

## Driving energy security: how electric cars cut oil dependence - T&E briefing

*This short briefing highlights the benefits of accelerating vehicle electrification in the context of the war in the Middle East. As co-legislators discuss the EU's Automotive Package and decide on the trajectory for vehicle electrification in Europe, the emerging energy crisis should serve as a stark reminder that Europe's only path to true strategic sovereignty lies in domestic clean power and technologies.*

**May update:** *This briefing was updated in May 2026 to include additional data broken down by European countries, additional scenarios for the weakening of the car CO2 regulation, an additional sensitivity analysis on use-phase costs, as well as providing more detail on the analytical assumptions in the annex. The previous version can be found [here](#).*

### **Key findings: Only electric cars and regulatory ambition can break us free from oil dependency**

- The US and Israeli strikes on Iran on 28 February 2026 triggered **the sharpest spike in crude oil prices since Russia's invasion of Ukraine in 2022**. By 6 April, EU pump prices had reached €2.11/L for diesel and €1.88/L for petrol – up 54 and 26 cents per litre respectively in the pre-conflict period.
- **Cars alone cost the EU €67 billion in oil imports (2025)**. Cars consume around 1 billion barrels of imported oil annually, making road transport the largest driver of Europe's oil dependency.
- **Electric cars are already cutting oil imports**. Nearly 8 million electric cars in the EU will save around 46 million barrels of oil in 2025, equivalent to €2.9 billion in avoided oil import costs.
- **Weakening EU electrification targets would deepen oil dependency**. A weaker automotive package based on ACEA demands could increase oil imports by more than 900 million barrels between 2026 and 2035, costing Europe €74 billion in additional oil import expenses compared to keeping strong EU vehicle targets with more ambition on corporate fleet electrification. This more ambitious scenario could avoid nearly 2.2 billion barrels of oil imports over the next decade, saving around €180 billion in fuel costs.
- **Electric cars are expected to be far cheaper to drive during the coming energy crises**. In a prolonged crisis scenario, driving a petrol car is expected to cost around €133 per month, compared to €62 for an EV. The expected crisis premium would add €17 per month for petrol cars but only €3.5 for EVs, meaning petrol drivers are expected to be five times more exposed to energy price shocks. For higher mileage corporate cars, the crisis premiums are higher: €40 for petrol versus €8 for BEVs.
- **Energy crises fuel fossil fuel profits and geopolitical adversaries at the expense of drivers**. When oil prices exceeded \$100 per barrel in 2022, European drivers paid €55

billion extra at the pump, while fossil fuel companies earned €104 billion in profits. Plus, continuing oil imports fund geopolitical adversaries.

- If current conditions are maintained until the end of 2026, this analysis estimates excess profit would be generated across the road fuel supply chain – €26 billion accruing to refiners and distributors operating largely within the EU, and €66 billion flowing to crude oil producers and oil-producing nations (source: T&E Oil profits tracker).

**Recommendations:** The EU needs to take bold action to transition away from fossil fuels and ensure that businesses and citizens across Europe benefit from stable and affordable energy prices. Reducing the amount of oil we consume and import is a win-win. It improves economic security, saves costs for drivers, reduces geopolitical uncertainties and decreases our climate impact. To achieve this the EU should do the following as part of the Automotive Package discussions:

- **Reject any weakening of the 2030 car CO2 target ambition** to secure rapid mass adoption of electric cars and investment certainty,
- **Support the end of the sale of new petrol and diesel cars and vans by 2035** to ensure that the regulation remains aligned with the EU's climate and industrial objectives.
- **In the Clean Corporate Vehicles Regulation, set more ambitious electrification targets for large corporate fleets** and remove plug-in-hybrids from the scope.

## 1. Oil imports for cars amount to 1 billion barrels and costs the EU nearly €67 billion in 2025

The EU is highly dependent on the import of fossil fuels: 96% for oil and 90% for natural gas.

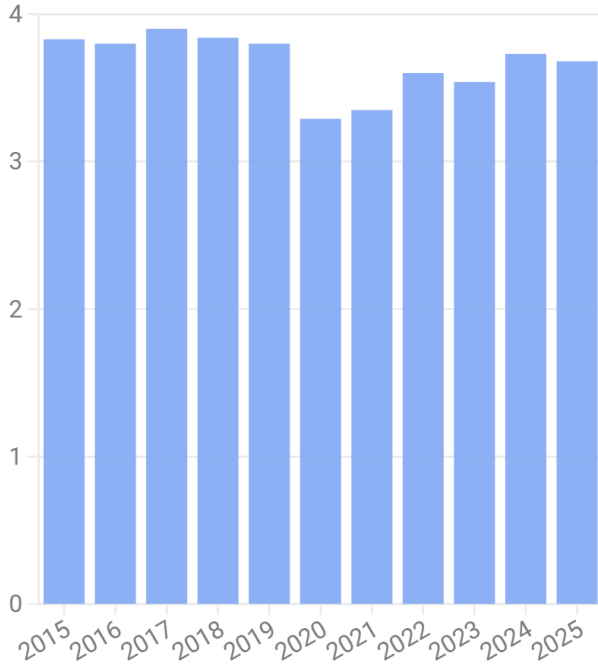
This continued dependence has been a major driver of high and volatile energy prices and is the cause of one of our main competitive disadvantages at the global level.

We import 3 to 4 billion barrels of oil per year. For many EU countries, oil is the largest share of energy supply, hence the biggest source of energy dependency and spending. This oil dependency is costing the EU around 260 billion euros per year (average over 2020-2025).

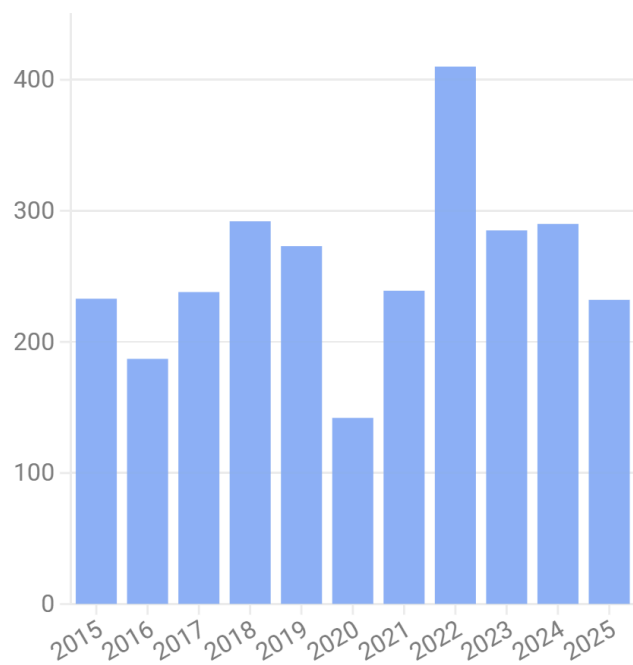
Half of the EU oil consumption goes to road transport, with sixty percent of that being used for cars. **In total oil imports for cars amount to 1 billion barrels every year** (average 2020-2025) and **cost the EU nearly €67 billion in 2025** (80 billion average over 2020-2025).

## In 2025, oil imports cost the EU €230 billion

Total annual crude import volume (billion barrels)



Total annual crude import cost (billion €)



Source: Eurostat, Statista • Prices adjusted for inflation.

European drivers paid a €55bn [‘geopolitical premium’](#) at the pump in 2022 when oil prices last averaged \$100 a barrel. This additional €55bn in 2022 came despite EU governments forfeiting €30bn in fuel duty cuts - a subsidy essentially paid for by taxpayers.

Compared to the previous energy crisis in 2022, the current war in the Middle East is impacting oil more than gas. Since oil is more fungible than gas, we can expect the impact to be more uniform and less regionally focused on the pipeline connected countries than with the last crisis. Although Europe was only [importing](#) 6% of its oil from via the Hormuz strait, it doesn’t protect the EU from global oil prices. This reliance exposes Europe to geopolitical instability and price shocks, particularly as a significant share of imports comes from politically volatile regions such as the Middle East.

