



BRIEFING

Electric Light Commercial Vehicles: Europe's next industrial test

Why Europe must accelerate the shift to electric Light Commercial Vehicles instead of further weakening its CO₂ trajectory

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Summary

Electric LCVs are reaching a tipping point: their market share in the EU reached 11% in 2025 and **registrations grew by 68% in a single year**. Buyers now have access to more electric models than conventional ones (61 vs. 54), while electric vans can already offer up to **14% lower total ownership costs than diesel equivalents**.

At the same time, competition is intensifying. Chinese manufacturers are expected to account for **18 of the 64 electric van models available in Europe by 2027**, while already narrowing the price gap with European competitors to as little as 3%. European manufacturers have underinvested in the transition, with dedicated **EV platforms accounting for just 18% of their electric van production in 2025, compared with 49% in China**, limiting their ability to compete on cost and performance.

The industry demands to delay the electric van transition directly conflict with Europe's industrial and climate objectives. Our analysis shows that **the current CO₂ trajectory is within reach and does not justify any further weakening of the ambition**. Maintaining ambitious CO₂ standards, combined with public support for electric LCVs produced in Europe under Article 4 of the Clean Corporate Vehicles Regulation, could **make the EU a global leader in electric van manufacturing, surpassing 40% electric production by 2030**.

Large companies' LCV fleets have an essential role to play in the transition. While they account for 55% of new LCV registrations, they purchase 75% of electric LCVs. The Clean Corporate Vehicles Regulation is a step in the right direction, but its proposed targets, 37% electric sales in 2030 and 80% in 2035, **remain less ambitious than the trajectory required under the CO₂ standards**.

Key recommendations

T&E recommends that EU policymakers:

- **Keep the Commission's CO₂ trajectory as a minimum and reject further weakening**

The Commission has already proposed to reduce the ambition of the LCV CO₂ trajectory. Any further weakening would delay investment, slow down electric LCV (especially vans) production and benefit Chinese competitors. **The EU should maintain the Commission's proposed trajectory as a minimum**. In particular, flexibilities around biofuels, 5 year target average or weaker PHEV emission accounting should be rejected.

- **Strengthen the Clean Corporate Vehicles Regulation targets**

Large companies should lead the LCV transition. The proposed targets are too weak and risk merely following the market. The EU average 2030 target should be increased from 37%

to 46% in 2030 and from 85% to 99% in 2035. Plug-in hybrid LCVs should be excluded from the scope of the regulation.

- **Preserve Article 4 on public support for clean, European-made LCVs**

Public money should support the transition to clean vehicles and European industrial capacity. Article 4 should be maintained to ensure that subsidies and fiscal incentives are reserved for electric LCVs produced in Europe. Plug-in hybrid LCVs should be excluded from the scope of the regulation.

Electric LCVs are a market reality

1.1 A strategic European market entering a fast transition

LCVs, and especially vans, are a typically European vehicle segment. According to ACEA data, 1.4 million vans were registered in the EU in 2025, making it the largest van market in the world. Demand is concentrated in a few major markets: France and Germany alone account for 43% of the European market, with France representing 25% of LCVs registrations in 2025 and Germany 18%. Italy and Spain follow with 13% each.

The distinction between a light commercial vehicle (LCV) and a van

Throughout the briefing, “LCV” refers to the full N1 vehicle category, including vans, pick-ups, small utility vehicles and passenger car-derived vans. “Van” refers specifically to the van segment within that category, which accounted for more than 83% of LCV sales in Europe in 2025. References to regulatory targets and ACEA market data therefore generally use the term LCVs, reflecting the scope of the legislation and available datasets. However, where industrial, technological or competitiveness considerations differ across vehicle types, the analysis focuses specifically on vans, which dominate the European LCV market.

The transition of light commercial vehicles to electric is essential for the climate and for air quality. According to the [Joint Research Center's 2023 Integrated Database of the European Energy System](#), LCVs account for 13% of road transport greenhouse gas emissions in the EU and contribute significantly to air and noise pollution, especially in cities. Despite progress in recent years, the decarbonisation of LCVs remains slower than that of cars, and the fleet is still overwhelmingly dependent on diesel.

