



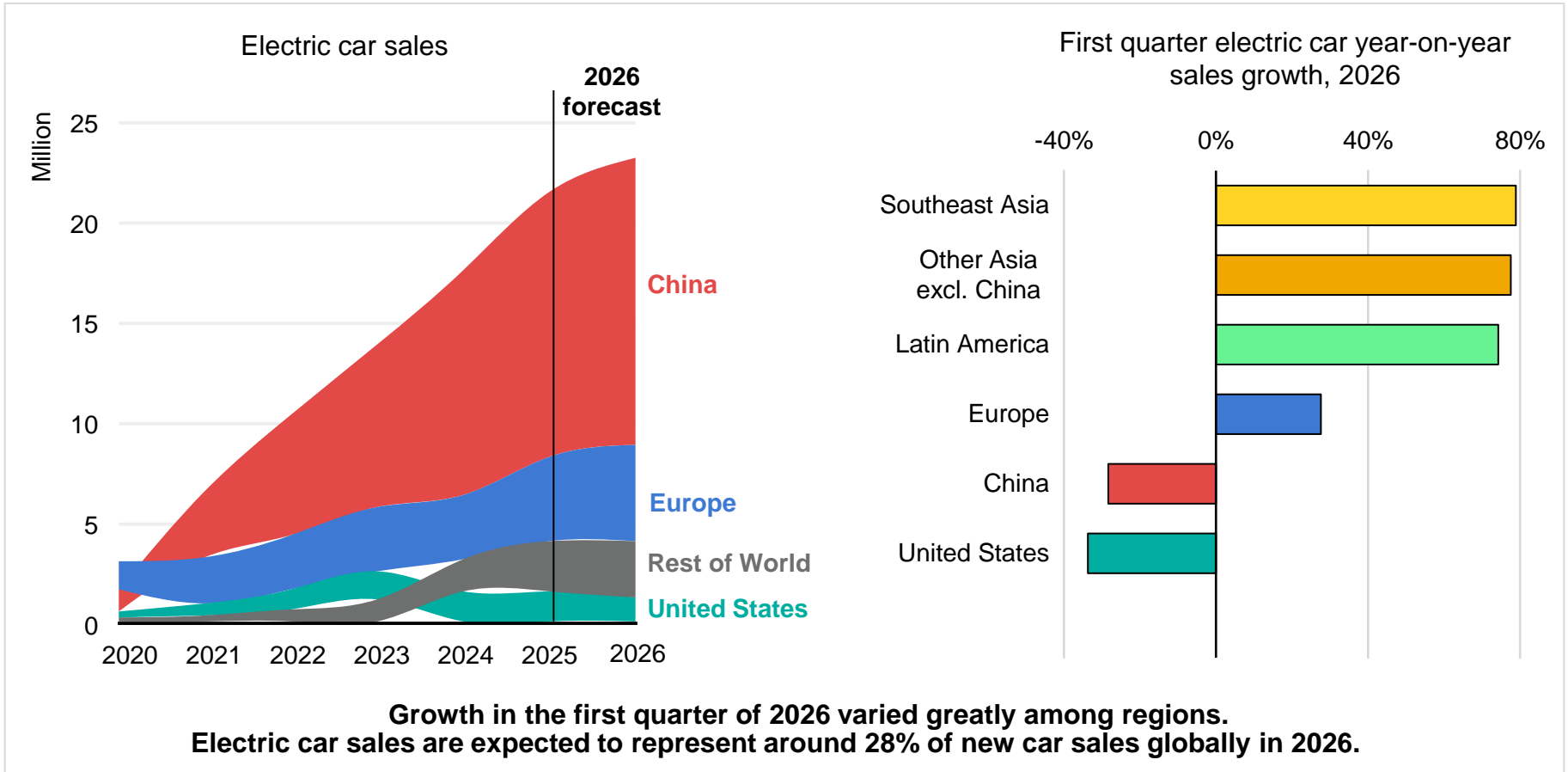
Global EV Outlook 2026

Technical webinar

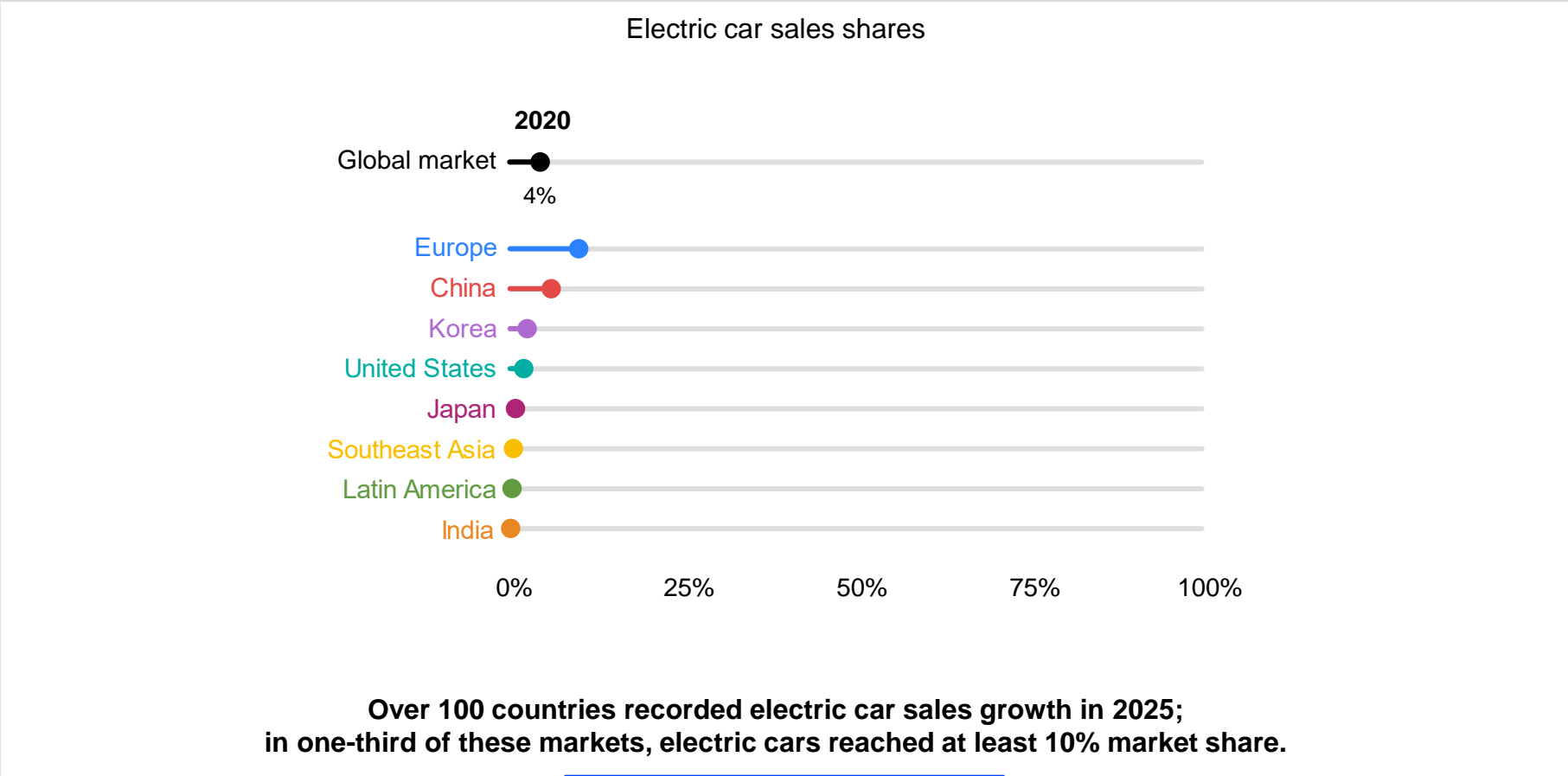
27 and 28 May 2026

Electric car sales

