



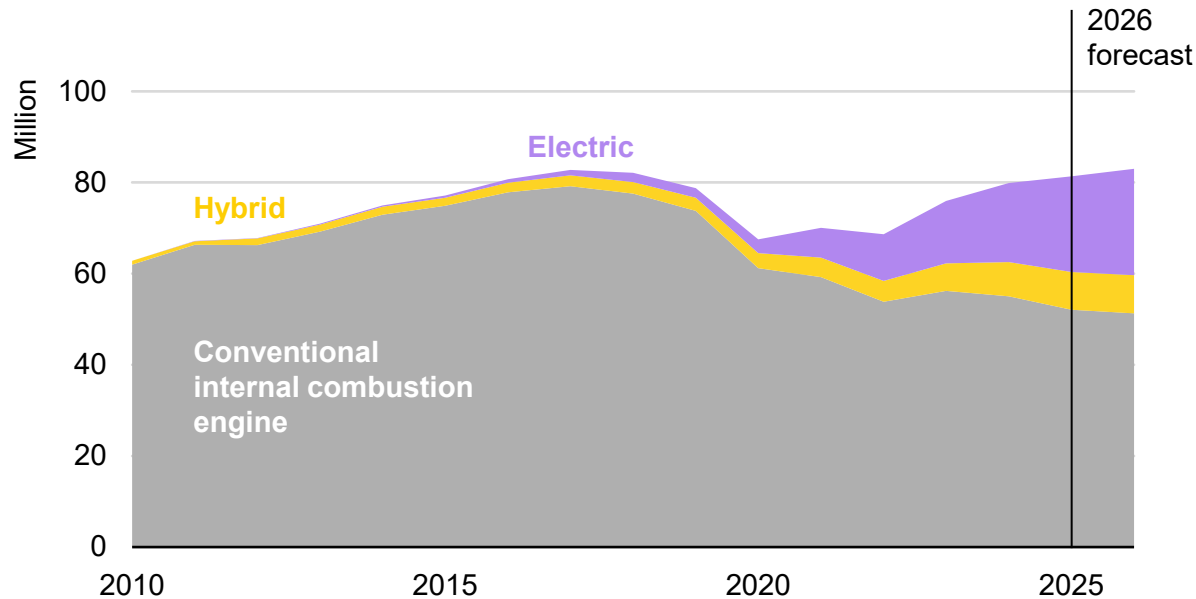
Global EV Outlook 2026

Launch webinar

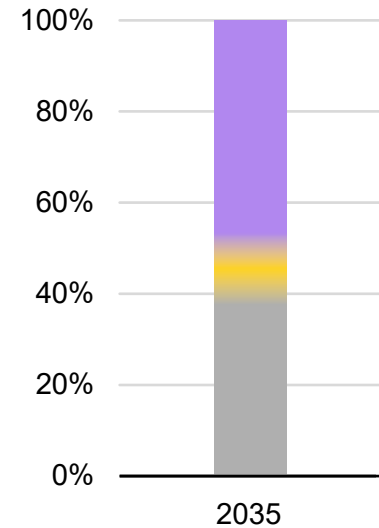
20 May 2026

Global car markets are in motion amid the global energy crisis

Car sales by technology

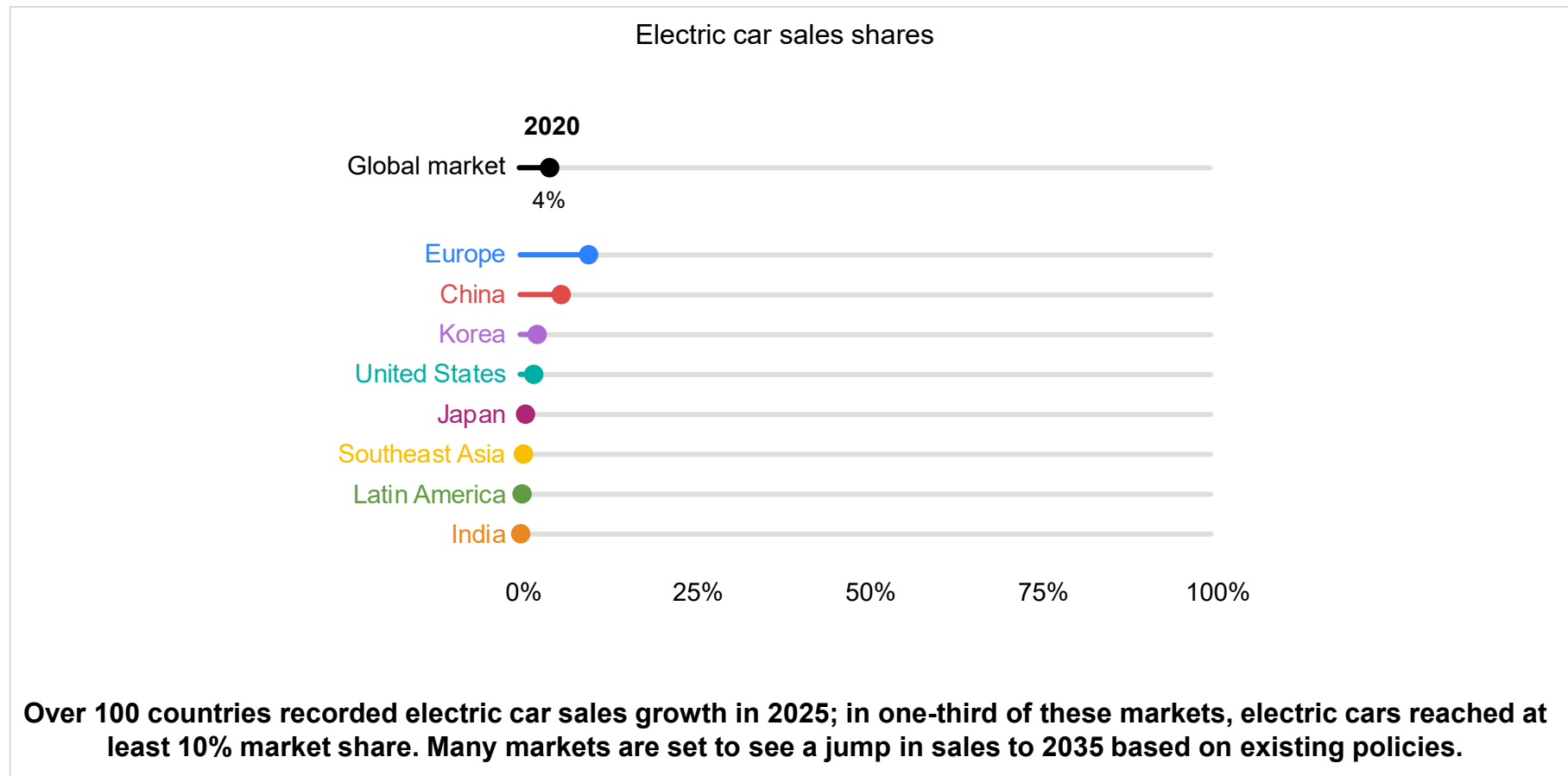


Share of car sales by technology (CPS and STEPS)

