Press Release

Stuttgart, 27 April 2026

Center for Solar Energy
and Hydrogen Research
Baden-Württemberg (ZSW)

Location: Meitnerstr. 1,
70563 Stuttgart

Over 74 million electric cars on the roads worldwide today

The market for electric vehicles is picking up pace again

Market growth for electric vehicles has picked up speed once again in 2025: a total of 21.4 million electric vehicles were newly registered worldwide. This represents an increase of 23 per cent compared to the previous year. With over 14 million new registrations, China continues to dominate the electric car market ahead of the USA, while Germany is catching up again after two weaker years: over the previous year, the number of new registrations rose by 50 per cent to 856,500 electric cars. This means that there are now 3,157,200 electric cars on German roads. The latest figures on electromobility were compiled by the Center for Solar Energy and Hydrogen Research Baden-Württemberg (ZSW). The survey covered purely battery-electric cars, plug-in hybrids as well as vehicles with range extenders.

By the end of 2025, the global fleet of electric cars will amount to 74.3 million vehicles. Around 60 per cent, or around 44 million, of these EVs are registered in China, while the USA takes second place with 7.1 million electric cars, ahead of Germany with 3.2 million vehicles. With the exception of the Chinese market (+40 per cent), the highest growth rates in the portfolio were achieved by smaller markets such as Spain with 50 per cent (+232,200 vehicles) and Denmark with 42 per cent (+206,600 vehicles).

The global electric vehicle market is increasingly dominated by China: Even though almost all markets recorded partially significant growth, China now accounts for two thirds of the 21.4 million new registrations, totalling 14.2 million vehicles. Moreover, almost every second newly registered car there is an electric vehicle. Chinese manufacturers dominate the domestic market, while manufacturers from other countries are only represented to a very limited extent. In the USA, however, new registrations were down slightly due to the expiry of tax credits for the purchase or leasing of electric vehicles in September 2025. Developments in Europe are encouraging: After stagnating in the previous year, new registrations rose significantly to around three million electric vehicles in 2025. This means that the EU has once again secured second place in the vehicle market behind China. These two markets are also the largest growth drivers for electromobility.

Following on from two weaker years, momentum has also picked up significantly in Germany: The market for new registrations expanded by 50 per cent and reached a record high of 856,500 electric vehicles for the first time since

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2022. The reasons for this include declining vehicle prices - also due to higher manufacturer discounts - in the past year, as well as a broader selection of vehicles. By international comparison, this development must now be further accelerated, given that only around one in three newly registered cars in Germany is electrically powered. The situation is quite different in the northern European countries: In Denmark and Sweden, two thirds of all new vehicles are electric cars, while in Norway the rate exceeds 97 per cent. In Norway, one in three cars in the vehicle fleet is already electric, whereas in Germany the share of electric cars in the total number of cars stands at just over six per cent.

Electric vehicles lessen our dependence on fossil fuel prices

"The developments in fuel prices in recent weeks clearly show that countries with a high percentage of electric vehicles are more resilient than countries with a low share. Owners of electric cars are not dependent on fossil fuels and are therefore better protected against extreme price spikes, which can ease social and economic burdens in times of crisis," says Andreas Püttner, project manager in the Systems Analysis department at ZSW. "An accelerated expansion of renewable energies for electric vehicles not only reduces dependency on price fluctuations of fossil fuels, but also intensifies climate protection in the transport sector."

German manufacturers: Position maintained in international competition

In addition to dynamic market developments, there are further positive signals from Germany: German manufacturers performed comparatively well at international level in terms of cumulative sales figures: VW, BMW and Mercedes are all ranking in the global top 10 manufacturers of electric vehicles. The Volkswagen Group remains in third place with over 5.7 million electric vehicles sold. However, compared to the industry leader BYD from China, which has further extended its lead over second-placed Tesla (USA), there is a growing gap in terms of numbers: BYD has sold over 15 million electric cars worldwide to date – which is around three times as many as VW. In addition to the domestic market, the company is also increasingly focussing on international markets, which is escalating the competitive situation for established manufacturers there. Added to this is the emergence of many still relatively unknown vehicle manufacturers from China, such as Li Xiang or Chery Automobile, in global markets.

