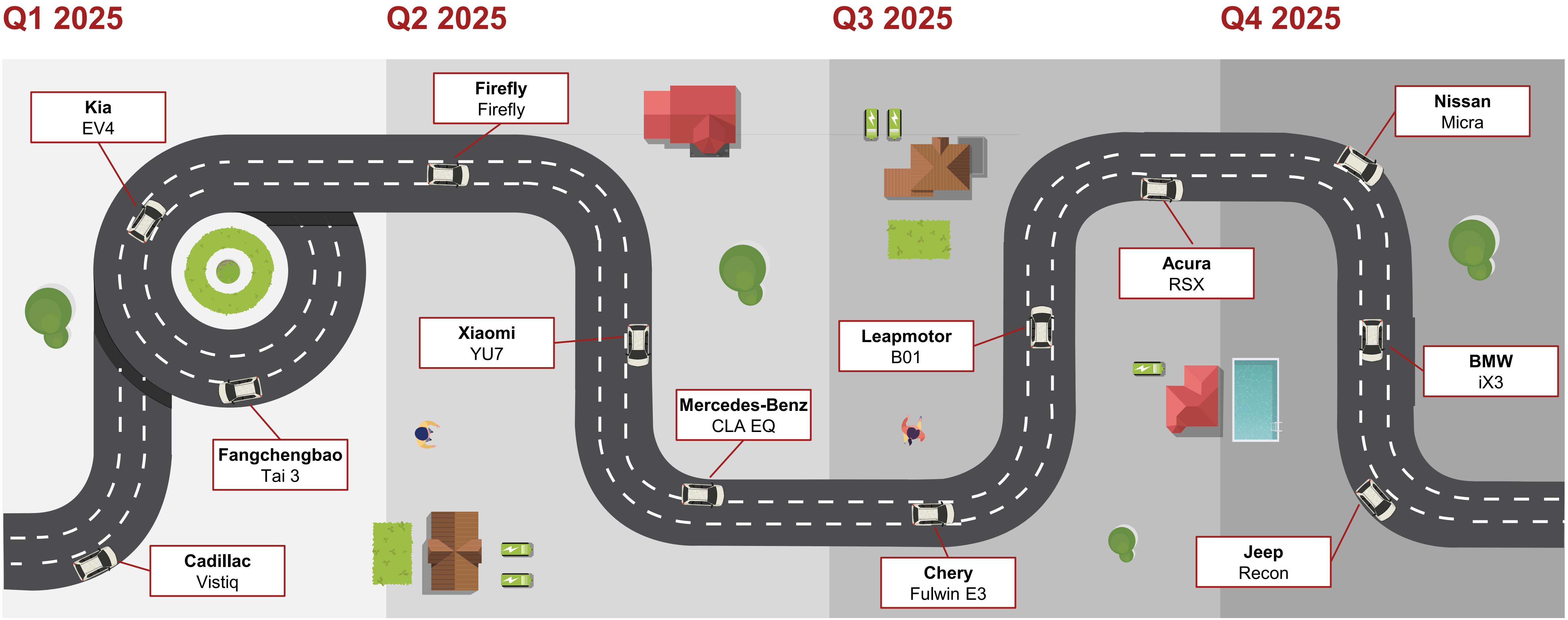
Model	Sales Q1-Q3 2025	Change
Geely (Geome) Xingyuan	343,351	→ 0
Tesla Model Y	292,843	↑ 1
Wuling Hongguang Mini EV	287,972	↑ 1
BYD Seagull	246,136	↓ 2
Xiaomi SU7	219,529	→ 0
Tesla Model 3	139,861	→ 0
XPeng Mona M03	131,812	↑ 1
BYD Yuan Up	130,070	New
Geely Panda	124,890	↓ 2
Changan Lumin	124,324	New

USA

Model	Sales Q1-Q3 2025	Change
Tesla Model Y	265,068	→ 0
Tesla Model 3	155,180	→ 0
Chevrolet Equinox	52,834	→ 0
Ford Mustang Mach-E	41,962	→ 0
Hyundai IONIQ 5	41,091	→ 0
Honda Prologue	36,553	→ 0
Ford F-150 Lightning	23,034	→ 0
VW ID.4	22,125	New
Chevrolet Blazer	20,825	→ 0
Rivian R1S	19,687	New

*) Germany, France, Italy and Spain
Source: PwC Autofacts® analysis, KBA, AAA, UNRAE, DGT, CPCA, KBB

Upcoming BEVs to drive market growth

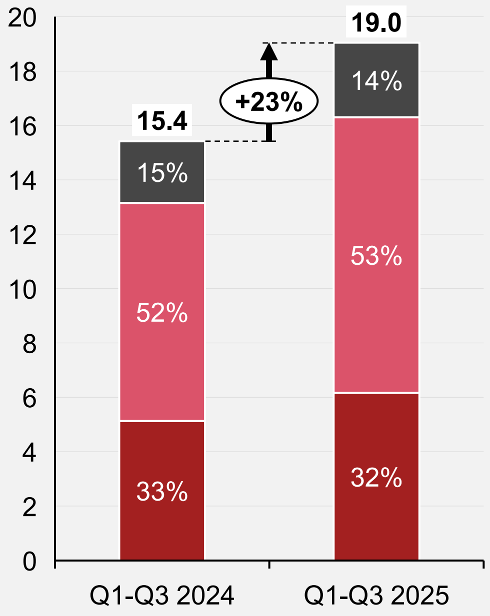


Source: S&P Global Mobility Light Vehicle Powertrain Production Forecast September 2025 release

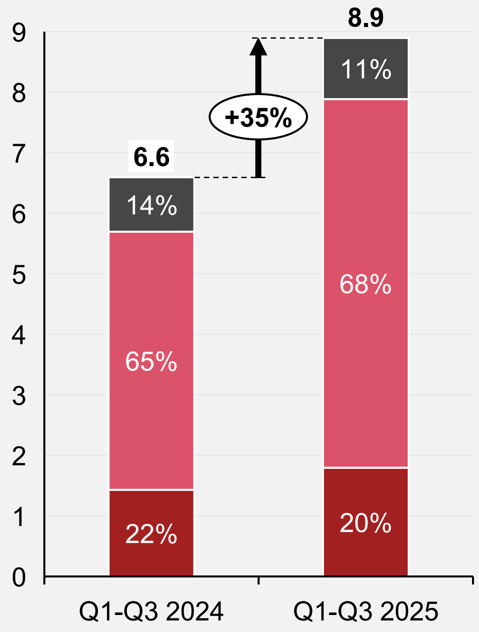
Electric vehicle sales growth continues

Q1-Q3 2024 vs. Q1-Q3 2025 (in million)

