

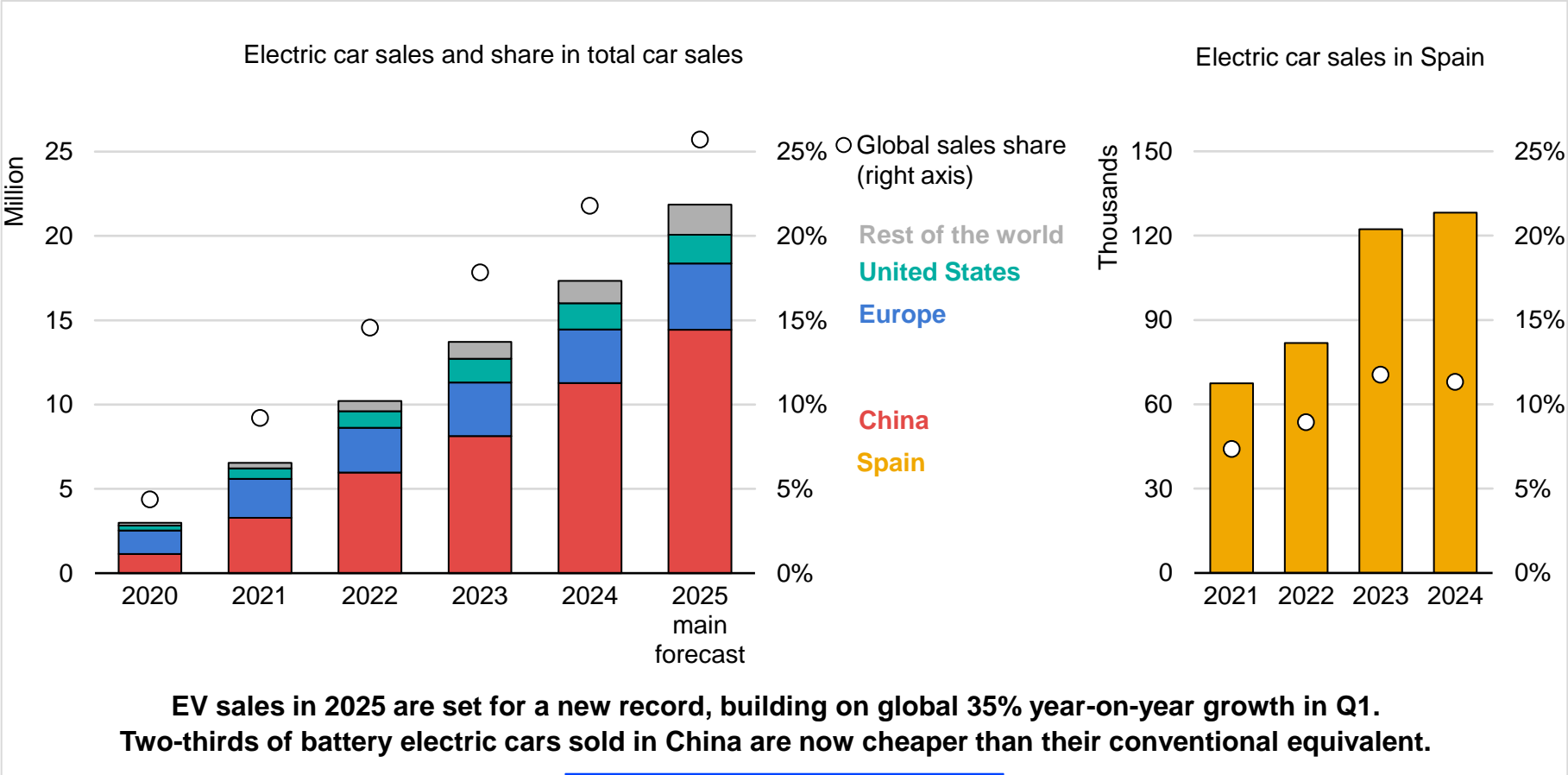


Global EV Outlook 2025

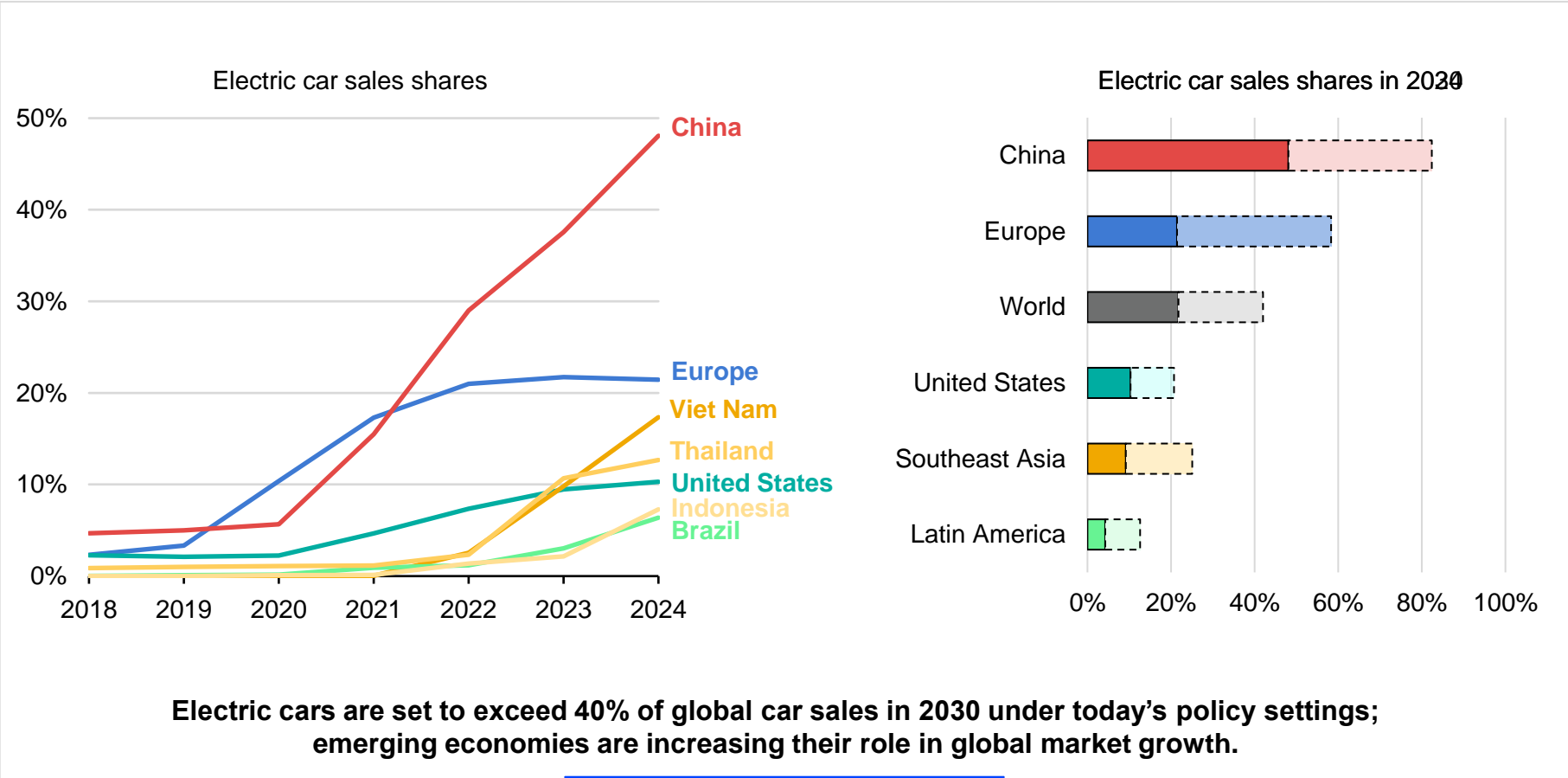
Mathilde Huismans, Energy Technology Analyst, Energy Technology Policy Division

