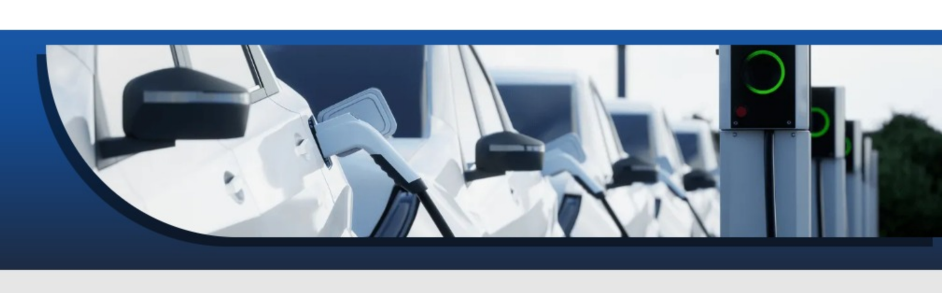
Demand for EVs in Europe:

Market Shifts and Growth Trends by Country in 2025



Written by **Michael Fisher**, | Updated: November 18, 2025

In 2025, Europe remains at the forefront of the electric vehicle transition, with EVs accounting for more than a quarter of all new car registrations. Governments continue to invest heavily in charging networks and zero-emission mandates, but progress is uneven. While Norway and Sweden are close to a full phase-out of petrol cars, electric models still represent less than 10% of new sales in some parts of Southern and Eastern Europe.

The internal combustion engine continues to rule most European countries, even as the EU prepares to end sales of new petrol and diesel cars by 2035. For now, only a few nations, led by the Nordics, are close to fully replacing hydrocarbon-based fuels with greener alternatives. Curious to track the global demand for electric cars, the team at Tradingpedia examined the latest sales and new registrations figures from the European Automobile Manufacturers' Association (ACEA) to reveal which nations lead in EV adoption.

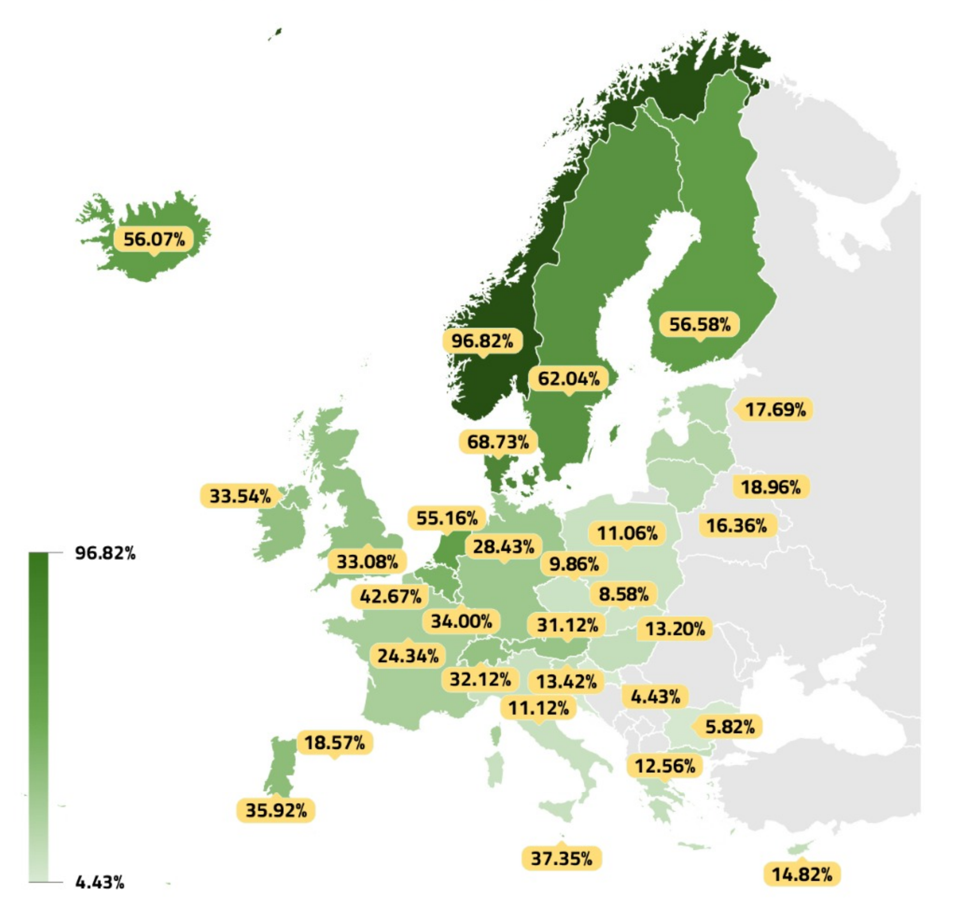
Data shows that across Europe, the growth of battery-electric vehicles (BEVs) has slowed in 2025, due to a range of factors including reduced subsidies and infrastructure challenges. In contrast, plug-in hybrid electric vehicles (PHEVs) are gaining traction, with sales up 32%, while hybrid-electric vehicles (HEVs) continue to grow in popularity. HEVs now hold the largest share of the market at 34.8% of all new car registrations, compared with a combined 35.2% for petrol and diesel vehicles.