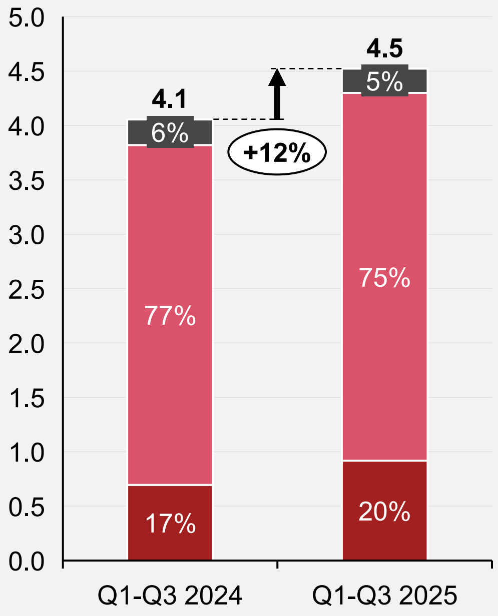
1 Total EVs



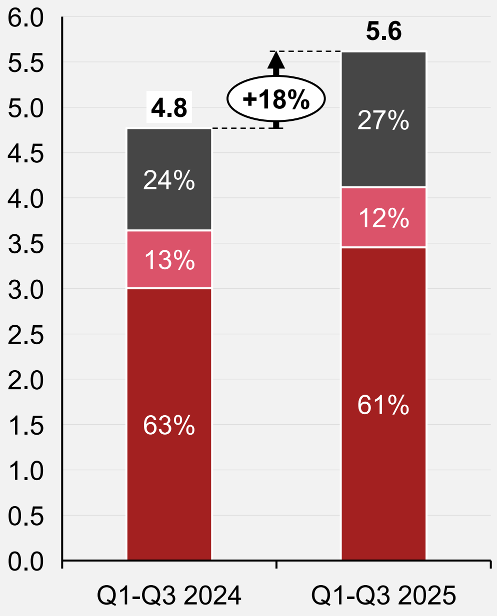
2 Battery EVs



3 Plug-in hybrid EVs



4 Full and mild hybrid EVs



Europe* China USA

*) 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

Sales of BEVs in the top five European markets increased by almost a third (32%) in Q3 2025 in comparison with the equivalent quarter last year, with more registrations (368,000) than in any quarter since Q4 2022. BEV sales for the year to date also exceed one million.

The EU top five can itself be divided into two – the BEV markets in Germany, the UK and France are much larger than those in Spain and Italy. Of the three largest markets, Germany continued the strong performance that has been evident throughout 2025, growing by 45% vs. Q3 2024. Indeed, more BEVs have been sold this year to date in Germany than in the whole of 2024. While the growth compared to 2024 in the UK and France was not as remarkable, it still saw year-on-year increases of 21% and 16%, respectively, in the third quarter. Notably, the UK's BEV market share stands at 23%, surpassing both France's 20% and Germany's 19%.

For several years, BEV sales trends in Spain and Italy followed a similar path, with both rather slow to develop. However, Spain's recent rapid growth continued in the third quarter, with sales more than doubling compared to Q3 2024. The BEV market share in Spain now stands at 11%, some way ahead of Italy at 5%.

PHEV sales in the top five markets in Q3 increased by 65% year on year, boosted by substantial rises in all markets except France, where sales actually decreased by 8%. For OEMs, increasing sales of PHEVs in 2025 presents strategic advantages in meeting their CO_2 targets. However, starting in 2026, due to changes in the test cycle, the CO_2 emissions value of all currently homologated PHEV models will increase substantially.

Meanwhile, ICE registrations fell in all top five markets in the third quarter. The largest decrease was seen in France, down by 27%.

Europe*	Q3 2025	Comparison to Q3 2024
BEV	607,000	+27%
PHEV	326,000	+58%
Hybrid	1,071,000	+13%
Total EV	**2,004,000**	**+23%**

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

Denmark boasted the strongest BEV growth among the other European markets, up by 43% in Q3 2025 vs. Q3 2024. Denmark's BEV market share of 70% is second only to Norway (97%) in all analyzed markets. Sweden has the highest PHEV market share (27%) among these other European markets.

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

China, South Korea and Japan

China

BEV sales grew by 36% in Q3 2025 in comparison with the same quarter last year, breaking through the two million barrier for the first time ever in a third quarter of the year. Indeed, more than one in three vehicles (34%) sold in this quarter were BEVs.

However, after years of rapid growth, PHEV sales declined by 6% in Q3 2025 vs. Q3 2024. While PHEVs and ICEs are still preferred by many consumers in higher vehicle segments, the plethora of recently launched entry-level BEVs are starting to dominate at the more affordable end of the market.

Total EV market share for the third quarter stood at 56%. Moreover, the NEV* market is expected to continue to flourish over the rest of the year, as consumers act before the expected reduction in the NEV* purchase tax exemption.

South Korea

BEV sales jumped by 86% in the third quarter compared to the same period last year, bringing BEV market share to 18%. With hybrids accounting for a third of all sales, the combined EV market share has now surpassed 50% for the first time in any quarter.

Japan

The Japanese EV market continues to be dominated by the sale of hybrids, which boasted a market share of 60% during Q3 2025. The combined market share of BEVs and PHEVs, on the other hand, is just over 3%.

China	Q3 2025	Comparison to Q3 2024
BEV	2,340,000	+36%
PHEV	1,249,000	-6%
Hybrid	222,000	-9%
Total EV	**3,811,000**	**+16%**

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

United States

BEV sales increased by 22% in the third quarter of 2025 in comparison with the same period last year, as consumers sought to take advantage of the tax credit of up to $7,500 before its expiry at the end of September. BEV market share reached 10% for the first time in any quarter.

After four successive quarterly year-on-year falls, PHEV sales in Q3 increased vs. Q3 2024, but only by 3% and less than the overall market. PHEV market share is less than 2%, reaching its lowest level since the first quarter of 2023.

Hybrid sales increased by 20%, attaining a market share of over 12% so far this year. Although still much more dominant than in Europe or China, ICE market share decreased to its lowest quarterly level on record – 76%.

As BEV incentives disappear, OEMs are introducing a range of innovative and affordable new electric models to lure consumers. Another factor bolstering the BEV market is the increasing number of OEMs adopting Tesla's charging plug, enhancing the overall charging experience. The robust BEV performance in the third quarter accelerated some BEV purchases, therefore the fourth quarter is anticipated to fall significantly short of the third quarter's levels.

