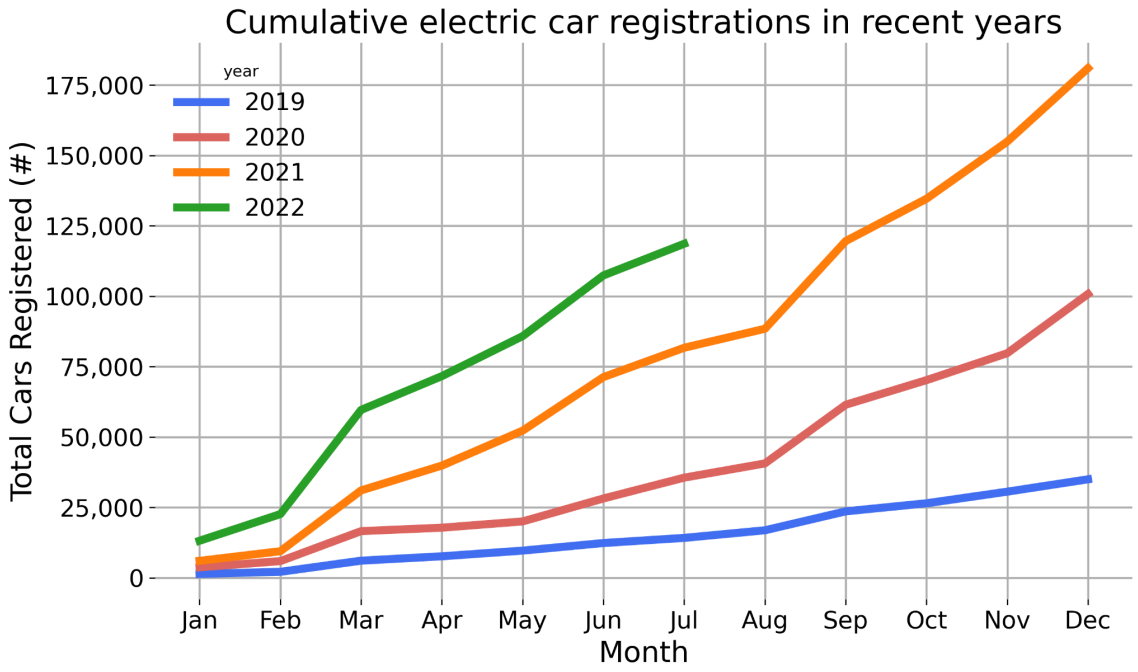
New AutoMotive

Electric Car Count: July 2022



2022 continues to be a record-breaking year for electric car sales. However, in the first full month since the government scrapped the plug-in car grant on 14th June, electric car sales have dropped slightly. Year-on-year total car registrations were down 8% in July 2022 compared with July 2021. Registrations of diesel cars have remained at historic lows, accounting for around 1 in ten new cars bought, while sales of petrol cars have not recovered since before the pandemic. Only electric cars showed any growth in market share or total volumes, and 2022 has already seen more electric cars registered than in the whole of 2020.

Ben Nelmes, Head of Policy and Research at New AutoMotive, said:
"In the first full month since the government axed the plug-in car grant, electric car sales have continued to grow, bucking broader market trends during a generally disappointing month for overall car sales."

"However, the UK can and should be targeting higher electric cars sales to reduce motoring costs, wean ourselves off Russian diesel and reduce greenhouse gas

emissions. In a month that saw record-shattering temperatures, it's disappointing that 60% of new cars bought are still fossil fuelled."

"July's soft growth in electric car sales is a warning light on the dashboard. The axing of the plug-in car grant was inevitable, but it has left a gaping hole in government policy on zero emission cars. The next government should move at pace to introduce a California-style ZEV mandate that boosts EV sales and reduces EV prices, and to improve access to the growing second hand EV market for car-dependent households."

The full data release will be available here from 3rd of the month, or the next working day after that. You can view the data on our interactive dashboard, here.

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Explainer: the ZEV mandate

What is the ZEV mandate?
The government has promised to introduce a scheme known as a 'Zero Emissions Vehicle Mandate', known more commonly as a ZEV mandate. The ZEV mandate is a system of legally binding targets that requires car and van manufacturers to sell an increasing number of zero emissions cars and vans as a proportion of all the cars and vans they sell. This is a kind of policy that has been used for cars in California and China, and is very similar to the system the UK has used to successfully incentivise renewable electricity, known as the 'Renewables Obligation'.

How do the targets work?
The targets are set as a percentage figure, and will start at 22% in 2024. That means that in 2024, 22% of all cars sold by any manufacturer must be zero emissions. The targets will gradually increase over time. If a manufacturer cannot meet their target, they must either pay a penalty or buy some 'surplus' from a manufacturer who has exceeded their targets.

Is this the same thing as the 2030 and 2035 phase-out of sales of petrol, diesel and hybrid cars and vans?
Not quite. The ZEV mandate is the policy that will encourage car manufacturers to shift to selling only zero emissions vehicles in line with the 2030 and 2035 deadlines. This is the policy that will make that ambition a reality. There are also other things the government is doing to realise that ambition, for example investing in charge points and using tax breaks for cars and grants for vans.

When will the ZEV mandate come into force?
It will come into force from 2024. The scheme is currently being designed by the Department for Transport, who recently consulted on how it might work. You can read about their plans here.