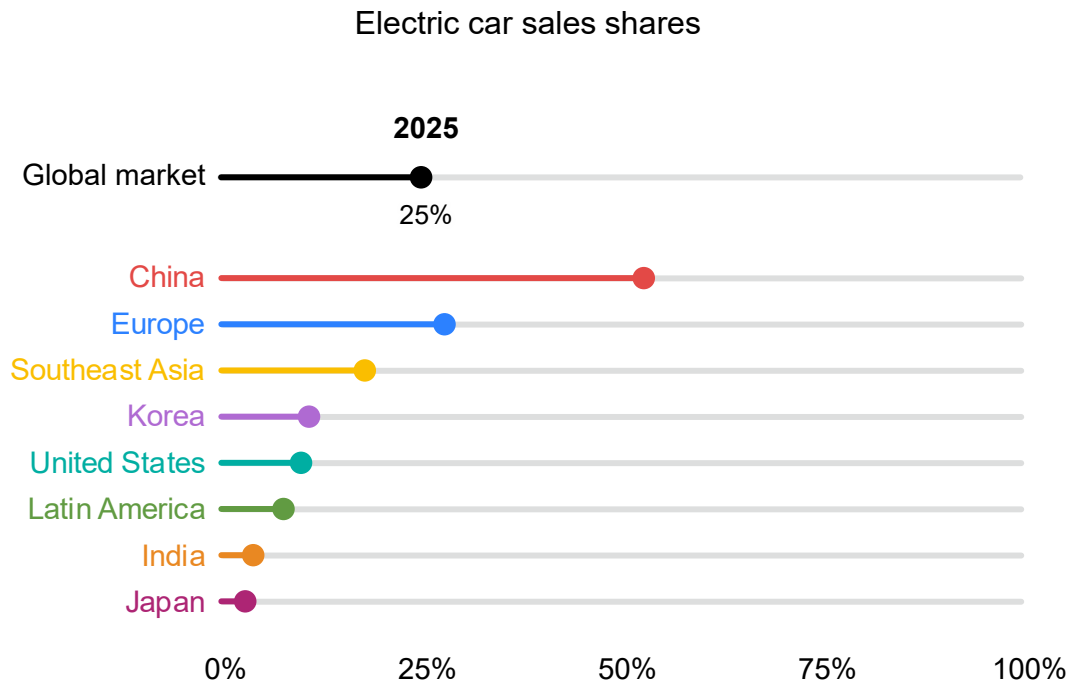


Sales of conventional ICE cars peaked in 2017, and EVs are set to reach 28% of car sales in 2026. With existing policies, electric cars are set to make up for about half of global car sales by 2035.

Electric car sales are spreading globally

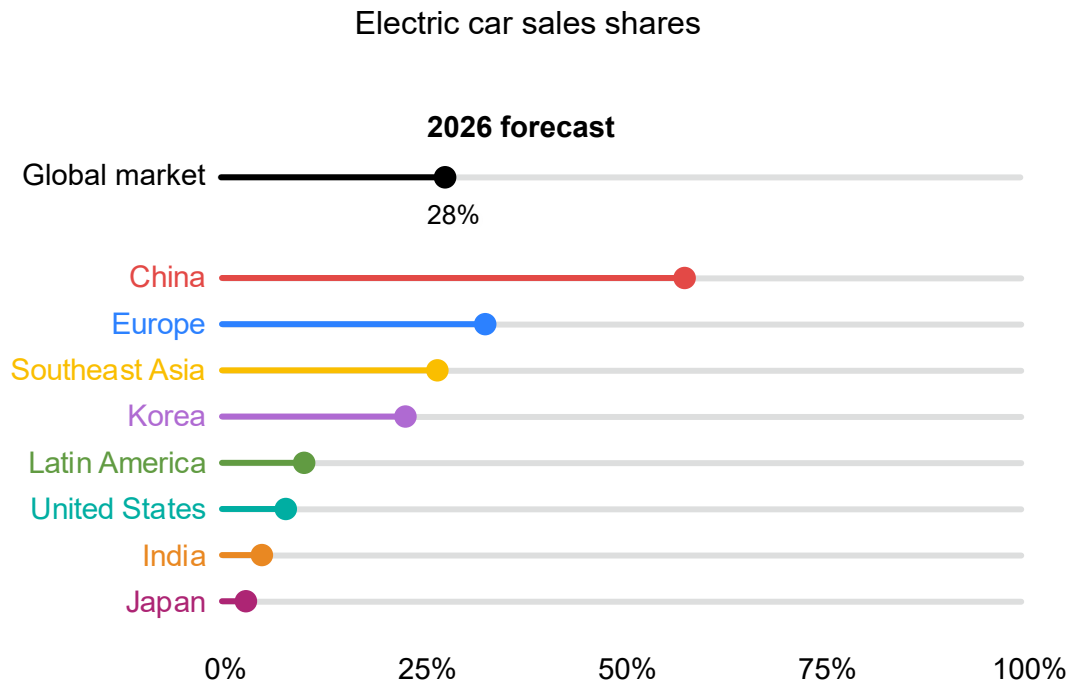