USA	Q3 2025	Comparison to Q3 2024
BEV	419,000	+22%
PHEV	69,000	+3%
Hybrid	494,000	+20%
Total EV	**981,000***	**+19%**

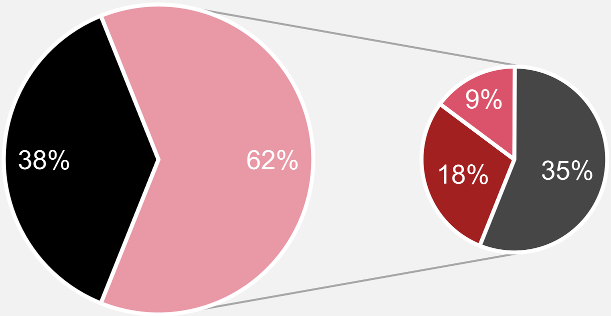
*) Numbers may not add up due to rounding
Source: PwC Autofacts® analysis, local governmental or car association data

Shares of electric vehicle registrations

Electric vehicle sales in Q3 2025 YTD

1 Europe*

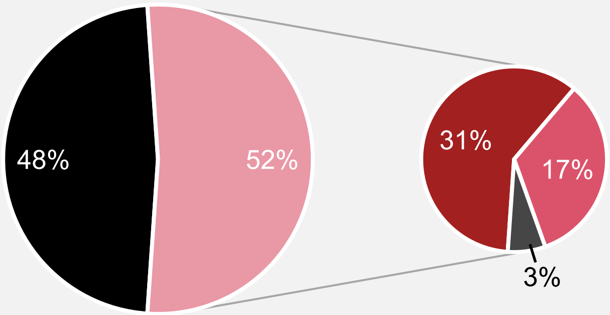
Total sales: 9,929,000
EV sales: 6,171,000



of which **BEVs:** 1,797,000
PHEVs: 919,000
Hybrids: 3,455,000

2 China

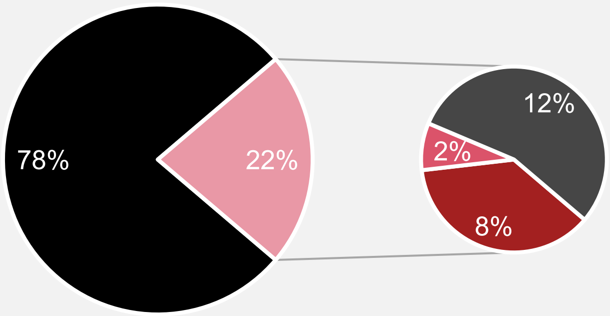
Total sales: 19,407,000
EV sales: 10,129,000



of which **BEVs:** 6,087,000
PHEVs: 3,380,000
Hybrids: 662,000

3 USA

Total sales: 12,193,000
EV sales: 2,736,000



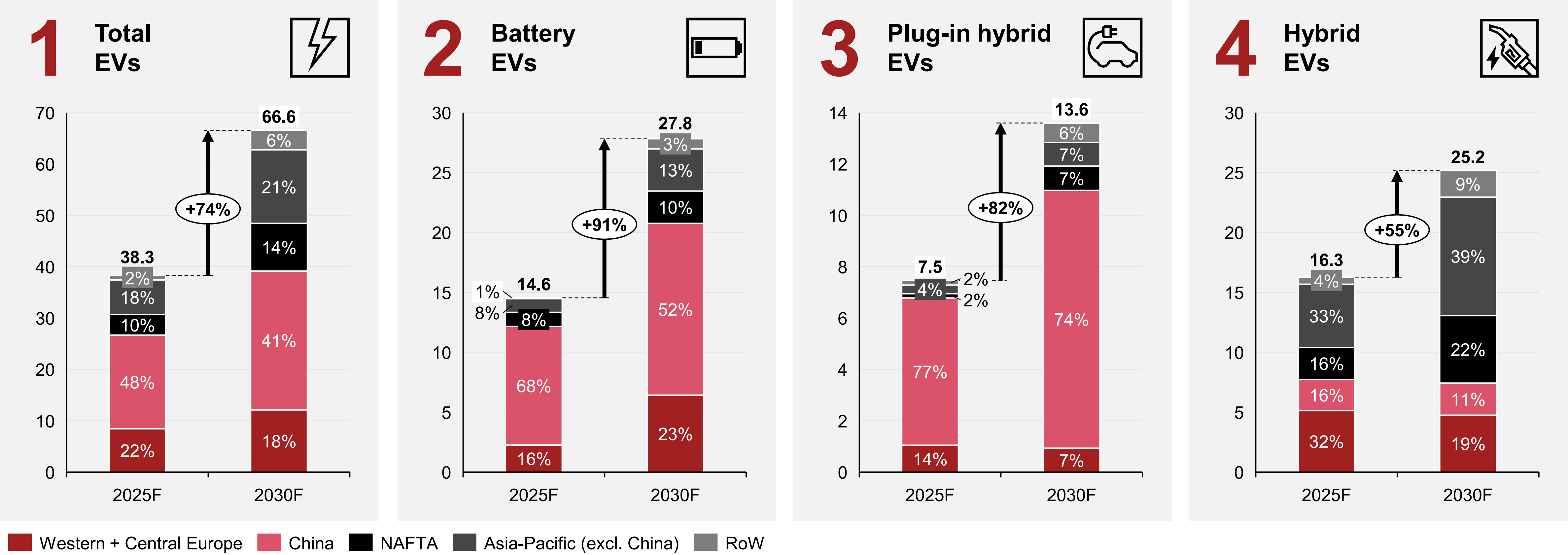
of which **BEVs:** 1,011,000
PHEVs: 224,000
Hybrids: 1,501,000