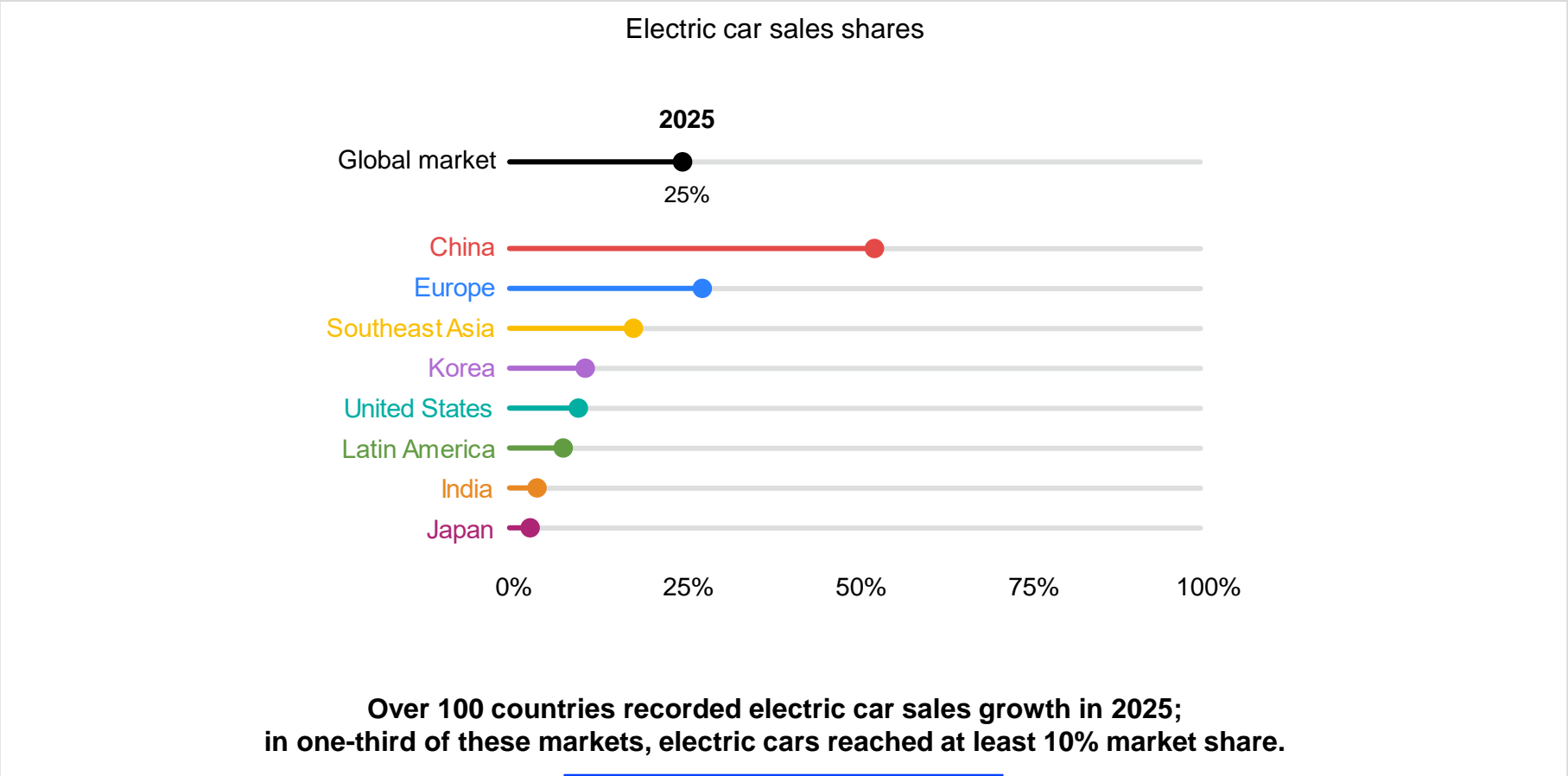
With 20 million sales, one in four new cars was electric in 2025



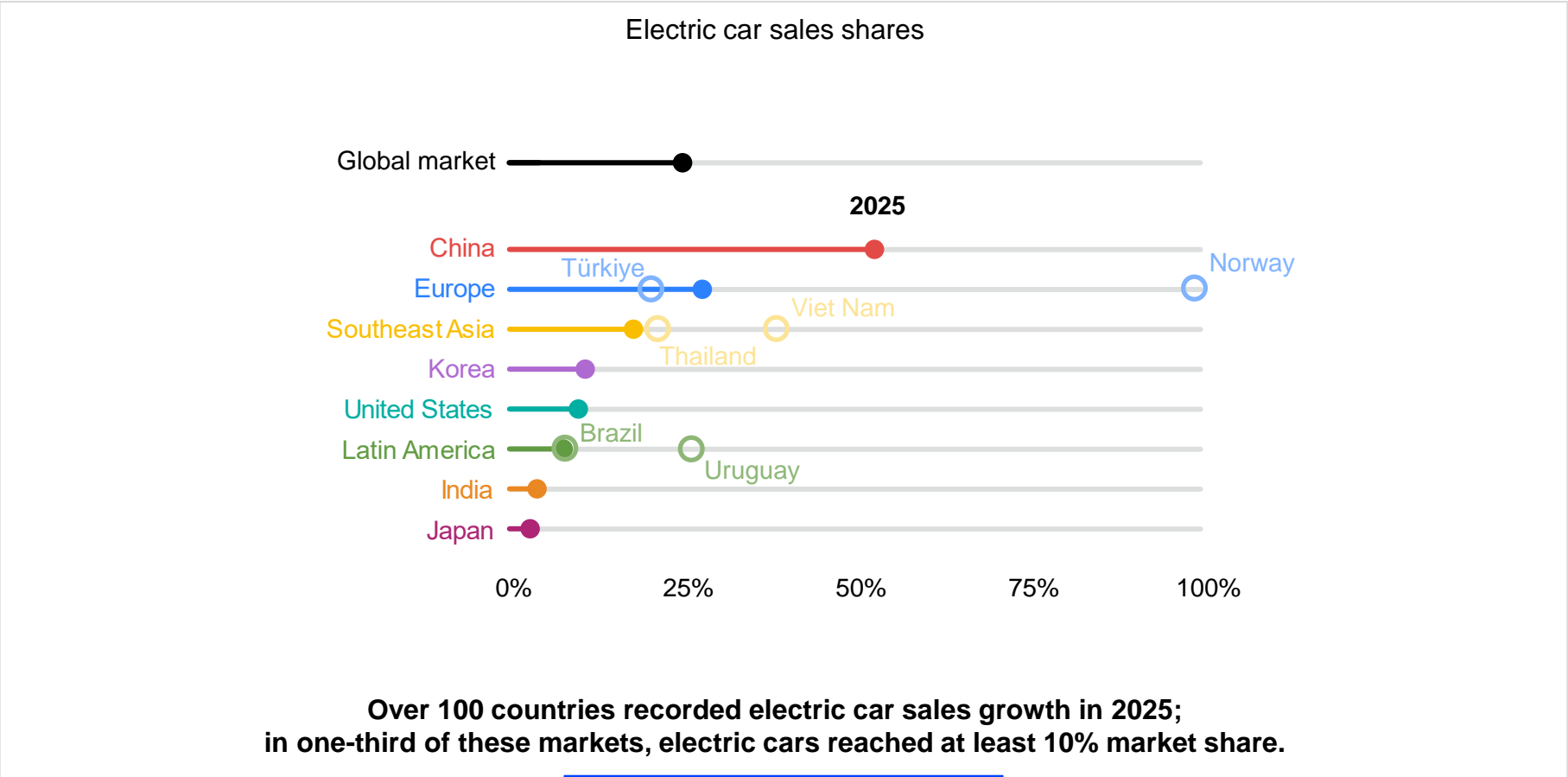
Electric car sales are spreading globally



