

Weakening the ZEV mandate would use oil equivalent to double Rosebank's entire output

The Government is currently consulting on revising the targets for new electric vehicles sold under the ZEV mandate, a move that would be a catastrophic decision for the UK's energy security and consumers' pockets. New analysis from T&E shows that the most significant target reduction would require oil supply equivalent to almost double the expected output of the Rosebank oil field - leaving the UK further dependent on imported oil to make up the shortfall. It would leave millions more consumers reliant on costly and volatile petrol and diesel to fuel their cars.

Key facts

- Reducing the 2030 ZEV target to 50% would result in up to 3 million fewer BEV sales, costing drivers up to £4.5 billion extra a year by 2035.
- This would create a demand for petrol equivalent to double the expected annual output from the prospective Rosebank oil field.
- Weakening the target would undermine the UK's energy security, as petrol cars are 4 times more impacted by international oil crises than EVs, while diesel cars are 9 times more impacted.
- Fuel retailers stand to benefit the most from the changes, with profits reaching up to £450 million by 2035 if the target is weakened.
- A reduction to the 2030 target could cut emissions reductions from the UK's flagship decarbonisation policy by up to 60%.

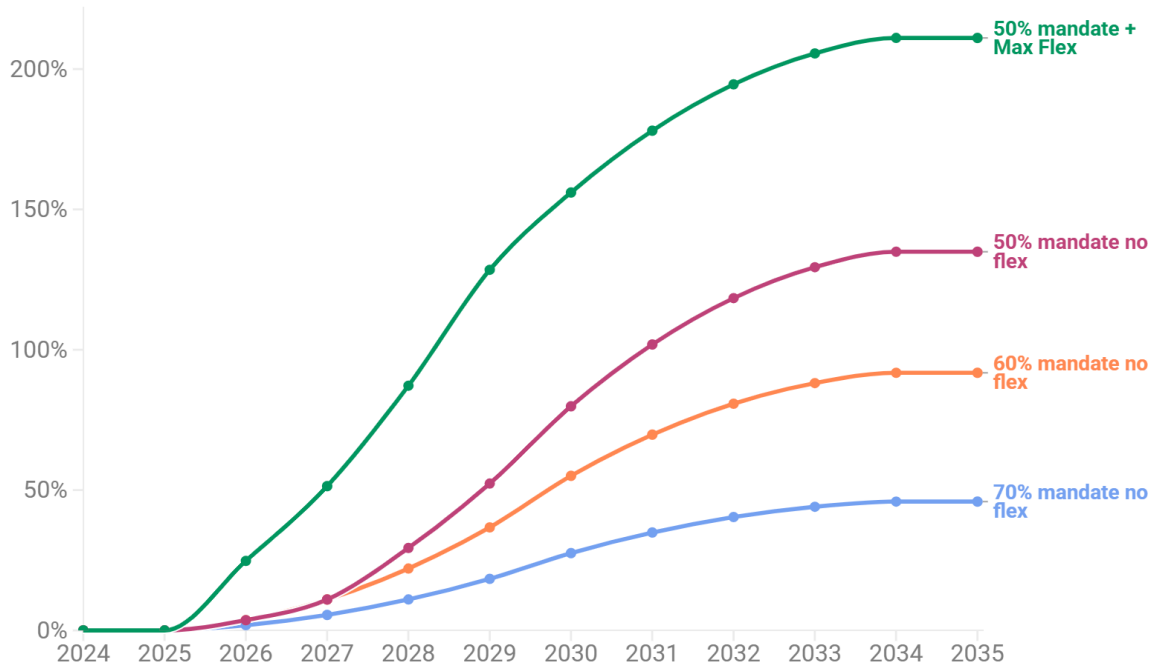
Weakening the ZEV mandate could use the equivalent of double Rosebank's output, with no benefit to drivers or energy security

The Government is [currently considering](#) a reduction of the 2030 Zero Emission Vehicle (ZEV) target, from its current level of 80% BEV sales by 2030, to as low as 50%. This would not only slow the electric vehicle transition and increase costs for consumers, but also create substantial additional demand for fossil fuels.