Key Highlights

- The largest number of EVs was sold in Germany so far in 2025: 599,962 vehicles were purchased, up 46.60% from 2024.
- The Nordics continue to lead Europe in the transition to electric mobility, with 96.82% of newly registered cars in Norway now fully electric.
- EVs account for 68.73% of new cars sold in Denmark, 62.04% in Sweden, and 56.58% in Finland.
- Europe's electric vehicle market expanded in 2025, with total sales rising 27% from the previous year to 2.72 million units.

Share of EVs Around the World

Share of BEVs and PHEVs in new car sales and registrations in 2025 (Jan-Sep)



Are EVs Really Replacing ICE Cars?

Electric vehicles are steadily transforming Europe's roads, but not at the same pace everywhere. **In Norway, the shift is nearly complete: 90.8% of all new cars registered in the first nine months of 2025 were electric**, leaving petrol and diesel models in sharp decline, down more than 50% and 37%, respectively. The rest of Europe is catching up fast. In **Lithuania**, **Latvia**, and **Iceland**, EV share has surged compared with last year, up 41.5%, 35.7%, and 30.3%, showing how even smaller markets are accelerating toward an electric future.

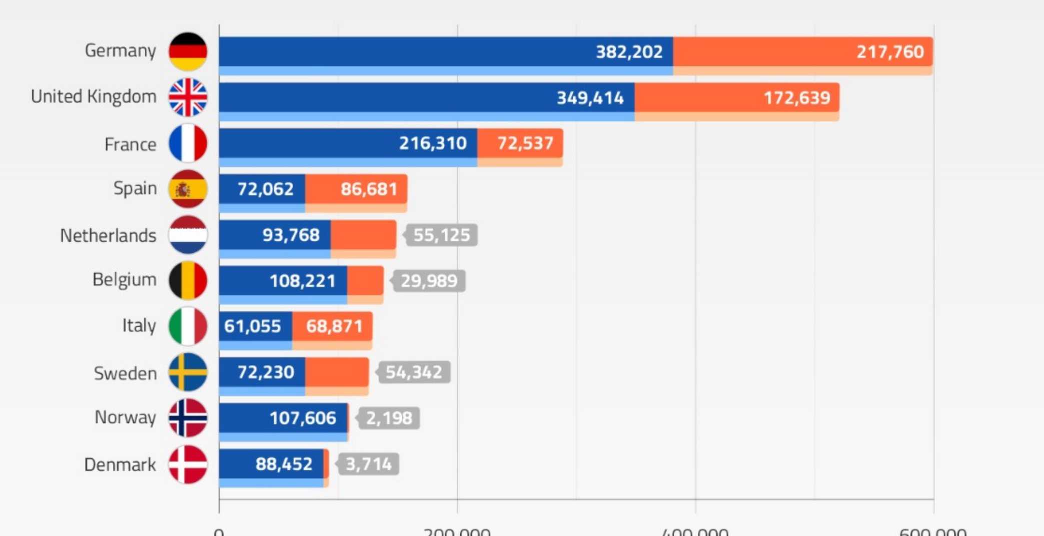
However, this replacement effect is far from uniform. Despite Latvia's electric vehicle share nearly doubling, petrol and diesel models still dominate the market, accounting for 79.42% of all new car registrations in 2025. **The contrast is even starker in Bulgaria, where 90.63% of new vehicles still run on conventional fuels**, and petrol registrations have actually risen by 10.83% year-on-year. Factors such as income levels, charging infrastructure, and vehicle affordability continue to shape adoption rates, as consumers in lower-income markets remain more sensitive to upfront costs and limited charging networks.