Electric car sales are spreading globally

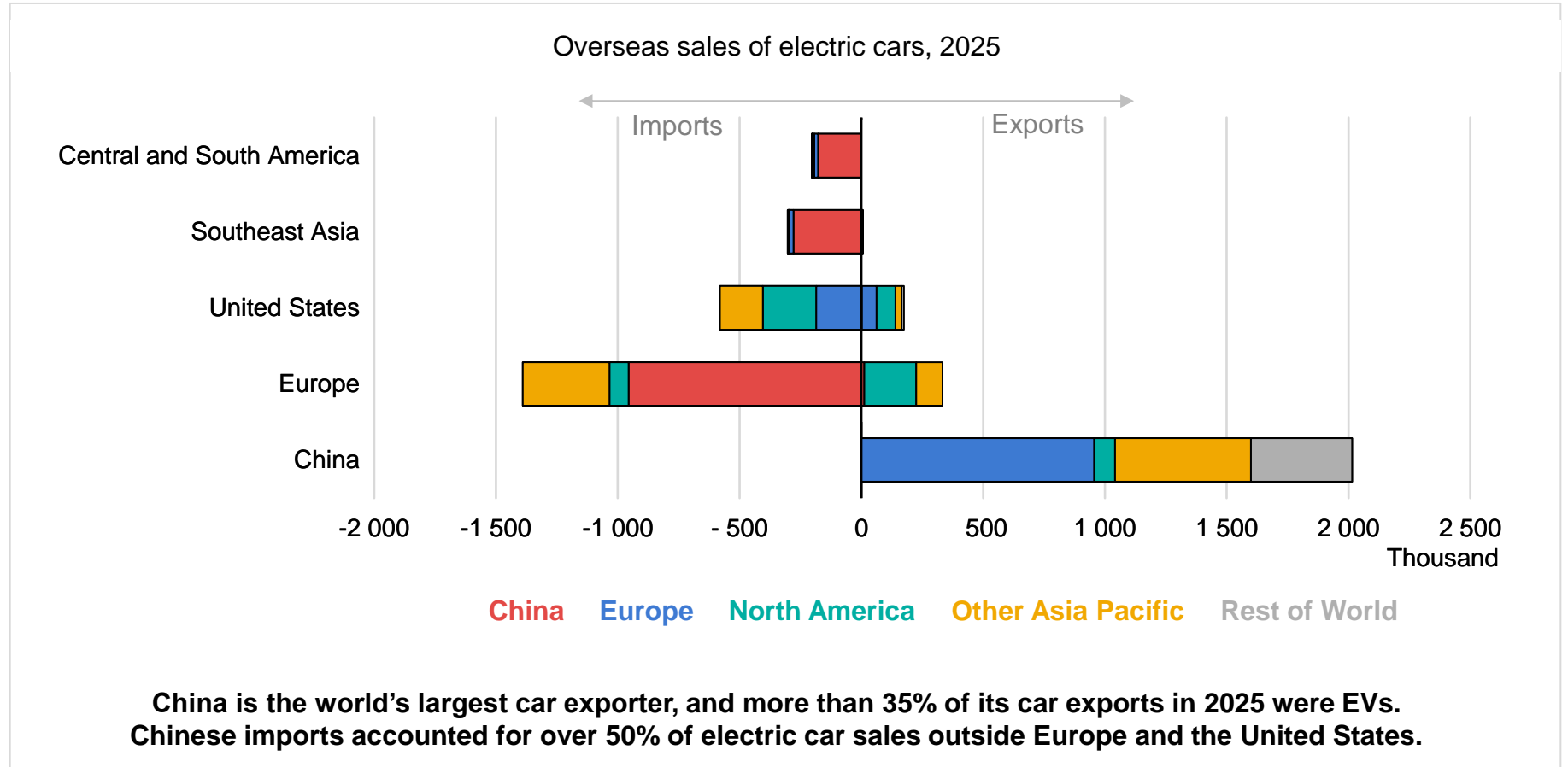


Electric car sales are spreading globally



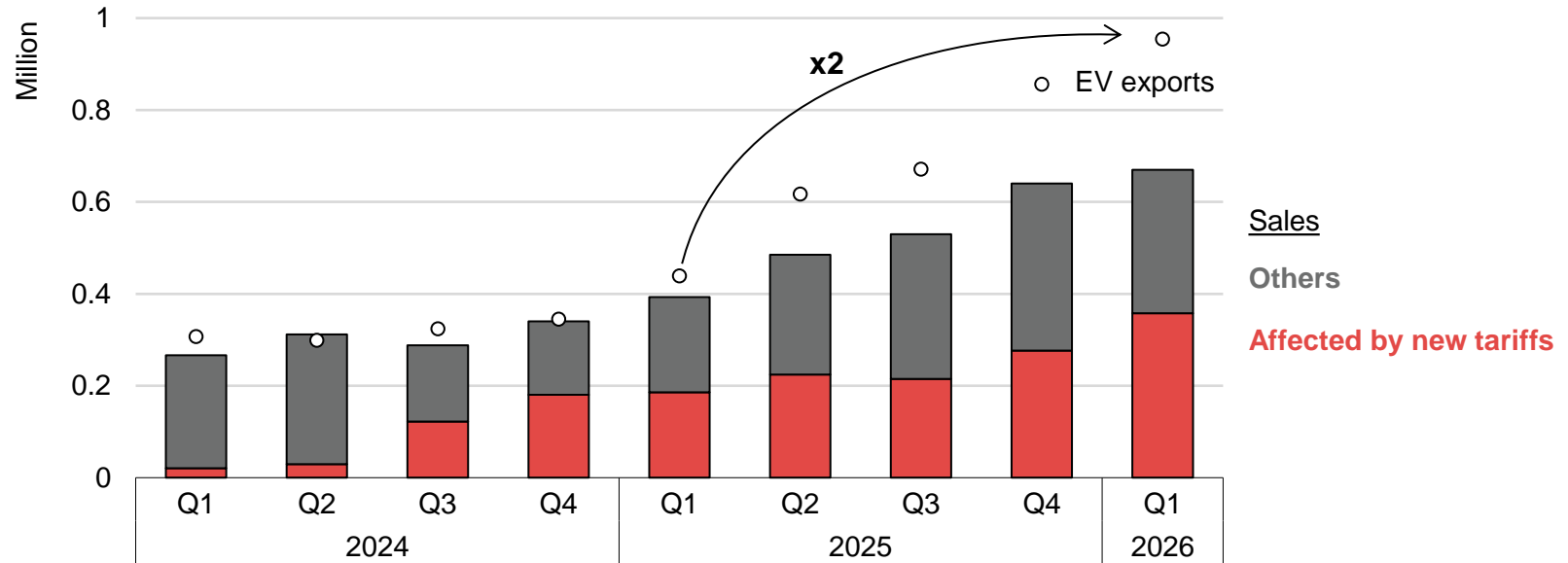
Electric car trade

Chinese electric car exports doubled to a record high in 2025



Chinese exports surge in 2026 despite headwinds

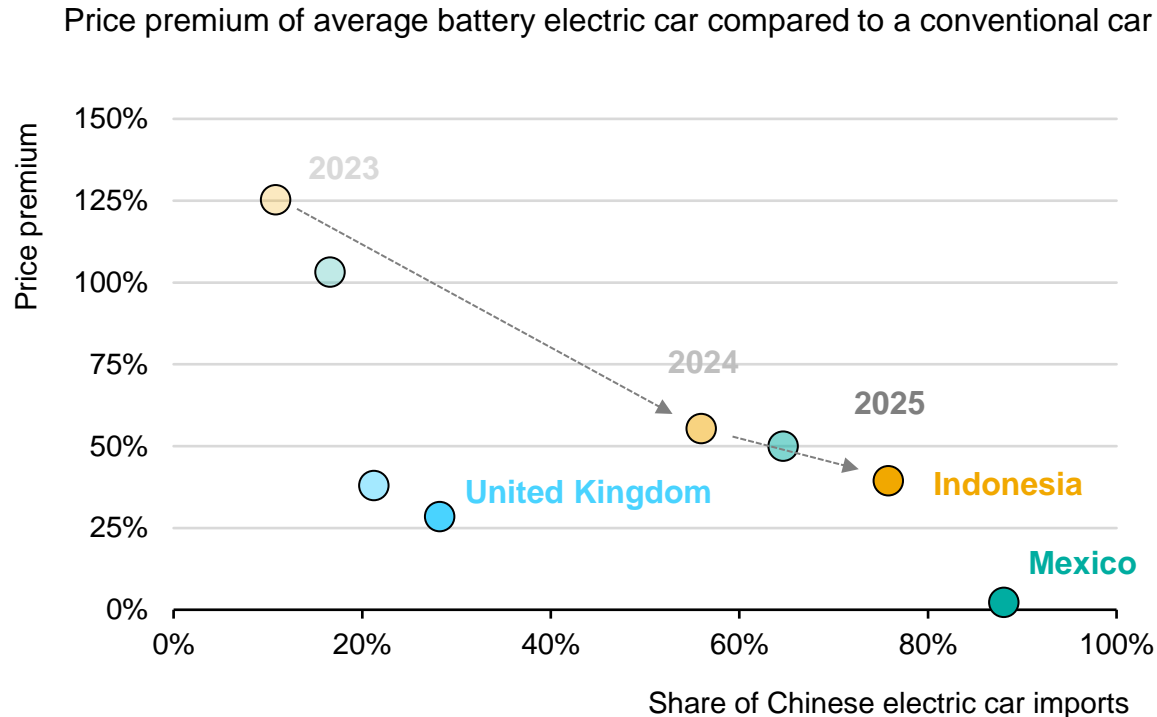
Quarterly overseas sales and exports of Chinese-made electric cars



Despite growing overseas inventories and rising trade barriers, Chinese EV exports doubled year-on-year in the first quarter of 2026.

Electric car affordability

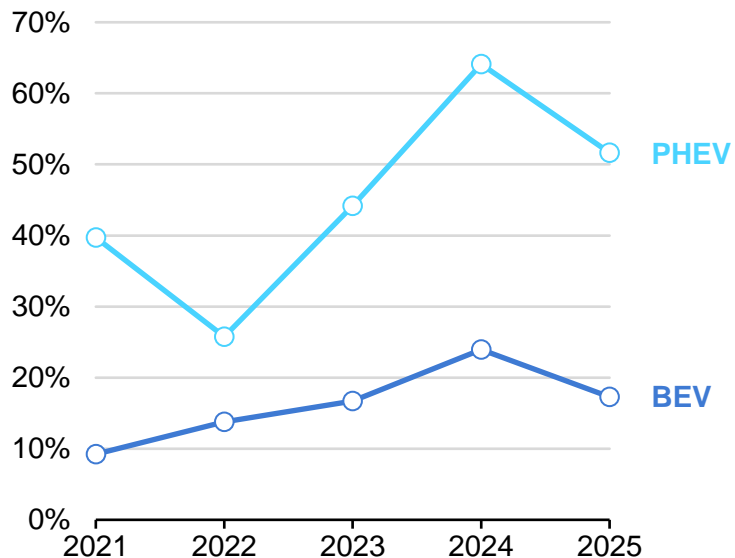
Chinese exports are bringing down prices in other markets