A reduction of the 2030 target to 50%, with an extension of flexibilities, would create a demand for petrol equivalent to **double the expected annual output** from the prospective Rosebank oil field. Even a reduction of the ZEV target to 70% would require 50% of the total Rosebank petrol output by 2035.

Weakening the ZEV mandate to 50% would require 200% of Rosebank's annual petrol output by 2035

Share of annual Rosebank petrol output



Source: T&E Analysis

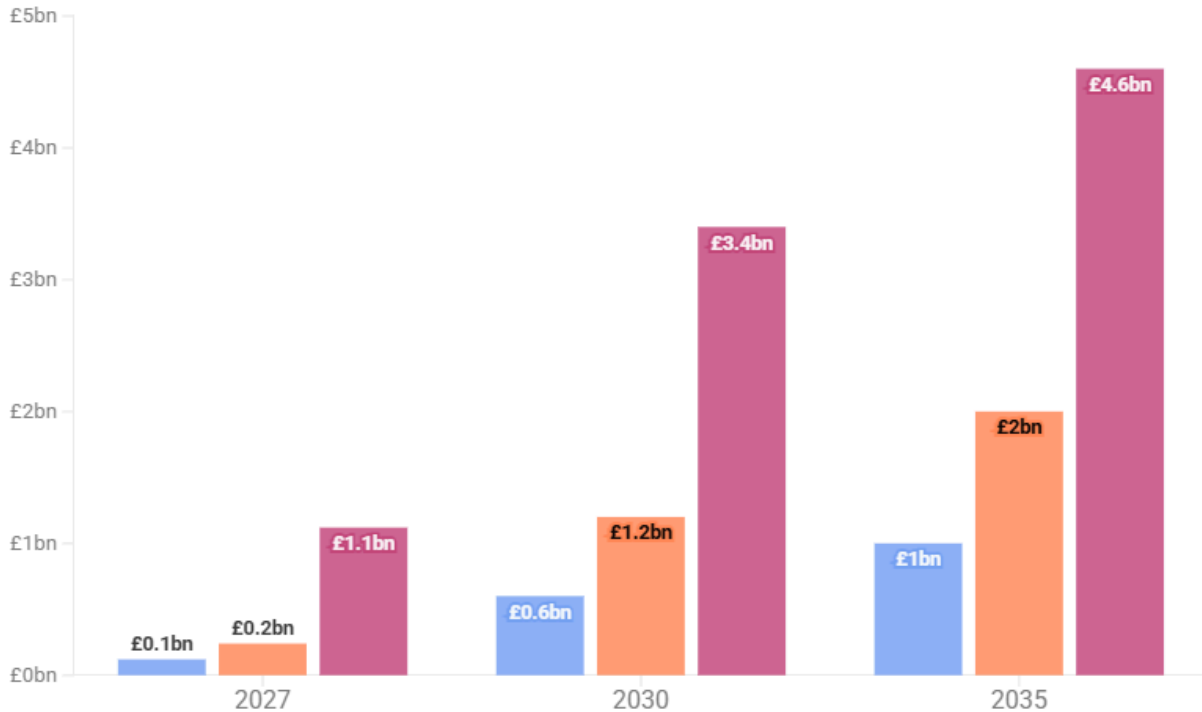


Weakening the ZEV mandate will harm consumers

Weakening the mandate by 50% would lead to up to [3 million fewer BEV sales](#), robbing consumers of their cost benefits. Even with no further flexibilities, this would result in up to 1.4 million fewer drivers switching to EVs, leaving these drivers paying [higher fuel costs of £1,000 a year](#) on average. T&E analysis finds that the lost fuel savings for consumers could total nearly £4.5 billion a year by 2035.