In **Germany**, Europe's largest auto market, BEV sales rose 38.3%, but the overall EV share stagnated at 28.4% of all new car registrations. **The end of certain subsidies and price cuts from Chinese automakers reshaped demand:** PHEVs rose sharply (+63.9%), suggesting consumers are hedging between affordability and range anxiety. **France**, meanwhile, saw an 8.6% drop in total EV registrations, driven by a collapse in plug-in hybrid sales (-26.8%), as its new 'green bonus' rules excluded many imported EVs. **Belgium** also experienced a decline (-9.8%) despite still-high EV penetration (nearly 43%), hinting at a post-subsidy cooldown.

Poland stands out as a potential turning point in Central Europe. BEV registrations more than doubled (+106.7%), with plug-in hybrids following closely (+97%), pushing the country's EV share to 11%, nearly twice last year's level. Similarly, Czechia saw its EV market grow 55% overall, with plug-in hybrids in the lead (+78.6%). These shifts suggest that company fleets and EU incentives are beginning to filter into mid-income markets.

Largest Sales of EVs in 2025 (Jan-Sep)

Countries with the largest number of EV sales in 2025 so far



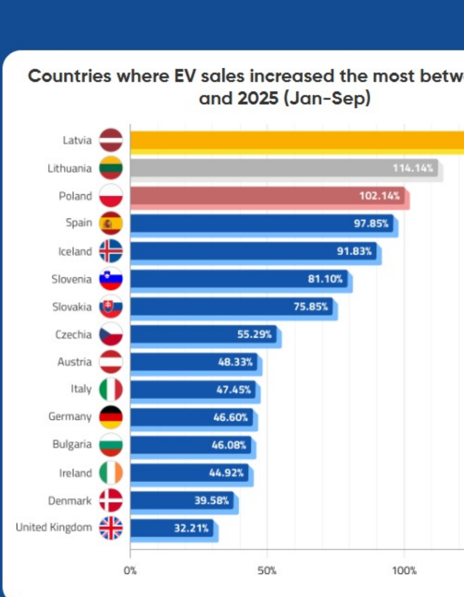
Europe's electric vehicle market is gaining momentum in 2025, with sales accelerating across both large and emerging markets. Total **BEV registrations rose 25.4% year-on-year** to nearly 1.8 million units, while **plug-in hybrid (PHEV) sales grew even faster at 32%**, reaching over 918,527 units.

Major markets are driving this expansion. **Germany**, for example, sold 382,202 BEVs and 217,760 PHEVs in the first nine months of 2025, marking a 38.3% increase in BEVs and a 63.9% surge in PHEVs, highlighting the growing popularity of hybrid options alongside full electrics. **The UK** followed closely, registering 349,414 BEVs and 172,639 PHEVs, with growth of 29.5% for BEVs and 38.2% for PHEVs, demonstrating strong market demand even as incentives evolve.

