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The Rt Hon Heidi Alexander MP
Secretary of State for Transport
Great Minster House, 33 Horseferry Road
London SW1P 4DR

18 November 2026

Dear Secretary of State

I am writing to set out the Committee's position on the Zero-Emission Vehicle (ZEV) Mandate Review. The Committee's view is that the mandate is working effectively. Weakening it would put the Government's commitment to tackling climate change at risk, miss an opportunity to reduce costs for a typical household by around £800 a year, increase the UK's exposure to volatile oil markets by up to 15 million barrels of oil a year in 2030, and damage long-term competitiveness as our major export markets rapidly transition to electric vehicles (EVs). Supporting evidence is set out in the annex.

Market growth for electric cars is ahead of the level required to meet the mandate's current level of ambition out to 2030.[1;2] Sales of EVs have reached record highs, with demand responding as choice and affordability improve.[3] Established manufacturers have demonstrated that the release of new, high-performing EVs can lead to a rapid growth in sales. The domestic market remains strong, with the share of vehicles made and sold in the UK rising since 2020. The UK should back the most successful British manufacturers who have invested in the technology of the future and ensure our automotive industry does not get left behind. Flexibilities, which were expanded less than a year ago, have worked as intended, providing a significant buffer for manufacturers to comply without facing fines. The headline target for the ZEV mandate this year is 33% but once CO_2 flexibilities are accounted for, manufacturers need to achieve around 25% to meet their obligations.[4] Sales of EVs are already above this level, with October's market share at 32%.[5]

Weakening the mandate will miss an opportunity to lower the costs of driving. A typical household can save around £800 a year by switching to an electric car. Facing the second fossil fuel price shock in just five years, the mandate also helps defend the UK economy against reliance on costly and volatile fossil fuel markets. Your department's impact assessment implies that cutting the headline ZEV targets would increase fuel consumption in the UK by an equivalent of up to 15 million barrels of oil per year by 2030. At current prices, this would cost the UK more than £1 billion.

The mandate helps ensure UK manufacturing keeps pace with the global shift to EVs and their value chains. Most British-made vehicles are made for export. The mandate, which applies only to domestic sales, does not apply to 77% of the cars made here.[6;7] In the EU, the UK's largest export market, EV sales have now overtaken petrol cars.[8;9] Germany (37% market share in October) and France (41%) have recently overtaken the UK in EV adoption and the UK now ranks 22nd globally for EV sales share over the last 12 months.[10] The certainty provided by the mandate has underpinned investment worth billions of pounds in vehicle and battery manufacturing, charging, and critical minerals.[11] These growing sectors support tens of thousands of jobs across the UK.[12;13] Experience in the auto-sector shows that ambitious, determined regulation drives investment, innovation, and competitiveness, whereas uncertainty jeopardises this.[14;15;16;17]

Government benefits for plug-in hybrids (PHEVs) are distorting the market. Correcting this would support domestic manufacturers more than weakening the mandate. Real-world data has consistently shown that PHEVs use significantly more fuel and produce significantly more emissions than test standards have assessed.[18] The mandate also provides an artificially high baseline for new entrants based on 2021 averages, effectively subsidising Chinese PHEVs. New competitors are taking an increasing share of UK car sales across all fuel types. Tightening the baseline for entrants would provide a more level playing field for UK manufacturers.

Slowing the shift to electric vehicles also leaves van drivers and businesses exposed to the high cost of diesel. The van transition has been challenging to date, primarily due to a lack of access to affordable public charging and the limited capability of early models. Weakening the mandate risks making these issues worse as it supports the supply of better, cheaper models to the UK, and investment in public charging. Government should re-commit to the transition to electric vans and focus on tackling barriers, while allowing manufactures enough breathing room in the meantime.

We welcome the Government's support for climate targets, but targets are not enough – they must be matched with action. The mandate underpins the largest share of emissions reduction to 2037 in the Government's Carbon Budget and Growth Delivery Plan (CBGDP).[19] Your department's impact assessment implies that cutting headline targets in the mandate would materially reduce these emissions savings, which in turn would mean that the legal Sixth Carbon Budget target would not be met without alternative action at the same scale. The additional emissions from Option 3 in 2030 are equivalent to the emissions savings of approximately 2.8 million residential heat pump retrofits, and more than the total emissions from the paper and glass manufacturing sectors in 2025.