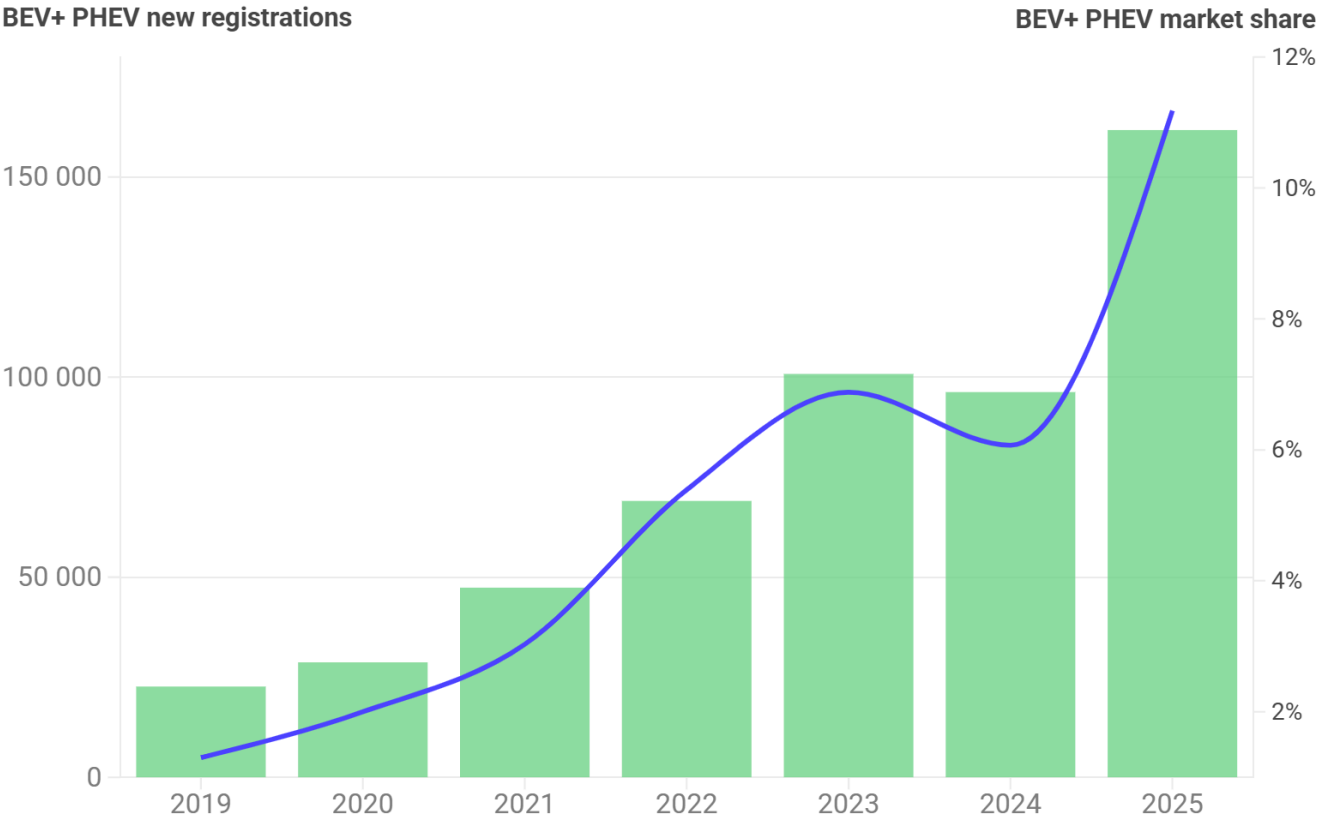
Electrification levels still vary significantly across Member States. Nordic countries are leading the transition: ACEA data shows electrically chargeable vans accounted for 32% of new LCV sales in Denmark and 29% in Sweden in 2025. This clearly demonstrates that a rapid transition to electric LCVs is possible. Countries that have traditionally lagged behind in charging infrastructure deployment, such as Italy and Spain, record low levels of electrification, at 5% and 9%, respectively, in 2025. The largest markets, France and Germany, at 11% in 2025, sit between these two groups.

Overall, electric LCVs represented 11% of the European market in 2025 and 12% in the first quarter of 2026. The trend is now very positive for electric LCVs: their registrations increased by 68% between 2024 and 2025. This momentum is expected to continue in 2026. Germany recorded an impressive 83% increase in electric LCV sales in Q1 2026 compared with Q1 2025.

France has significantly increased purchase support for electric LCVs in its “electrification plan” in June 2026. The Spanish EV purchase aid scheme “Programa Auto+” covers LCVs and is expected to come into force in summer 2026.

The electric LCV market is gaining momentum in the EU

BEV+PHEV share BEV + PHEV



Source: ACEA • ACEA data include BEV and PHEV powertrains in the electrically chargeable category. Cross-referencing other datasets (EV-Volumes) allows to infer the PHEV share, which is below 1% in 2025. **T&E**

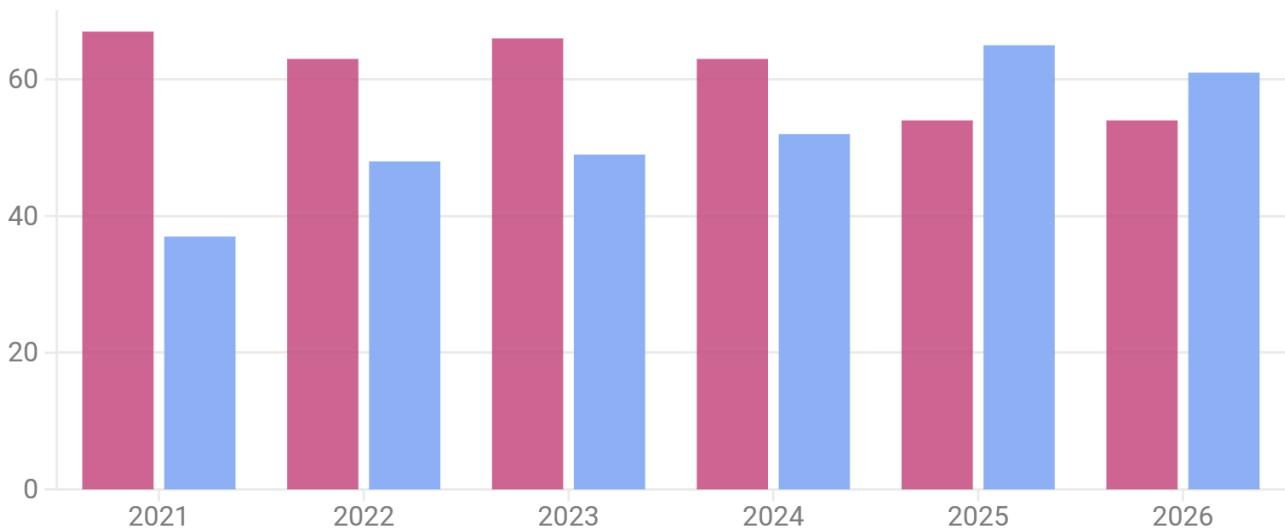
1.2 Electric LCVs: a technology ready for scale

The technological case for LCV and especially van electrification is now firmly established. Suitable electric models are available for the overwhelming majority of use cases, offering businesses a credible pathway to reduce both operating costs and emissions. The analysis of the [GlobalData Hybrid and Electric Vehicles Sales Forecast](#) shows that, since 2026, van buyers have had more electric models to choose from than conventional models: 61 battery electric models compared with 54 models with a combustion or hybrid powertrain.

The offer of electric vans has increased significantly in the last 5 years

ICE models BEV models

Number of van models sold in the EU



Source: T&E Analysis, EV-Volumes, GlobalData



The economics of electric vans are improving rapidly. Despite still higher upfront purchase prices compared to diesel, their total cost of ownership (TCO) is now significantly more competitive across a wide range of use cases.