German manufacturers, however, were also able to hold their competitive position in terms of new registrations worldwide in 2025. VW once again achieved fourth place with over 1.4 million electric vehicles sold - an increase of 39 per cent compared to the previous year. BMW sold almost 650,000 electric vehicles, positioning the company in seventh place. BYD, however, also

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dominates first place in this category with almost 4.5 million vehicles sold. The Chinese company Geely, which also owns Volvo, showed the strongest growth in the top ten. With over 1.8 million new registrations, Geely displaced Tesla in third place (1.7 million).

Company cars: CO_2 fleet limit value could bolster German manufacturers

"German manufacturers should capitalise on their successes and position themselves even more strongly in the direction of electromobility," as Andreas Püttner states. "In the face of a globally shrinking market volume for vehicles with combustion engines, value creation and prosperity can be preserved in this way. The introduction of binding CO_2 fleet limits for company cars could provide an important impetus for strengthening growth momentum in Germany and the EU. German manufacturers in particular could benefit from this, as company cars represent a particularly significant sales segment for them in their domestic market." According to the Federal Motor Transport Authority, company cars will account for around two thirds of all new car registrations in Germany in 2025. And this is precisely why greater electrification of the company car segment would also boost the used car market for electric vehicles, as ZSW expert Andreas Püttner argues.

Chinese manufacturers dominate the top ten e-vehicle models

In concluding, let's take a look at the individual vehicle models sold globally: The extent of the competition from China is also evident here. Tesla stands at the top of the ranking in terms of global cumulative new registrations with its Model Y and Model 3 models. VW also remains in the top ten with the ID.4. The remaining vehicles in the top ten, however, all come from China.

There are no European models in the top ten global new registrations in 2025 and eight of the ten vehicle models come from Chinese manufacturers. Geely was particularly successful with the EX2, which took fifth place with 479,000 vehicles sold.

Further data on electric mobility are available at:
www.zsw-bw.de/mediathek/datenservice.html

Information on data collection

Why are plug-in hybrids included in the statistics?

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In addition to purely battery electric vehicles (BEV), the ZSW also includes vehicles with plug-in hybrid drives (PHEV) and with range extenders (REEV) in the data analysis, as these vehicles are defined as electric vehicles according to official statistics, e.g. in Germany and the EU, but also by the International Energy Agency (IEA).

What types of vehicles are categorised as electric vehicles?

In addition to conventional passenger cars, the ZSW also includes light commercial vehicles (LCVs) weighing in at less than 3.5 tonnes. This also includes, for example, delivery or trade vehicles.

How many new registrations were recorded for passenger cars with pure battery drive (BEV)?

BEVs will account for around 70 per cent of new registrations worldwide in 2025. Around two thirds of the global fleet are BEVs and one third PHEVs or REEVs.

About the ZSW

The Center for Solar Energy and Hydrogen Research Baden-Württemberg (ZSW) ranks as one of the leading institutes for applied research in the major energy transition areas: Photovoltaics, wind energy, batteries, fuel cells, electrolysis, eFuels, circular economy, policy advice and the use of AI for process and system optimisation. Together with industry, we are paving the way for new technologies to enter the market. More than 300 colleagues and around 100 scientific and student assistants work at the ZSW locations in Stuttgart and Ulm. The ZSW operates a test field for wind energy and another test field for PV systems. The ZSW is a member of the Innovation Alliance Baden-Württemberg (innBW), an alliance of ten business-orientated research institutions.