Southern Europe is starting to catch up in the EV transition. **Spain** nearly doubled BEV sales to 72,062 and more than doubled PHEVs to 86,681, while **Italy** also posted strong growth (up 26.6% year-over-year to 61,055 BEVs, and up 72.6% to 68,871 PHEVs), driven by rising consumer interest and improving infrastructure. In contrast, France saw PHEV sales drop 26.8% to 72,537, and Belgium's PHEVs fell 47.3% to 29,989, highlighting a fragmented market where hybrid adoption is highly sensitive to incentives and policy changes.

Impressive Growth in EV Sales in Certain Markets

Countries where EV sales increased the most between 2024 and 2025 (Jan-Sep)



Smaller and emerging markets are outpacing their larger counterparts in the electric vehicle revolution, registering the most pronounced relative gains. Latvia (+141.5%), Lithuania (+114.1%), and Poland (+102.1%) more than doubled their EV fleets compared with 2024, illustrating how electrification is surging from a low baseline in Central and Eastern Europe. Across southern Europe and the Nordic fringes, Spain (+97.8%) and Iceland (+91.8%) witnessed near-doubling of EV sales, signalling a swift embrace of electric mobility beyond the traditional early-adopter strongholds.

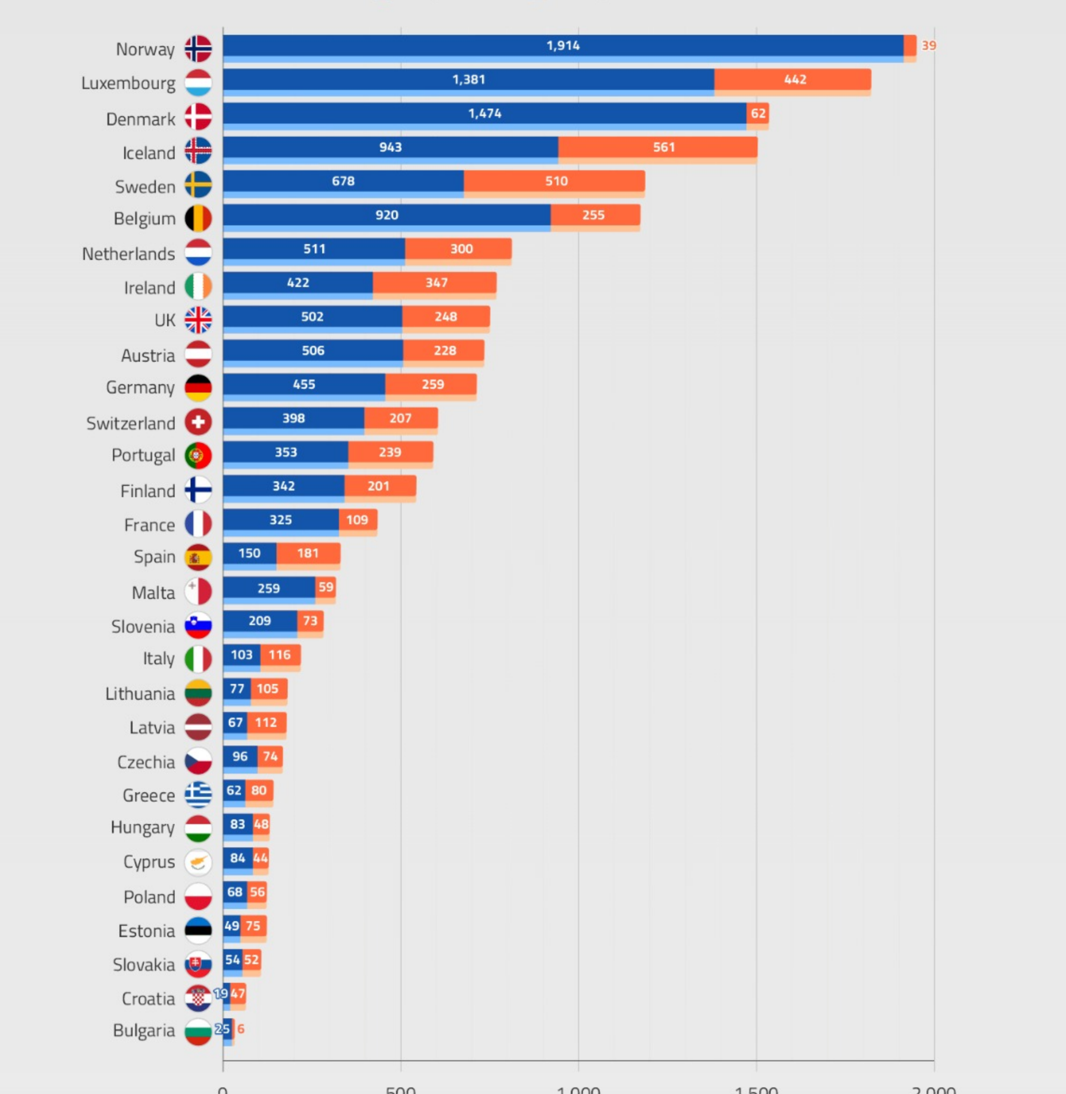
In the Nordics, Norway continued to post strong absolute growth (+31.5%), although certain segments lagged: plug-in hybrid (-14.3%) and hybrid (-66%) registrations fell, even as battery-electric vehicles surged. Sweden (+15%) and Finland (+13.9%) showed steady, incremental gains, though hybrids in Finland declined sharply (-17.5%), reflecting a shift in consumer preference toward full electrics.