2 June 2025

Global electric car sales continue to break records

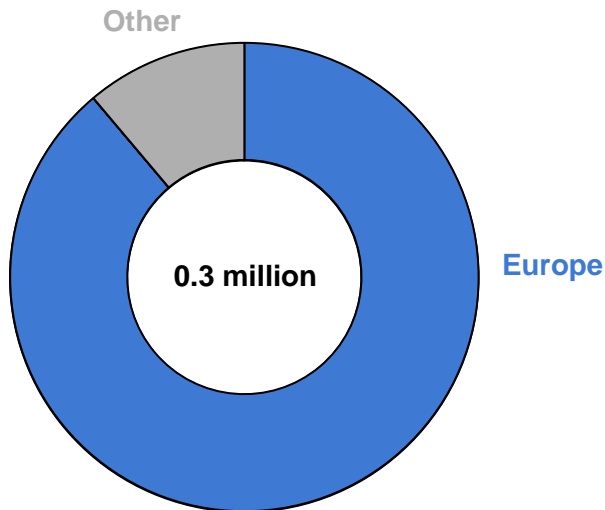


Electric cars are expanding into more markets



Emerging EV markets are increasingly driven by Chinese carmakers

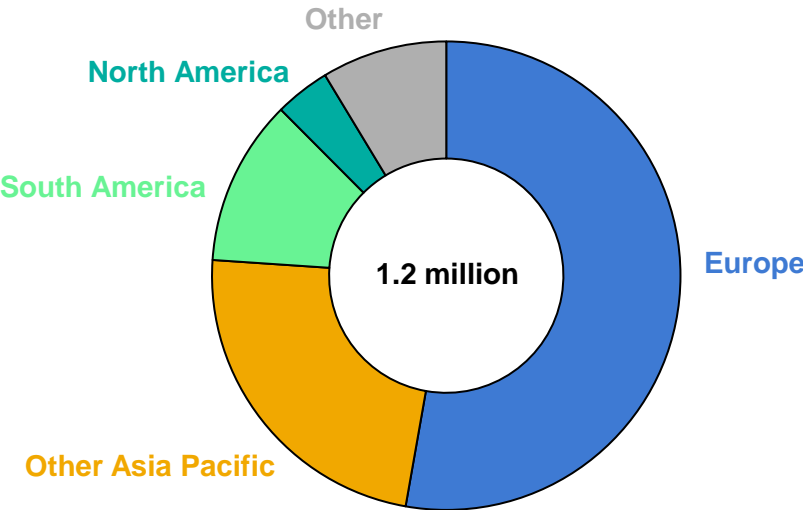
Sales of electric car exports from China, 2021



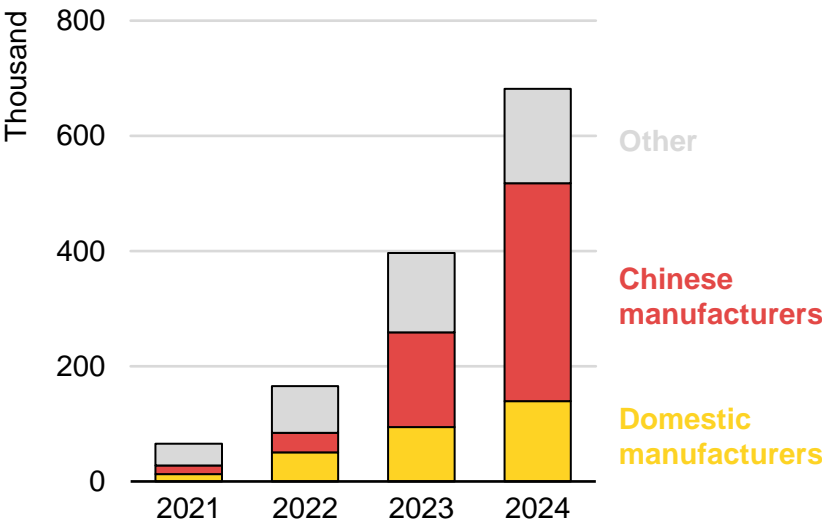
**Global trade of electric cars rose 20% in 2024 amid rising trade restrictions.
Chinese producers are diversifying their export markets and expanding overseas operations.**