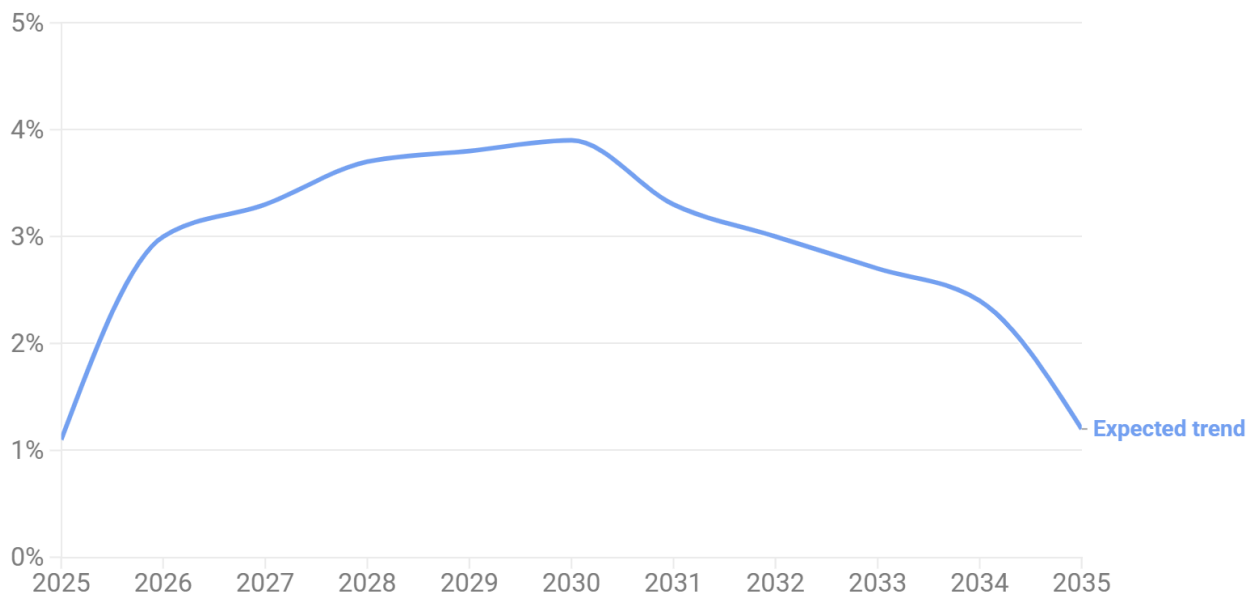
In France for example, the recent increases in purchase incentives have further improved the business case for electric vans. A recent [study](#) by Carbon 4 has shown that, compared with diesel models, electric vans now deliver a TCO advantage of 11% for small urban delivery vans, 12% for medium-sized vans used by tradespeople, and up to 14% for heavy-duty construction vans. This trend toward rapid improvement in the TCO of electric vans is also confirmed by Arval's latest [study](#).

PHEVs for LCVs

Plug-in hybrid technology has remained far more marginal in the LCV market than in the passenger car sector, accounting for less than 1% of registrations in 2025. As with passenger cars, plug-in hybrid LCVs generally suffer from a weaker total cost of ownership and deliver limited environmental benefits in real-world operation. In addition, they face a significant drawback specific to commercial vehicles: the dual powertrain substantially reduces payload capacity, directly affecting their operational usefulness.

As a result, plug-in hybrid LCVs offer limited value as either an industrial or decarbonisation pathway. Market projections from GlobalData reinforce this assessment, with their market share expected to remain below 4% through 2035. Public policies should therefore focus on accelerating the deployment of full electric LCVs, which represent the only long-term technology pathway to decarbonize this sector.

Plug-in hybrid technology falls short for LCVs



Source: Analyse T&E, GlobalData, EV-Volumes



Europe must maintain its electrification ambition to remain an industrial leader

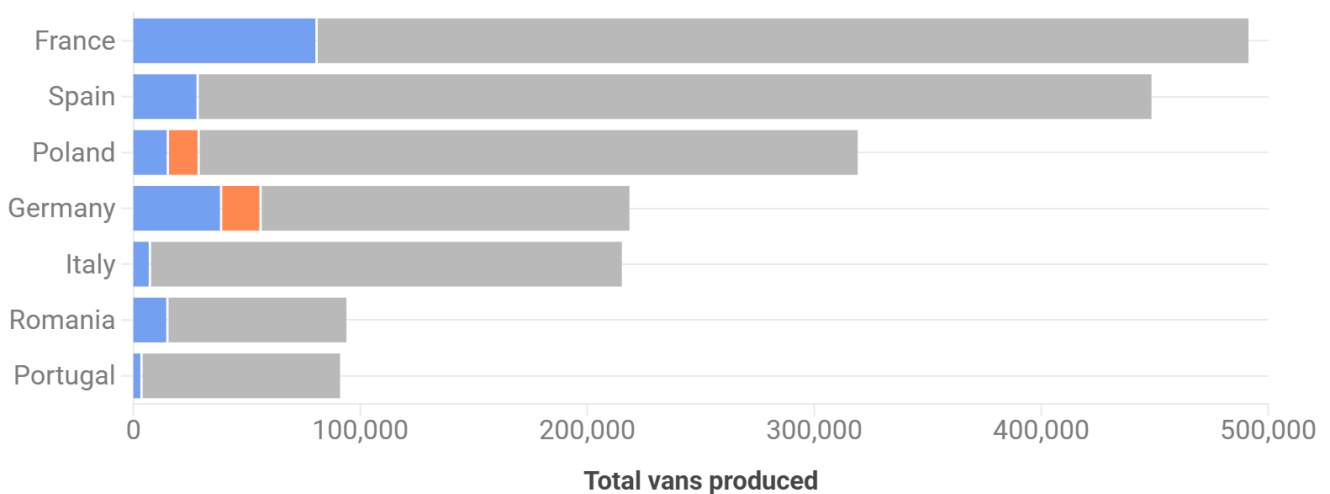
2.1 Europe's lead in electric van manufacturing is under growing pressure from China

Vans are a major industrial asset for the EU, with 25 factories producing vans across the continent. Europe produced nearly 1.9 million vans in 2025, mainly in France, Spain and Poland, which accounted for 26%, 24% and 17%, respectively, of total EU production. The European van industry supports a significant number of industrial jobs across assembly, components, maintenance and aftersales.