Weakening the ZEV Mandate target to 50% could cost consumers £4.6 billion a year in lost fuel savings by 2035

70% mandate no flex 60% mandate no flex 50% mandate no flex



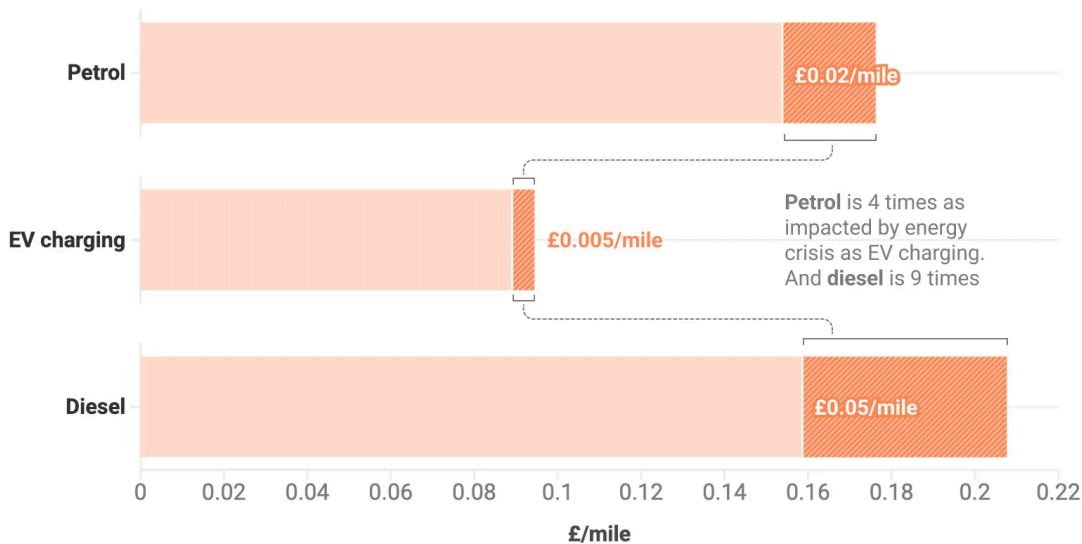
Source: ECIU and T&E Analysis



EVs help to protect drivers from oil price shocks, as they are much more protected from price volatility that occurs in international oil markets than petrol or diesel cars. This was demonstrated clearly in the April 2026 oil crisis following the outbreak of the US-Iran war, in which electric vehicle charging costs were [4 times less impacted](#) by the oil price rise than petrol and 9 times less than diesel. In early April, it cost drivers [£71 less per month](#) to charge an EV than to fill up with diesel - a significant cost saving for a typical household. This is likely to increase further, with petrol and diesel prices reaching their [highest in four years](#) on 15th September 2026, and expected to continue rising over the coming months.

UK petrol cars four times more affected by energy crisis than EVs, diesel cars nine times

Normal energy prices April 2026 premium



Source: T&E analysis



Lower-income drivers stand to lose out most from any changes to the ZEV mandate. The ZEV mandate has been crucial in driving production of affordable, mass-market EVs over luxury models, which were previously prioritised by the car industry due to their ability to produce higher profit margins. [T&E UK analysis](#) finds that since the mandate's introduction, 17 new EV models under £25,000 were introduced or are planned to be introduced to the UK by 2027, compared to just 2 previously.

However, there is still more to be done, as demand is still outstripping supply for many of these models, such as the new ID. Polo, which has a waitlist of [up to 10 months](#). Any weakening of the target could risk the delivery of new affordable EVs, reducing supply and consumer choice in both the first-hand and second-hand markets. The lack of investment certainty will also harm British industry in the long run, as other countries, particularly China, are starting to pull ahead in the affordable EV market.