Emerging EV markets are increasingly driven by Chinese carmakers

Sales of electric car exports from China, 2024

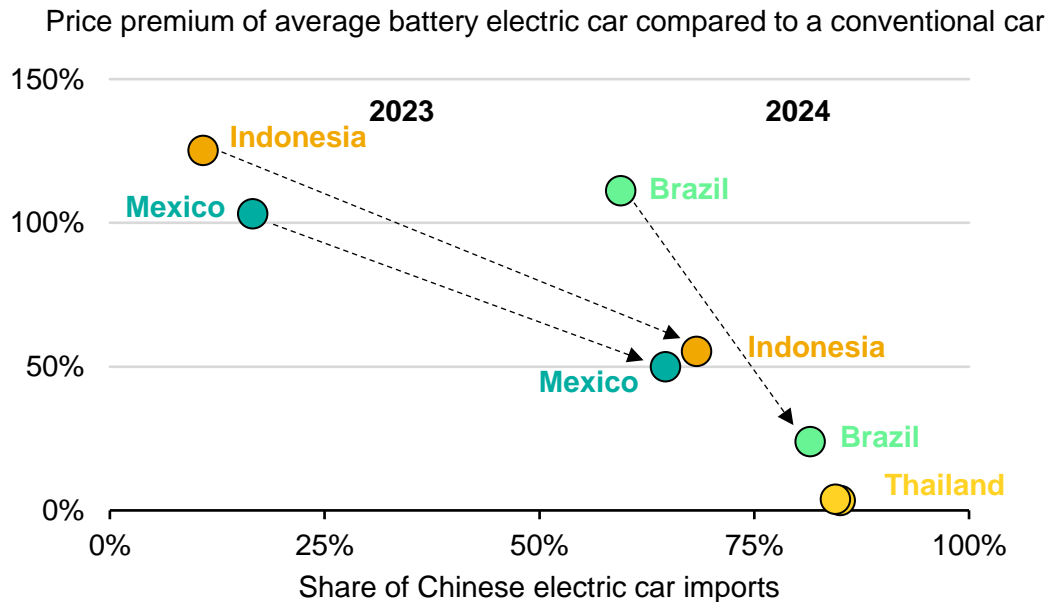


Electric car sales in emerging markets other than China



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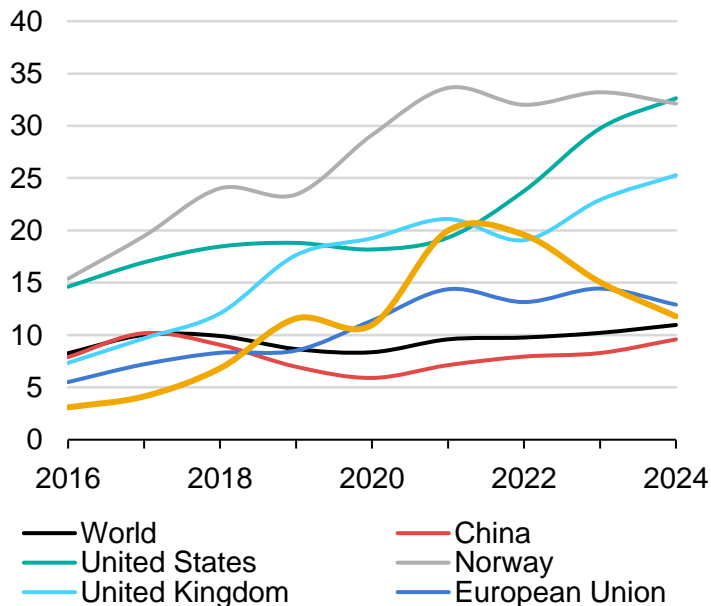
Imports are bringing down prices in other markets



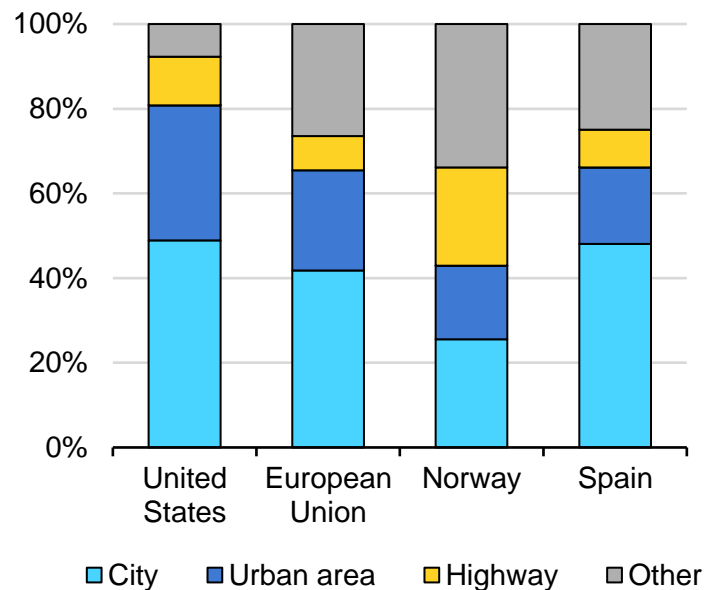
Battery electric cars have reached price parity in Thailand on the back of imports from China; They also saw significant price drops in Brazil and other emerging markets.