Finally, this is not just a decision for Westminster. The mandate is a jointly owned policy across the UK, Scottish, and Welsh Governments, and the Northern Ireland Executive. It underpins the separate carbon budgets set by the devolved administrations, and there is a risk to their ability to deliver against their statutory obligations without it. Impacts on devolved targets, households, and businesses, must be considered as part of this Review.

The mandate is a critical policy for the UK's climate targets, the cost of living, the future of British industry, and our resilience to high and volatile fossil fuel prices. The Government should stand firm:

1. Maintain current headline targets for cars through to 2030.
2. Update the Utility Factor for PHEVs so the mandate credits real-world emissions reduction.
3. Level the playing field by tightening the CO_2 baseline used to credit new market entrants.
4. Set post-2030 phase-out requirements which maximise electric-only driving capability.
5. Address barriers to accelerate electric van adoption.
6. Building on the Budget, bring forward further policies to reduce the cost of public charging and ensure future regulatory and fiscal decisions are coherent with delivering the mandate.

Yours sincerely,



Nigel Topping CMG
Chair, Climate Change Committee

CC: The Rt Hon Andy Burnham MP, Prime Minister of the United Kingdom; The Rt Hon Miatta Fahnbulleh MP, Secretary of State for Energy Security and Net Zero; Stephen Flynn MSP, Cabinet Secretary for Economy, Tourism and Transport; The Rt Hon Louise Haigh MP, First Secretary of State; The Rt Hon John Healey MP, Chancellor of the Exchequer; Mark Hooper MS, Deputy Minister for Transport; Liz Kimmins MLA, Minister for Infrastructure; and The Rt Hon Jonathan Reynolds MP, Secretary of State for Business, Innovation, Science and Trade.

Evidence annex

1. Developments in the new car market

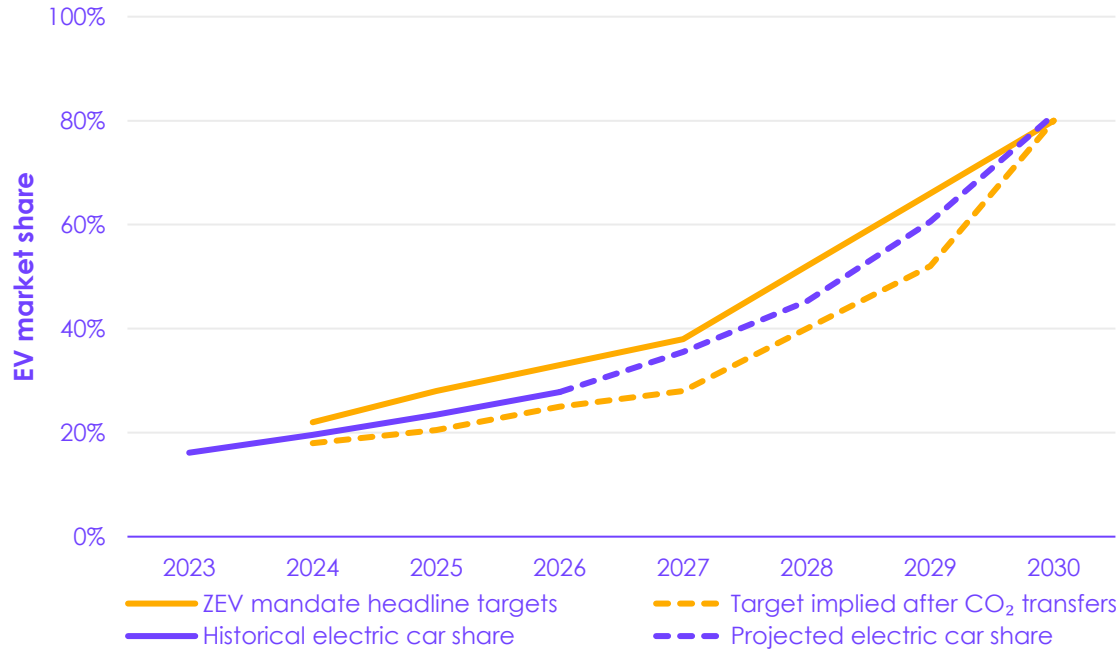
- For the third successive year, electric car sales are on track to surpass the target level implied by the mandate once the use of CO_2 transfers is accounted for (Figure 1).
  - Electric vehicles (EVs) have taken a 27% market share in the year to date, compared to the 'implied' target of 25% for 2026 once accounting for the expected use of the CO_2 transfer flexibility.*;[20]
  - This continues a trend of overcompliance against the mandate in the car market. At the end of 2025, there were 60,000 excess ZEV credits in the car market.[21]
  - This is before accounting for various other flexibilities available to OEMs to achieve compliance, including borrowing, banking, and trading.
- Sales of new electric cars are growing at the pace required to meet the current ZEV mandate (Figure 1). Rapid growth can be observed in the private retail market.
  - EV sales have grown by over 30% in the year-to-date to October, compared to the 31% annual average growth DfT states is required between 2025 – 2030 to meet the mandate's current trajectory.[22;23]
  - In the 12 months to Q2 2026, EV sales in the private car market grew more than 50% compared to the same period the year before.[24] This demonstrates that consumers in all parts of the new car market are responding decisively to improving EV offerings.
- Consumer demand has responded to improved vehicle choice and incentives.
  - Increasing competition, underpinned by the mandate, has seen the number of affordable electric models on offer increase from fewer than 10 in 2024 to now over 50.[25;26] The increased supply of cheaper new models has helped reduce the average price premium on new electric cars from 37% at the end of 2023, to 16% at the end of 2025 (Figure 2).
  - Discounting rates for EVs have eased in recent months and were exceeded by discounting on petrol models in September.[27] Competition and discounting are not the only drivers of price reductions – continued reductions in the cost of battery-packs have been another key driver.[28] BloombergNEF assess the manufacturing cost premium on EVs made in Europe to be 10% in 2025, while Renault claim they are profitable on several compact EV models.[29;30]
  - Several OEMs have seen significant jumps in EV market share following the release of