ICE EV BEV PHEV Hybrid

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

Regional electric vehicle* assembly forecast

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

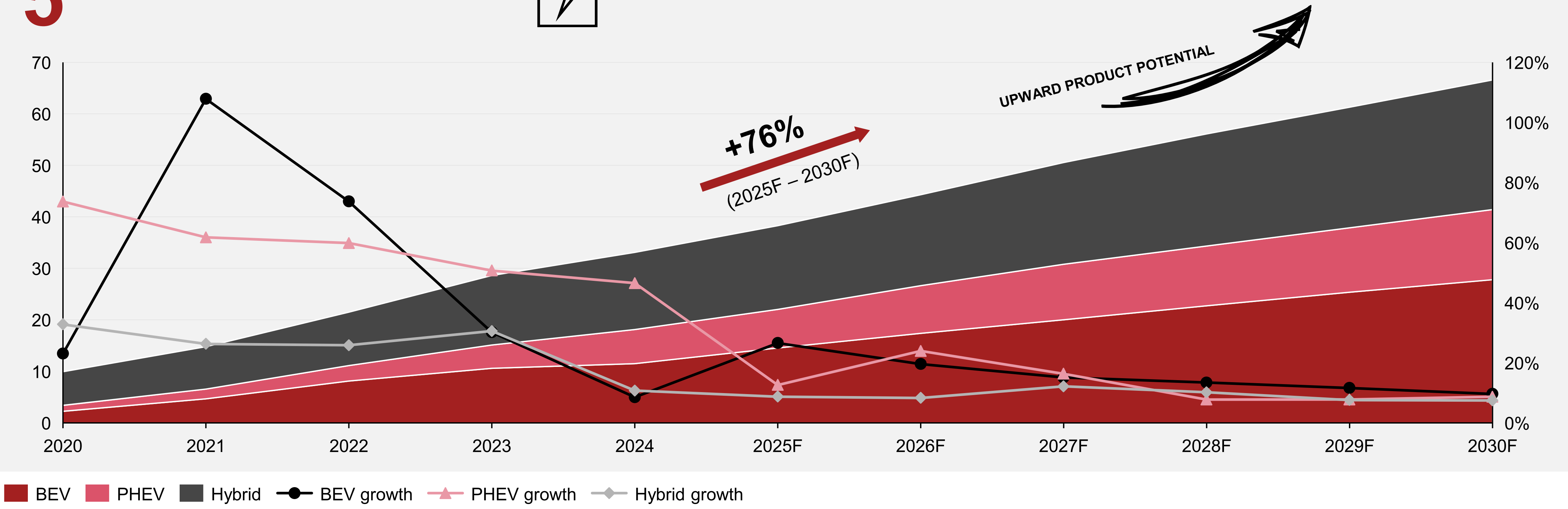


*) Electric vehicles = BEV, PHEV (incl. REEV) and hybrid (incl. FHEV, MHEV and Series-Hybrid); **) Incl. passenger cars and light commercial vehicles
Source: S&P Global Mobility Light Vehicle Powertrain Production Forecast September 2025 release

Electric vehicle* assembly forecast

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

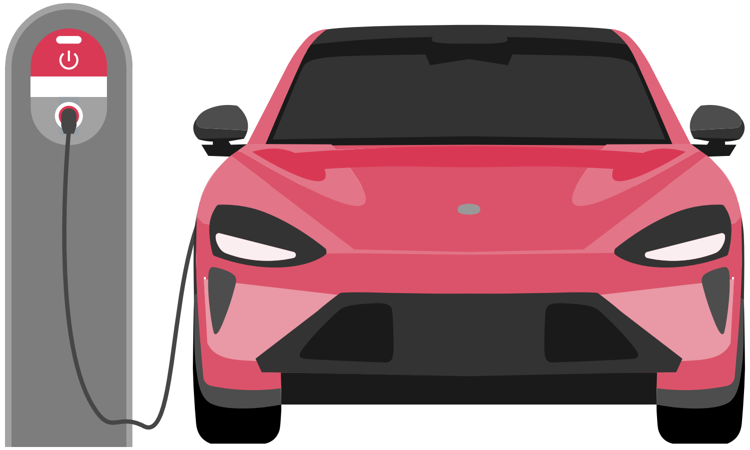
5 Global EV production by powertrain



*) 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 September 2025 release

Overview: BEV model launches

2025 (not exhaustive)

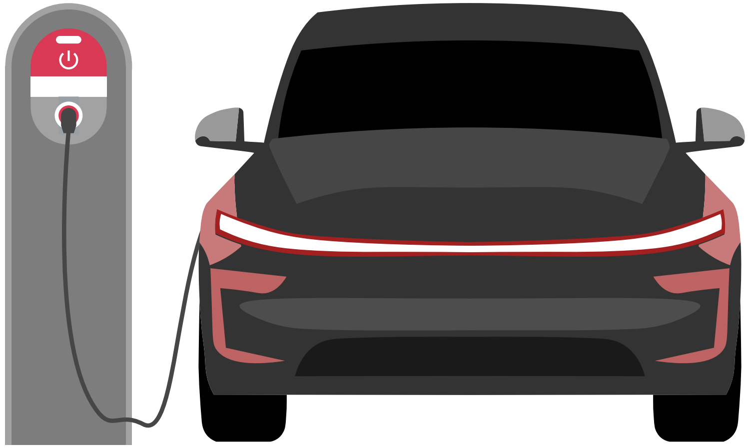


Brand	Model	Launch	Quarter
BMW	iX3	2025	Q4
BYD	E-VALI	2025	Q4
Deepal	L06	2025	Q4
Ford	Bronco	2025	Q4
Honda	Ye S GT	2025	Q4
Hyundai	Elexio EV	2025	Q4
Jeep	Recon	2025	Q4
Mercedes-Benz	GLB EQ	2025	Q4
Mitsubishi	Eclipse Cross	2025	Q4
Nissan	Micra	2025	Q4
Proton	E5	2025	Q4
Shangjie	H5	2025	Q4
Toyota	C-HR+	2025	Q4
Volvo	ES90	2025	Q4
Zeekr	RT	2025	Q4

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

Overview: BEV model launches

2026 – 2029 (not exhaustive)

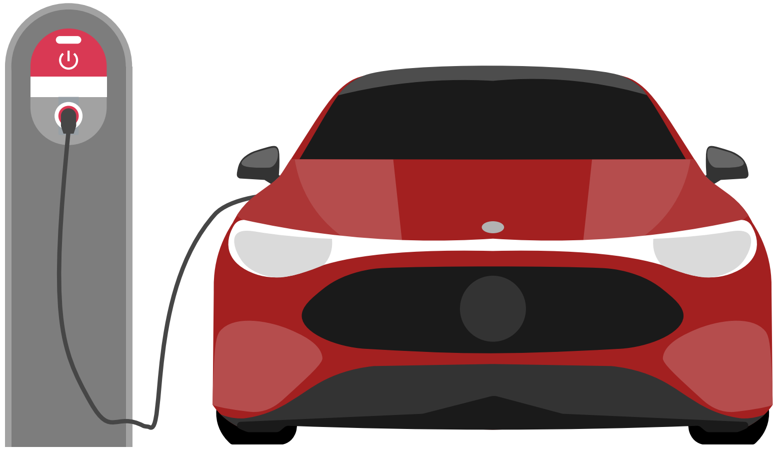


Brand	Model	Launch
Alfa Romeo	Stelvio	2028
Audi	A4 e-tron	2029
BMW	i1	2029
Changan	Lumin	2027
Chery	QQ	2026
Cupra	Raval	2026
Dacia	Evader	2027
Denza	N9	2026
Ford	F-100-Lightning	2027
Jeep	Recon	2026
Kia	Morning	2028
Lexus	ZL	2028
Lucid	Space	2029
Mercedes-Benz	GLC EQ	2026
Mercedes-Benz	E-Class EQ	2026