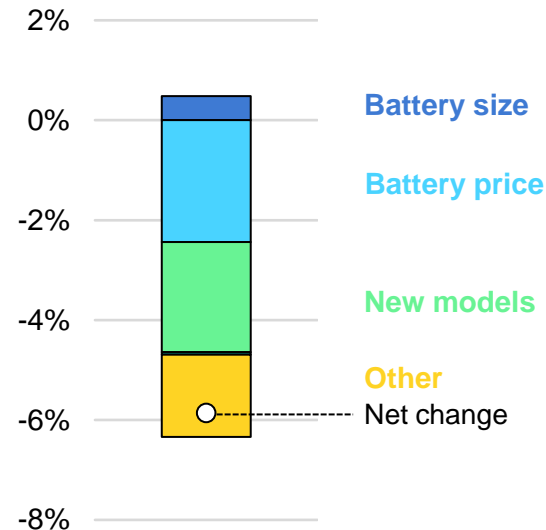
Battery electric cars have reached price parity in Mexico on the back of imports from China. Some European countries are also seeing increased Chinese electric car imports bring down the price gap.

In Germany, electric car prices declined after years of increasing

Electric car price premium



Decomposition of year-on-year change in average battery electric car price, 2025

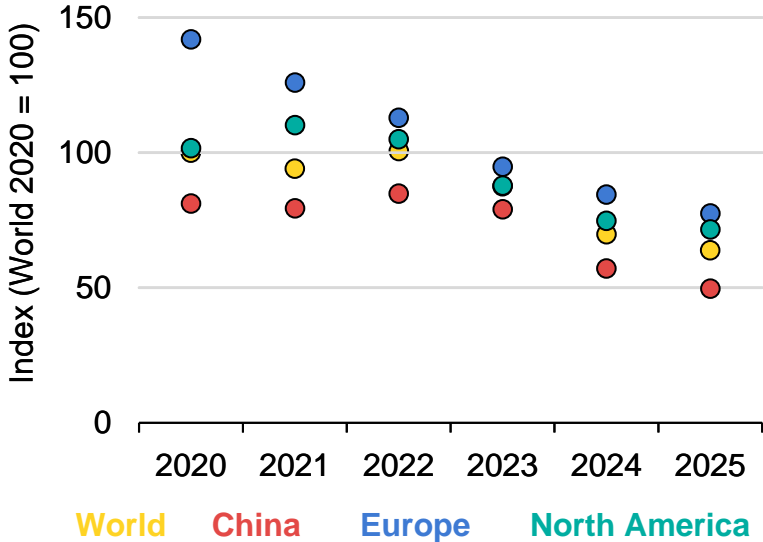


The increasing stringency of EU CO₂ targets has prompted carmakers to launch more affordable EV models and cut prices on existing models, while battery price declines also supported improving the affordability in 2025.

