Introduction
In this edition we compare the evolution of BEV’s and PHEV’s in Europe since 2014.
We also publish the main highlights of June 2016 and take a preliminary peak at Europe’s Best Selling EV’s that month.

June 2016 Highlights

- **Europe registered 100.000 new electric vehicles in 2016.** The total of plug-in passenger cars (96,000), light commercial vehicles and “Twizy” quadricycles has exceeded the 100,000 registrations in just six months;
- We expect the 200.000 milestone to be reached in December, which would be a new record;
- **PEV sales in Europe** in June were 16.358 for passenger cars, up 15% from May 2016 and up 1% from June 2015, with the yearly total now 23% above the result of the same period in 2015. Sales are expected to drop slightly in July, as the summer holiday season usually brings slow selling months;
- Sales of all-electric vehicles (7.909) were behind plug-in hybrids (8.449), with BEV’s watching their sales drop 13% regarding the same period last year. This is partially explained by buyers waiting for longer range versions of existing models and for upcoming new models, like the Opel Ampera-e or the Second Generation Nissan Leaf;
- Comparing the year-to-date registrations with the same period last year, the countries with higher growth rate were Lithuania (300%), Latvia (133%), Austria (120%), Iceland (119%), Finland (102%) and Belgium (89%);
- Leading countries for PEV market share are: Norway (29%), Sweden and Iceland (both around 3%), the Netherlands (2.45%) and Switzerland (1.76%);
- Looking only at BEV market share, the leading markets are: Norway (16%), Austria (1.17%), Iceland (1.14%), France (1.13%), the Netherlands and Switzerland (both at 1%);
- Plug-in Light Commercial Vehicles (N1 Category) had a 12% increase, which is in line with previous performances;
- Regarding **EV Charging Infrastructure**, the total of charging positions in Europe reaches over 92.000, of which 9.458 Fast Charging positions.

**BEV’s vs PHEV’s**
While the growth of PEV’s has been almost uninterrupted in the last couple of years; we can see some significant changes when we divide PEV sales by technology, between the all-electric BEV’s and the double engine PHEV’s:
In 2014, BEV’s had the upper hand over PHEV’s, with all-electric passenger cars growing in each quarter; however, in the beginning of 2015, as more and more PHEV’s were launched into the market (Audi A3 e-Tron, VW Golf GTE...), the difference between both technologies became smaller every quarter, until the last quarter of 2015, when PHEV’s clearly outpaced BEV’s; although Q4 of last year was significantly influenced by fiscal changes in countries like the Netherlands or Sweden, PHEV’s continued to outsell pure electric cars in the beginning of 2016, until now.

Looking at the market share of each technology, you can see in the graphic the shrinking BEV market share trend in Europe. This is an event that is becoming increasingly discordant with the BEV share in the global PEV market, which has never got lower than 55% share in the same period and is now at 60%. This is due in most part to the Chinese PEV market, currently the largest in the world, with 41% of the world PEV sales this year, where BEV’s have 67% market share.

### Best Selling EV’s in Europe

<table>
<thead>
<tr>
<th>Model</th>
<th>June 2016 Registrations</th>
<th>Year On Year - % Variation</th>
<th>BEV/PHEV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renault Zoe</td>
<td>2,391</td>
<td>- 4%</td>
<td>BEV</td>
</tr>
<tr>
<td>Mitsubishi Outlander PHEV</td>
<td>1,753</td>
<td>- 11%</td>
<td>PHEV</td>
</tr>
<tr>
<td>Nissan Leaf</td>
<td>1,591</td>
<td>+ 9%</td>
<td>BEV</td>
</tr>
<tr>
<td>Tesla Model S</td>
<td>1,482</td>
<td>- 29%</td>
<td>BEV</td>
</tr>
<tr>
<td>Volkswagen Passat GTE</td>
<td>1,124</td>
<td>N/A</td>
<td>PHEV</td>
</tr>
<tr>
<td>Mercedes C350e</td>
<td>813</td>
<td>+ 127%</td>
<td>PHEV</td>
</tr>
</tbody>
</table>

June data show that the European EV market growth has slowed down a little, because of the temporary sales drop in Germany, with registrations increasing only 1% year-on-year, to 16,000 units.

**First Place** – The Renault Zoe climbed to First, despite a slight decrease in the French hatch registrations (-4%), with the leading market being France, as usual, with 55% (1,306 units) of them being registered there. Some good performances were also seen in Norway (398 units) and Germany (225).
Second Place – The Mitsubishi Outlander PHEV dropped to Second, but not all was bad, as sales dropped less (-11%) than in previous months. Norway contributed with 521 units, looking as a new opportunity market for the Japanese SUV, but Mitsubishi’s model also progressed in Sweden, where sales are back at last year levels (248 units in June ’16 vs 293 in June ’15);

Third Place – The Nissan Leaf remained in Third, but grew 9% Year-on-year, with strong showings throughout Europe, especially in France (397) and Norway (318).

Fourth Place – The Tesla Model S all-electric vehicle surged to the Fourth Position, but nevertheless its deliveries were down 29% regarding the same month last year, hampered by the 50% drop in Norway (284 units now vs 566 a year ago), with two digit drops in other important markets. This lower performance by the Tesla model might be explained by the automaker being busy with the recent launch of the Model X SUV in Europe.

Fifth Place – The Volkswagen Passat GTE dropped to the Fifth position, with the German midsize model proving to be quite popular in Scandinavia, where 62% of these units were registered, with the best example being the 453 deliveries in Sweden.

Sixth Place – Starting to be a familiar sight in the ranking, the Mercedes C350e was Sixth, with strong showings in the United Kingdom and Portugal, countries where this model is among the Top 3 PEV best sellers.