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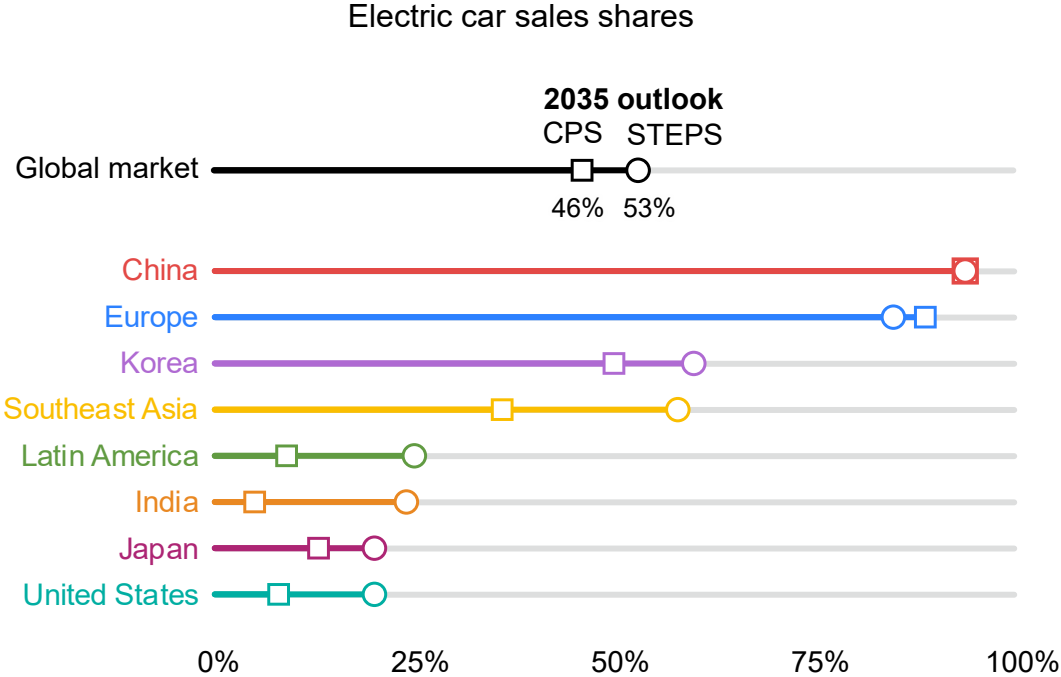
Over 100 countries recorded electric car sales growth in 2025; in one-third of these markets, electric cars reached at least 10% market share. Many markets are set to see a jump in sales to 2035 based on existing policies.