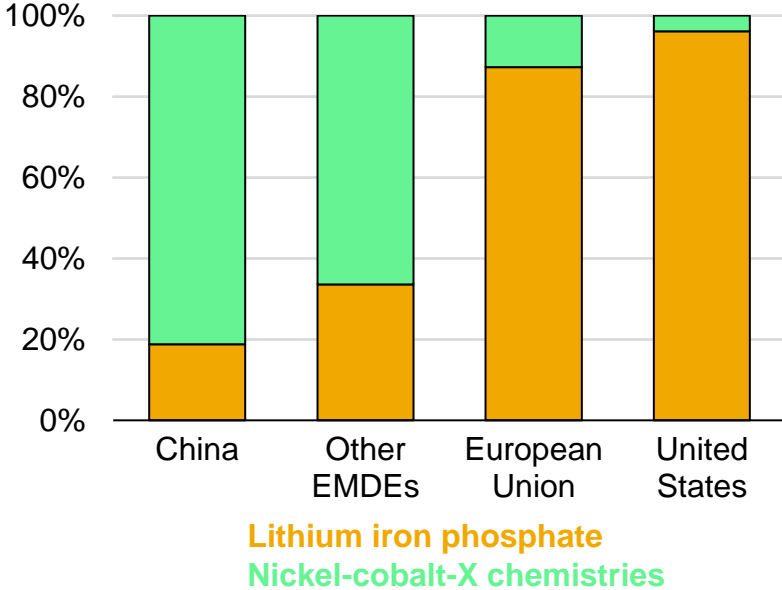
EV batteries

Battery price continues to fall everywhere, but not equally

Battery pack prices



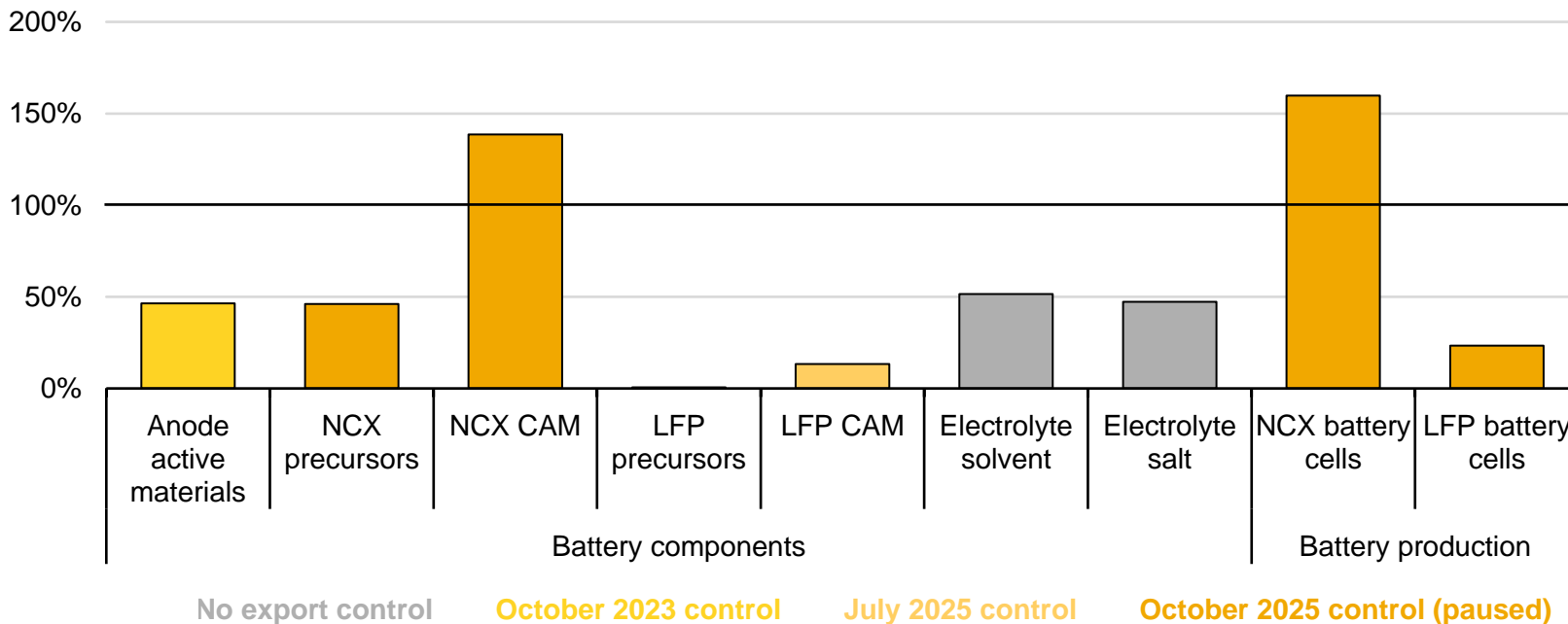
Share of electric vehicle battery sales by chemistry and region, 2025



Global average battery prices dropped by 8% in 2025. Prices decreased across all regions, though unevenly. Difference in chemistry preference is stark, with China preferring cheaper chemistries – and so do emerging markets.

China holds significant leverage along the battery supply chain

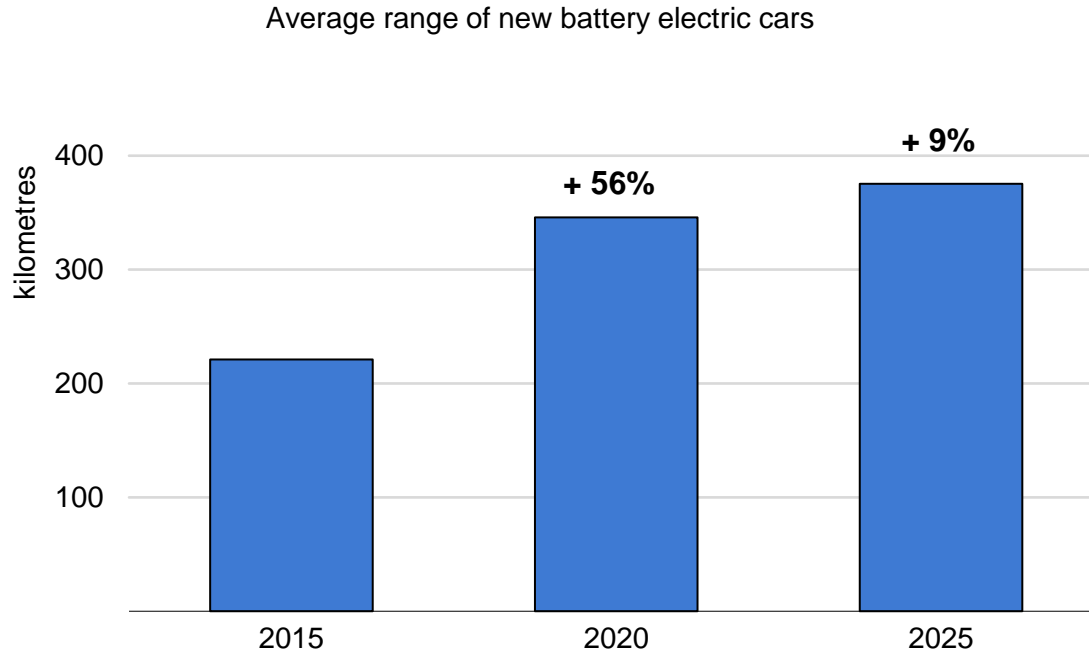
Share of global demand excluding China that could be met without China, 2025



The battery supply chain remains highly dependent on Chinese production, with cathode precursors, LFP and anode materials particularly exposed. Chinese export controls introduce an additional risk.