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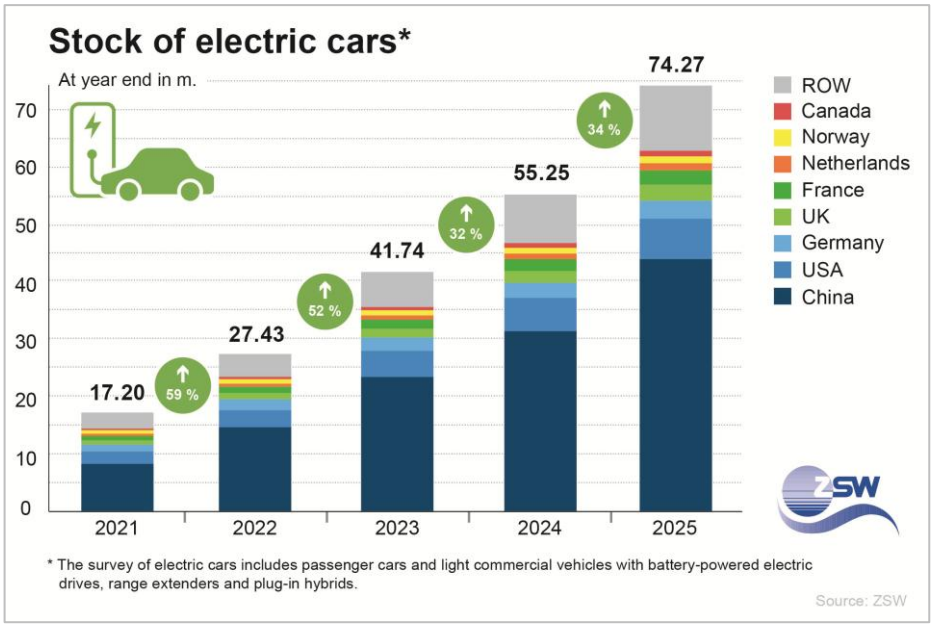
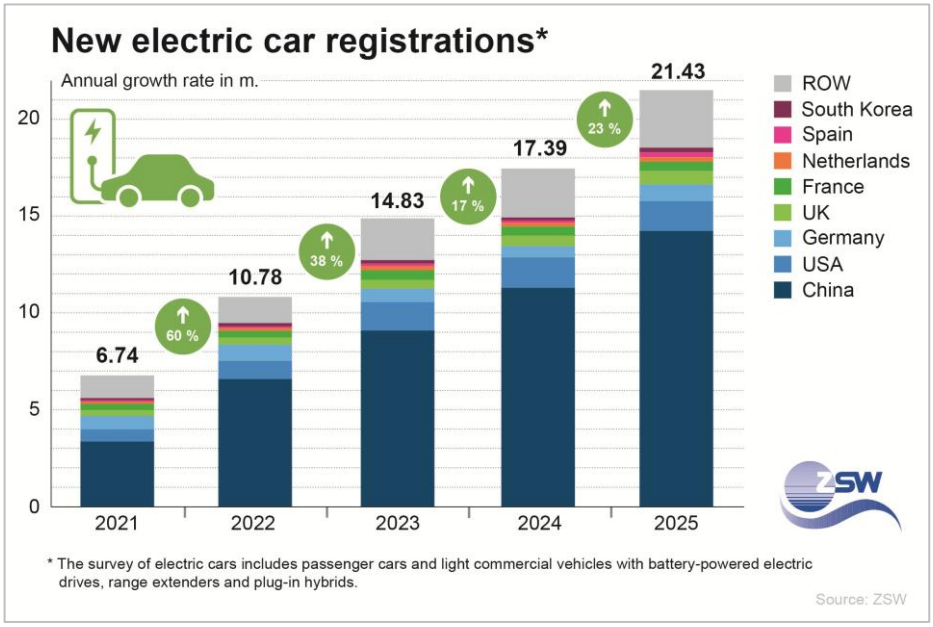


The global fleet of electric cars as of 31 December 2025. Graphic: ZSW



Worldwide new registrations of electric cars as of 31 December 2025. Graphic: ZSW

The image material is available from Solar Consulting or at https://energie.themendesk.net/zsw/.