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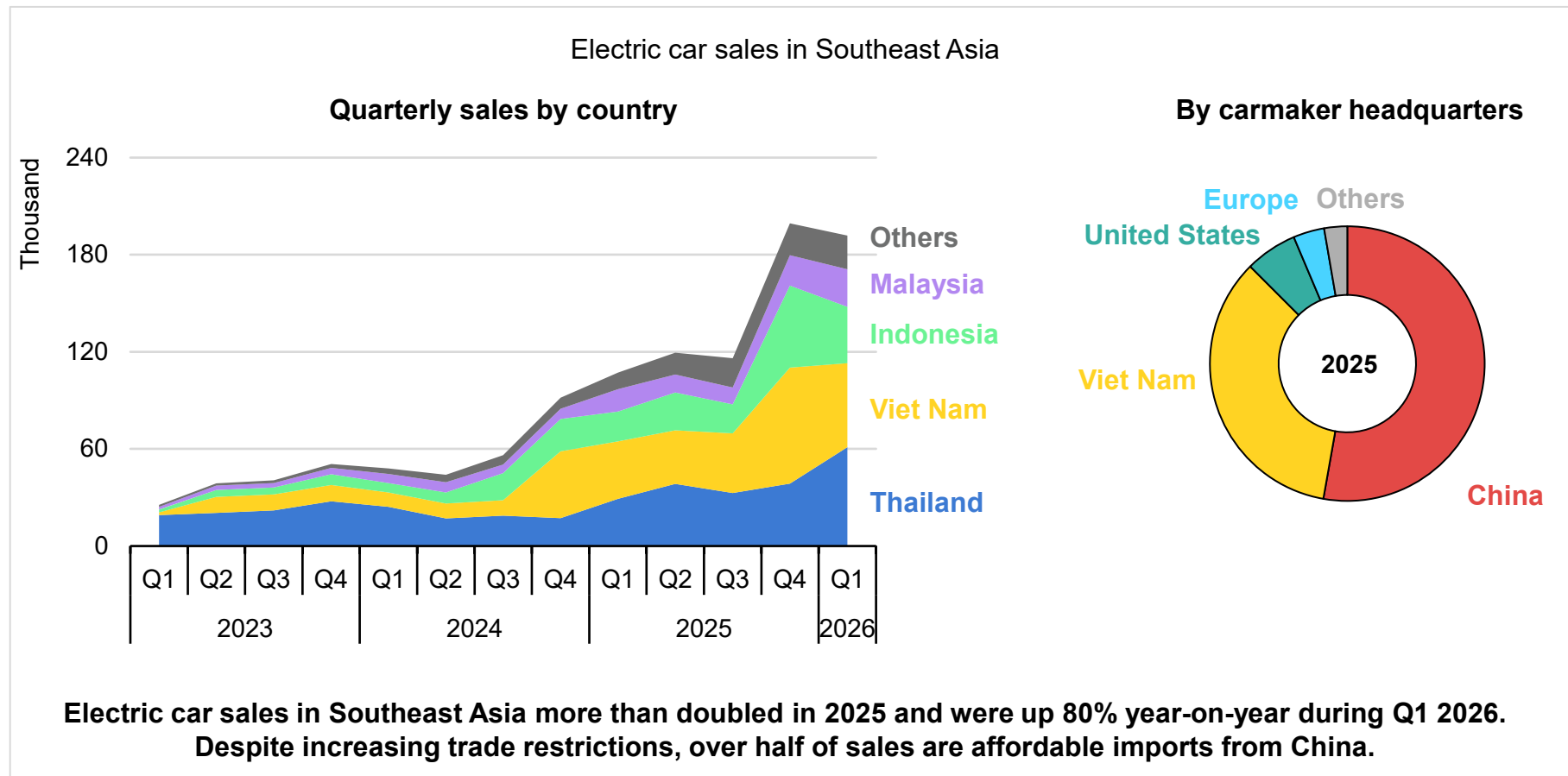