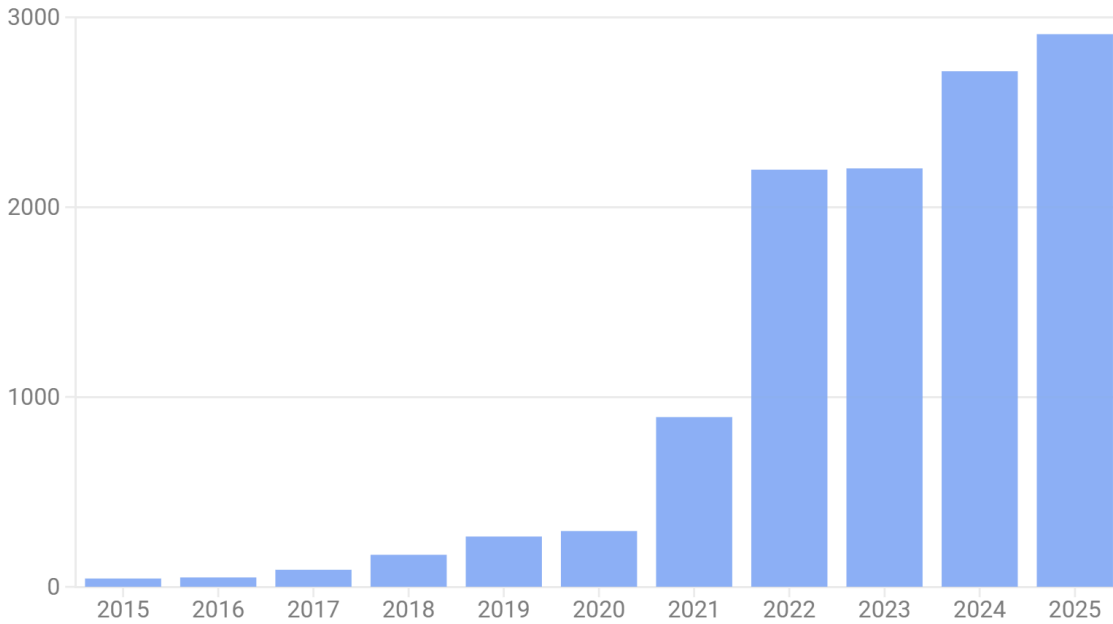
## 2. Electric cars have already saved 46 million barrels of oil in 2025

Today there are close to 8 million electric cars (BEVs) in the EU. Each of these electric cars replaces a combustion car and its associated oil consumption. The electric car fleet continues to grow rapidly, but already these existing electric cars are saving the EU **46 million barrels of oil imports in 2025 for a total value of €2.9 billion**. This would increase to €4.7 billion euros with oil prices observed in the 2022 energy crisis. The savings from these vehicles will continue

to accumulate each year for the next 15-20 years and exponentially increase as the number of electric cars on the road increase.

### In 2025, electric cars saved the EU €2.9 billion in crude oil imports

Avoided crude oil spending due to BEVs (million €)

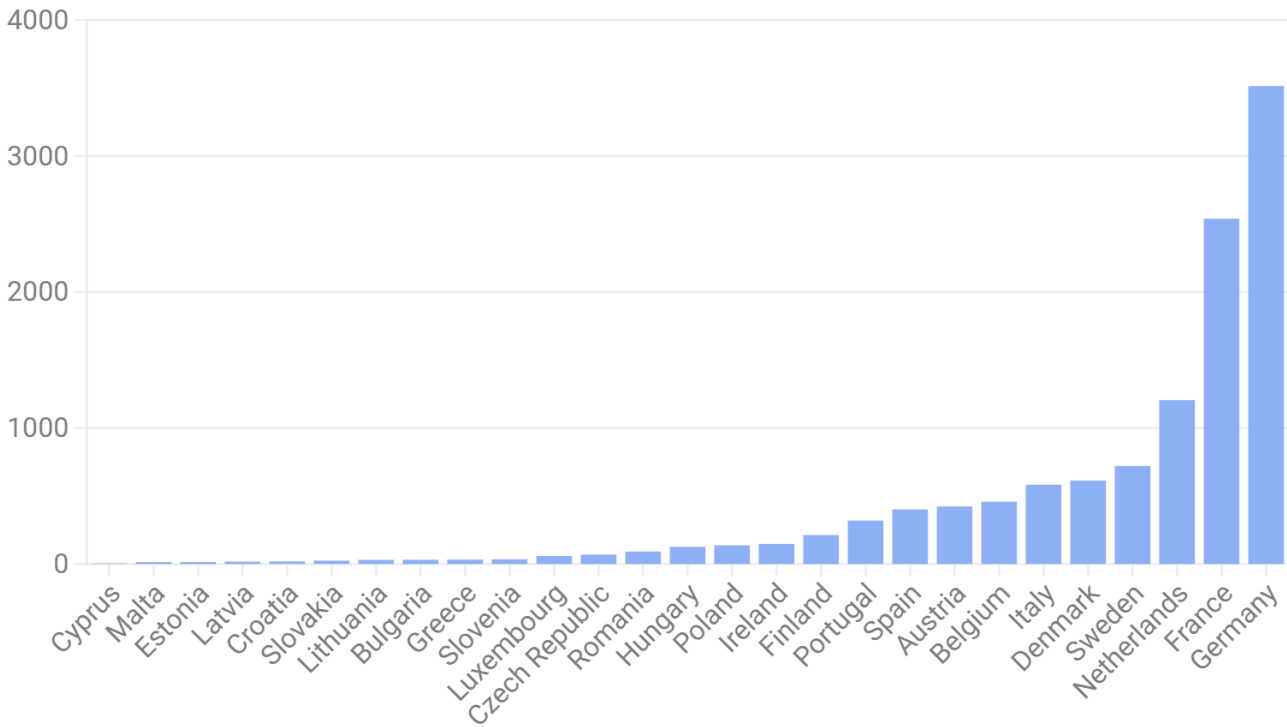


Source: T&E analysis, EAFO BEV fleet, Eurostat • Prices adjusted for inflation.

Since 2015, BEVs have saved a cumulative total of 156 million barrels of crude oil, equivalent to €12 billion. Large car markets with dynamic EV sectors are achieving considerable savings. For example, Germany's BEV fleet has enabled it to save 46 million barrels, equivalent to €3.5 billion in crude oil spending, while France has saved 33 million barrels, equivalent to €2.5 billion. Countries with slower BEV uptake, such as Italy and Spain, have achieved more limited savings, equivalent to €580 million and €400 million respectively. A country with a large car market and low BEV uptake, such as Poland, has saved close to €140 million in crude oil spending.

## In the past decade, BEVs saved the EU €12 billion in oil imports

Avoided crude oil import spending due to BEVs between 2015 and 2025 (million €)



Source: T&E analysis, EAFO BEV fleet, EU oil price from Eurostat. Prices adjusted for inflation.

### Electrification drives the growth in clean domestic energy

With more BEVs on the road and a rising share of low-carbon electricity, domestic low carbon (non fossil) electricity is increasingly being used in cars as a replacement of imported fossil fuels.

The total amount of domestic clean electricity used in cars in the EU saw a 8-fold increase from 2020 to 2025 (around 1 Mtoe). The rising BEV share of the fleet is responsible for 90% of the increase.

The EU countries with the most domestic low carbon electricity used in cars are large markets such as France, Germany, followed closely by smaller countries with high BEV penetration and low-carbon grids, like Norway and Sweden.

### 3. Weakening electrification ambition would increase oil imports by 613 million barrels of oil over 2026-2035

The European Parliament and EU Member States are currently discussing the automotive package proposed by the European Commission in December 2025. The outcome of these discussions will shape the future of the European automotive industry, and in particular the speed of the transition to electric vehicles.