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

Overview: BEV model launches

2026 – 2029 (not exhaustive)



Brand	Model	Launch
Mercedes-Benz	g-Class	2027
Nissan	Qashqai	2029
Polestar	7	2028
Porsche	Cayman	2028
Renault	Austral	2028
Rivian	R2	2026
Skoda	Epiq	2026
Toyota	Compact Cruiser	2028
Toyota	bZ4	2029
Volkswagen	ID. Polo	2026
Volkswagen	ID. Golf	2029
Volvo	EX60	2026
Volvo	EX40	2027
Wuling	Sunshine	2026
Zeekr	9X	2028

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

Electric vehicle sales data

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

		Q1-Q3 2025	Market share	Q1-Q3 2024	YTD YoY	Q3-25	Quarter YoY	Sep-25	Month YoY	Aug-25	Month YoY	Jul-25	Month YoY
	BEV	216,311	18.2%	216,840	-0.2%	67,978	+16.3%	31,439	+11.1%	16,992	+29.6%	19,547	+14.8%
	PHEV	72,537	6.1%	99,098	-26.8%	23,388	-8.0%	9,118	-9.5%	5,855	-5.0%	8,415	-8.3%
	Hybrid	531,166	44.8%	412,695	+28.7%	154,927	+17.2%	62,039	+16.7%	39,722	+29.9%	53,166	+9.7%
	Total EV	820,014	69.1%	728,633	+12.5%	246,293	+14.0%	102,596	+12.1%	62,569	+25.5%	81,128	+8.7%
France	Other	366,481	30.9%	537,278	-31.8%	97,997	-27.4%	37,494	-21.0%	25,281	-30.0%	35,222	-31.5%
	BEV	382,202	18.1%	276,390	+38.3%	133,476	+44.7%	45,495	+31.9%	39,367	+45.7%	48,614	+58.0%
	PHEV	217,760	10.3%	132,861	+63.9%	78,855	+82.1%	27,685	+85.4%	23,973	+76.7%	27,197	+83.6%
	Hybrid	603,270	28.6%	545,301	+10.6%	203,304	+12.1%	69,527	+14.9%	58,605	+5.1%	75,172	+15.5%
	Total EV	1,203,232	57.0%	954,552	+26.1%	415,635	+31.2%	142,707	+29.8%	121,945	+26.5%	150,983	+36.5%
Germany	Other	907,116	43.0%	1,161,522	-21.9%	291,924	-10.9%	92,821	-6.2%	85,284	-15.5%	113,819	-10.8%
	BEV	61,055	5.2%	48,217	+26.6%	16,330	+23.0%	7,169	+11.6%	3,298	+27.3%	5,863	+37.5%
	PHEV	68,871	5.9%	39,902	+72.6%	24,128	+113.5%	10,670	+160.1%	4,669	+94.5%	8,789	+83.2%
	Hybrid	517,825	44.3%	474,282	+9.2%	140,182	+7.0%	57,243	+7.5%	30,414	+8.9%	52,525	+5.4%
	Total EV	647,751	55.5%	562,401	+15.2%	180,640	+16.1%	75,082	+17.7%	38,381	+16.6%	67,177	+14.0%
Italy	Other	520,244	44.5%	640,046	-18.7%	132,193	-17.5%	51,781	-10.6%	28,951	-20.1%	51,461	-22.1%
	BEV	72,101	8.4%	38,000	+89.7%	25,833	+101.0%	10,110	+59.7%	7,032	+160.8%	8,691	+127.1%
	PHEV	86,654	10.1%	42,239	+105.2%	30,587	+166.3%	10,369	+155.2%	7,907	+162.7%	12,311	+178.8%
	Hybrid	354,705	41.5%	276,718	+28.2%	100,791	+17.6%	35,295	+18.0%	25,468	+19.8%	40,028	+15.9%
	Total EV	513,460	60.1%	356,957	+43.8%	157,211	+42.9%	55,774	+38.4%	40,407	+49.8%	61,030	+42.7%
Spain	Other	341,200	39.9%	387,876	-12.0%	87,608	-11.9%	29,393	-10.5%	20,908	-17.5%	37,307	-9.5%
	BEV	349,414	22.1%	269,931	+29.4%	124,573	+21.1%	72,779	+29.1%	21,969	+14.9%	29,825	+9.1%
	PHEV	172,639	10.9%	124,943	+38.2%	65,600	+51.1%	38,308	+56.4%	9,803	+69.4%	17,489	+33.0%
	Hybrid	596,046	37.8%	538,935	+10.6%	199,814	+6.7%	119,917	+15.0%	28,366	-2.4%	51,531	-4.5%
	Total EV	1,118,099	70.8%	933,809	+19.7%	389,987	+16.9%	231,004	+24.8%	60,138	+11.4%	98,845	+4.6%
UK	Other	460,073	29.2%	580,285	-20.7%	145,966	-16.0%	81,887	-9.1%	22,770	-25.6%	41,309	-22.1%
	BEV	1,081,083	15.7%	849,378	+27.3%	368,190	+31.7%	166,992	+26.6%	88,658	+37.4%	112,540	+35.2%
	PHEV	618,461	9.0%	439,043	+40.9%	222,558	+64.9%	96,150	+66.7%	52,207	+68.8%	74,201	+60.1%
	Hybrid	2,603,012	37.7%	2,247,931	+15.8%	799,018	+11.3%	344,021	+14.3%	182,575	+10.9%	272,422	+8.2%
	Total EV	4,302,556	62.4%	3,536,352	+21.7%	1,389,766	+22.8%	607,163	+23.7%	323,440	+24.4%	459,163	+20.4%
Europe 5	Other	2,595,114	37.6%	3,307,007	-21.5%	755,688	-15.6%	293,376	-10.4%	183,194	-20.1%	279,118	-17.7%