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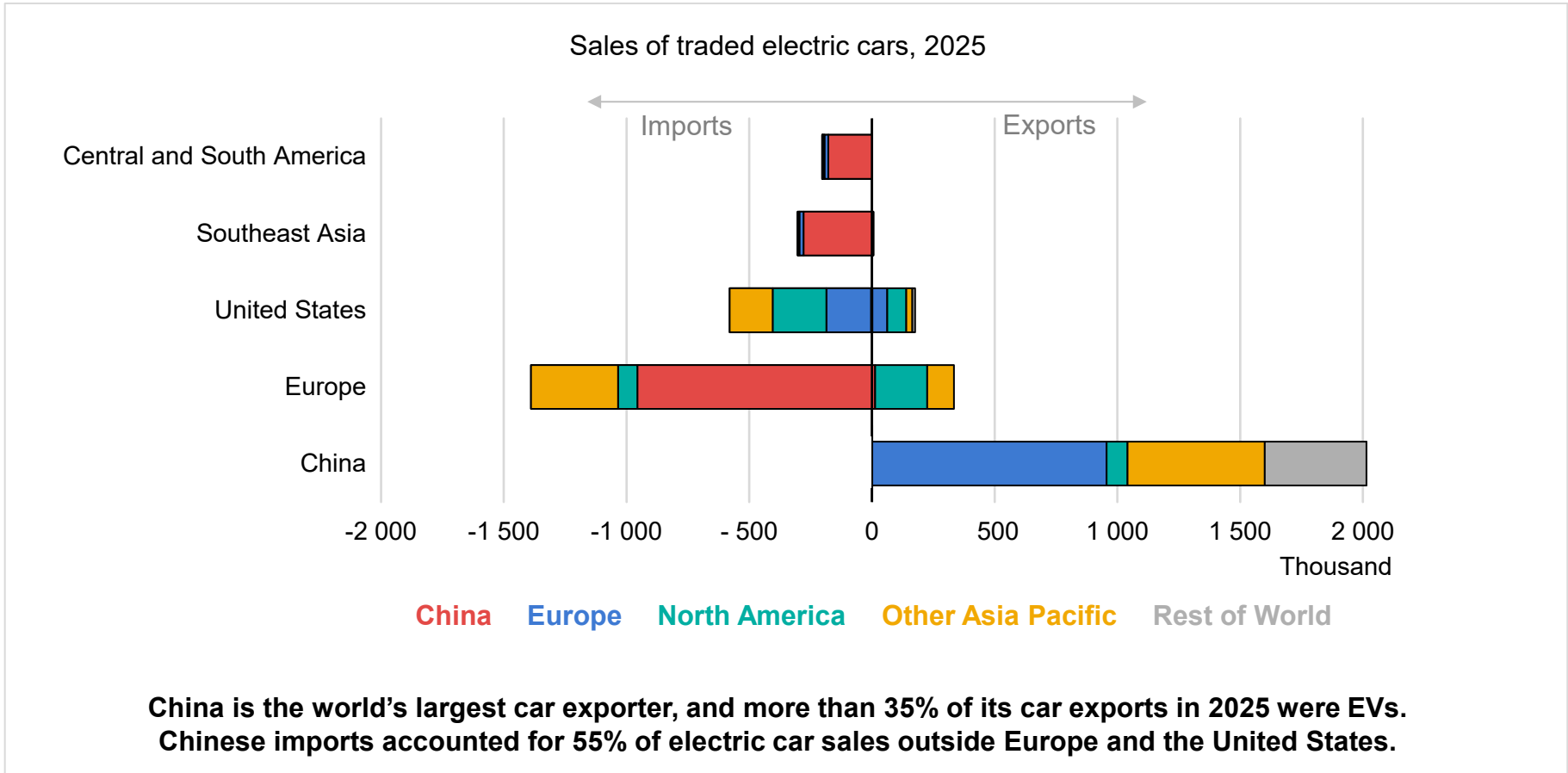