T&E modelled possible outcomes for the automotive package based on five scenarios:

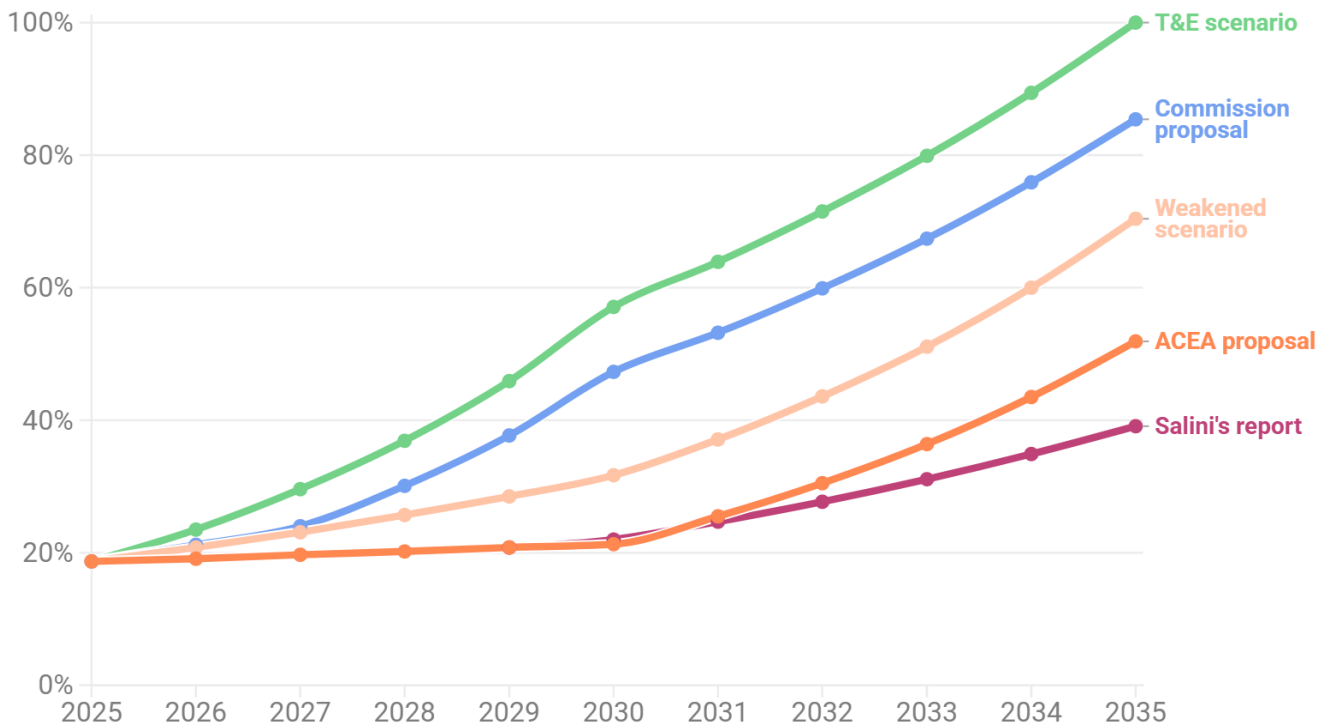
- **T&E scenario:** the EU safeguards the ambition of the 2030 car CO<sub>2</sub> target, excludes additional flexibilities, and implements stronger targets for corporate fleet electrification by 2030. The EU also maintains the 2035 phase-out of new combustion engine cars<sup>1</sup>. In this scenario there would be an additional 77 million BEVs on the road in 2035.
- **Commission scenario:** implementation of the automotive package as proposed by the European Commission (car CO<sub>2</sub>: 3 year average in 2030, small BEV supercredits and 90% target in 2035, combined with corporate fleet ZLEV targets). In this scenario there would be an additional 64 million BEVs on the road in 2035.
- **Weakened scenario:** the Commission proposal is further weakened, including some of the key demands advocated by the car industry, as presented in a previous [T&E analysis](#). This includes extended flexibilities in 2030 with a five-year averaging of the target, a freeze of the utility factor correction and the extension of the super-credit scope, the weakening the 2035 target to 80% and removal of corporate fleet ZLEV targets. In this scenario there are 26 million fewer electric cars on the road in 2035 than in the T&E scenario.
- **ACEA scenario:** In a [leaked position paper](#) analysed by T&E, ACEA proposes a long list of amendments, including averaging the 2030 target over five years, freezing the utility factor correction, introducing fuel and green steel credits as soon as possible, applying super-credits to all small BEVs regardless of their production location, adding an additional super-credit for highly efficient BEVs, and weakening the zero and low emission vehicle (ZLEV) benchmark. Regarding the 2035 target, ACEA has proposed weakening it to 80%, with 10% granted unconditionally and 10% based on fuel and material credits. They also want to allow sales of vehicles that run exclusively on so-called 'carbon-neutral fuels'.
- **Salini scenario:** The draft report by Massimiliano Salini MEP, the EU Parliament's lead on the revision of the car CO<sub>2</sub> targets was released in April. The EPP rapporteur's proposal goes beyond the ACEA position while replicating almost all of it's elements. For 2035, the

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<sup>1</sup> Assumption: large corporate fleet at 69% ZEVs in 2030 (full Commission proposal target is met with ZEV and PHEV are excluded from the scope) while the rest of the market (small and medium size fleet and price buyers) is at 50% BEV.

Salini report proposes a 73% reduction based on 10% granted unconditionally, 10% 'eligible' fuel credits, and 7% from green steel credits. Another difference with the ACEA proposal is that Salini's proposal does not include weakening the ZLEV benchmark, and instead proposes a different super-credit mechanism with a 1.5 multiplier for small BEVs made in Europe.

BEV sales share

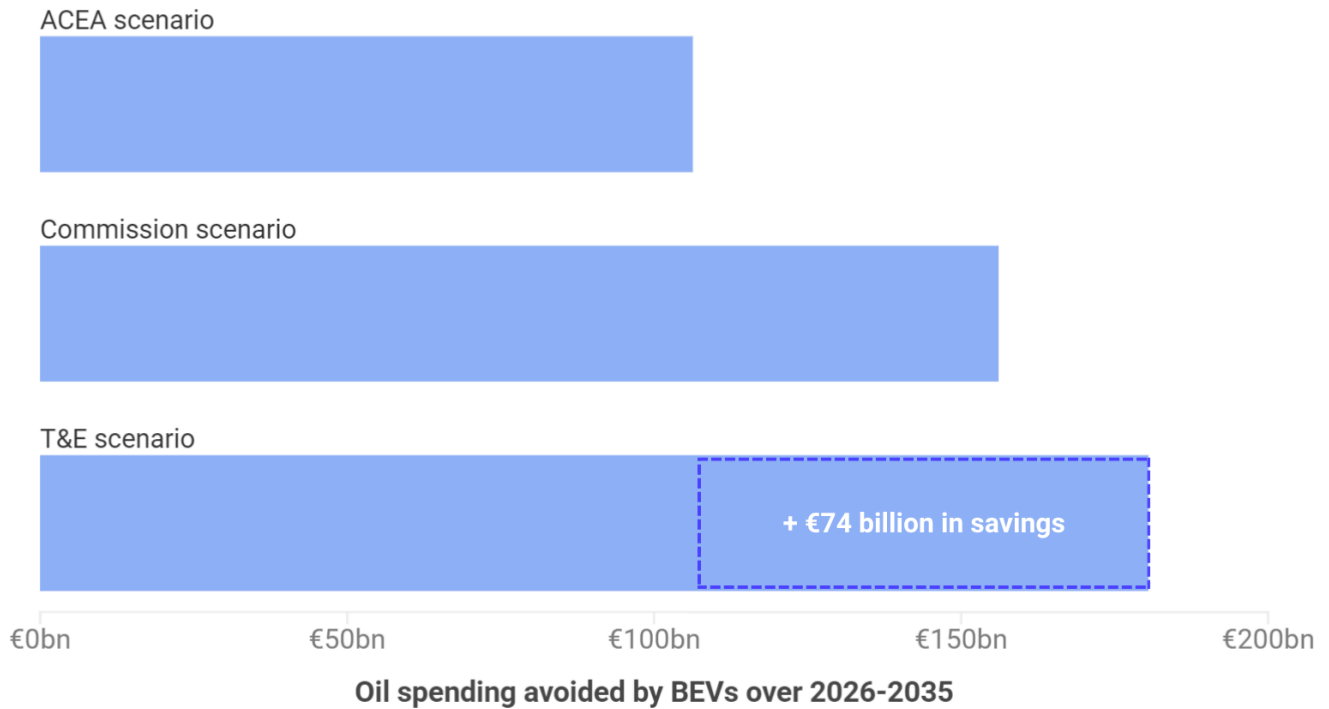


Source: T&E modelling

In addition, we model a **sensitivity scenario 'accelerated fleet turnover'**, where older and higher consumption combustion vehicles are replaced more quickly with new electric cars. This would expand the new car market and can be supported by policies such as scrappage schemes and stronger electrification targets for corporate fleets.