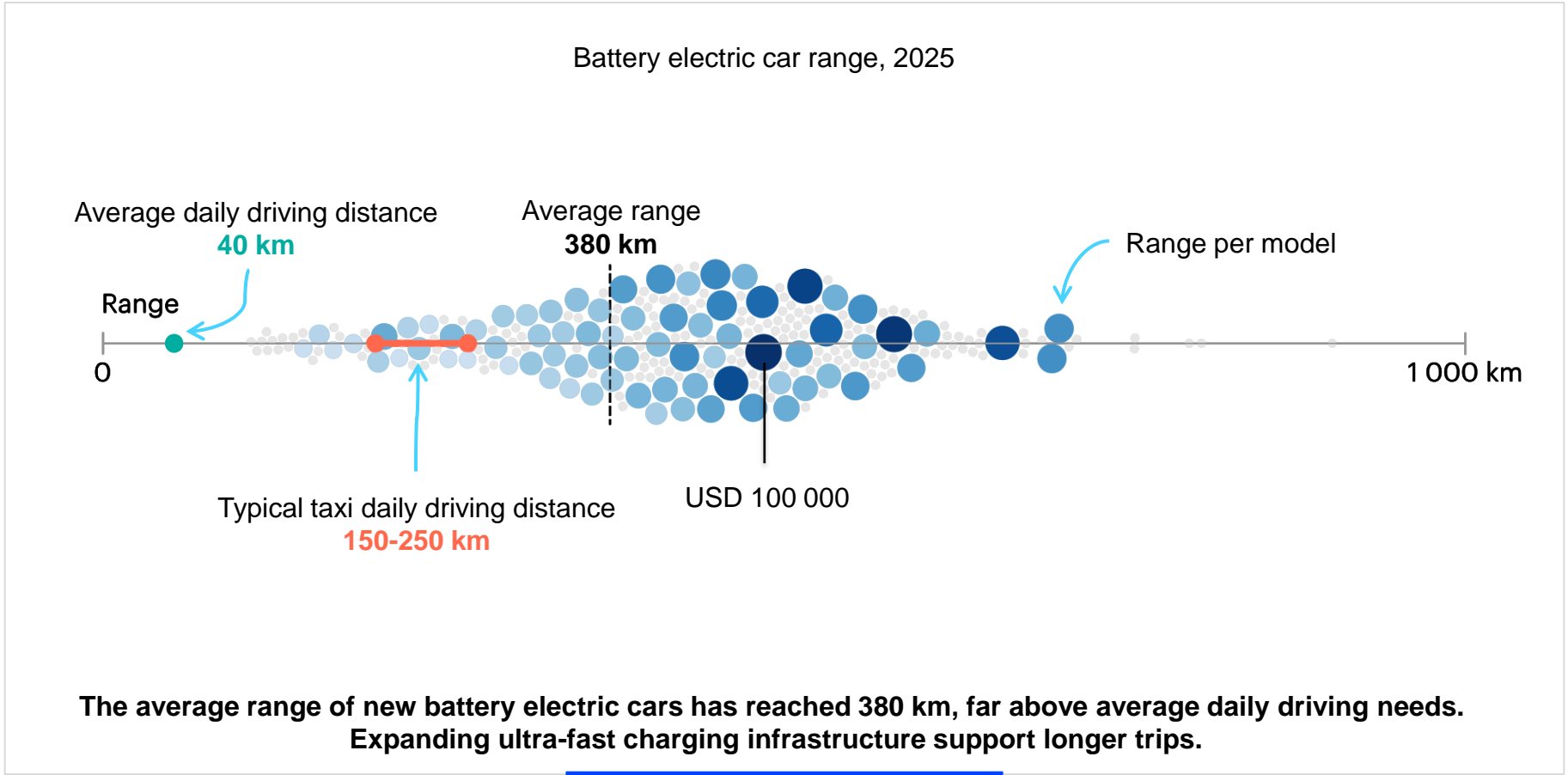
Driving range of battery electric cars

The average range of battery electric cars is plateauing



The average range of new battery electric cars has reached close to 400 km, far above average daily driving needs. Expanding ultra-fast charging infrastructure support longer trips.

The average range of battery electric cars is plateauing

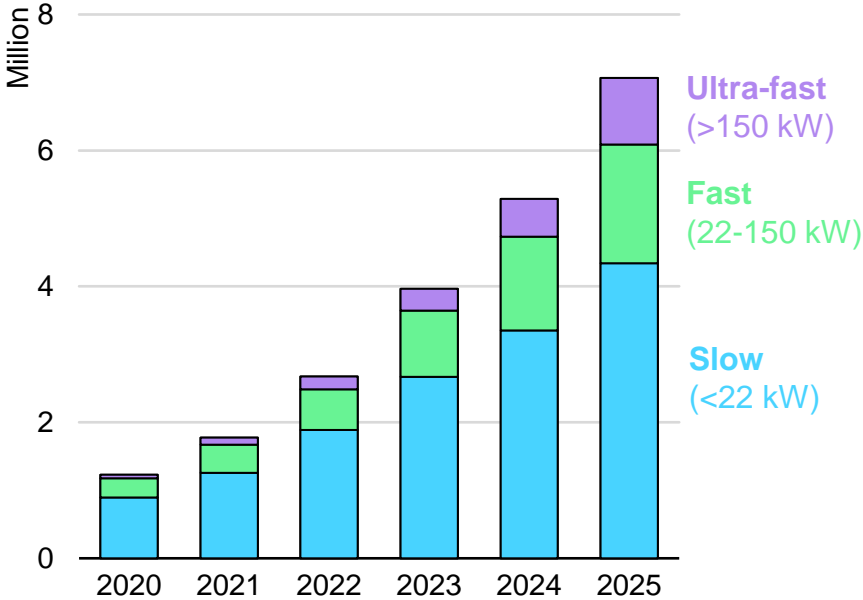


The average range of new battery electric cars has reached 380 km, far above average daily driving needs. Expanding ultra-fast charging infrastructure support longer trips.

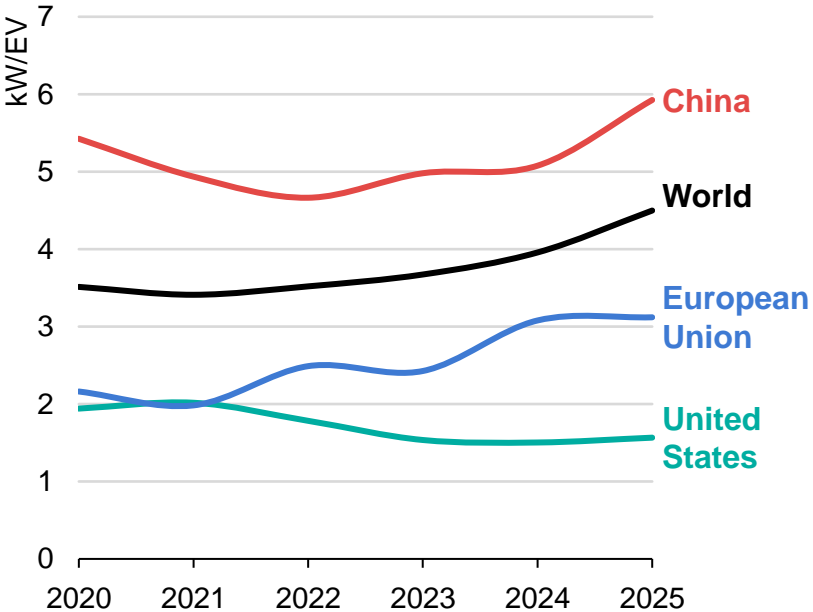
EV charging

Public fast charging networks continue to expand

Global stock of public charging points by speed



Average charging capacity per electric light-duty vehicle



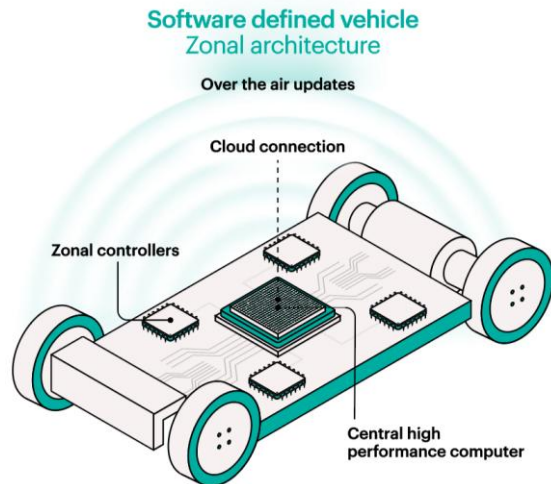
Around 45% of newly installed chargers were fast or ultra-fast
Charging capacity per electric light-duty vehicle is increasing globally but varies across major markets.