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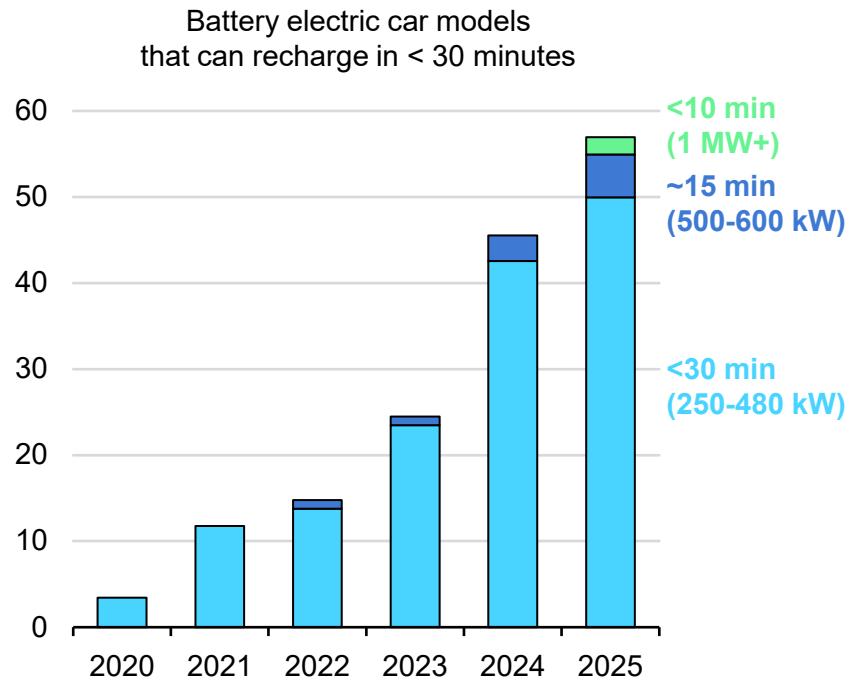
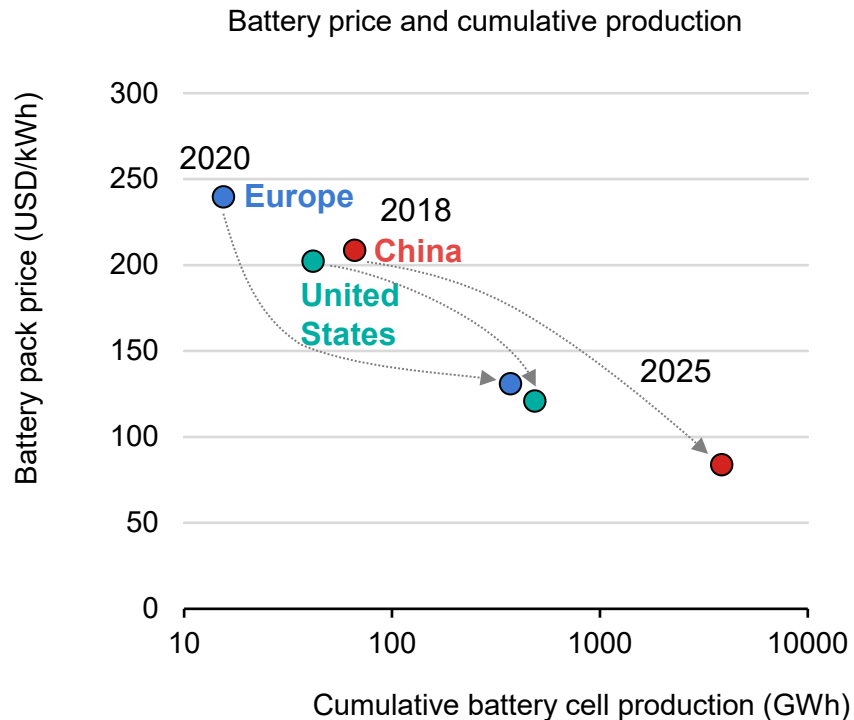
Southeast Asia is one of the fastest growing electric car markets



