

# Demand for EVs in Europe: Market Shifts and Growth Trends by Country in 2025



Written by Michael Fisher | Updated: January 29, 2024

In 2025, Europe remained at the forefront of the electric vehicle transition, with EVs accounting for more than a quarter of all new car registrations. In 2026, 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 sales and new registrations figures throughout 2025 from the European Automobile Manufacturers' Association (ACEA) to reveal which nations lead in EV adoption.

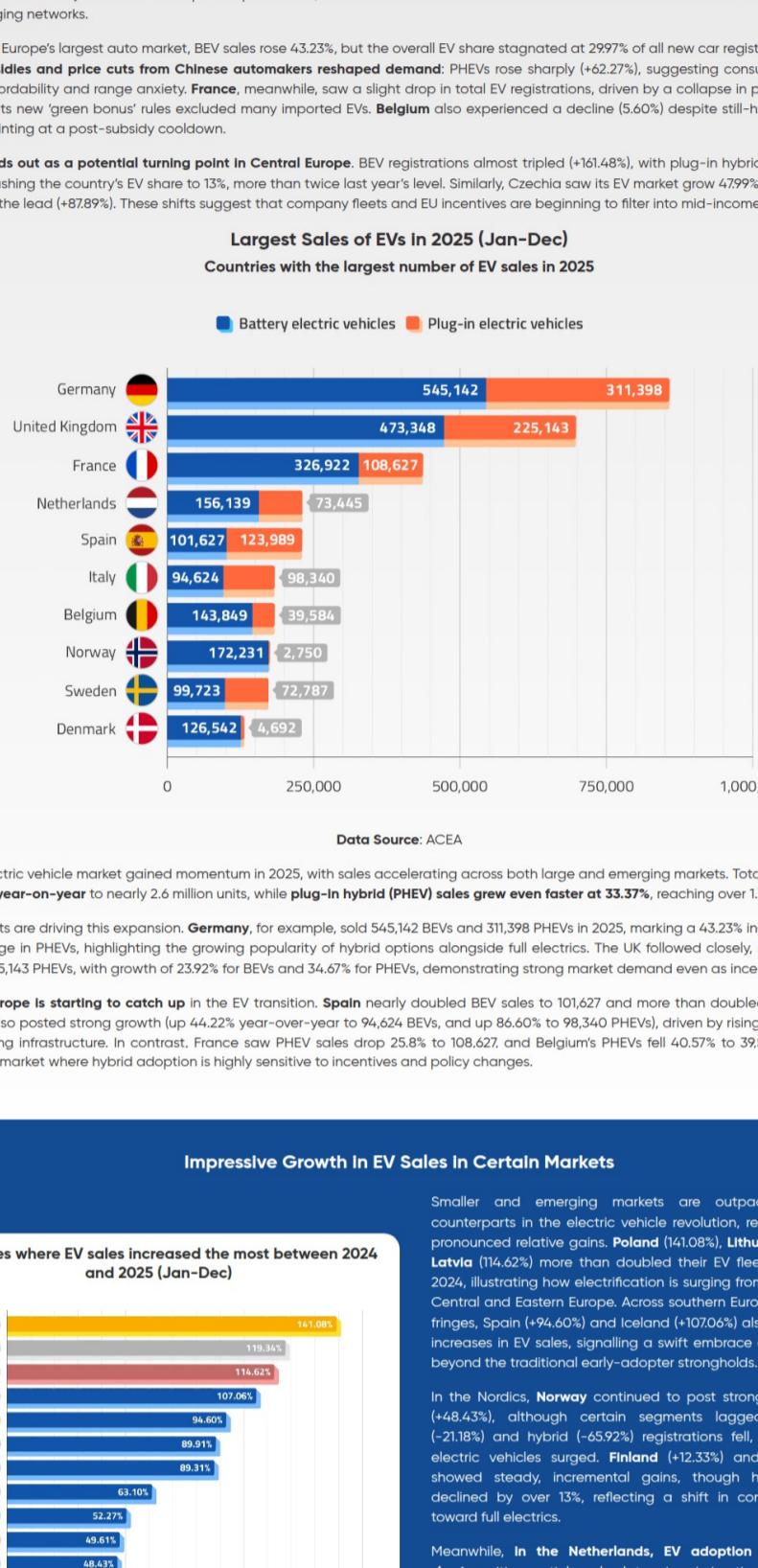
Data shows that across Europe, the growth of battery-electric vehicles (BEVs) has slowed in 2025, due to a range of factors including reduced subsidies and infrastructure challenges. In contrast, plug-in hybrid electric vehicles (PHEVs) are gaining traction, with sales up 33%, while hybrid-electric vehicles (HEVs) continue to grow in popularity. HEVs now hold the largest share of the market at 34.4% of all new car registrations, compared with a combined 33.8% for petrol and diesel vehicles.