## Car industry's demands could cost EU €74bn extra in oil imports

Expected savings in the cost of crude oil as BEVs replace ICEs (excluding PHEVs)



Source: T&E modelling based on €82/barrel (average oil price over 2021-2025). Scope: EU27

Between 2026 and 2035, the BEV fleet would save 2.2 billion barrels of oil with a more ambitious EU Automotive Package (T&E scenario), which amounts to around €180 billion in oil import savings.

Weakening the ambition of car and corporate fleet regulations based on the ACEA demands would decrease oil saved by the BEV fleet by more than 900 million barrels between 2026 and 2035 compared to the T&E scenario. If the oil price were to quickly return to the low of €70/barrel price observed in the past three years, this would result in additional oil import expenses of €63 billion. However, oil prices are expected to remain dependent on geopolitical volatility. We conservatively estimate that the additional oil import expenses could reach at least €74 billion if prices remain similar to the 2021-2025 average (€82/barrel). This is equivalent to:

- 10 months of oil imports for cars (1.1 billion barrels per year for cars only).
- 22% of EU total military annual expenditure ([€343 billion in 2024](#))
- 38% of the total support the EU has given to Ukraine since the beginning of the war ([\\$197 billion](#))



At a national level, the weakening implied by ACEA demand leads to the need for significant additional oil spending over the next decade (compared to T&E scenario): €18 billion in Germany, €13 billion in France , €11 billion in Italy, €7 billion in Spain, and €42 billion in Poland.

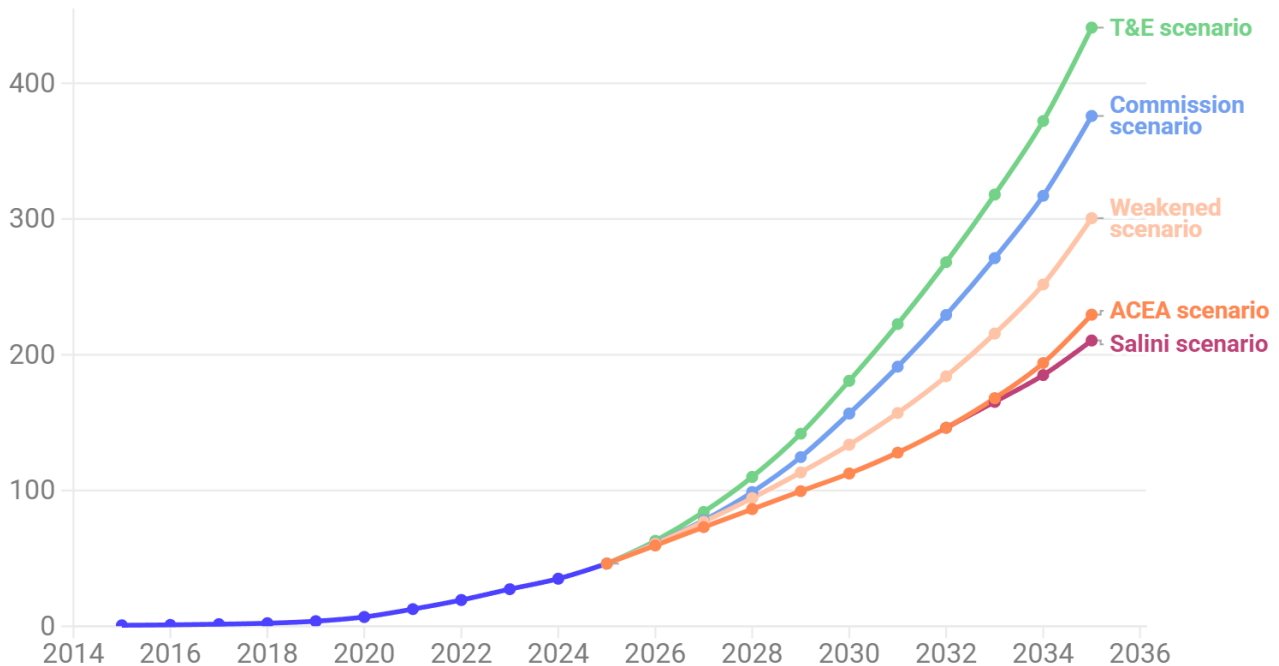
The results of the different weakening scenarios, including sensitivity to the oil price, are summarised in the table below, while additional spending for the largest car market are provided in Annex:

Scope: EU27	Oil savings (equivalent barrel of crude oil)		Oil savings based on €70/barrel (million EUR)		Oil savings based on €82/barrel (million EUR)	
	2026-2035 cumulative (billion barrels)	Additional vs T&E scenario (million barrels)	2026-2035 cumulative (billion EUR)	Additional vs T&E scenario (billion EUR)	2026-2035 cumulative (billion EUR)	Additional vs T&E scenario (billion EUR)
T&E scenario	2.2		154		181	
Commission scenario	1.9	298	133	21	156	24
Weakened scenario	1.6	613	111	43	130	50
ACEA scenario	1.3	905	91	63	106	74
Salini scenario	1.3	918	90	64	105	75

If accelerated fleet turnover is also implemented, an additional 200 million barrels could be saved over the 2026-2035 period, equivalent to €14 billion based on the €70/barrel scenario.

## T&E scenario would save Europe 2.2 billion barrels of oil imports in the next decade

Million barrels of crude oil imports avoided by BEVs



Source: T&E analysis, EAFO BEV fleet, Eurostat. Scope: EU27

### 4. Petrol cars drivers are 5 times more impacted by energy crises than EV drivers

Since the beginning of the energy crisis, both oil and natural gas prices have increased. As a result electricity prices in Europe are also expected to increase.

#### Crisis impact on consumer petrol prices

Before the start of the war in the Middle East, oil prices were 67 \$/barrel (Brent Crude Oil, 17 Feb), on March 9th, they surpassed 100 \$/barrel. By 6 April, EU pump prices had reached €2.11/L for diesel and €1.88/L for petrol – up 54 and 26 cents per litre respectively in the pre-conflict period.

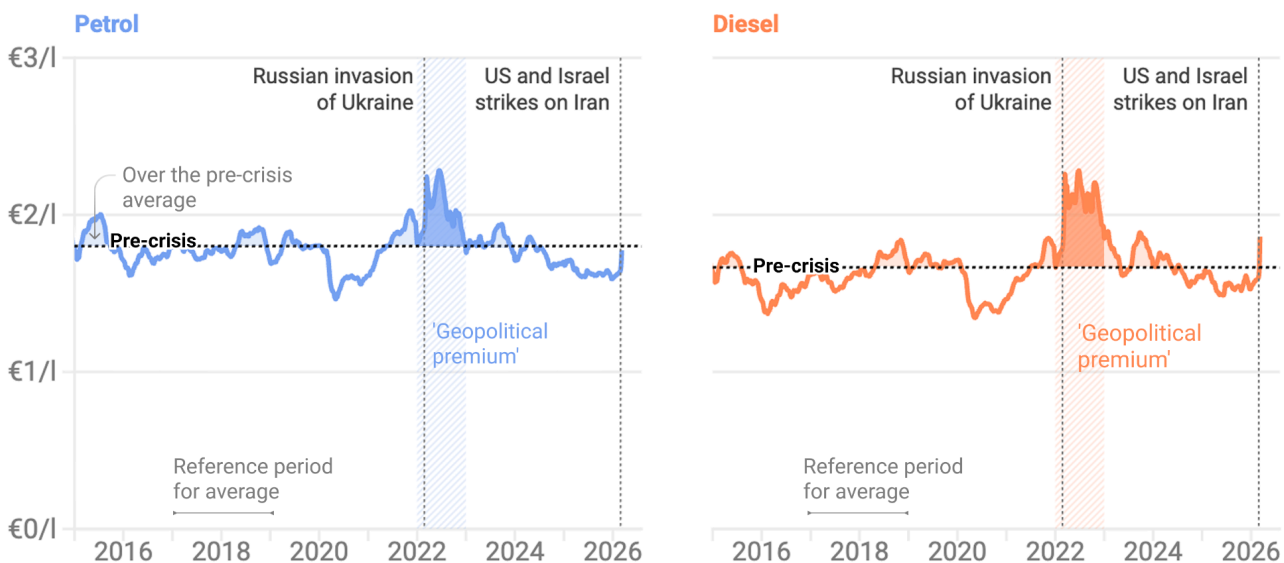
Given the geopolitical uncertainties, it is quite possible that oil prices could reach, or even exceed, a level as seen during the 2022 energy crisis. In our analysis, we have modelled two scenario:

- a first scenario based on the peak prices at EU scale observed in the first week of April, with petrol reaching €1.9/L at the pump and diesel reaching €2.1/L. This is a 15% increase in petrol price compared to the average 2025 price and a 36% increase in diesel price.