* 'Electric vehicles' refers to fully battery-electric cars and vans and does not include hybrid vehicles (HEVs) or plug-in hybrid vehicles (PHEVs).

new, more affordable models (Figure 3).[31] For example, Renault's EV sales share has risen by approximately 24 percentage points since 2024, following the launch of the Renault 5. Similarly, Ford's EV sales share has increased by 19 percentage points since the release of the Puma Gen-E.

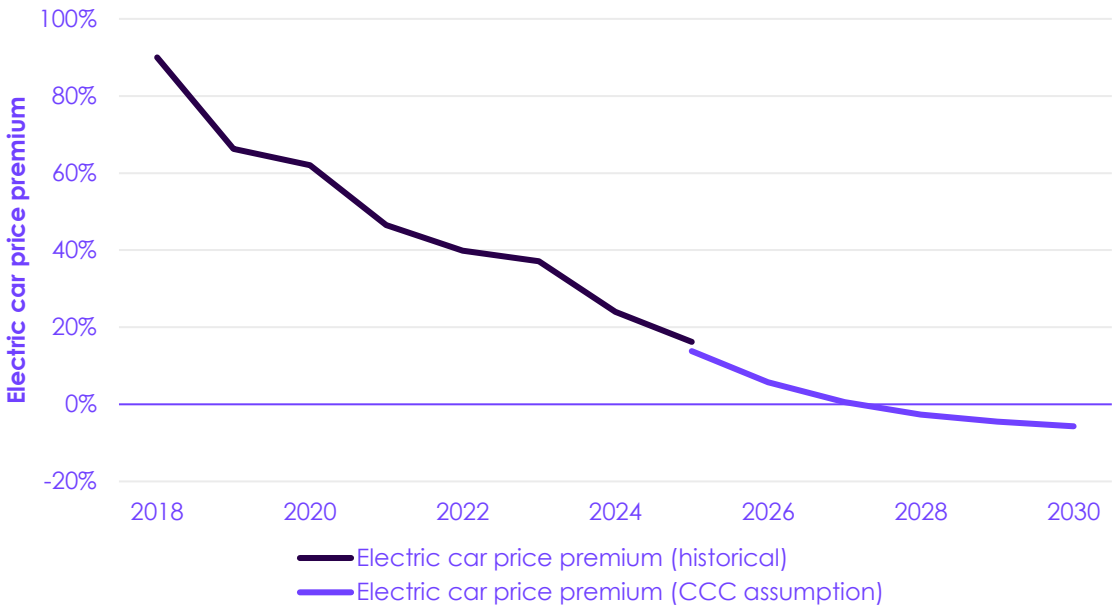
- Electric car sales are surging across Europe (Figure 4), which is a key export market for the UK, while the domestic market has remained competitive.
  - 77% of cars made in the UK in September 2026 were exported.[32] The EU accounts for around 60% of the UK's car exports and over 90% of commercial vehicle exports.[33]
  - EV sales in the EU were up 45% in the year to date to September 2026 compared to the same period last year, bringing the market share in 2026 so far to 24%.[34] Germany, France, and Belgium, which are key export destinations for the UK, each had a higher EV share than the UK as of September 2026 (Figure 4).[35] European markets have largely relied on fiscal incentives to drive adoption of EVs to date.[36]
  - The share of vehicles made in the UK that are sold in the UK increased from 20% in 2020 to more than 24% in 2025; meanwhile the mandate was introduced in 2024.[37;38]