Europe is a global leader in van manufacturing

2025

BEV PHEV ICE



Source: T&E analysis based on GlobalData light vehicle production forecasts.



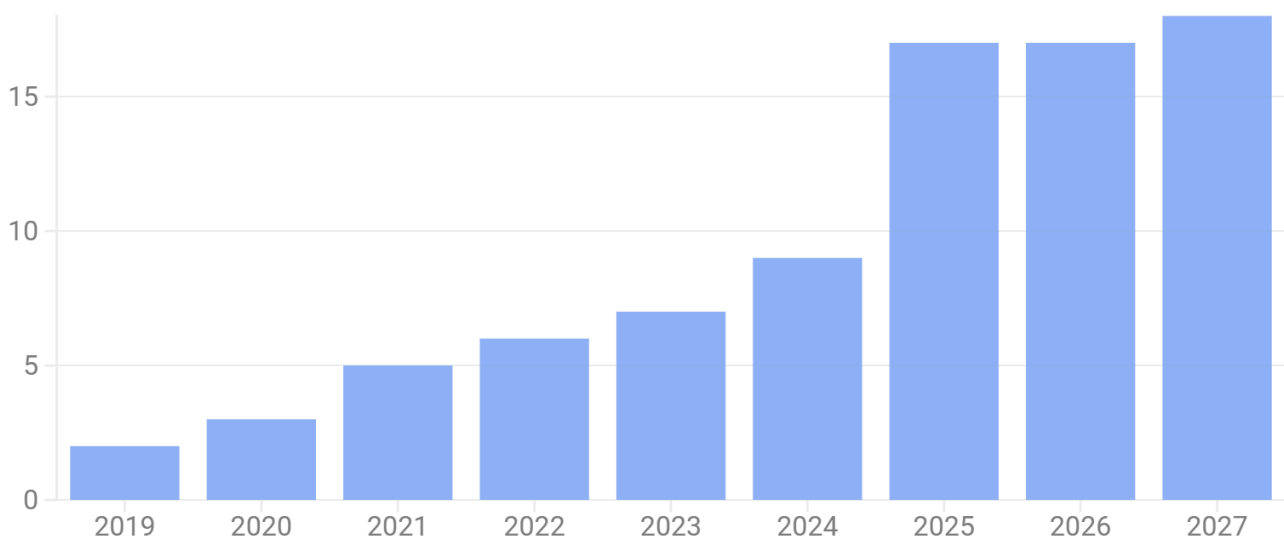
China is the other major economic bloc with a well-developed van industry, with nearly 800,000 vans produced in 2025. The electrification of China's production base is accelerating rapidly, with around 100,000 electric vans produced in 2025, compared to 38,000 in 2021. This growth is driven by a fast-electrifying domestic market, where 120,000 new electric vans were sold in 2025.

2.2 The e-van sector faces the same competitiveness challenge as cars

European manufacturers remain strongly established in their home market, accounting for 77% of new van sales in Europe in 2025. However, as China rapidly scales up domestic electric van production, Chinese OEMs are increasingly turning their attention to the European market. According to [recent announcements](#) and the GlobalData sales forecast, 18 of the 64 electric van models expected to be available in Europe by 2027 would be Chinese.

Chinese automakers are increasing their pressure on the European e-vans market

Number of Chinese electric van models sold in the EU



Source: T&E Analysis, EV-Volumes, GlobalData, carmakers announcements



This growing presence reflects a broader structural dynamic: Europe's competitiveness gap with China in electric vans is driven by the same factors that have already reshaped the electric passenger car market, namely battery costs and the availability of dedicated electric van platforms.

Batteries are at the heart of this competitive advantage. [Chinese battery packs are significantly cheaper than European equivalents](#), up to 90% for LFP technology and around 75% for NMC technology, translating directly into a significant cost advantage at vehicle level.

This disadvantage for Europe is further reinforced by the lack of investment by European OEMs in dedicated electric van platforms. While 49% of electric vans produced by Chinese manufacturers in 2025 were built on dedicated EV architectures, the share was just 18% for European manufacturers. This has reduced their ability to capture the cost and efficiency gains associated with purpose-built electric vans, contributing to the weakening of their competitiveness and slowing the growth of the European electric van market.

As a result, an analysis based on 2025 listing prices before taxes of leading made-in-EU and made-in-China models sold in Europe shows that European OEMs have almost lost their historical price competitiveness over Chinese manufacturers, despite the latter facing significant import costs.

Segment	Chinese brand, made-in-China	European brand, made-in-EU
Small van	Maxus e-Deliver 3 31,960€	Renault Kangoo E-Tech 30,972€
Medium van	Maxus e-Deliver 5 37,827€	Peugeot e-Expert 35,697€
Large van	Maxus e-Deliver 9 49,090€	Mercedes eSprinter 46,211€

Market-level price competitiveness alone does not determine commercial success in the van and broader LCV segment. The LCV market is generally harder to penetrate than passenger cars, as customers require strong aftersales networks, reliable parts supply, and a well-developed conversion ecosystem. Yet, this structural barrier should not lead Europe to complacency. Some Chinese OEMs can leverage commercial networks already established through their expansion in the passenger car market, while others are actively seeking partnerships with incumbent European actors. The announcement of the partnership between Delivan, owned by Chery, and Gruau, a specialist in commercial vehicle bodywork and LCV conversion for diverse professional applications, marks a step in that direction.

2.3 Resisting calls to weaken CO₂ standards

The CO₂ standards for LCVs are the key instrument to stimulate industrial investment, increase production volumes and support the development of dedicated electric platforms. Weakening this trajectory would be a gift to Chinese OEMs. It would result in reduced competitiveness of European electric models precisely at the moment when Chinese manufacturers are preparing to enter the European market. It would also undermine pioneering European initiatives, such as the Flexis joint venture between Renault, Volvo, and CMA CGM, which have invested heavily in developing these purpose-built electric vans.