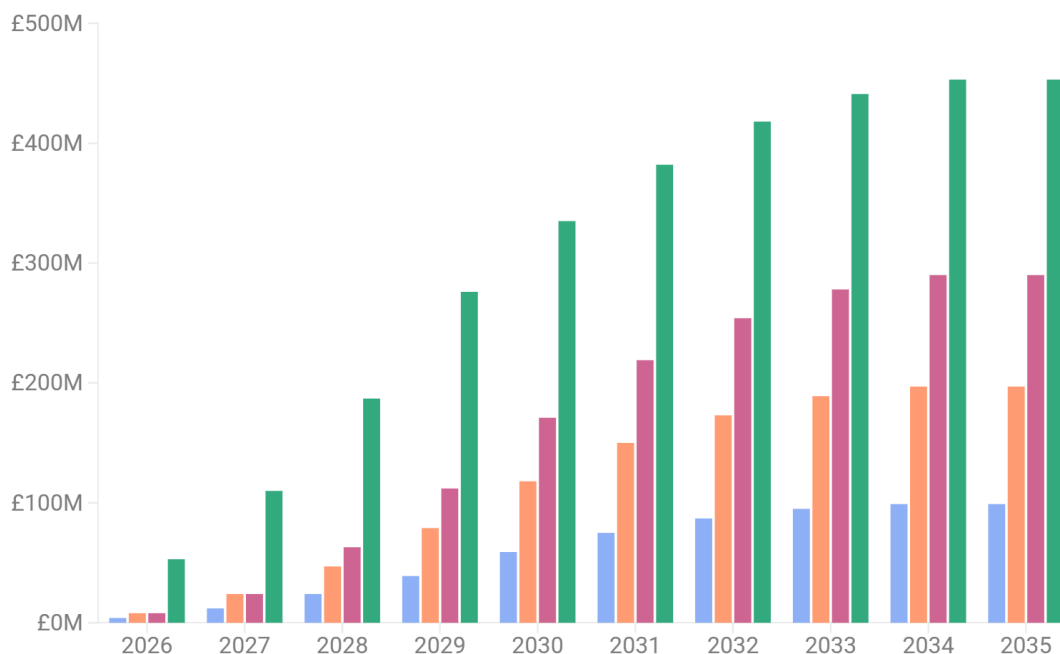
While the ZEV mandate harms consumers and the UK's energy security, fuel retailers will reap the benefits

Prolonging reliance on combustion vehicles by weakening the ZEV mandate targets and/or flexibilities will cost drivers while increasing profits for fuel retailers such as BP and Shell. T&E analysis finds that additional fuel retailer profits could reach £450 million by 2035 if the

government were to reduce the ZEV target to 50% (with additional flexibilities). Even if the target was only reduced to 70%, additional profits would still reach £100 million by 2035.

Oil retailers stand to gain up to £450 million from a weaker ZEV mandate

70% mandate no flex 60% mandate no flex 50% mandate no flex 50% + Max ICE Credits



Source: T&E Analysis



This comes on top of a time of already record profits for oil companies. Major global oil companies made [\\$93bn in profits](#) in the financial quarter following the US-Iran war, while drivers pay extortionate prices to fuel their cars. Any weakening of the ZEV mandate would give a further handout to global oil companies in exchange for minimal investment in the UK's renewable future.

Weakening the ZEV mandate will harm our energy security

With any ZEV mandate weakening likely to increase demand for international oil, the UK's energy security is at risk. The UK's transport system is already incredibly dependent on international oil, with transport using up [58% of the UK's oil imports](#). With domestic oil expansion unable to make up the shortfall, it is clear that weakening the ZEV mandate will only increase our dependence on international oil, at a time when it is critical to accelerate the UK's energy independence.