Figure 1 Electric car sales are growing above the rate required to deliver the ZEV mandate.



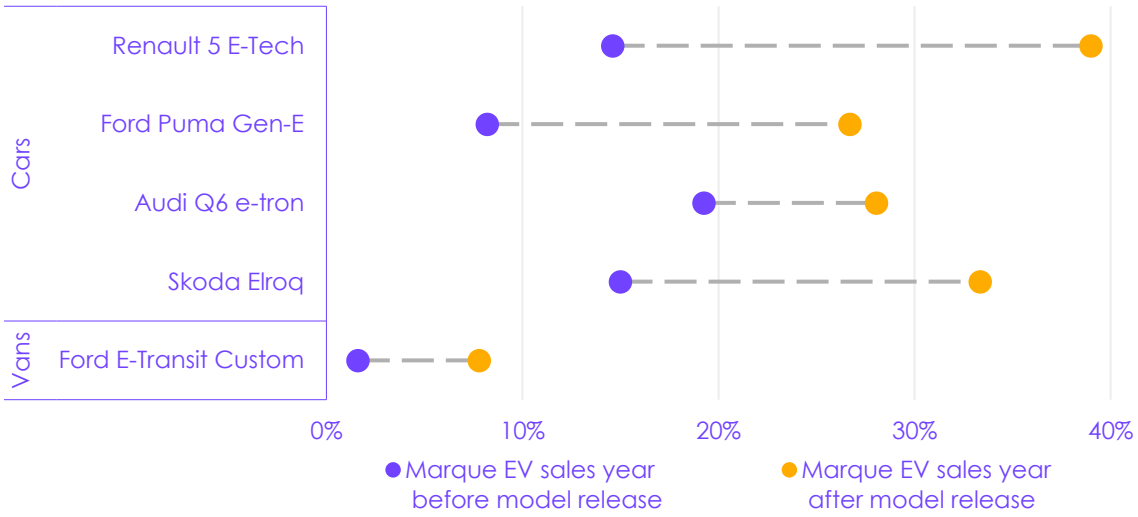
Description: If electric car sales continue to grow at the rate observed in the year to October 2026, the EV sales share would exceed the target implied once accounting for CO_2 transfers and would reach 80% by 2030.
Source: CCC analysis; Department for Transport (DfT) (2026) *Vehicle licensing statistics*; DfT (2026) *Zero Emission Vehicle Mandate Review*; SMMT (2026) *October 2026 Outlook*; SMMT (2026) *A Blueprint for 2030: Driving the Future Together*; New Automotive (2026) *Electric Car Count*; SMMT (2026) *New Car Registrations*.
Notes: (1) Projected electric car share is based on a 30.4% annual compound growth rate which is the growth in electric car sales in the year to October 2026 versus the same period in 2025. This compound growth is applied to the number of electric car sales in 2025 out to 2030. To calculate market share, we assume a total market size for 2026, 2027, and 2028 based on SMMTs October 2026 outlook. 2030 market size is based on SMMT's *A Blueprint for 2030: Driving the Future Together*. The total market size for 2029 was linearly interpolated. This is broadly consistent with DfT's assessment of the required growth in EV sales to deliver the mandate, as set out in the consultation. (2) The ZEV mandate includes a flexibility which allows manufacturers to reduce their real ZEV quota by transferring credits generated via overcompliance of CO_2 efficiency improvements in their non-ZEV fleets. We have assumed the projected level of the implied target by extrapolating from the use of this flexibility in 2024 and 2025, out until 2029 when the flexibility ends.

Figure 2 The falling price of electric cars is on track to reach parity with petrol cars within the next few years.