Legend

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

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

Electric vehicle sales data

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

		Q1-Q3 2025	Market share	Q1-Q3 2024	YTD YoY	Q3-25	Quarter YoY	Sep 25	Month YoY	Aug 25	Month YoY	Jul 25	Month YoY
	BEV	46,151	21.5%	32,632	+41.4%	14,617	+39.8%	5,383	+21.8%	4,314	+39.2%	4,920	+67.7%
	PHEV	20,793	9.7%	12,500	+66.3%	7,689	+102.1%	2,486	+94.4%	2,421	+116.2%	2,782	+97.9%
	Hybrid	61,715	28.7%	46,132	+33.8%	21,502	+43.6%	7,597	+49.6%	6,552	+38.4%	7,353	+42.6%
	Total EV	128,659	59.8%	91,264	+41.0%	43,808	+49.9%	15,466	+43.5%	13,287	+48.4%	15,055	+58.6%
Austria	Other	86,456	40.2%	99,759	-13.3%	28,256	+5.9%	10,279	+12.8%	8,165	+0.1%	9,812	+4.3%
	BEV	108,221	33.4%	96,279	+12.4%	31,241	-2.0%	11,966	-1.4%	9,080	-9.4%	10,195	+5.0%
	PHEV	30,060	9.3%	57,117	-47.4%	9,674	-16.8%	3,261	-8.6%	2,870	-22.9%	3,543	-18.2%
	Hybrid	36,562	11.3%	32,374	+12.9%	9,514	+17.5%	3,358	+16.8%	2,585	+3.0%	3,571	+31.8%
	Total EV	174,843	54.0%	185,770	-5.9%	50,429	-2.3%	18,585	+0.0%	14,535	-10.6%	17,309	+3.3%
Belgium	Other	149,026	46.0%	170,799	-12.7%	38,823	-6.6%	12,934	-1.2%	11,585	-11.4%	14,304	-7.1%
	BEV	88,374	65.6%	60,744	+45.5%	31,252	+43.0%	12,993	+46.2%	8,985	+27.7%	9,274	+56.4%
	PHEV	3,829	2.8%	5,237	-26.9%	1,121	-24.7%	302	-50.5%	393	-9.9%	426	-3.6%
	Hybrid	18,672	13.9%	22,778	-18.0%	5,806	-9.8%	2,294	-10.6%	1,662	-5.6%	1,850	-12.4%
	Total EV	110,875	82.3%	88,759	+24.9%	38,179	+28.2%	15,589	+29.2%	11,040	+19.6%	11,550	+36.2%
Denmark	Other	23,911	17.7%	37,941	-37.0%	6,581	-35.8%	2,190	-37.6%	2,046	-43.7%	2,345	-24.4%
	BEV	19,229	35.6%	15,643	+22.9%	6,503	+28.2%	2,591	+40.7%	1,941	+2.5%	1,971	+47.1%
	PHEV	11,290	20.9%	11,149	+1.3%	3,396	+1.9%	1,104	+6.0%	1,151	-14.2%	1,141	+20.2%
	Hybrid	14,605	27.1%	17,706	-17.5%	4,335	-5.7%	1,561	+65.5%	1,349	-27.5%	1,425	-20.5%
	Total EV	45,124	83.7%	44,498	+1.4%	14,234	+9.5%	5,256	+37.4%	4,441	-12.8%	4,537	+11.1%
Finland	Other	8,818	16.3%	11,005	-19.9%	2,449	-26.8%	740	-4.8%	821	-43.6%	888	-20.4%
	BEV	93,769	34.7%	90,265	+3.9%	29,946	-0.1%	12,008	-3.6%	9,019	-4.1%	8,919	+9.8%
	PHEV	55,125	20.4%	39,160	+40.8%	19,416	+67.5%	6,516	+77.8%	5,822	+50.1%	7,078	+74.8%
	Hybrid	76,467	28.3%	81,646	-6.3%	23,964	-5.4%	8,948	+4.0%	7,194	-12.8%	7,822	-7.7%
	Total EV	225,361	83.5%	211,071	+6.8%	73,326	+9.6%	27,472	+11.1%	22,035	+2.3%	23,819	+15.4%
Netherlands	Other	44,592	16.5%	67,458	-33.9%	14,247	-22.2%	4,727	-27.4%	4,515	-23.1%	5,005	-15.7%
	BEV	107,605	95.0%	80,935	+33.0%	36,857	+27.5%	14,084	+12.7%	13,482	+28.6%	9,291	+56.6%
	PHEV	2,198	1.9%	2,573	-14.6%	397	-13.8%	85	-42.0%	211	+31.1%	101	-34.0%
	Hybrid	1,801	1.6%	5,405	-66.7%	142	-74.3%	30	-79.0%	52	-79.1%	60	-62.5%
	Total EV	111,604	98.5%	88,912	+25.5%	37,396	+25.0%	14,199	+11.1%	13,745	+26.2%	9,452	+51.3%
Norway	Other	1,718	1.5%	2,882	-40.4%	411	-33.2%	130	-28.5%	170	-24.1%	111	-46.9%

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*

		Q1-Q3 2025	Market share	Q1-Q3 2024	YTD YoY	Q3-25	Quarter YoY	Sep-25	Month YoY	Aug-25	Month YoY	Jul-25	Month YoY
Portugal	BEV	36,707	21.4%	29,225	+25.6%	11,690	+18.6%	4,984	+23.0%	3,074	+23.8%	3,632	+9.5%
	PHEV	24,924	14.5%	20,739	+20.2%	8,920	+40.1%	3,115	+42.1%	2,712	+49.3%	3,093	+31.1%
	Hybrid	40,048	23.3%	25,268	+58.5%	10,286	+33.0%	3,443	+25.5%	2,835	+24.0%	4,008	+48.4%
	Total EV	101,679	59.3%	75,232	+35.2%	30,896	+29.0%	11,542	+28.4%	8,621	+30.9%	10,733	+28.1%
	Other	69,885	40.7%	82,590	-15.4%	16,642	-4.7%	5,457	-10.0%	4,369	-16.5%	6,816	+10.4%
Sweden	BEV	72,734	34.4%	66,236	+9.8%	22,672	-5.2%	9,658	-16.5%	6,790	-0.4%	6,224	+12.5%
	PHEV	54,634	25.8%	44,337	+23.2%	17,691	+32.5%	7,667	+46.8%	5,159	+32.9%	4,865	+14.6%
	Hybrid	16,988	8.0%	18,931	-10.3%	5,550	+2.2%	2,002	+1.8%	2,260	+8.1%	1,288	-6.3%
	Total EV	144,356	68.2%	129,504	+11.5%	45,913	+7.5%	19,327	+3.0%	14,209	+11.1%	12,377	+11.0%
	Other	67,190	31.8%	69,890	-3.9%	19,681	-3.5%	6,836	-10.8%	6,605	-4.6%	6,240	+7.5%
Switzerland	BEV	35,725	21.1%	32,802	+8.9%	12,522	+9.7%	5,182	+13.6%	3,257	-4.8%	4,083	+18.9%
	PHEV	18,540	11.0%	15,111	+22.7%	6,948	+54.8%	2,553	+49.8%	1,989	+61.6%	2,406	+54.9%
	Hybrid	61,208	36.2%	57,462	+6.5%	19,542	+3.5%	6,805	-2.4%	5,840	+4.2%	6,897	+9.3%
	Total EV	115,473	68.4%	105,375	+9.6%	39,012	+12.1%	14,540	+9.9%	11,086	+8.1%	13,386	+18.5%
	Other	53,454	31.6%	70,355	-24.0%	16,782	-14.9%	5,489	-20.7%	5,050	-11.0%	6,243	-12.4%
Rest of Europe*	BEV	107,783	7.9%	78,850	+36.7%	41,016	+58.2%	14,415	+58.5%	11,210	+68.9%	15,391	+51.0%
	PHEV	78,820	5.8%	47,168	+67.1%	28,524	+84.4%	8,958	+111.7%	7,749	+78.2%	11,817	+71.6%
	Hybrid	524,161	38.3%	448,435	+16.9%	171,631	+24.6%	54,888	+24.1%	51,413	+20.7%	65,330	+28.1%
	Total EV	710,764	51.9%	574,454	+23.7%	241,171	+34.6%	78,261	+36.0%	70,372	+31.3%	92,538	+36.0%
	Other	657,674	48.1%	726,866	-9.5%	209,891	-0.8%	67,318	+3.6%	58,018	-4.8%	84,555	-1.3%
Europe*	BEV	1,797,381	18.1%	1,432,989	+25.4%	606,506	+26.6%	260,256	+21.9%	159,810	+27.0%	186,440	+33.5%
	PHEV	918,674	9.3%	694,134	+32.3%	326,334	+57.7%	132,197	+62.6%	82,684	+56.4%	111,453	+53.3%
	Hybrid	3,455,239	34.8%	3,004,068	+15.0%	1,071,290	+13.1%	434,947	+15.3%	264,317	+11.7%	372,026	+11.5%
	Total EV	6,171,294	62.2%	5,131,191	+20.3%	2,004,130	+22.7%	827,400	+23.1%	506,811	+22.0%	669,919	+22.7%
	Other	3,757,838	37.8%	4,646,552	-19.1%	1,109,451	-12.4%	409,476	-8.2%	284,538	-16.4%	415,437	-13.3%