Technology trends

Software-defined vehicles

Over 90% of OEMs are committed to zonal architectures

100% of models with zonal architecture are battery electric



Autonomous vehicles

100% of robotaxis are battery electric

EVs sold in 2025 were $\approx 2x$ more likely to be partially automated than ICEs and hybrids

Computing chips and AI

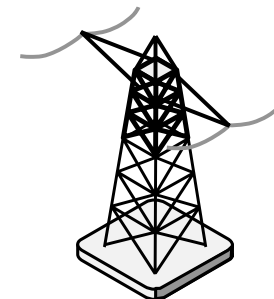
5x more powerful chips for driving automation since 2020

AI improves battery management and charging

Energy system integration

EVs offer flexibility benefits via smart charging

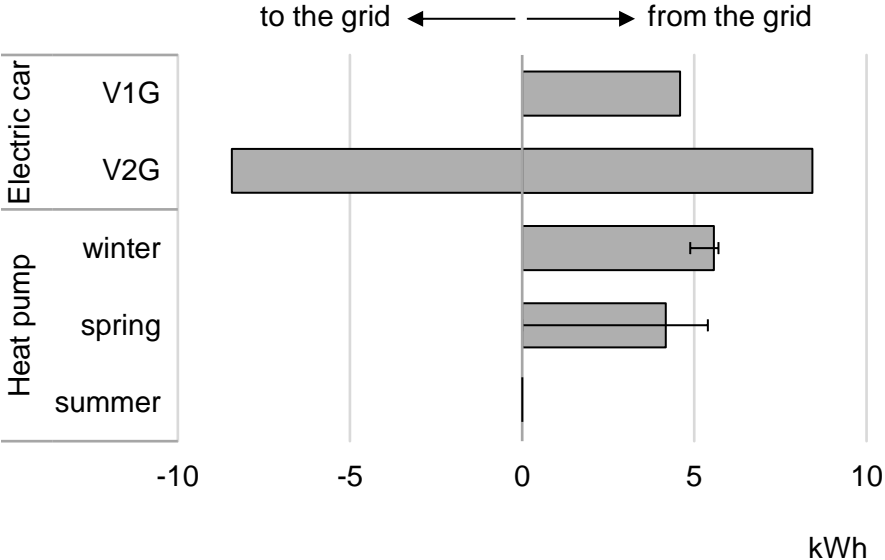
First commercial V2G tariffs offer free home charging



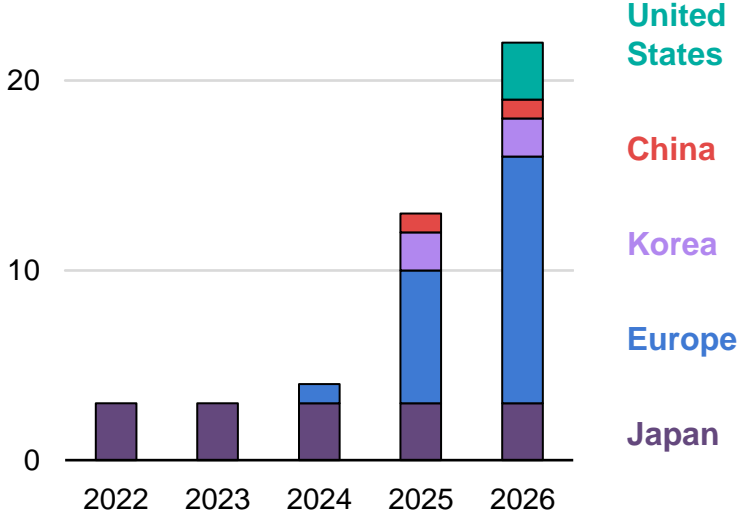
Cars are evolving into connected digital platforms, spearheaded by electric vehicles.

Bidirectional charging can alleviate grid constraints

Average hourly flexibility potential, case study on German households



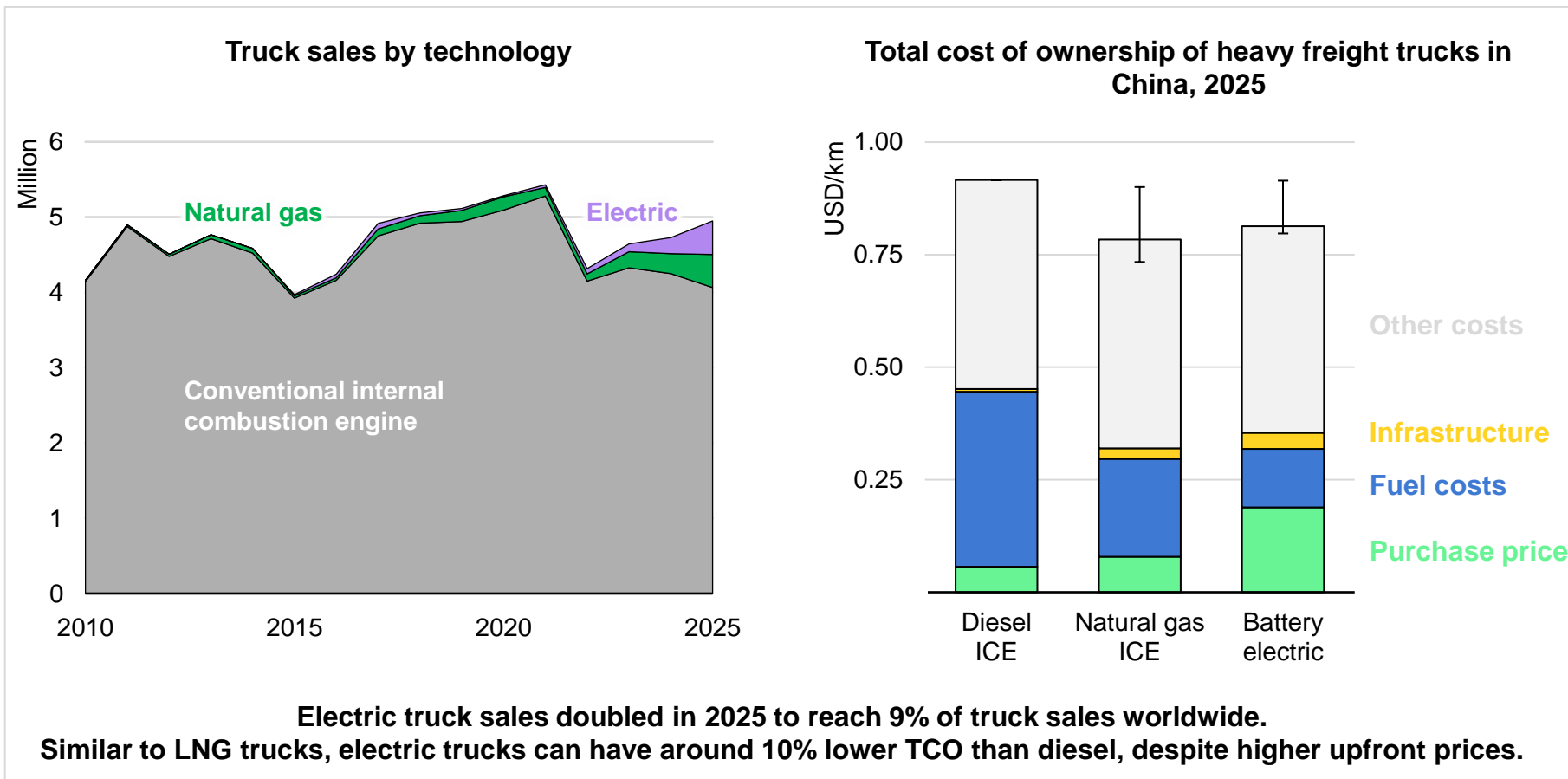
Number of V2G capable models by carmaker headquarters



While more vehicle-to-grid (V2G)-capable EVs and chargers have become available, scaling up deployment hinges on interoperability between EVs, chargers and grid operators.