Chinese electric car exports doubled to a record high in 2025

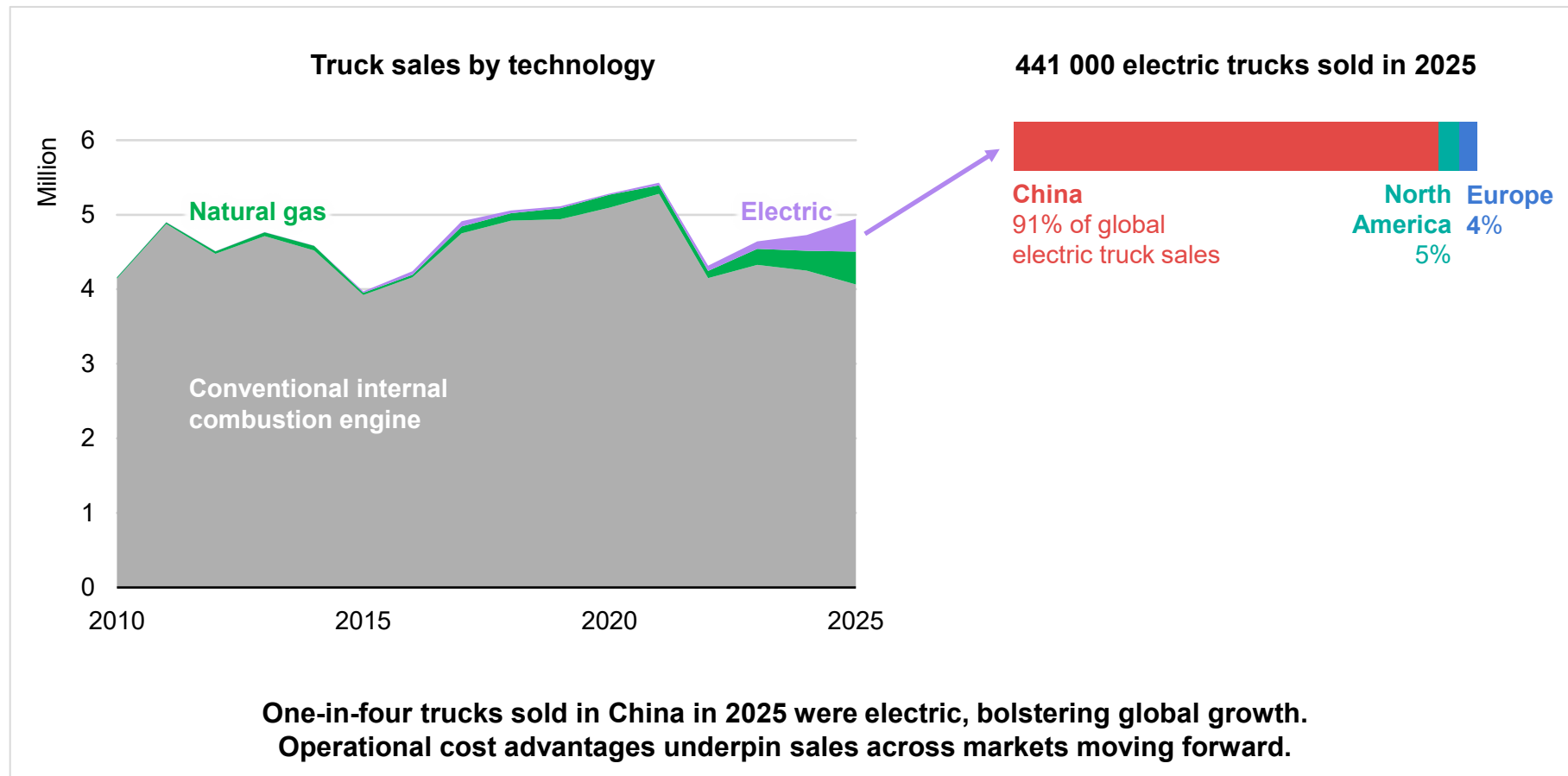


Industrial choices and innovation have given China an edge

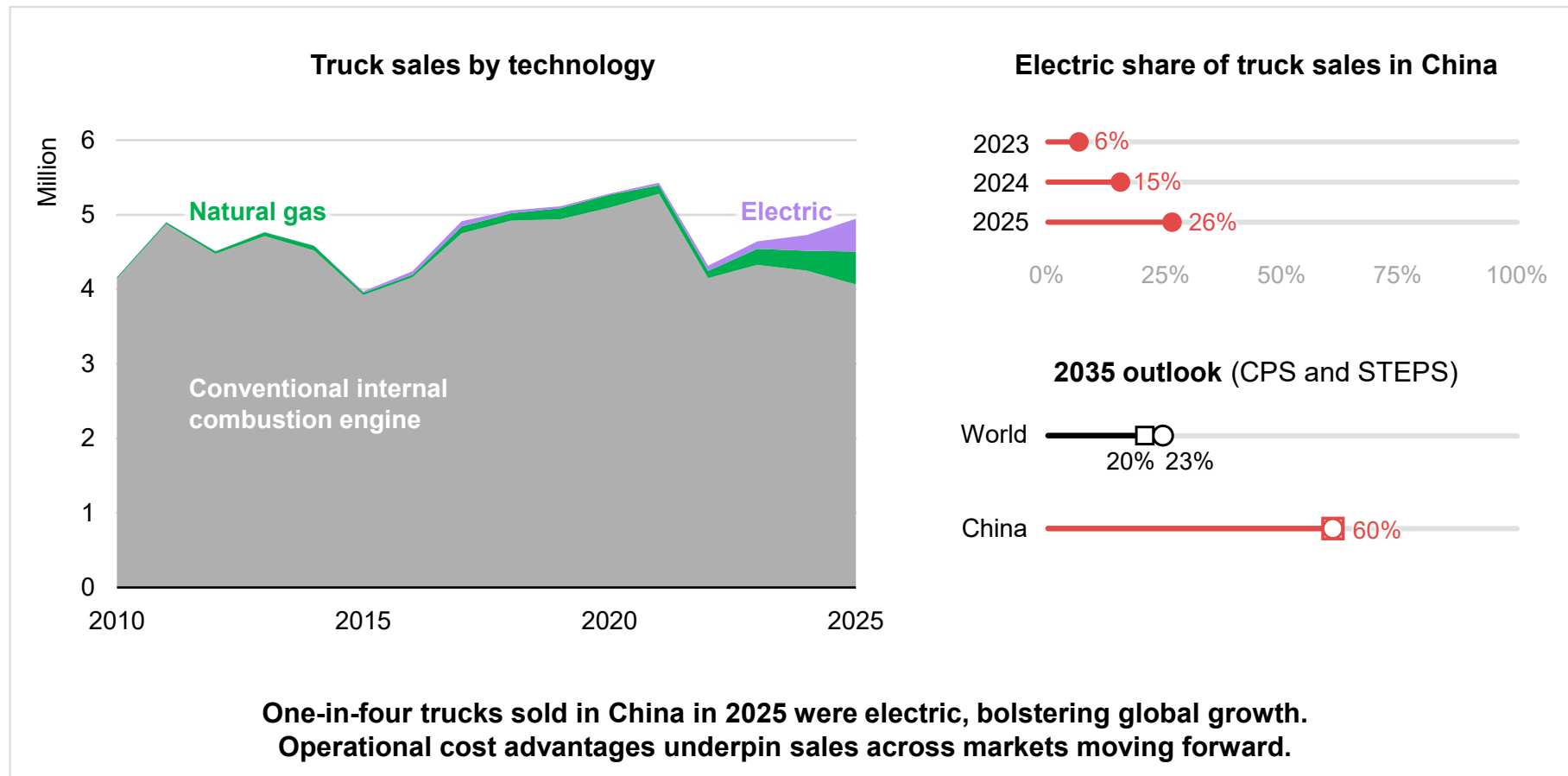


Economies of scale and battery technology innovation accelerated battery price declines in China. Higher voltage batteries are enabling faster charging of electric cars.

Global electric truck sales more than doubled in 2025