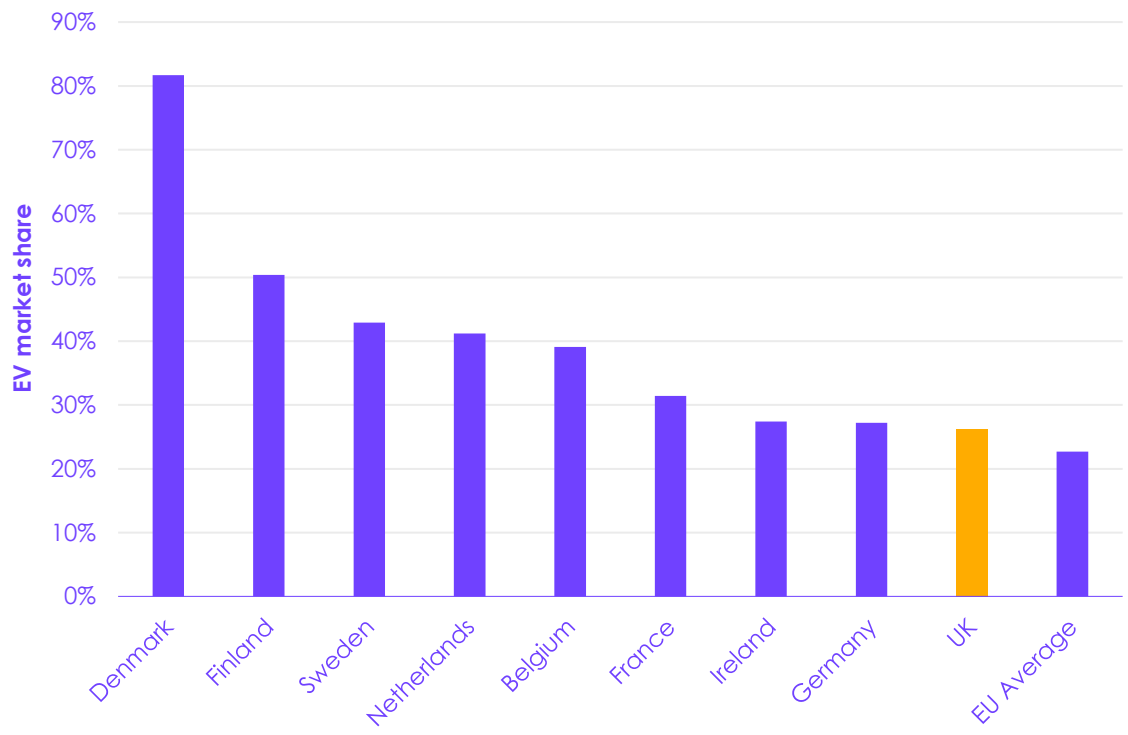
Description: The upfront price premium for new electric cars has seen sustained declines and is on track to reach parity on a like-for-like basis with petrol cars on average around 2027, in line with our assumptions. We also assume price reductions continue, after which point an electric car will be cheaper to purchase than a petrol equivalent.
Source: CCC analysis; Autotrader (2026) Data shared in correspondence with the CCC.
Notes: Price premium is based on the recommended retail price (RRP), before discounting, of like-for-like models of new electric and internal combustion engine cars in the UK market. Many used EVs are already at price parity with petrol and diesel equivalents.

Figure 3 OEMs see rapid uptake in EV share when they supply models that meet consumers' needs and budgets.



Description: The share of manufacturers' sales that are EVs increases significantly following the release of competitive electric models.
Source: CCC analysis; New Automotive (2026) *Electric Car Count*; Department for Transport (2026) *Vehicle licensing statistics*.
Notes: (1) Data points represent the manufacturer share of EV sales in the calendar year prior to, and the year after, the vehicle model was first registered in the UK. (2) Other EV models also contributed to brand's EV share, but the growth in overall EV share was driven largely by the models listed. (3) Where the model was released in 2025, year-to-date data has been used for the EV sales share the year after model release (January to October 2026), except the Renault 5 E-Tech where August 2026 was the latest data available.

Figure 4 Several European markets have overtaken the UK in adoption of EVs, including the EU's two largest car markets.



Description: Many European countries, including the EU's largest markets in France and Germany, have overtaken the UK.
Source: Transport and Environment (2026) *Plugged in: T&E's EV market watch*
Notes: Values represent sales shares of electric cars in the year to the end of Q3 2026.