- a second scenario assuming a prolonged crisis where crude oil price would approach \$200/barrel. In this case, we have estimated that petrol could reach €2.2/L at the pump while diesel could approach 2.5€/L. This would be a further 16% increase in petrol and diesel prices.

## European drivers paid a €55bn 'geopolitical premium' in 2022

Fuel prices at the pump, corrected for inflation (in EUR 2026)



Source: Oil Bulletin, UNFCCC • Pre-crisis prices represent the 2017–2019 average, when crude oil traded at \$63 per barrel. Last updated 13/03/2026

### Crisis impact on consumer electricity prices

Since the start of the Iran conflict, gas prices have increased by 40% compared to the previous year. Given that wholesale electricity prices are heavily linked - despite the increased use of renewable energy in the power mix - to the gas prices, the EU average consumer electricity prices is likely to increase too<sup>2</sup>.

As observed during the 2022 energy crisis, we expect electricity prices for consumers to be only partly correlated to gas prices, so that the EU average consumer electricity price may increase to 323 €/MWh in the mid-term if the crisis is prolonged (12% increase compared to 289 €/MWh observed in 2025 according to Eurostat). Indeed for the 2022 crisis, while wholesale electricity prices spiked in 2022, the end consumer prices did not peak abruptly but progressively increased over a longer period. Given the usual delay, the impact on electricity prices might not be perceivable at the start of April, but we have assumed that, in the worst case, electricity

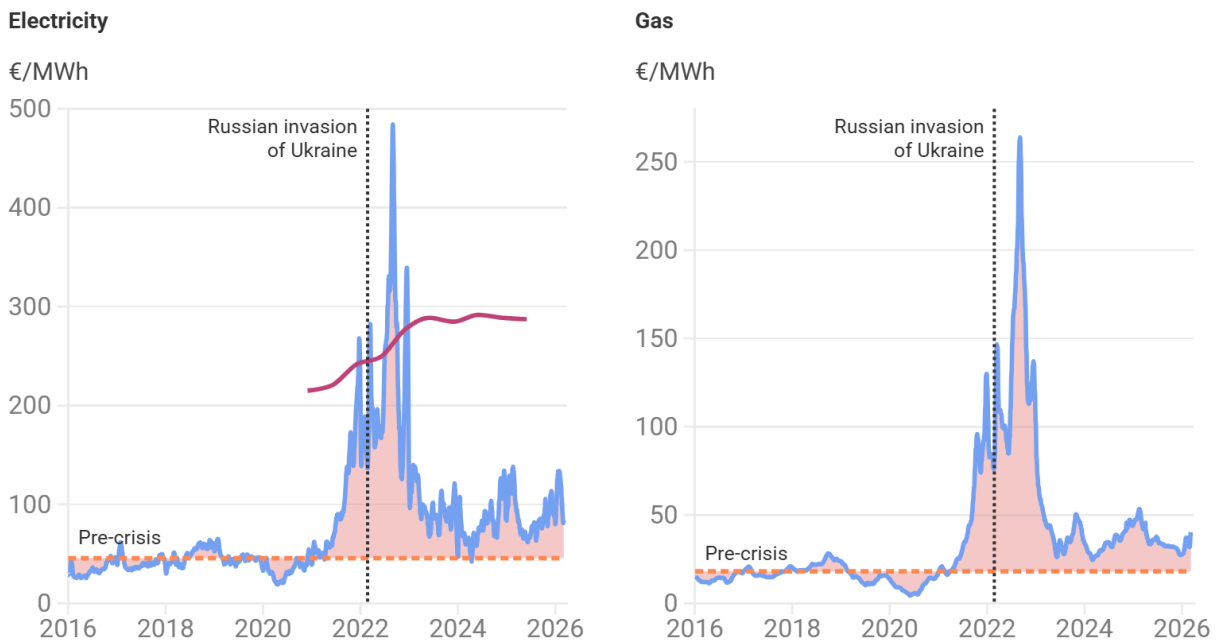
<sup>2</sup> This problem is widely recognised and in a speech in the European Parliament on the 11th March, President von der Leyen, stated "it is crucial that we reduce the cost impact, when gas sets the electricity price" [ec.europa.eu](https://ec.europa.eu)

prices for consumers would likely not exceed 306 €/MWh (a 6% increase compared to the 2025 average).

## European wholesale electricity prices mirror gas quotations

Electricity and gas saw a 89% and 100% increase in wholesale price respectively after the Ukraine war compared to previous years

Wholesale price   pre-crisis average   Retail Price



Source: T&E analysis, EMBER, Investing.com, Eurostat

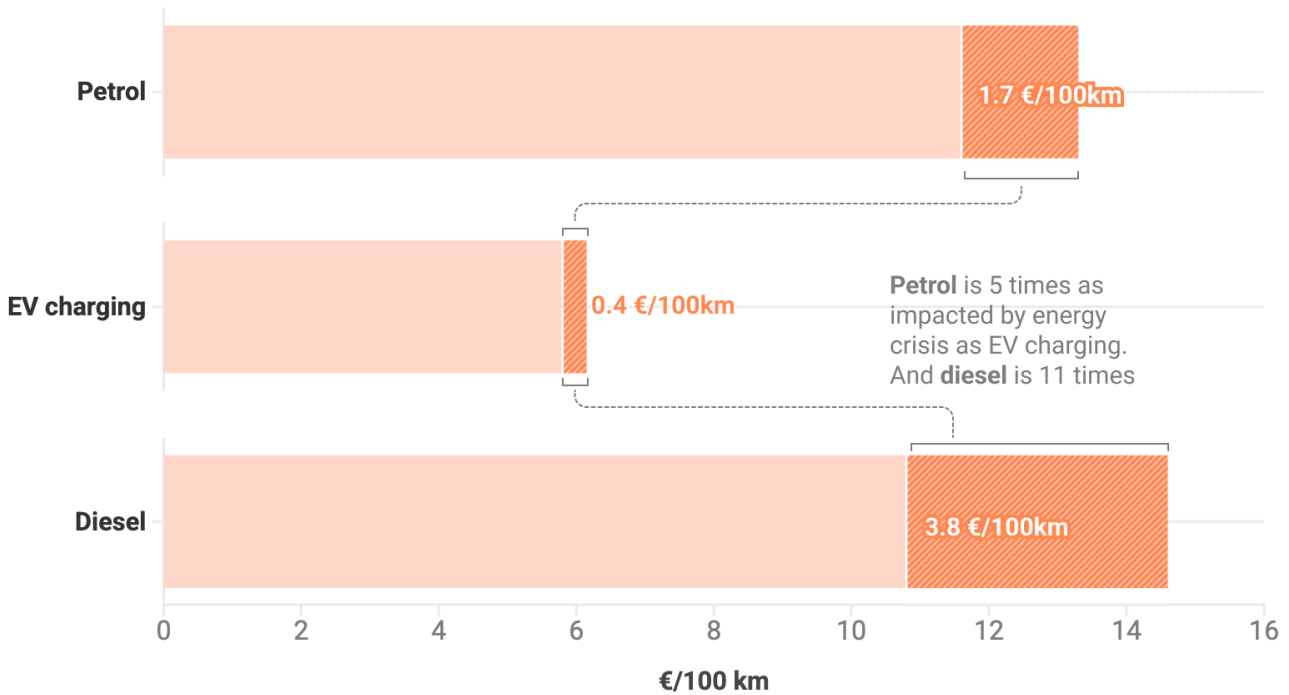
## Electric cars vs petrol cars at the temporary peak in early April 2026

In early April 2026, the crisis premium was five times higher for petrol cars and PHEVs than for BEVs, and 11 times higher for diesel cars. At the EU level, the use phase price of an average new petrol car was €13.3/100 km in early April, compared to €11.6/100 km in 2025. This implies a crisis premium of €1.7/100 km during this April peak. For diesel cars, the premium reached €3.8/100km (an increase in the use phase price from €10.8/100km in 2025 to €14.6/100km in early April). This results in a monthly cost of €133 for petrol cars and €146 for diesel ones.