A coordinated roll out of charging infrastructure is key for EV adoption

EVs per public charger, 2016-2024



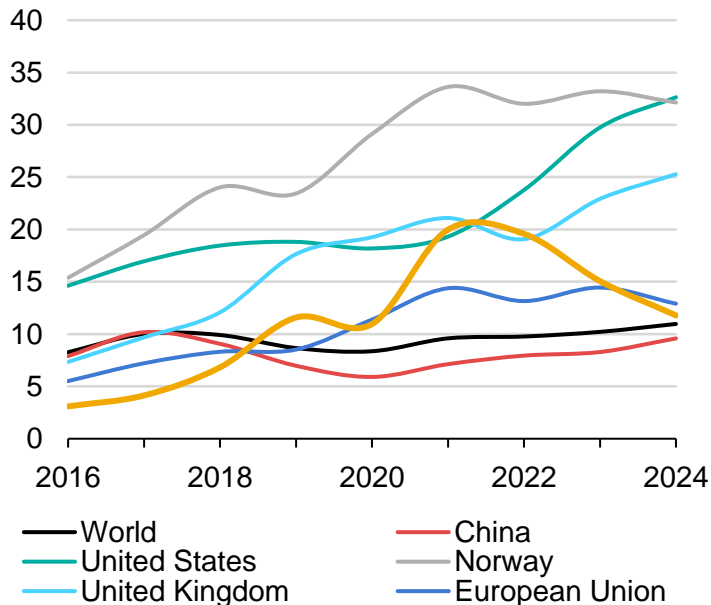
Distribution of charger stock points



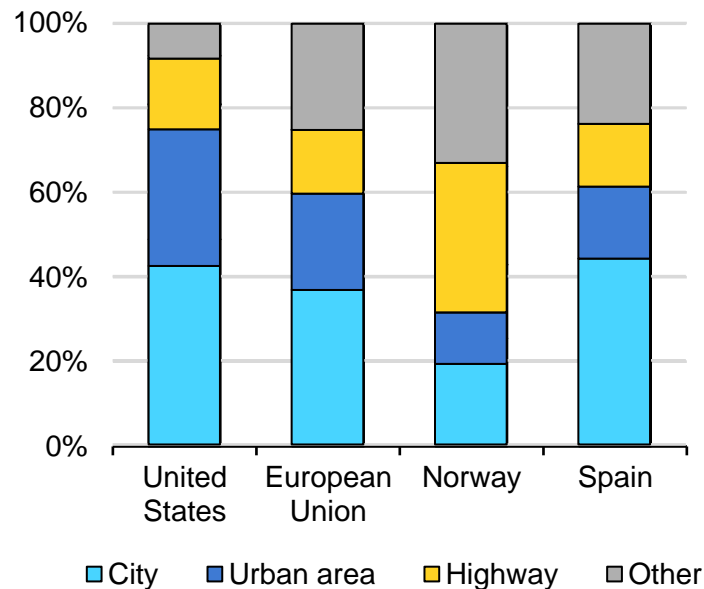
Norway leads in EV deployment supported by high powered highway chargers. But other countries advance rapidly, notably Spain accelerated the installation of public chargers in recent years.