Meanwhile, the Netherlands, once a rapidly expanding EV market, is beginning to plateau. Total EV registrations rose 15%, but growth was uneven: battery-electric vehicles increased only slightly (+3.9%), hybrids fell (-6%), while plug-in hybrids gained more strongly (+40.5%), highlighting a maturing market with evolving segment dynamics.

Overall, Europe's largest markets are transitioning from explosive early growth toward a more mature phase, where absolute volumes remain high, but year-on-year percentage increases are more moderate compared with the smaller, emerging markets leading the electrification surge.

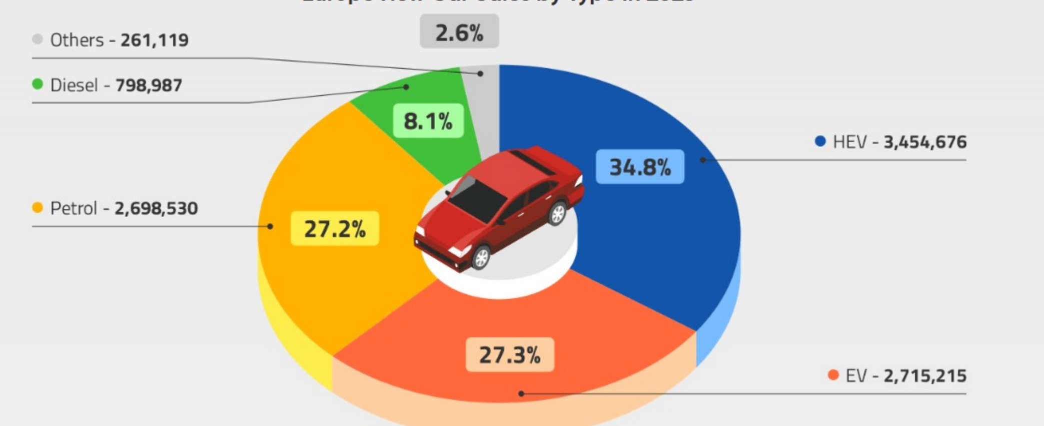
Countries with the Most EV Sales per Capita