By comparison, the use phase price of an average BEV with home charging was €6.2/100 km in a scenario where the electricity price increased by 6% by early April, compared to €5.8/100 km in 2025. This is equivalent to a temporary premium of €0.35/100 km for BEVs and results in a monthly cost of €62 per month for charging. Using official real-world fuel consumption data for PHEVs collected by the European Environment Agency (EEA), we found that PHEVs are more costly to drive than petrol cars in any scenario. The use phase price is €12.7/100 km in 2025, increasing to €14.5/100 km in early April 2026, implying a temporary crisis premium of €1.8/L.

## Petrol cars five times more affected by energy crisis than EVs

Normal energy prices April 2026 premium



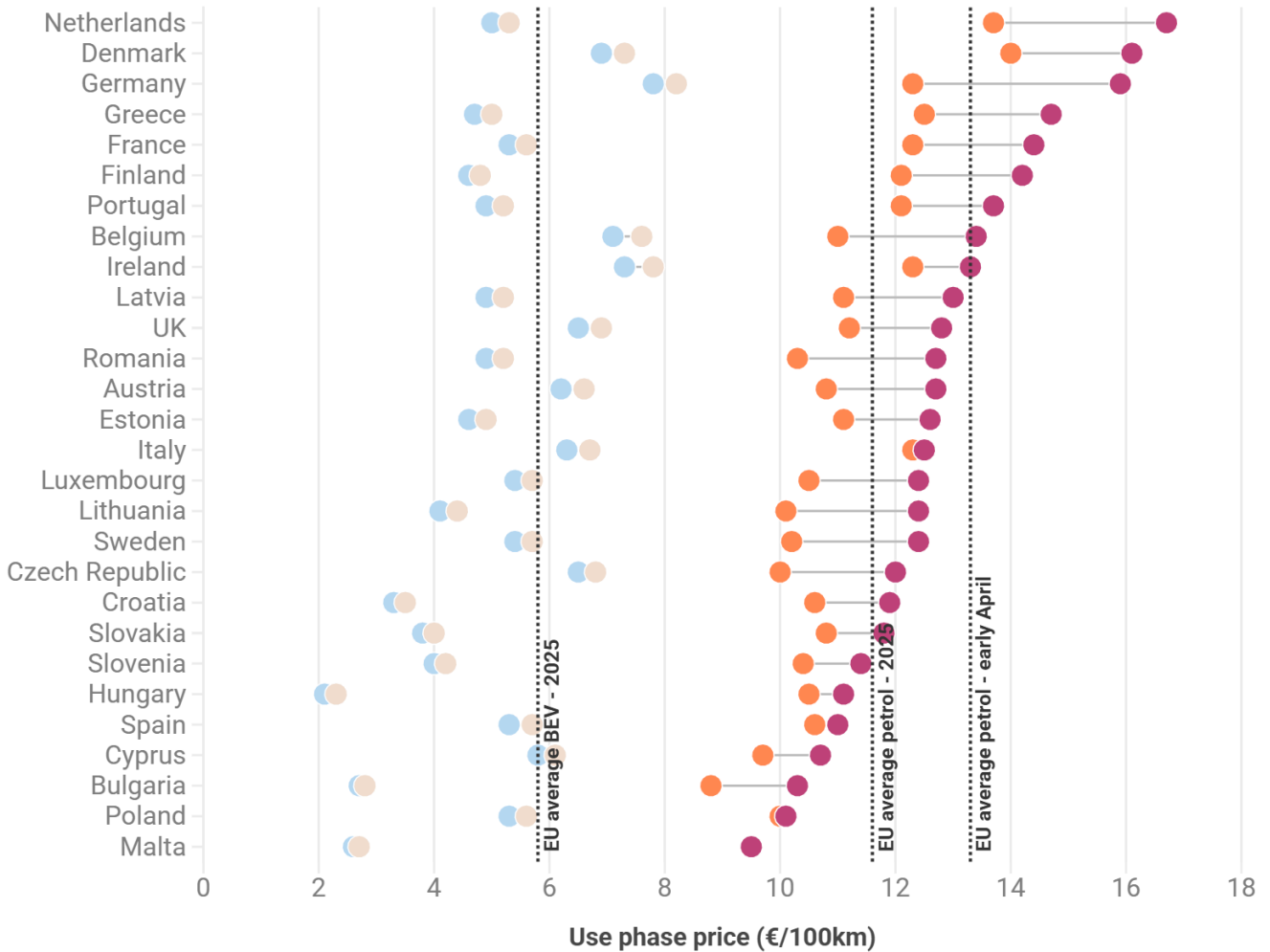
Source: T&E analysis

For high mileage corporate cars (assuming 28,000 km per year), the expected crisis premium reaches €39 per month for petrol versus €8 for BEVs. This premium brings the monthly running costs to €306 for a petrol car and €143 for a BEV, thus yielding a total monthly saving of €163.

At national level, we observed more variation in the crisis premium given the difference in taxation per country. In large car markets, the use phase price of petrol cars reached €15.9/100km in Germany, €14.4/100km in France, €13.4/100km in Poland, €11/100km in Spain and €10.1/100km in Italy.

## On average, petrol cars were five times more affected by energy crisis than BEVs in early April 2026

● Petrol cars - 2025 ● Petrol cars - early April 2026 ● BEVs - 2025 ● BEVs - assumed price increase



Source: T&E analysis, Eurostat (2025 electricity price), Oil Bulletin (fuel prices), Office for National Statistics (UK data). Scenario assuming a 6% increase in electricity prices in April 2026.

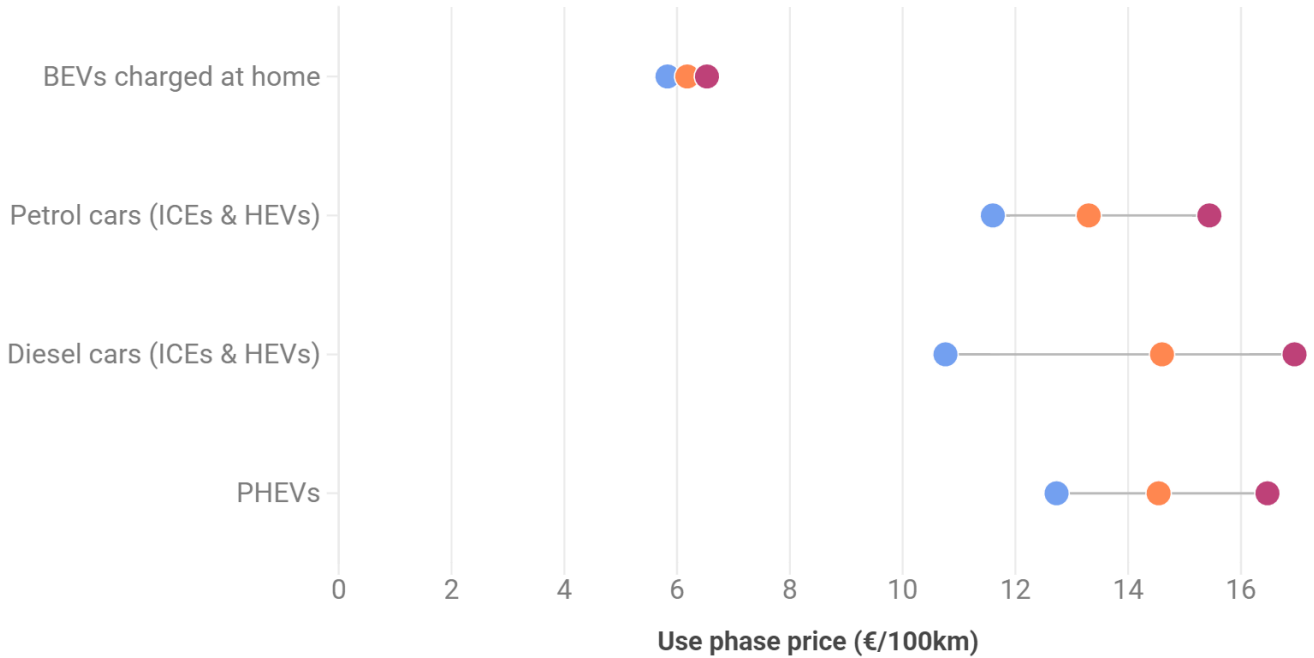
### Electric cars vs petrol cars in a prolonged crisis

In a prolonged crisis, petrol cars are expected to be more impacted by the oil crisis than BEVs, with a 24% increase in use phase costs compared to an 12% increase for BEVs.