## Key Highlights

- The largest number of EVs in 2025 was sold in Germany: 854,540 vehicles were purchased, up 9.6% from 2024.
- The Nordics continue to lead Europe in the transition to electric mobility, with 97.41% of newly registered cars in Norway now fully electric.
- EVs account for 70.8% of new cars sold in Denmark, 63.1% in Sweden, and 61.3% in Iceland.
- Europe's electric vehicle market expanded in 2025, with total sales rising 30.9% from the previous year to 3.86 million units.

## Share of EVs Around the World

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



## 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: 97.41% of all new cars registered in 2025 were electric, leaving petrol and diesel models in sharp decline, down more than 50% and 35%, respectively. The rest of Europe is catching up fast. In Poland, Lithuania, and Latvia, all saw sharp increases in EV adoption compared with last year. Poland's EV share more than doubled, rising 122.5% from 5.82% to 12.95%. Lithuania climbed 57.41%, from 11.5% to 18.1%, while Latvia increased 30.3%, from 11.1% to 14.3%. These jumps show that even smaller markets are accelerating rapidly toward electric mobility.

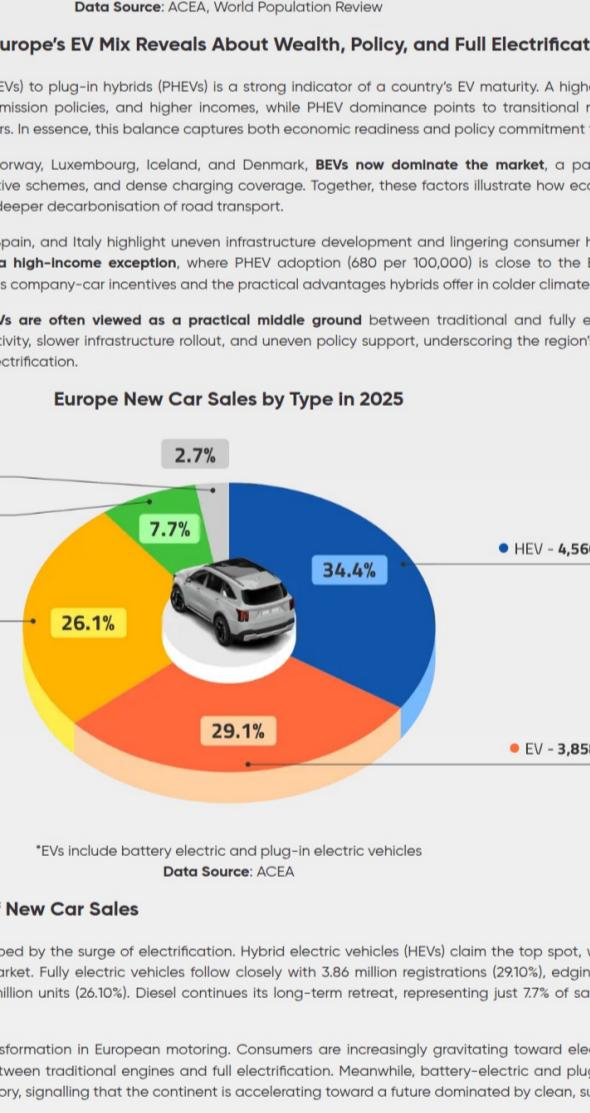
However, this replacement effect is far from uniform. Despite Latvia's electric vehicle share nearly doubling, petrol and diesel models still dominate the market, accounting for 78.91% of all new car registrations in 2025. The contrast is even starker in Bulgaria, where 94.42% of new vehicles still run on conventional fuels, and petrol registrations have actually risen by 14.39% 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 43.23%, but the overall EV share stagnated at 29.97% of all new car registrations. The end of certain subsidies and price cuts from Chinese automakers reshaped demand: PHEV sales rose sharply (+62.27%), suggesting consumers are hedging between affordability and range anxiety. France, meanwhile, saw a slight drop in total EV registrations, driven by a collapse in plug-in hybrid sales (-25.8%), as its 'green bonus' rules excluded many imported EVs. Belgium also experienced a decline (5.60%) despite a 20.5% rise in EV penetration (over 43%), hinting at a post-subsidy cooldown.