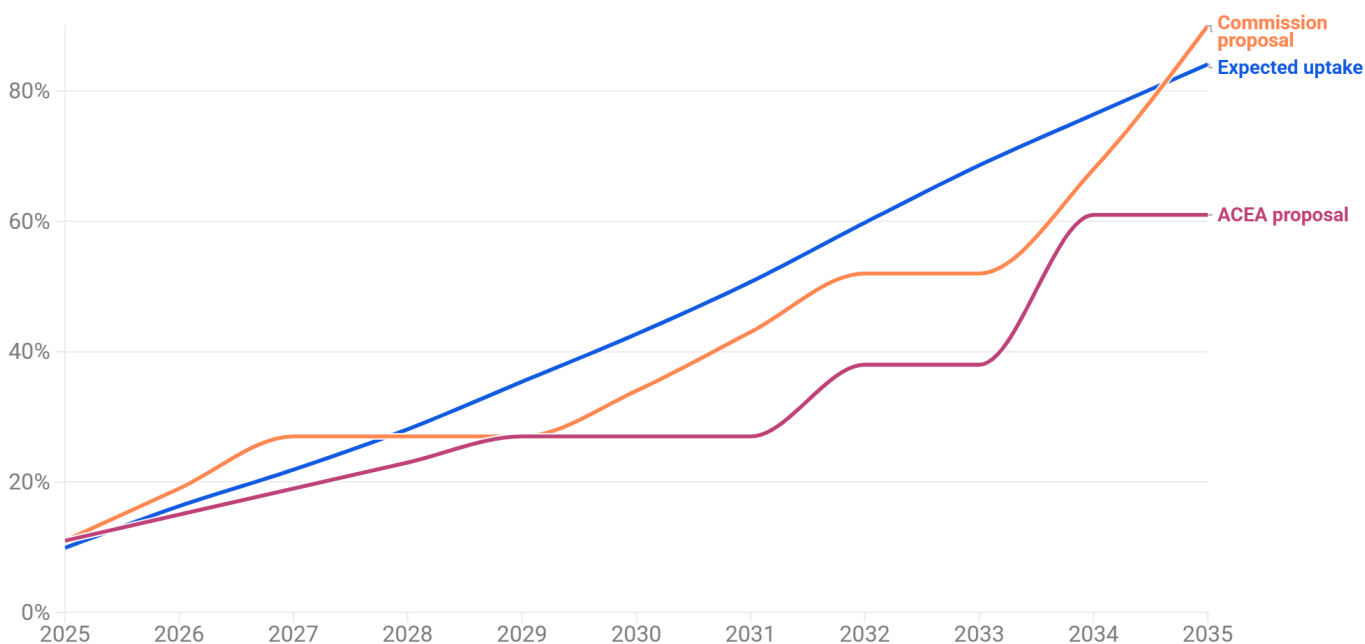
The European Commission has already made several concessions to the automotive industry in its December 2025 automotive package, including a reduction of the 2035 target from 100% to 90% (with a requirement for OEMs to “offset” these emissions through the use of green steel and

alternative fuels) as well as a three-year averaging mechanism and a weakening of the 2030 target from 50% to 40%.

Yet ACEA continues to claim that the targets are out of reach and is calling for a broad set of additional flexibilities: a further reduction of the 2035 target to 80% and of the 2030 target to 35%, a four-year averaging of the 2030 and 2025 targets, a freeze of the utility factor used to calculate PHEV emissions, and the creation of a “carbon neutral fuel” category that would allow vehicles running on biofuels and e-fuels to be counted as zero-emission. These would break market momentum: our analysis shows that ACEA's flexibilities would result in only 19% electric LCV sales in 2027, 27% in 2030 and 61% in 2035. To model ACEA's requests, we assumed a 20% share of LCVs running exclusively on eligible fuels in 2035.

Independent projections based on GlobalData's database challenge this simplified narrative. Rather than pointing to an unfeasible transition pathway, the data suggests that the CO₂ trajectory for LCVs is within reach.

E-LCVs uptake projection in the EU can meet the trajectory proposed by the Commission



Source: T&E analysis, GlobalData



Most importantly, the 2030–2032 target appears well within reach. Under current market dynamics, OEMs are on track not only to meet this objective but to exceed it by 386,000 electric LCVs.

The 2025–2027 target is more challenging, with a gap estimated at around 126,000 electric LCVs. This shortfall largely reflects European OEMs' insufficient investment in dedicated production lines for electric vans and delayed scale up of new, more competitive electric models.