Based on the expected energy prices in the situation of prolonged crisis, we calculate that a new gasoline car would cost €154 over a month (€15.4/100km), or €38 more than in a 'normal' energy price situation. In comparison, an average medium BEV would cost €65 over one month in a prolonged crisis (€6.5/100km). This is a crisis premium of only €7, or five times lower than for a petrol car. This results in a €31 monthly saving on top of the €58 savings from BEVs under normal energy prices.

## Petrol cars five times more affected by energy crisis than BEVs

Price range ● 2025 ● Start of April 2026 ● Prolonged crisis



Source: T&E analysis, Eurostat (2025 electricity price), Oil Bulletin (fuel prices). Scenario assuming a 6% increase in electricity prices in April 2026. Prolonged crisis scenario: gasoline at 2.2€/L, diesel at 2.5€/L, 12% increase in electricity price vs 2025.

For high mileage corporate cars, the expected crisis premium reaches €90 for petrol versus €16 for BEVs, or a €73 monthly saving for BEVs, on top of the monthly €135 savings under normal energy prices in 2025.

	€/100 km		€/month			
	ICE	BEV	ICE corporate	BEV corporate	ICE average/private	BEV average/private
<b>Expected 'energy crisis' prices<sup>3</sup></b>	15.4	6.5	360	152	154	65
<b>'Normal' energy prices (2025)</b>	11.6	5.8	271	136	116	58

<sup>3</sup> The petrol price is based on the 2022 average, when crude oil prices averaged \$109 per barrel. The electricity price is based on T&E estimates, considering a 12% increase compared to H1 2025 electricity prices.

<b>Expected 'crisis premium'</b>	3.8	0.7	90	16	38	7
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Overall, the energy price for BEVs is expected to be 58% lower than for a gasoline car during a prolonged energy crisis (50% in under 2025 energy prices) which highlights the benefits of electric cars both in terms of energy cost reduction but also resilience against energy price volatility.

**Lesson from Ukraine war - 'geopolitical premium' fuels fossil fuel profits**

In 2022, EU member states experienced some of the highest rises in petrol and diesel prices on record. After the Russian invasion of Ukraine, oil prices exceeded \$100 a barrel, reaching \$115 at the end of the month of May. As a result, across the EU by mid-2022, diesel prices were up 45%, and petrol increased by 36% ([T&E briefing](#)). Towards the end of June 2022, petrol and diesel prices at the pump exceeded €2 per litre meaning drivers were spending €24 to €31 more to fill up a 50 litre engine than they were in pre-crisis times (2017-2019), accounting for inflation.

The European Commission estimates that in 2022, the total subsidy to fossil fuels increased to €136 billion, of which €107 billion went to oil and gas consumers. More than half were spent as a direct response to the energy price crisis. €136 billion could have replaced 4.3 million diesel cars with affordable EVs (€25,000) which would have reduced the EU's oil dependency by 70,000 barrels of crude oil a day and save the continent \$2.5 billion a year in oil imports, assuming \$100 per barrel. Higher world market prices mean more profits for the fossil fuel sector. EU oil and gas companies earned about €104 billion in profits in 2022, a 45% increase compared to 2021.

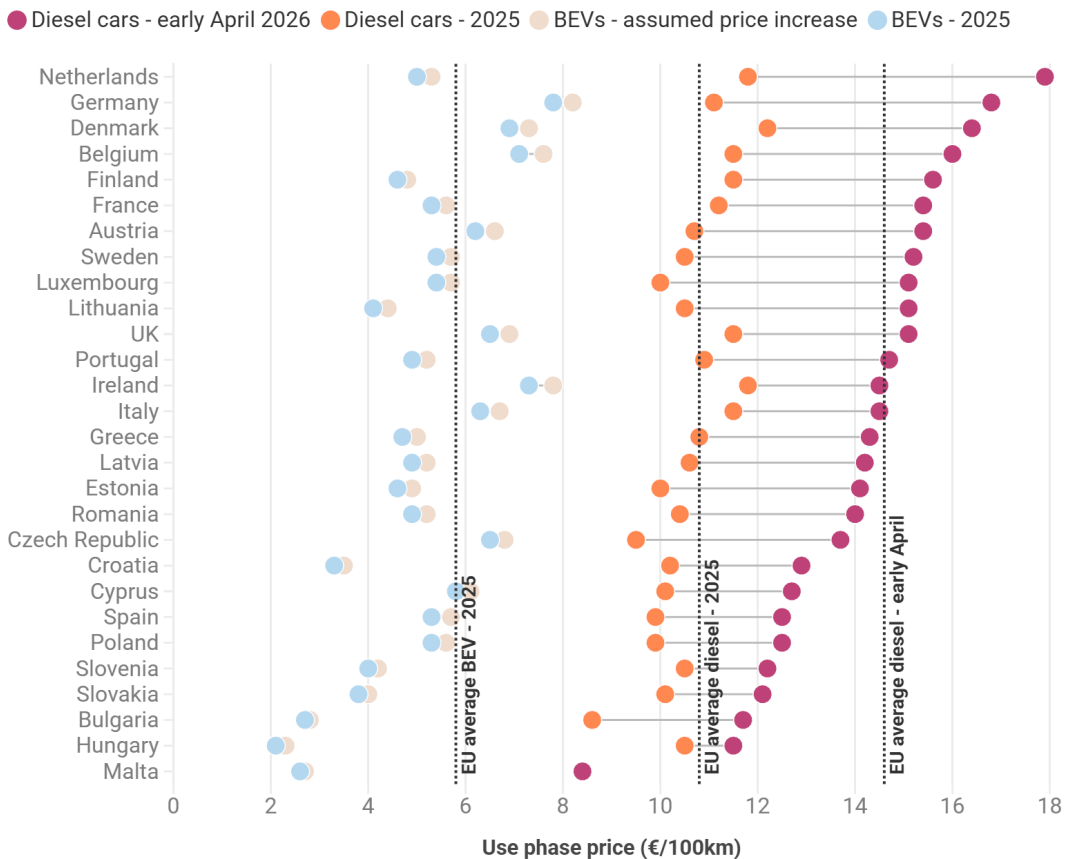
## Annex

**Additional spending on crude oil imports over the period 2026–2035 compared to T&E scenario, based on an oil price of €82/barrel:**

Billion €	Commission proposal	Weakened scenario	ACEA scenario	Salini scenario
France	3	9	13	14
Germany	5	12	18	19
Italy	3	8	11	11
Poland	1	3	4	4
Spain	2	5	7	8

### Electric cars vs diesel cars at the temporary peak in early April 2026

**On average, diesel cars were 11 times more affected by energy crisis than BEVs in early April 2026**



Source: T&E analysis, Eurostat (2025 electricity price), Oil Bulletin (fuel prices), Office for National Statistics (UK data). Scenario assuming a 6% increase in electricity prices in April 2026.