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

		Q1-Q3 2025	Market share	Q1-Q3 2024	YTD YoY	Q3-25	Quarter YoY	Sep 25	Month YoY	Aug 25	Month YoY	Jul 25	Month YoY
	BEV	6,087,000	31.4%	4,260,000	+42.9%	2,340,000	+36.2%	905,000	+31.9%	765,000	+37.1%	670,000	+41.4%
	PHEV	3,380,000	17.4%	3,126,000	+8.1%	1,249,000	-6.2%	477,000	-2.5%	406,000	-5.8%	366,000	-10.9%
	Hybrid	662,100	3.4%	639,200	+3.6%	222,000	-9.2%	82,000	-7.9%	70,000	-15.7%	70,000	-3.4%
	Total EV	10,129,100	52.2%	8,025,200	+26.2%	3,811,000	+15.7%	1,464,000	+15.8%	1,241,000	+15.8%	1,106,000	+15.5%
China*	Other	9,277,900	47.8%	9,232,800	+0.5%	3,027,000	+11.6%	1,110,000	+10.3%	1,005,000	+15.5%	912,000	+9.2%
	BEV	27,668	1.4%	24,845	+11.4%	10,041	+10.3%	4,484	+20.8%	2,649	-1.2%	2,908	+7.3%
	PHEV	32,979	1.7%	31,076	+6.1%	10,401	+9.5%	4,018	+26.9%	2,786	+5.3%	3,597	-2.3%
	Hybrid	1,166,359	60.3%	1,146,739	+1.7%	365,953	-4.9%	134,739	-6.5%	98,011	-7.9%	133,203	-0.8%
	Total EV	1,227,006	63.4%	1,202,660	+2.0%	386,395	-4.2%	143,241	-5.1%	103,446	-7.5%	139,708	-0.7%
Japan	Other	708,436	36.6%	681,909	+3.9%	223,513	-9.5%	86,269	-3.5%	56,408	-17.8%	80,836	-9.2%
	BEV	171,378	13.6%	108,923	+57.3%	78,647	+85.5%	28,760	+137.8%	24,319	+58.0%	25,568	+71.4%
	PHEV	10,680	0.8%	5,828	+83.3%	3,393	+40.3%	1,218	+44.0%	997	+42.0%	1,178	+35.4%
	Hybrid	428,542	34.0%	341,385	+25.5%	144,630	+25.9%	51,973	+13.5%	43,809	+25.4%	48,848	+42.8%
	Total EV	610,600	48.4%	456,136	+33.9%	226,670	+41.9%	81,951	+39.6%	69,125	+35.5%	75,594	+51.2%
South Korea	Other	651,234	51.6%	733,384	-11.2%	208,540	-9.9%	75,947	+5.5%	69,684	-9.7%	62,909	-23.7%
	BEV	1,010,831	8.3%	900,945	+12.2%	418,516	+21.7%	147,801	+43.0%	145,249	+14.7%	125,466	+10.3%
	PHEV	224,411	1.8%	236,205	-5.0%	68,815	+2.6%	21,556	+12.3%	26,121	+4.8%	21,138	-8.0%
	Hybrid	1,501,133	12.3%	1,127,392	+33.2%	493,541	+19.7%	145,310	+14.0%	181,048	+20.2%	167,183	+24.7%
	Total EV	2,736,375	22.4%	2,264,542	+20.8%	980,872	+19.2%	314,667	+25.9%	352,418	+16.6%	313,787	+15.9%
USA	Other	9,457,057	77.6%	9,437,872	+0.2%	3,122,126	+1.9%	935,607	+1.8%	1,111,647	-1.4%	1,074,872	+5.6%
	BEV	76,473	8.2%	69,276	+10.4%	29,328	+53.9%	12,076	+88.0%	10,033	+70.3%	7,219	+7.1%
	PHEV	38,041	4.1%	15,371	+147.5%	12,428	+69.7%	4,491	+81.8%	3,906	+47.7%	4,031	+82.5%
	Hybrid	143,695	15.4%	131,505	+9.3%	49,949	+3.5%	14,811	+9.1%	17,381	+4.3%	17,757	-1.6%
	Total EV	258,209	27.6%	216,152	+19.5%	91,705	+22.8%	31,378	+39.6%	31,320	+24.3%	29,007	+7.5%
Australia	Other	676,893	72.4%	714,108	-5.2%	219,969	-3.6%	75,513	-2.5%	69,219	-8.4%	75,237	+0.1%
	BEV	53,521	3.0%	45,658	+17.2%	22,845	+57.7%	8,195	+74.5%	7,643	+50.0%	7,007	+49.1%
	PHEV	63,368	3.5%	38,243	+65.7%	22,484	+42.4%	7,386	+63.1%	7,527	+40.9%	7,571	+28.1%
	Hybrid	74,879	4.1%	38,647	+93.8%	32,268	+148.1%	11,564	+182.0%	10,143	+141.0%	10,561	+124.8%
	Total EV	191,768	10.6%	122,548	+56.5%	77,597	+79.3%	27,145	+103.7%	25,313	+72.8%	25,139	+64.2%
Brazil	Other	1,617,413	89.4%	1,629,619	-0.7%	598,884	-5.0%	204,333	-2.5%	189,431	-9.3%	205,120	-3.3%