A coordinated roll out of charging infrastructure is key for EV adoption

EVs per public charger, 2016-2024

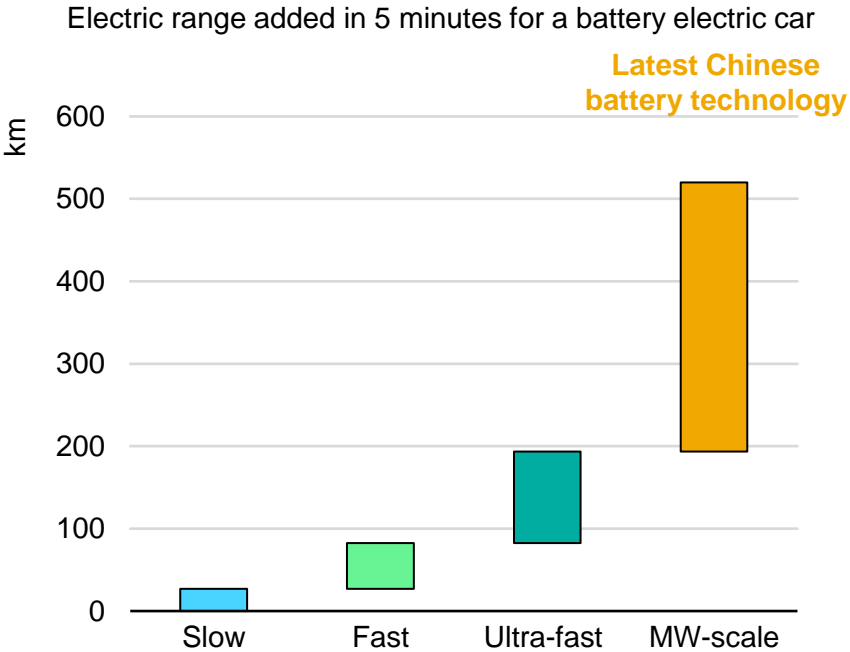
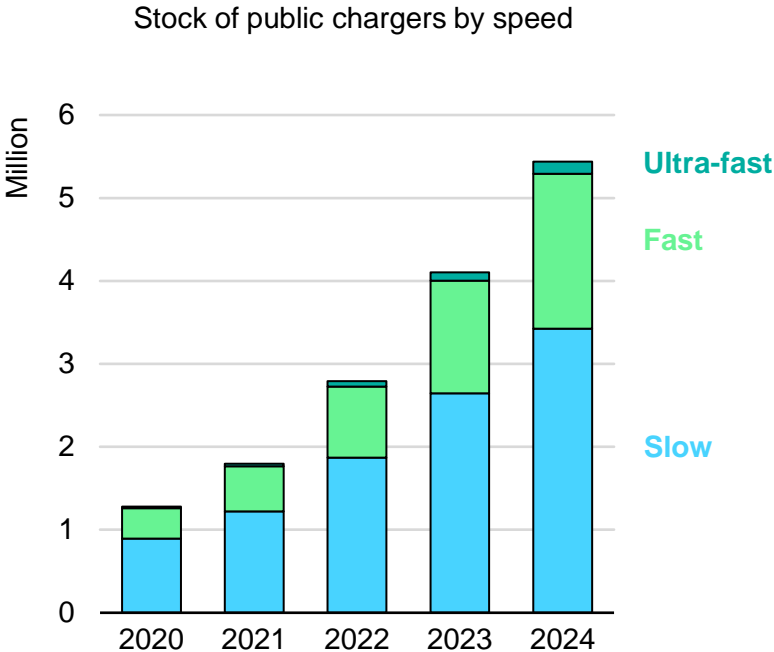