## Methodology:

- **Oil savings:** We estimate the uptake of BEVs in the EU27 passenger car fleet based on the projected BEV sales in each policy scenario using a simplified turnover model. We then assume that each BEV replaces a new combustion engine car sales, taking into account the real-world fuel consumption of an average vehicle. This average includes conventional petrol and diesel cars and hybrid electric vehicles, but excludes plug-in hybrid electric vehicles. We project that the average fuel consumption of new ICE vehicles would decrease by 1.1% per year between 2025 and 2034. The average annual mileage is 12,000 km, and the modelling includes a mileage change depending on the age of the car on the road, with an average reduction of 3% per year. We consider a refining efficiency of 93% to derive the quantity of crude oil from the total fuel consumed. To derive the total oil import savings, we have considered two scenarios:
  - Low scenario: If the oil price were to quickly return to the low of €70/barrel price observed in the past three years and would stay constant up to 2035
  - Central scenario: a conservative price of €82 per barrel, based on the average of the past five years (2021–2025).
  - As a reference, the European Commission forecasts the oil price to increase to €92/barrel in 2030 and €105/barrel in 2040 (both expressed in 2025€ here) in the car CO2 review impact assessment ([Table 8](#)).
  
- **Use phase price:**
  - Real-world emissions for cars registered in 2023, based on [on-board fuel consumption meter \(OBFCM\) data](#) collected by the EEA:
    - Petrol ICE+HEV: 7.1 L/100km
    - Diesel ICE+HEV: 6.9 L/100km
    - PHEV with 2.9 L/100km and 18.9 kWh/100km in charge-depleting mode (41.5% of the driven mileage), 8.2 L/100km in charge-sustaining mode (54.8% of the driven mileage) and 19.9 L/100km in charge-increasing mode (3.6% of the driven mileage)
  - Average BEV electricity consumption: 20.2 kWh/100km from [ICCT](#)
  - Fuel prices (EU level) according to the [EU oil bulletin](#):
    - Petrol: 1.6 €/L in 2025 and 1.9 €/L early April 2026 (oil bulletin date: 06/04/2026)
    - Diesel: 1.6 €/L in 2025 and 2.1 €/L in early April 2026
  - Fuel prices (UK level) according to the [Weekly road fuel prices](#):
    - Petrol: 1.6 €/L in 2025 and 1.8 €/L early April 2026 (date: 06/04/2026)
    - Diesel: 1.7 €/L in 2025 and 2.2 €/L in early April 2026
  - Electricity price from [Eurostat](#): €289/MWh in 2025 (EU level)
  - Electricity price from [gov.uk](#): €320/MWh in 2025 (UK level)

- Prolonged crisis scenario assumption:
  - Petrol: 2.2 €/L
  - Diesel: 2.5 €/L
- Electricity price scenario:
  - 12% increase vs 2025 in a prolonged crisis
  - 6% increase vs 2025 assumed in April 2026 in a worst-case scenario. (In practice, the electricity paid by households may not yet be impacted by the crisis, as there is a delay between wholesale price increases and retail price increases for households.)

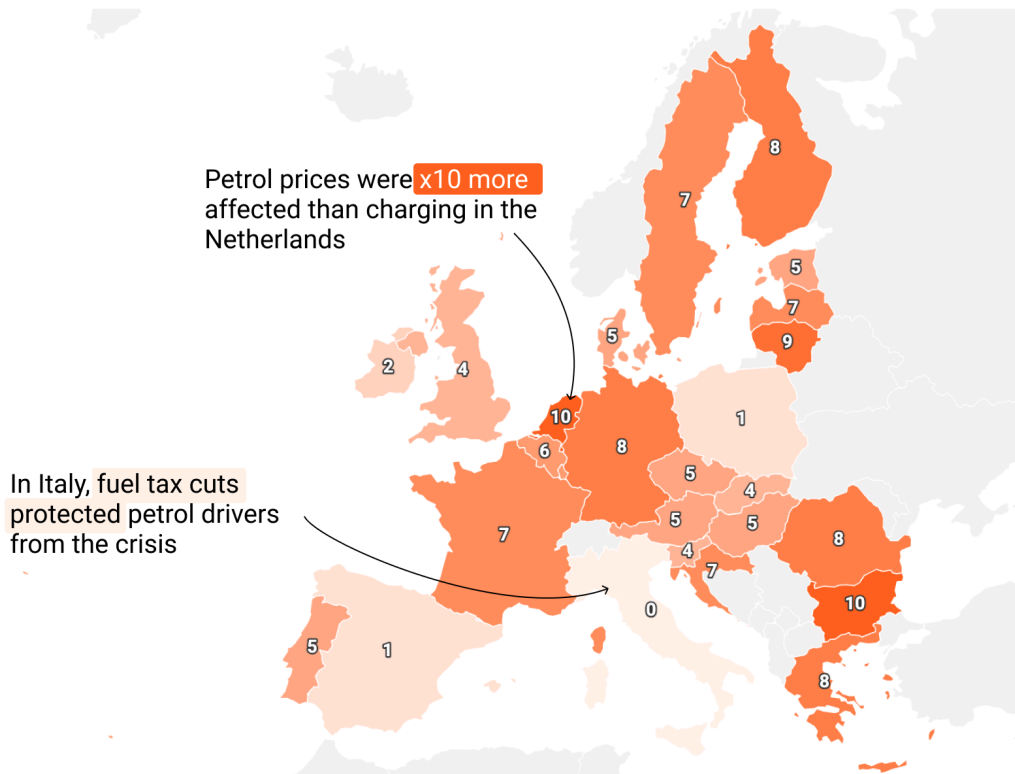
- **Use cost premium national breakdown**

Country	Gasoline €/100km - 2025	Gasoline €/100km - peak	Diesel €/100km - 2025	Diesel €/100km - peak	BEV €/100km - 2025	BEV €/100km - short crisis assumptio n	Petrol vs BEV crisis premium	Diesel vs BEV crisis premium
Netherlands	13.7	16.7	11.8	17.9	5.0	5.3	10	20
Denmark	14.0	16.1	12.2	16.4	6.9	7.3	5	10
Germany	12.3	15.9	11.1	16.8	7.8	8.2	8	12
Greece	12.5	14.7	10.8	14.3	4.7	5.0	8	13
France	12.3	14.4	11.2	15.4	5.3	5.6	7	13
Finland	12.1	14.2	11.5	15.6	4.6	4.8	8	15
Portugal	12.1	13.7	10.9	14.7	4.9	5.2	5	13
Belgium	11.0	13.4	11.5	16.0	7.1	7.6	6	10
Ireland	12.3	13.3	11.8	14.5	7.3	7.8	2	6
Latvia	11.1	13.0	10.6	14.2	4.9	5.2	7	12
Romania	10.3	12.7	10.4	14.0	4.9	5.2	8	12
Austria	10.8	12.7	10.7	15.4	6.2	6.6	5	13
Estonia	11.1	12.6	10.0	14.1	4.6	4.9	5	15
Italy	12.3	12.5	11.5	14.5	6.3	6.7	0	8
Luxembourg	10.5	12.4	10.0	15.1	5.4	5.7	6	16
Lithuania	10.1	12.4	10.5	15.1	4.1	4.4	9	19
Sweden	10.2	12.4	10.5	15.2	5.4	5.7	7	15
Czech Republic	10.0	12.0	9.5	13.7	6.5	6.8	5	11
Croatia	10.6	11.9	10.2	12.9	3.3	3.5	7	13
Slovakia	10.8	11.8	10.1	12.1	3.8	4.0	4	9
Slovenia	10.4	11.4	10.5	12.2	4.0	4.2	4	7

Hungary	10.5	11.1	10.5	11.5	2.1	2.3	5	8
Spain	10.6	11.0	9.9	12.5	5.3	5.7	1	8
Cyprus	9.7	10.7	10.1	12.7	5.8	6.1	3	8
Bulgaria	8.8	10.3	8.6	11.7	2.7	2.8	10	19
Poland	10.0	10.1	9.9	12.5	5.3	5.6	1	8
Malta	9.5	9.5	8.4	8.4	2.6	2.7	0	0
UK	11.2	12.7	11.5	15.1	6.5	6.9	4	9

## Petrol prices up to 10 times more affected by energy crisis than EVs

BEV savings vs petrol cars: 1x 10x



Source: EU weekly oil bulletin and UK government (06/04/26), electricity price scenario (+6% vs 2025)