UK market overview

Total UK car registrations were down by 26% from June 2021, indicating the impact of global supply chain disruptions on the supply of vehicles and the impact of the cost of living crisis on consumer purchasing power. Despite these headwinds, electric car registrations continued to grow, accounting for 16% of the market nationally.

Fuel Type	Registered vehicles July 2022	Market share July 2022 (%)	Registered vehicles July 2021	Market share July 2021 (%)
Petrol	51,564	50.98	61,307	53.12
Hybrid	27,724	27.41	31,597	27.38
Pure electric	11,240	11.11	10,418	9.03
Diesel	10,399	10.28	11,889	10.3
Other	213	0.21	203	0.18

Table 3 provides a full UK market overview, and will be updated from 3rd of the month, or the next working day after that.

Regional highlights

We track regional registrations using a three-month rolling average, which masks big variations in EV market share from month to month. The DVLA regions with the highest share of EVs are as follows:

- Peterborough & Cambridgeshire - 35%
- Oxfordshire - 34%
- North East England - 18%
- London - 18%
- Severn Valley - 16%

Refer to tables 4 & 5 for full regional statistics, and will be updated from 3rd of the month, or the next working day after that.

The race for EV market share

Without any deliveries of Teslas, Hyundai secured the biggest share of the market in July. Supply chain issues were evident in the data, with VW, Kia and MG experiencing significant year-on-year falls in their July EV sales. Cupra - a SEAT subsidiary - have leapt into 6th place in our rankings, with their new EV model clearly a hit with consumers.

Manufacturer	Number of EVs registered in July `22	% of all EVs registered in July `22	Number of EVs registered in July `21	Difference in number of EVs registered between July `22 and July `21
HYUNDAI	1370	12.19	698	672
VOLKSWAGEN	1172	10.43	1579	-407
AUDI	899	8	560	339
KIA	715	6.36	981	-266
NISSAN	656	5.84	344	312
CUPRA	568	5.05	0	568
MG	545	4.85	967	-422
BMW	532	4.73	336	196
MERCEDES-BENZ	521	4.64	588	-67
MINI	509	4.53	286	223

For the full data, and year-on-year comparisons, refer to table 1 in the full release, which will be available from 3rd of the month, or the next working day after that.

The brands that are quickest to electrify

Hyundai put in an impressive showing this month, with almost 1 in 4 of their 6,000 new car registrations being fully electric. Of the mass market brands, Renault, Fiat, and MG also feature in our league of the top ten brands who sell the most EVs as proportion of their total sales.

Manufacturer	Number of EVs registered in July `22	EVs as % of the manufacturer's total registrations in July `22	Number of EVs registered in July `21	EVs as % of the manufacturer's total registrations in July `21
GENESIS	34	68	0	0.00
DS	82	35.5	69	28.99
CUPRA	568	34.4	0	0.00
JAGUAR	335	31.97	452	42.76
RENAULT	486	23.74	360	27.40
PORSCHE	246	23.43	208	25.65
HYUNDAI	1370	22.58	698	12.98
FIAT	306	21.86	219	14.30
MINI	509	19.11	286	10.46
MG	545	19.06	967	41.25

We exclude brands that are 100% electric from this table since they do not need to electrify their sales. For the full data, refer to table 2 in the full release, which will be available from 3rd of the month, or the next working day after that.

Notes

About Electric Car Count

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

Electric Car Count provides an overview of the newly licensed passenger cars. It is released monthly, in the first few days of each month, providing data on the previous month's newly licensed cars. In the UK, vehicles must be licensed (also known as registered) to be legally driven on UK roads.

We provide an overview of the state of the market, showing the number of cars registered by each manufacturer, broken down by fuel type. This provides a new way to track the transition to EVs in the UK.

Visit our interactive data dashboard here: www.newautomotive.org/ecc

For more background information on the statistics we provide, you can read our blog about the race for EV market share: www.newautomotive.org/blog/the-race-for-ev-market-share-is-under-way

Data sources & methodology

The data shows the number of type M1 vehicles (i.e. passenger cars) in the DVLA's vehicle licensing database as it stands on, or shortly after, the 1st day of the month. The DVLA's vehicle licensing database is the legal record of all vehicles licensed for use in the UK. We obtain the data from the DVLA's vehicle enquiry service API, and the DVSA's MOT history API.

The data covers all cars with a standard form UK vehicle registration mark (VRM, i.e. the vehicle's number plate), but does not capture any vehicles with personalised VRMs.

Terminology

We use the following terms to refer to vehicle fuel types:

Pure electric: battery electric, or other purely electric-powered vehicles (such as hydrogen). These are vehicles where the drivetrain of the vehicle is only electric, with no facility to drive using a fossil fuelled engine.

Hybrid: vehicles that have the ability to drive under electric power or under fossil fuel power. These include vehicles classified by the DVLA as "hybrid electric", "electric diesel", for example.

Q&A

- *Why are the numbers different from other organisations, such as the SMMT?*

Our numbers are typically slightly different from those published by the SMMT. We cannot speculate as to why this is because the SMMT do not publish the methodology for obtaining their vehicle data.

Our data is based on the DVLA's legal record of vehicles licensed as it stands on the first of the month.

Our methodology does not capture newly registered vehicles with a personalised number plate. These take longer to appear in our database, and are not included in the monthly release. We do not believe that these are a statistically significant part of the market.

- *Will you make this data open and accessible to more organisations?*

Yes, we are happy to supply the data to anyone where doing so will not conflict with our mission. We encourage people to reach out to us on data@newautomotive.org.