New BEV and PHEV registrations per 100,000 citizens



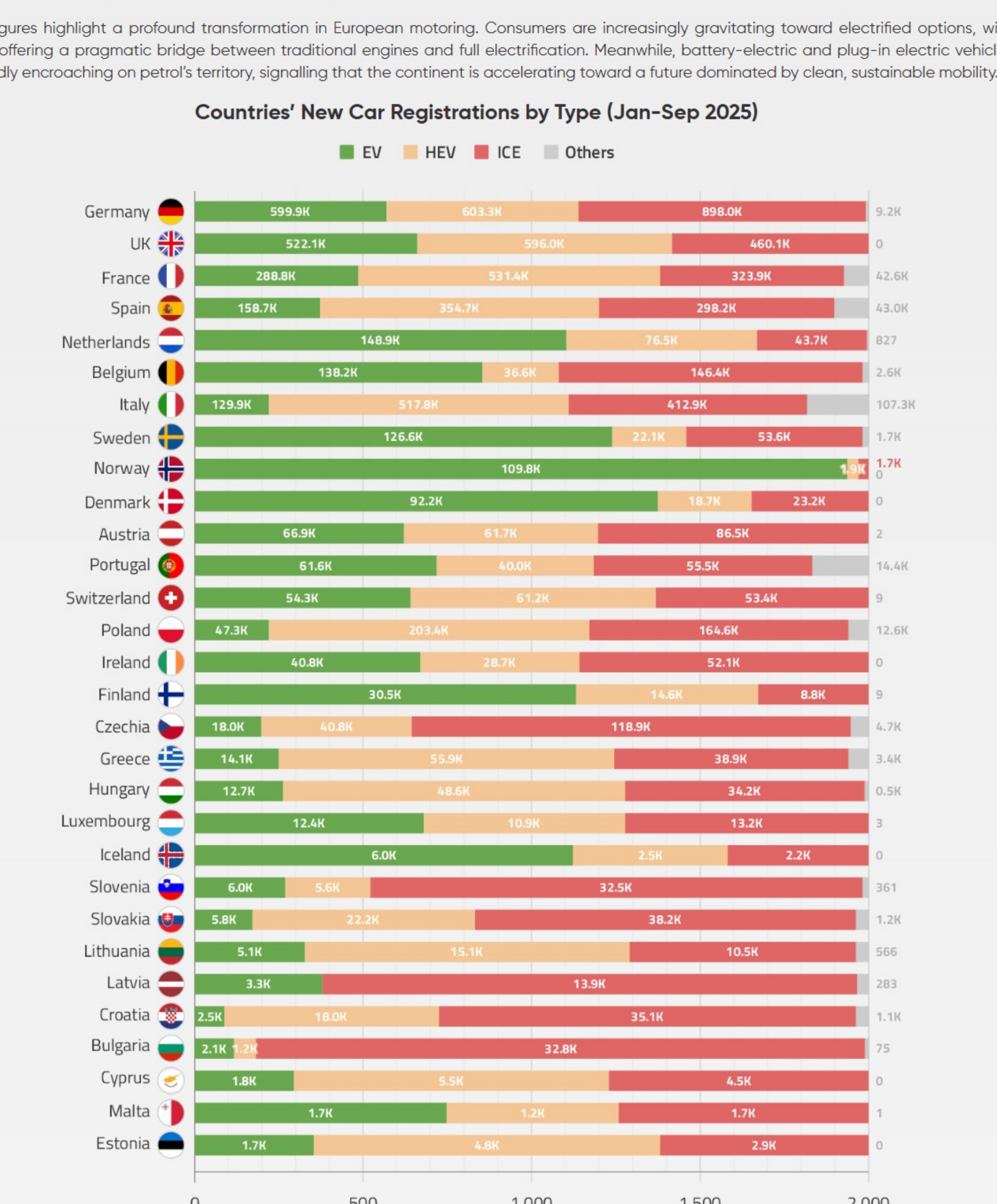
The BEV–PHEV Divide: What Europe's EV Mix Reveals About Wealth, Policy, and Full Electrification Readiness

Europe New Car Sales by Type in 2025



Hybrids Claim Largest Slice of New Car Sales

Countries' New Car Registrations by Type (Jan-Sep 2025)



Europe's Uneven Road to Electrification: From Norway's EV Dominance to the Hybrid Hurdle in the East

Legacy Automakers Take Charge as Tesla Falls Behind in European EV Sales

Top-Selling Car Brands by EV sales in 2025

Top-Selling Automotive Groups by EV Sales in 2025

Methodology