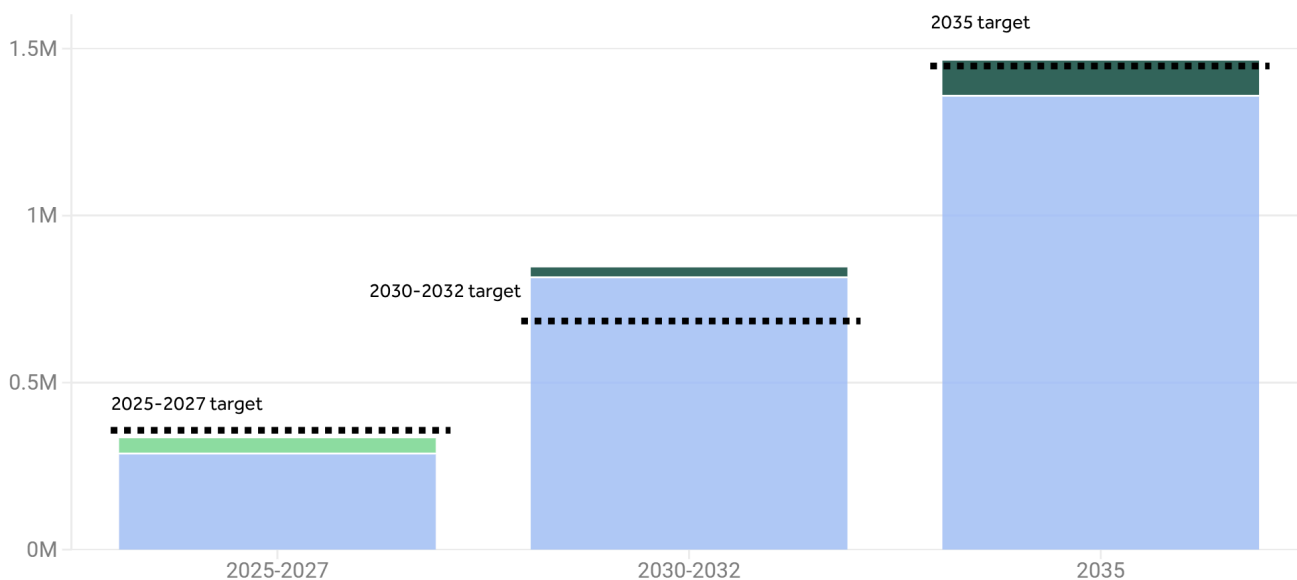
In this context, Member States have the ability to create the short-term conditions needed to accelerate the “made-in-EU” electric van market. France’s 2026 electrification plan is particularly instructive in this regard: by offering new purchase incentives for electric LCVs as part of its “electrification plan”, the government has set an ambitious goal of 50,000 electric LCVs by 2026. If a comparable increase in ambition were replicated across Member States, the EU would come within just 41,000 LCVs of meeting the 2025–2027 target.

This suggests that the target remains feasible under appropriate policy conditions, but that achieving it will require Member States to urgently strengthen their policy frameworks for LCVs, including both demand-side support and enabling measures.

Looking ahead to 2035, projections remain very close to the Commission's proposed trajectory, with a remaining gap of approximately 95,000 electric LCVs. This shortfall could be closed through faster electrification of large companies' LCV fleets, which are best positioned to transition rapidly, as suggested in the following section on the Clean Corporate Vehicles Regulation.

Yearly sales of electric LCVs to meet the Commission proposed targets are within reach

- Expected uptake
- Accelerated electrification of large fleets
- Short-term national demand policy



Source: T&E Analysis, ACEA, GlobalData



Now is not the time to weaken the rules any further than has already been done. Europe needs regulatory certainty to unlock investment and to create the conditions for OEMs to scale their

electric LCV production, reduce their costs and secure their supply chains. Their ability to remain competitive in a market that is shifting toward electric LCVs depends on it.

03

Strong demand policies are essential to accelerate a made-in-EU transition

3.1 Large companies: the natural leaders of LCV electrification

The LCV market is overwhelmingly driven by businesses, which account for 91% of new registrations. Large companies (those with at least two of the three following criteria: balance sheet total of €25M; net turnover of €50M; or >250 employees) alone represent around 45% of new LCV sales. They are also best positioned to lead the transition to electric mobility, and are already doing so: around 75% of electric LCVs are registered by large companies.

The leading role of large companies in the electrification of their fleets reflects several structural advantages that also make electrification a strong business opportunity. First, large companies are better able to absorb the higher upfront cost of electric LCVs while benefiting from lower operating costs over their lifetime. Second, their scale makes it easier to deploy charging solutions, whether through depot charging infrastructure or support for employee at-home charging. Third, they typically have dedicated fleet management teams capable of planning and managing the transition, including identifying suitable use cases for electrification, assessing total cost of ownership, deploying charging infrastructure, training drivers and adapting operational practices.

Embodying the fast transition in the LCV fleets of large companies: the example of EDF - section written in association with the company

For the electrification of its fleet, EDF's methodology consists of analyzing use cases, namely, the alignment between vehicle specifications, charging solutions, and operational requirements.

For LCVs, this alignment is critical, as they are directly tied to EDF's core business activities (grid maintenance, technical and industrial worksites). EDF operates a fleet of approximately 23,000 LCVs.

For these vehicles, key parameters to assess include passenger capacity, driving range and charging speed, as well as payload volume and weight.

Cargo volume is no longer a major constraint. Remaining challenges relate mainly to larger vans, where a trade-off persists between payload capacity and driving range, as well as to long-distance use cases. These limitations are progressively being addressed, notably through regulatory changes allowing 4-tonne LCVs to be driven with a standard Category B licence in France, and through the deployment of fast-charging infrastructure.

Regarding charging solutions, the primary approach is site-based charging, with 75% of EDF sites already equipped. EDF has also developed home-charging solutions for its employees.

90% of LCV use cases are now covered at EDF and are therefore fulfilled by electric models. As a result, fleet electrification is accelerating, with approximately one in four LCVs in EDF's fleet already electric. The goal is to reach a fully electric LCV fleet by 2030.

The electrification of large companies' van fleets also benefits the wider market. According to a survey we conducted in 2021, large companies replace their vans after an average of five years, after which these vehicles enter the second-hand market, the primary source of vans for artisans, SMEs and private households. Accelerating electrification of large companies' fleets is therefore one of the most effective ways to expand access to affordable electric LCVs across the broader economy.