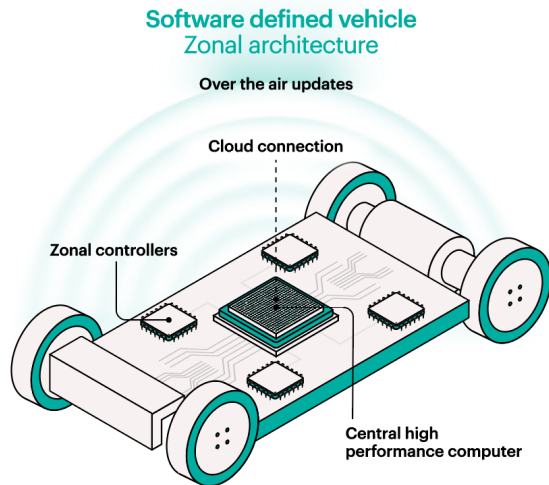
Global electric truck sales more than doubled in 2025



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

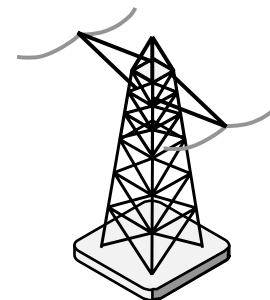
5x more powerful chips for autonomous driving since 2020

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 the electric vehicle industry.

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