Distribution of charger stock by power



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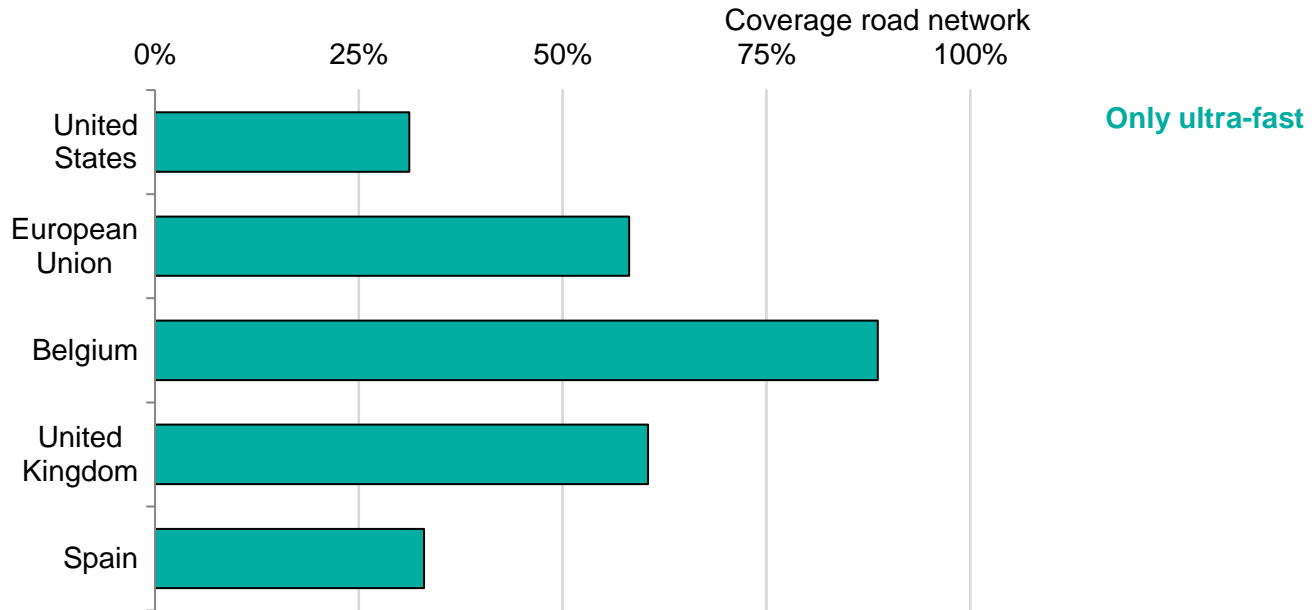
Fast chargers facilitate longer distance travel



**The share of fast and ultra-fast chargers globally has been steadily increasing.
At the end of 2024, about 85% of the EU highway network had fast chargers at least every 50 km.**

The fast chargers network is expanding

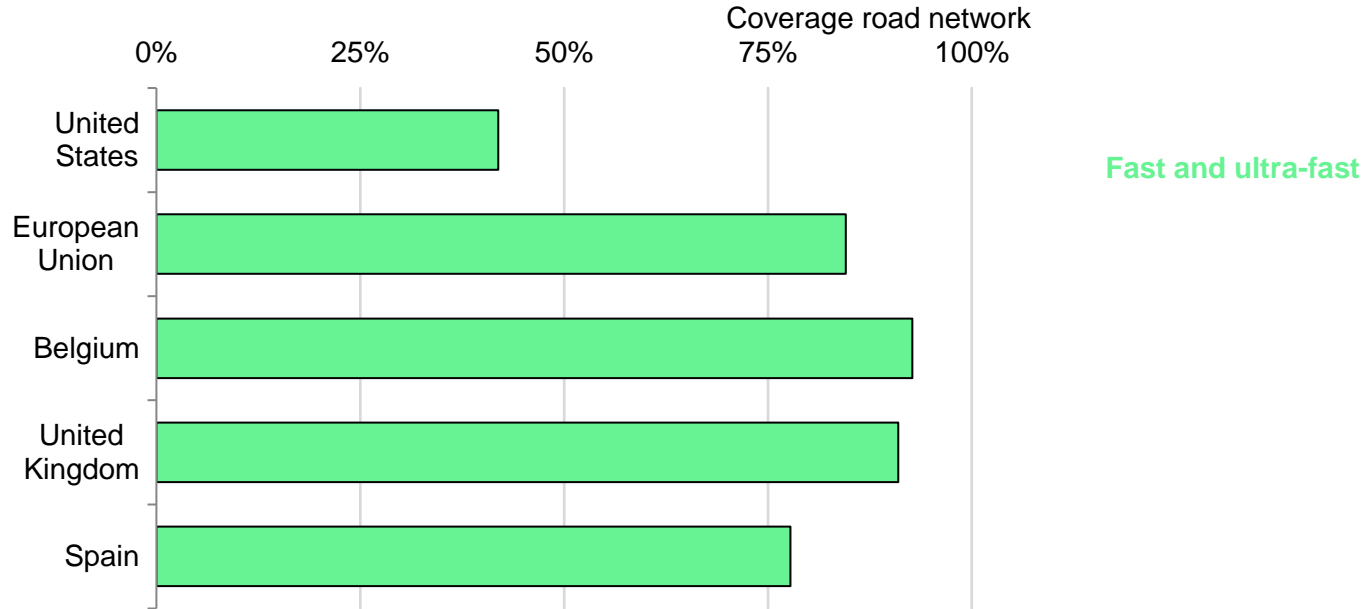
Percentage of highways that is covered by a fast or ultra-fast charger every 50 km for selected markets, 2024