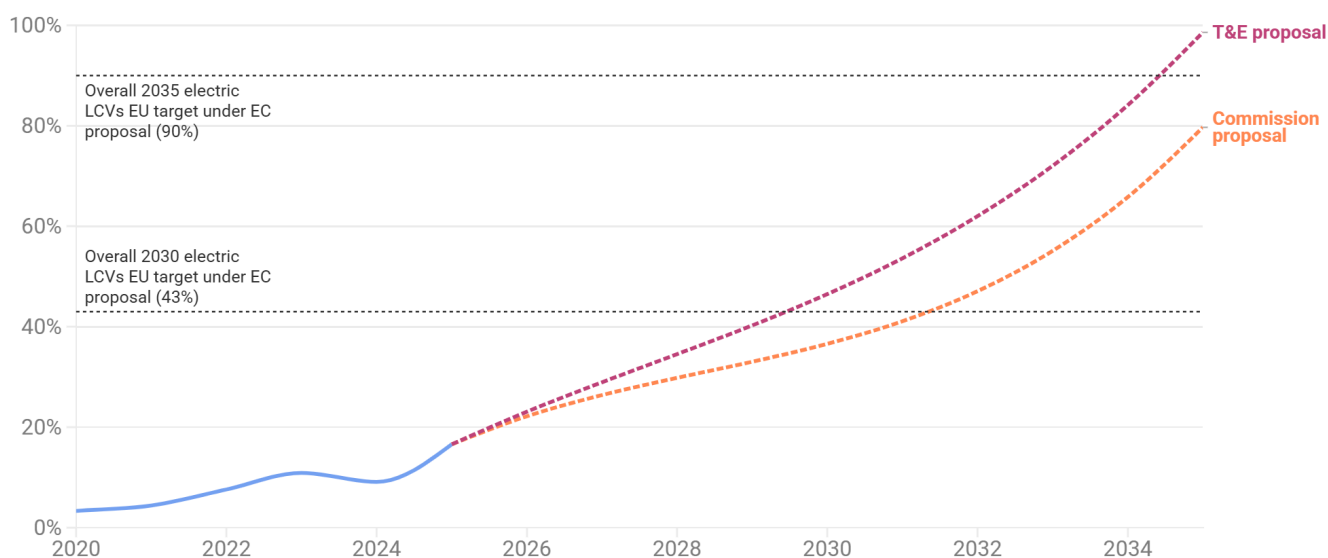
3.2 The Clean Corporate Vehicles Regulation: strengthening the targets for LCVs

As part of the Automotive Package presented in December 2025, the European Commission proposed a [Clean Corporate Vehicles Regulation](#) to boost demand for electric cars and LCVs. The proposal sets binding targets for Member States, not direct obligations on companies, requiring a minimum share of new company vehicle registrations to be zero- and low-emission vehicles in 2030 and 2035, with a specific sub-target for zero-emission vehicles. The scope is limited to large companies as defined above. Member States retain full flexibility on how to meet these targets, including through fiscal reforms, purchase subsidies, tax incentives or procurement rules.

Member State targets vary according to GDP per capita. According to T&E's analysis, the proposed targets would collectively amount to an EU-wide requirement for 41% zero- and low-emission vehicles by 2030, of which at least 37% would need to be zero-emission vehicles. In 2035, the proposed targets would result in zero- and low-emission vehicles accounting for 89 % of large fleets, of which at least 80% would need to be zero-emission vehicles. Low-emission LCVs are defined as LCVs with tailpipe emissions from 1 to 50 g CO₂/km, in accordance with Regulation (EU) 2019/631. Typically, low-emission vehicles are Plug-In Hybrid Vehicles (PHEVs).

This ambition level is insufficient: it would simply ask big companies to follow business as usual or track the market average, when they should be leading it. Abandoning the objective of making large companies' van fleets leaders of the energy transition would instead shift the burden onto SMEs, which have a lower financial and operational capacity to reach similar electrification levels in the short term.

European Commission proposal asks large companies to follow the market, rather than lead on electrification



Source: T&E Analysis, GlobalData, ACEA



The proposed targets should therefore be increased by 5 percentage points in 2030 and 10 percentage points in 2035. Plug-in hybrid LCVs should also be excluded from the scope of the regulation, as they deliver none to very limited industrial, consumer and environmental benefits. This would raise the EU-wide targets to 46% in 2030 and 99% in 2035, turning the regulation into a meaningful demand-side driver. It would accelerate the emergence of a second-hand electric LCV market, provide long-term certainty for vehicle manufacturers, and help ensure a smooth pathway towards the 2035 zero-emission objective.

3.3 The Clean Corporate Vehicles Regulation: preserving Article 4

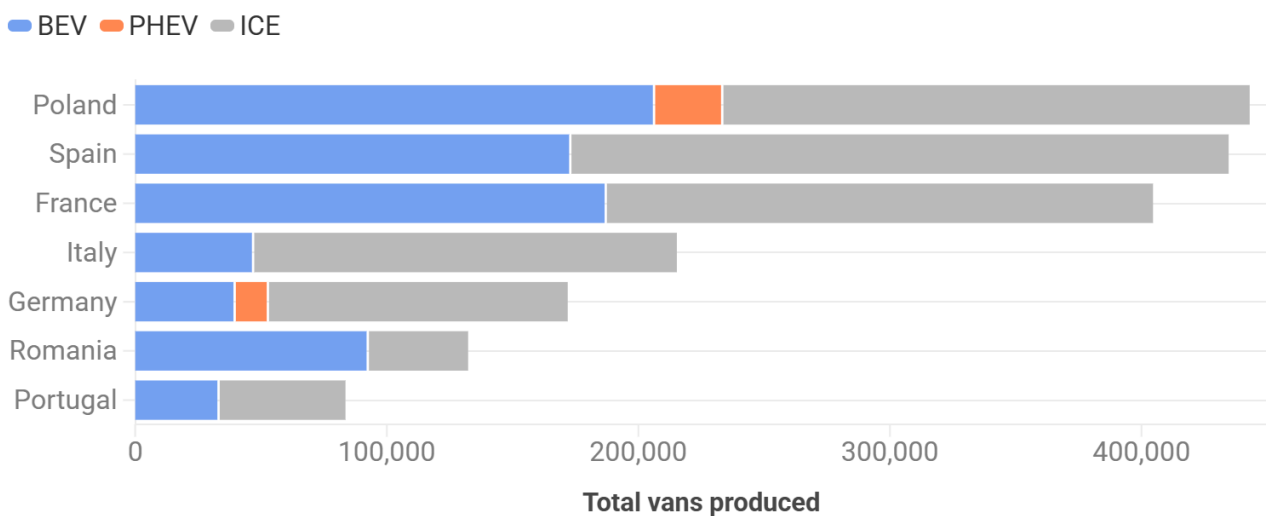
While the targets need improvement, Article 4 of the Clean Corporate Vehicles Regulation establishes an important principle: public support should be reserved for electric LCVs. Given their non-existent to very limited benefits, plug-in hybrid LCVs should not be eligible to receive such support

This principle would encourage Member States to reform LCV taxation and subsidies, giving companies a clear signal that public money will support truly clean technologies. This is particularly important because businesses need visibility: fleet decisions are planned years in advance, and companies need to know which technologies will be supported by public policy.