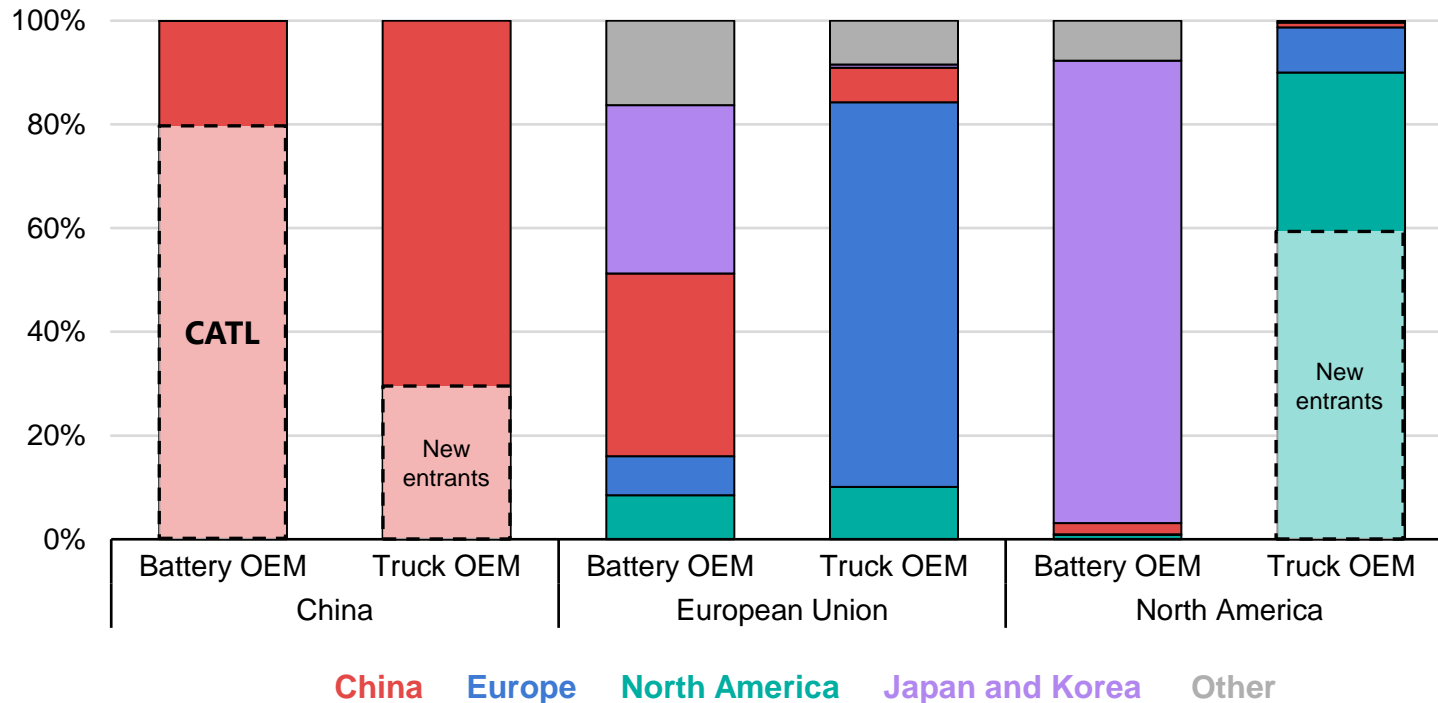
Electric trucks

Total cost of ownership dynamics underpin electric truck adoption



Manufacturing of electric trucks rises, but trade remains limited

Share of electric truck sales by location of truck and battery manufacturer headquarters, 2025

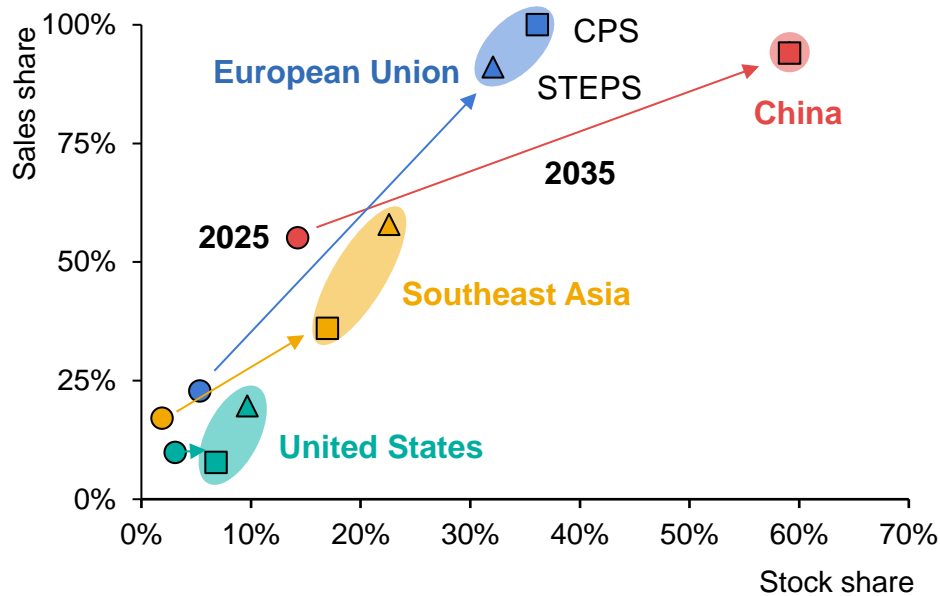


Electric truck manufacturers mostly sell to domestic markets, but the battery suppliers are mostly Asian.

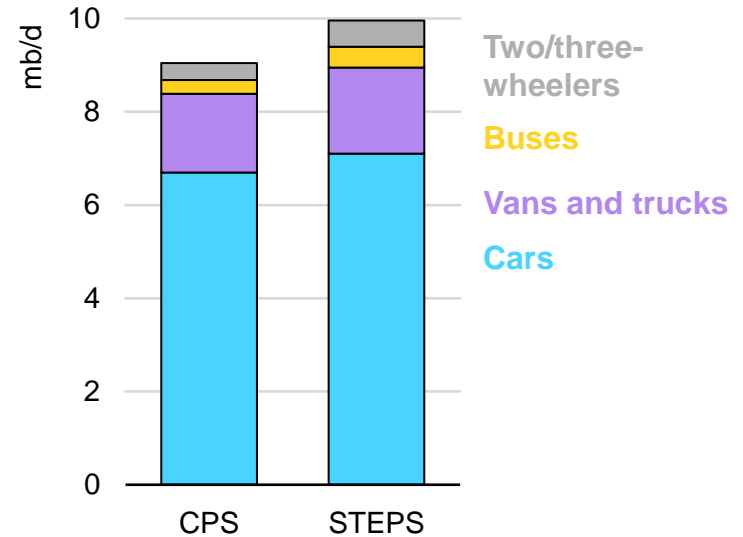
EV outlook

The EV fleet is set to grow over the coming decade

Electric car sales and stock shares, 2025-2035



Oil displacement, 2035



In both IEA policy-based exploratory scenarios, EVs displace close to 10 million barrels of oil per day by 2035, around to 10% of today's global oil consumption.

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