Over half of Europe's highways now have ultra-fast charging stations every 50 km.

The fast chargers network is expanding

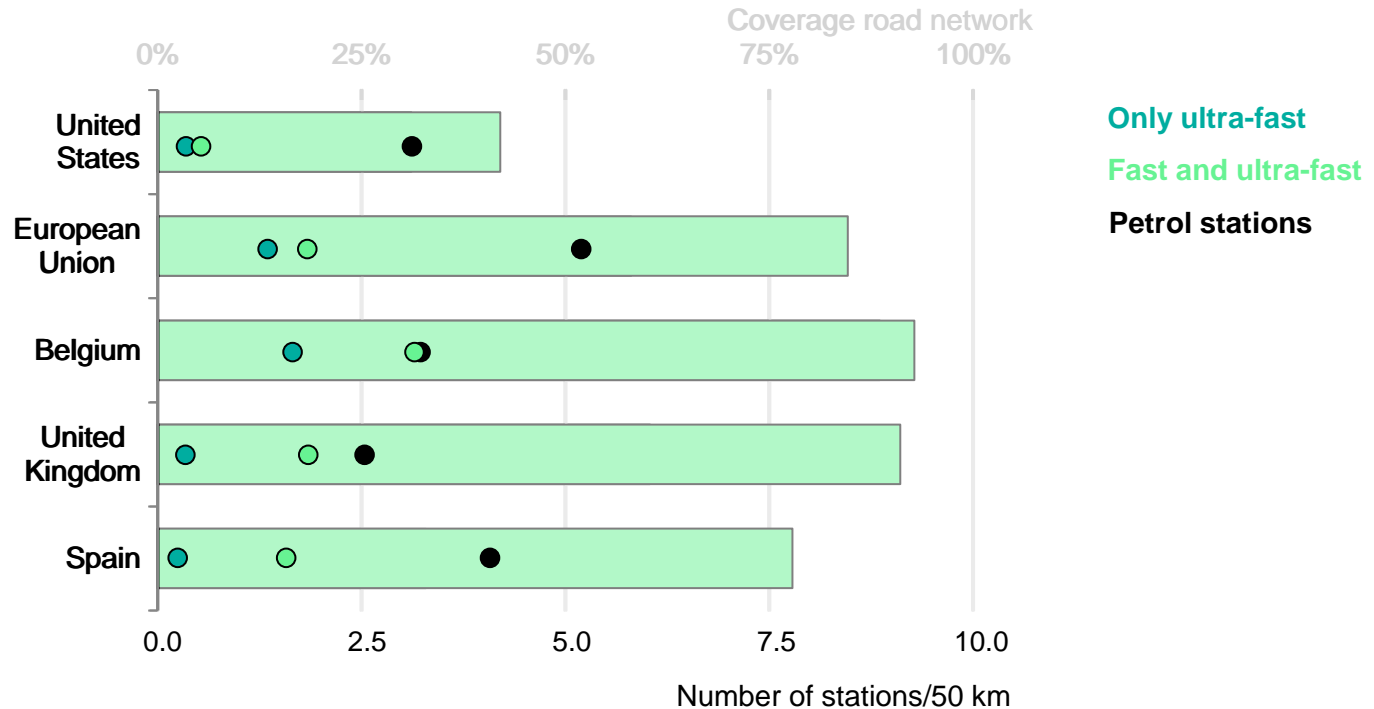
Percentage of highways that is covered by a fast or ultra-fast charger every 50 km for selected markets, 2024



**Over half of Europe's highways now have ultra-fast charging stations every 50 km.
Despite reasonable coverage petrol stations still outnumber charging stations.**

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