Article 4 also includes an industrial dimension: only vehicles produced in Europe (as to be defined under the Industrial Accelerator Act) should be eligible for public support. This matters: it ensures that demand-side policies do not simply subsidise imported vehicles, leading to capital drain of European taxpayers' money, but instead help build a European electric van industrial base. Europe is particularly well positioned to become a major production hub for electric vans, with countries such as Poland, Spain and France expected to play a leading role. For example, by 2030, 47% of van production in Poland is expected to be electric, 40% in Spain and 46% in France.

Europe has the potential to become a leader in electric vans production

2030 ▾



Source: T&E analysis based on GlobalData light vehicle production forecasts.



By reserving financial support to electric technologies and European-produced vehicles, Article 4 has the potential to simultaneously stimulate demand for electric LCVs and support European jobs, investment, and industrial capacity. As such, Article 4 is a key instrument for delivering both the environmental and industrial objectives of the transition.

Conclusion: LCVs are Europe's next industrial test

Europe is now in LCVs where it was in cars a few years ago. European manufacturers dominate the domestic market. European factories are central to production. European brands still enjoy strong customer relationships. But Chinese manufacturers are accelerating, building competitive electric models and preparing to enter the European market on a large scale.

Europe must avoid repeating its past mistakes: assuming industrial leadership is permanent, delaying investment, weakening regulation and reacting once competitors have already scaled.

Europe holds all the cards to establish itself as an industrial leader in electric van production, while simultaneously delivering on its economic and climate objectives. What is needed now is a coherent and integrated strategy for the segment: maintaining ambitious CO₂ standards, strengthening demand-side measures for large companies' fleets, and ensuring that public support is directed towards clean vehicles produced in Europe. Taken together, these policies can reinforce Europe's industrial competitiveness, lower operating costs for businesses, improve air quality especially in cities, and accelerate emissions reductions

Recommendations

01

Keep the Commission's CO₂ trajectory as a minimum and reject further weakening of the LCV CO₂ standards

02

Strengthen the Clean Corporate Vehicles Regulation targets and exclude Plug-in hybrid LCVs from the scope of the regulation

03

Preserve Article 4 on public support for clean, European-made LCVs and exclude Plug-in hybrid LCVs from the scope of the CCV regulation

Further information

Clean Corporate Vehicle Regulation targets by Member State

Member State	Target for combined shares of ZEV and LEV, 2030	Minimum target for ZEV share 2030	Target for combined shares of ZEV and LEV, 2035	Minimum target for ZEV share 2035
Austria	52%	47%	95%	95%
Belgium	52%	47%	95%	95%
Bulgaria	28%	25%	67%	56%
Croatia	28%	25%	67%	56%
Cyprus	32%	29%	76%	64%
Czechia	32%	29%	76%	64%
Denmark	52%	47%	95%	95%
Estonia	32%	29%	76%	64%
Finland	48%	43%	95%	95%
France	40%	36%	95%	80%
Germany	48%	43%	95%	95%
Greece	28%	25%	67%	56%
Hungary	28%	25%	67%	56%
Ireland	52%	47%	95%	95%
Italy	40%	36%	95%	80%
Latvia	28%	25%	67%	56%
Lithuania	28%	25%	67%	56%
Luxemburg	52%	47%	95%	95%

Malta	40%	36%	95%	80%
Netherlands	52%	47%	95%	95%
Poland	28%	25%	67%	56%
Portugal	28%	25%	67%	56%
Romania	28%	25%	67%	56%
Slovakia	28%	25%	67%	56%
Slovenia	32%	29%	76%	64%
Spain	32%	29%	76%	64%
Sweden	52%	47%	95%	95%
EU 27	40.6%	36.6%	88.6%	79.7%

Vans specifications

Segment	Model	Cargo volume (m3)	Length	Range WLTP
Small Van	Maxus e-Deliver 3	4.8	4.5 m	371 km
	Renault Kangoo E-Tech	3.3 - 4.3	4.5 m	308 km
Medium Van	Maxus e-Deliver 5	6.6	4.8 m	335 km
	Peugeot e-Expert	5.3 - 6.6	4.6 m	330 km

Large Van	Maxus e-Deliver 9	9.7 - 12.5	5.5 - 5.9 m	330 km
	Mercedes eSprinter	10.5 - 14	5.9 - 7 m	358 km

Methodology - The selected vans are representative of Chinese and European-made vans sold in the EU in 2025, according to the GlobalData Hybrid and EV sales Forecast. The reported prices are listing prices before taxes published on the OEMs websites. We calculated the average prices for a sample of countries for which it was possible to retrieve the listings - Belgium, Germany, Italy and Austria for the small and medium vans categories, Belgium, Germany and Austria for the large van category.

Data sources

- **T&E has acquired global vehicle sales and production forecast data supplied by GlobalData;** *Copyright © Global Hybrid and EV sales Forecast (Q1 2026) and Global Light Vehicle Powertrain Forecast (April 2026). All rights reserved; GlobalData is an independent provider of industry information. The sales forecast is based on GlobalData's model of the macro-environment, including economic and competitive developments. GlobalData uses industry contacts, press and media coverage, direct automotive manufacturer and supplier contacts, investment analysts, and other Globaldata assets. Permission to use GlobalData copyrighted reports, data and information does not imply endorsement by GlobalData of the manner, format, context, content, conclusion, opinion or viewpoint in which GlobalData reports, data and information or their derivatives are used or referenced herein.*
- **EV-Volumes;** *Historical BEV, FCEV and PHEV sales volumes are obtained from EV-Volumes sales tracker and from the xEV-share tracker (April 2026). The databases cover the whole 27 EU member states. LCV and Pickups segments were included in the study.*
- **ACEA;** *Historical data for LCVs registrations in the EU+EFTA, UK were obtained from periodic public releases.*

Further information

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