Poland stands out as a potential turning point in Central Europe. BEV registrations almost tripled (+161.48%), with plug-in hybrids following closely (+19.36%), pushing the country's EV share to 13.3%, more than twice last year's level. Similarly, Czechia saw its EV market grow 47.9% overall, with plug-in hybrids in the lead (+87.89%). These shifts suggest that company fleets and EU incentives are beginning to filter into mid-income markets.

## Largest Sales of EVs in 2025 (Jan-Dec)

Countries with the largest number of EV sales in 2025



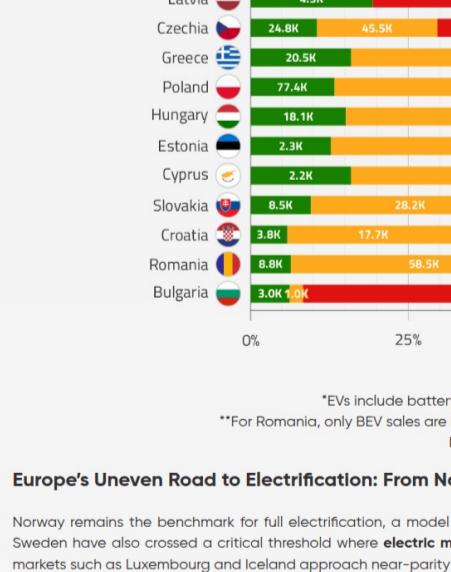
Europe's electric vehicle market gained momentum in 2025, with sales accelerating across both large and emerging markets. Total BEV registrations rose 29.73% year-on-year to nearly 2.6 million units, while plug-in hybrid (PHEV) sales grew even faster at 33.37%, reaching over 1.27 million units.

Major markets are driving this expansion. Germany, for example, sold 545,142 BEVs and 311,398 PHEVs in 2025, marking a 43.23% increase in BEVs and a 62.27% surge in PHEVs, highlighting the growing popularity of hybrid options alongside full electric. The UK followed closely, registering 473,348 BEVs and 225,143 PHEVs, with growth of 23.92% for BEVs and 34.67% for PHEVs, demonstrating strong market demand even as incentives evolve.

Southern Europe is starting to catch up in the EV transition. Spain saw BEV sales rise 44.22% year-over-year to 94,627 BEVs, and up 84.60% to 98,340 PHEVs, driven by rising consumer interest and improving infrastructure. In contrast, France saw PHEV sales drop 25.8% to 108,627, and Belgium's PHEVs fell 40.57% to 39,984, 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-Dec)



Smaller and emerging markets are outpacing their larger counterparts in the electric vehicle revolution, registering the most pronounced relative gains. Poland (+154.9%), Lithuania (+119.3%), and Latvia (+116.62%) more than doubled their EV fleets compared with 2024. Illustrating the exponential growth from a low baseline in Central and Eastern Europe, nations south of Europe and the Nordic fringe, such as Bulgaria (+45.38%) and Poland (+107.06%) also witnessed sharp increases in 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 (+48.43%), although certain segments lagged: plug-in hybrid (-21.18%) and hybrid (-65.92%) registrations fell, even as battery-electric vehicle sales surged. Finland (+12.33%) and Sweden (+9.57%) showed steady, incremental gains, though hybrids in Finland declined by over 13%, reflecting a shift in consumer preference toward full electrics.