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

		Q1-Q3 2025	Market share	Q1-Q3 2024	YTD YoY	Q3-25	Quarter YoY	Sep 25	Month YoY	Aug 25	Month YoY	Jul 25	Month YoY
India	BEV	120,541	4.3%	69,976	+72.3%	48,725	+132.0%	15,072	+143.9%	17,844	+163.1%	15,809	+96.7%
	PHEV	63	0.0%	15	+320.0%	13	-7.1%	1	-90.9%	3	+200.0%	9	+350.0%
	Hybrid	249,609	8.8%	259,829	-3.9%	75,293	-12.1%	21,835	-18.1%	26,672	-8.6%	26,786	-10.0%
	Total EV	370,213	13.1%	329,820	+12.2%	124,031	+16.3%	36,908	+12.3%	44,519	+23.7%	42,604	+12.7%
	Other	2,462,394	86.9%	2,583,330	-4.7%	758,184	-7.0%	240,240	-2.7%	256,289	-8.5%	261,655	-9.3%
Indonesia	BEV	55,225	12.8%	28,061	+96.8%	16,263	+12.7%	4,043	-15.3%	6,351	+19.2%	5,869	+35.6%
	PHEV	3,285	0.8%	67	+4803.0%	1,566	+5923.1%	542	+6675.0%	685	+6127.3%	339	+4742.9%
	Hybrid	44,265	10.3%	40,704	+8.7%	17,055	+7.0%	5,859	+6.8%	5,228	-4.9%	5,968	+20.6%
	Total EV	102,775	23.8%	68,832	+49.3%	34,884	+14.8%	10,444	+1.7%	12,264	+13.1%	12,176	+31.2%
	Other	328,310	76.2%	424,660	-22.7%	101,166	-29.6%	34,738	-26.8%	32,683	-32.9%	33,745	-29.0%
Turkey	BEV	132,149	17.8%	57,484	+129.9%	47,411	+126.4%	12,706	+33.1%	17,480	+208.8%	17,225	+200.3%
	PHEV	36,749	4.9%	7,116	+416.4%	9,870	+482.3%	3,557	+435.7%	2,029	+235.9%	4,284	+903.3%
	Hybrid	163,442	22.0%	107,168	+52.5%	57,093	+29.8%	22,469	+50.6%	17,040	+15.9%	17,584	+22.3%
	Total EV	332,340	44.7%	171,768	+93.5%	114,374	+71.6%	38,732	+54.1%	36,549	+74.3%	39,093	+90.3%
	Other	410,347	55.3%	503,505	-18.5%	140,310	-3.7%	49,542	+11.3%	45,666	-5.5%	45,102	-14.7%
Analyzed markets	BEV	9,532,167	18.5%	6,998,157	+36.2%	3,618,282	+34.9%	1,398,393	+33.2%	1,156,378	+34.9%	1,063,511	+37.3%
	PHEV	4,708,250	9.1%	4,154,055	+13.3%	1,704,304	+3.8%	651,966	+8.4%	532,738	+2.3%	519,600	-0.0%
	Hybrid	7,889,263	15.3%	6,836,637	+15.4%	2,529,072	+9.5%	925,507	+9.1%	733,649	+7.6%	869,916	+11.5%
	Total EV	22,129,680	43.0%	17,988,849	+23.0%	7,851,658	+18.3%	2,975,866	+19.0%	2,422,765	+17.6%	2,453,027	+18.2%
	Other	29,347,822	57.0%	30,587,739	-4.1%	9,509,143	+0.3%	3,221,665	+2.0%	3,120,565	-0.8%	3,166,913	-0.4%

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

Authors and PR contact

Harald Wimmer
Partner, Global Automotive Leader
PwC Germany
Phone: +49 170 7864752
harald.wimmer@pwc.com

Steven Van Arsdale
Global Lead Analyst, PwC Autofacts®
PwC Germany
Phone: +49 151 65231099
steven.james.van.arsdale@pwc.com

Jörn Neuhausen
Senior Director
Strategy& Germany
Phone: +49 172 2511143
joern.neuhausen@pwc.com

Annabelle Kliesing
Senior Manager Communications and Thought Leadership
Strategy& Germany
Phone: +49 171 1686382
annabelle.kliesing@pwc.com

Automotive contacts

Henning Rennert
Europe Automotive Leader
Strategy& Germany
Phone: +49 160 95553583
henning.rennert@pwc.com

Dom Tribe
Automotive Leader UK
PwC UK
Phone: +44 7483 365751
dom.tribe@pwc.com

Francesco Papi
Automotive Leader Italy
Strategy& Italy
Phone: +39 334 620 9639
francesco.papi@pwc.com

Alain Galloni
Automotive Leader France
Strategy& France
Phone: +33 7 61 75 78 36
alain.galloni@pwc.com

Manuel Diaz Delgado
Automotive Leader Spain
PwC Spain
Phone: +34 649 61 45 35
manuel.diaz.delgado@pwc.com

Jens Horning
CEE Automotive Leader
PwC Slovakia
Phone: +421 903 451 242
jens.horning@pwc.com

C.J. Finn
Automotive Leader USA
PwC USA
Phone: +1 734 717 3792
charles.j.finn@pwc.com

Jun Jin
Automotive Leader China
PwC China
Phone: +86 10 6533 2977
jun.jin@cn.pwc.com

Kavan Mukhtyar
Automotive Leader India
PwC India
Phone: +91 99875 38628
kavan.mukhtyar@pwc.com

Eiichi Yamanaka
Automotive Leader Japan
PwC Japan
Phone: +81 90 6513 6236
eiichi.yamanaka@pwc.com

Patrick Ziechmann
Automotive Leader ASEAN
PwC Malaysia
Phone: +60 (0)12 280 1871
patrick.oliver.ziechmann@pwc.com

Yong-Wook Jun
Automotive Leader South Korea
PwC South Korea
Phone: +82 2 709 7982
yong-wook.jun@pwc.com

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