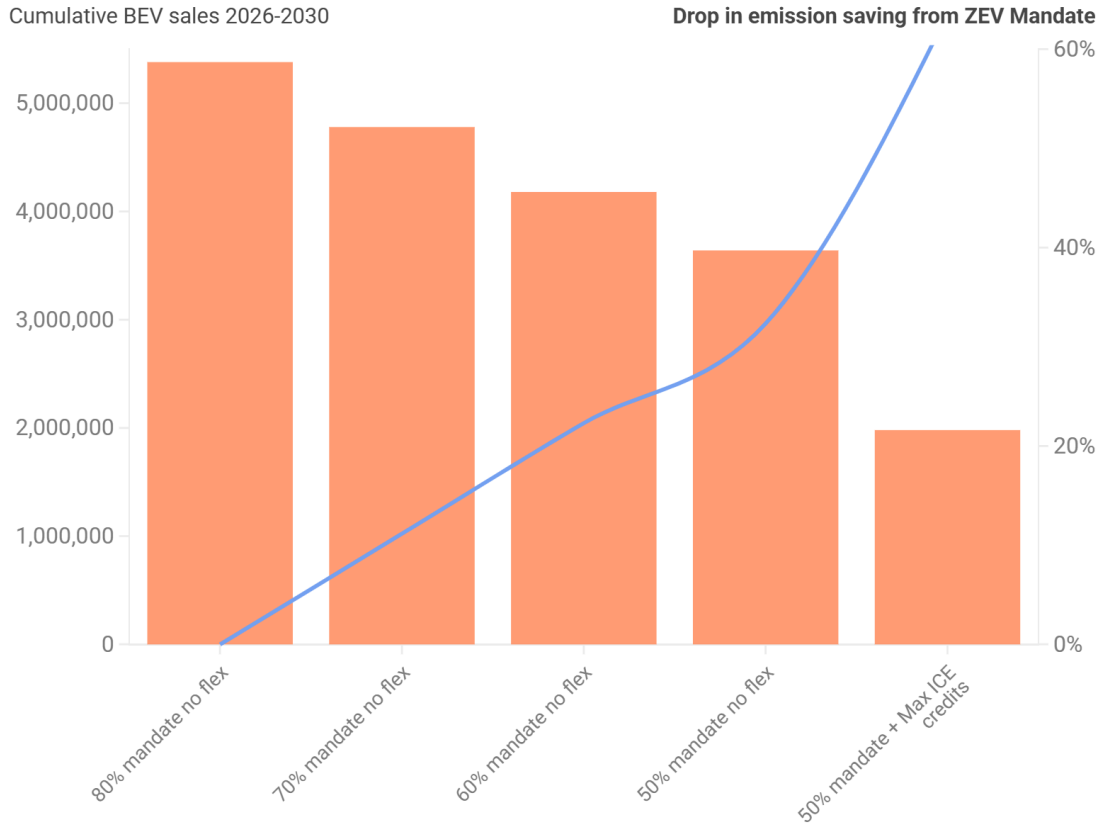
Creating policy to increase reliance on imported fossil fuels in a time of geopolitical instability, when EVs provide an easy, cheap, and homegrown alternative, is nonsensical. With the rollout of smart charging and Vehicle-to-Grid technology, a rapid EV transition can even further support the UK's energy independence - by providing [‘batteries on wheels’](#) which act as a distributed virtual power plant.

Weakening the ZEV mandate would cut emissions reductions from the UK's flagship decarbonisation policy by up to 60% - meaning significant savings will need to be made elsewhere

Weakening the ZEV mandate would cut emissions reductions from the UK's flagship decarbonisation policy by up to 60%. This is completely incompatible with the UK's carbon budgets. The UK's climate targets are [legally binding](#), which means that if the ZEV mandate policy is weakened at all, emissions savings will need to be made elsewhere.

Proposal to cut the ZEV Mandate target to 50% BEV sales in 2030 will lead to between 1.4 and 3 million fewer BEV sales

■ % reduction in emission saving ■ BEVs sold



Source: T&E analysis of UK car sales



Other industries such as farming and heavy industry are harder and more costly to decarbonise, putting the onus on consumers to potentially pay more for products. Meanwhile, a rapid EV transition is an easy win-win for consumers and the climate, as electric vehicles have both cheaper running costs, no tailpipe emissions and much lower lifecycle emissions than combustion engine vehicles. Maintaining the ZEV mandate is a no-brainer to protect consumers, increase our energy independence, and meet the UK's climate targets.

About us

We are the national office of the European clean transport NGO T&E, whose aim is to achieve a zero-emission mobility system that is affordable and has minimal impacts on our health, climate and environment and is accessible to all while locking in growth and jobs for the UK.

<https://www.transportenvironment.org/te-united-kingdom>

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