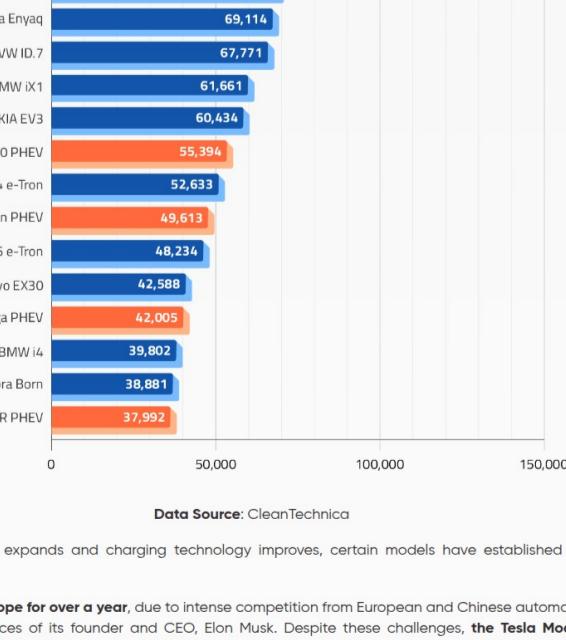
Meanwhile, in the Netherlands, EV adoption showed signs of slowing with growth largely plateauing during the first three quarters of the year. Battery-electric vehicle sales increased by just 3%, while overall EV sales rose a modest 15%. This slowdown, however, proved temporary. In the final two months of 2025, the market regained traction, with total 2025 EV sales jumping 24.15%, driven by a 18.14% rise in battery-electric vehicles and a much stronger 39.21% surge in plug-in hybrid sales.

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

■ BEV per 100,000 ■ PHEV per 100,000



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

The ratio of battery electric vehicles (BEVs) to plug-in hybrids (PHEVs) is a strong indicator of a country's EV maturity. A higher BEV share reflects advanced infrastructure, strong zero-emission policies, and higher incomes, while PHEV dominance points to transitional markets with weaker policy consistency translating into faster, deeper decarbonization of road transport.

PHEV-centric markets stand out, as Spain, Italy, and Italy, for example, where PHEV adoption (60.01%) is close to the BEV uptake (59.92% per 100,000), a balance shaped by generous company-car incentives and the practical advantages hybrids offer in colder climates.

In Southern and Eastern Europe, PHEVs are often viewed as a practical, mid-range option between traditional and fully electric vehicles. BEV affordability-driven transition toward electric.

EVs have been on the decline for over a year, due to intense competition from European and Chinese automakers, reports of inconsistent

build quality, and the political challenges of the transition. The UK and France have already seen EV sales surpass ICE vehicles, but more years on hybrids as a cautious, policy-led bridge. Austria, Portugal, and Switzerland mirror this balance, signaling steady but incomplete progress.

Further south and east, the shift is more gradual. In markets such as Italy, Spain, and Hungary, hybrids dominate, relying on HEVs as an interim step, but limited EV uptake. Central Europe still holds the largest share of new car sales.

Overall, the EU's EV market is 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.

## Europe New Car Sales by Type in 2025

■ EVs include battery electric and plug-in electric vehicles  
■ Diesel - 1,026,354  
■ Petrol - 3,467,041  
■ Others - 352,937

■ EV - 3,858,088  
■ HEV - 4,566,850  
■ PHEV - 2,700,410  
■ ICE - 1,750,000  
■ Others - 2,700,000

\*EVs include battery electric and plug-in electric vehicles  
\*\*For Romania, only BEV sales are included, as PHEV data is not available in the source.  
Data Source: ACEA, CleanTechnica

## Hybrids Claim Largest Slice of New Car Sales

Europe's new car market is dominated by hybrids, with 34.4% of all new registrations in 2025 going to HEVs. This is followed by PHEVs at 25.1%, BEVs at 20.1%, and ICE vehicles at 7.7%. Diesel sales have declined to 2.7%, while petrol remains the most popular fuel type at 25.1%.

These figures highlight a profound transformation in European motoring. Consumers are increasingly gravitating toward electrified vehicles, with hybrids offering a pragmatic path between traditional and full electric.

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