2. Household savings

- Based on October 2026 fuel and energy prices and assuming mostly at-home charging, a typical household saves over £800 per year if they switch to an EV, while both low-income and high-income households also save (Figure 5).
  - A representative low-income household in our analysis saves around £400 a year when switching to an EV. They save less than a typical household because we assume they drive less (and so generate lower fuel cost savings).
  - We assume a typical household and representative low-income household obtain cars in the used or lease markets, large parts of which are already at or around price parity.[39;40] Weakening the mandate would reduce supply of affordable electric models which feed through to the used market.

  - A representative high-income household in our analysis also saves when switching to an EV, despite our assumption that they buy a new EV with an upfront price premium of 15% (the average in the new retail market in March 2026). In practice, many new vehicles are already available at or around price parity, particularly in the large car segment.

  - Approximately 65% of households have access to off-street parking in Great Britain.[41] A typical household that cannot charge at home still pays around £100 more per year if they switch to an EV – highlighting the impact of the premium on public charging and the need to increase access to affordable charging. The recent Budget included welcome support for those reliant on public charging, but the Government could and should go further, starting by implementing the recommendations of the review into the cost of public charging.[42;43]

- The IEA expects current raised fuel prices to remain elevated in 2027, but even when assuming prices return to levels seen before the Iran war, households who can charge at home save money (Figure 5).*

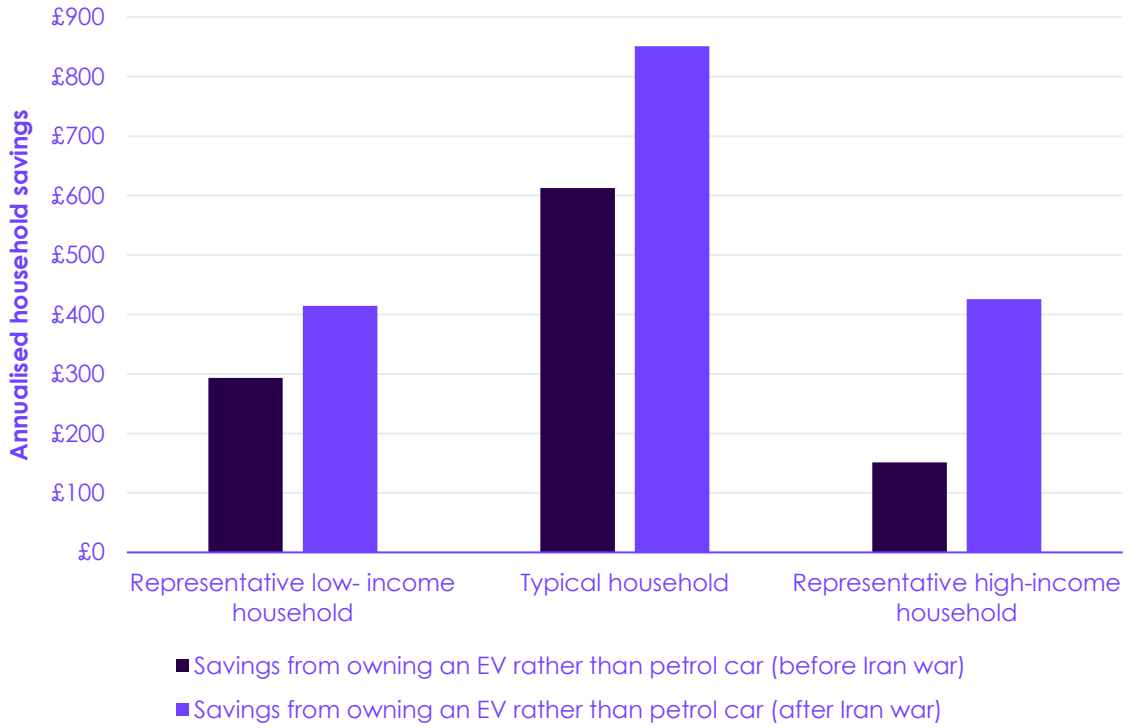
- Our estimates are based on a similar methodology to the one we used to inform analysis in Chapter 5 of our 2026 UK Progress Report. A full summary of the analytical approach and assumptions can be found there (in Section 5.1).[44]

  - The typical household is based on median (or modal, where there are a range of discrete options) household characteristics for the UK. The representative low- and high-income households are based on median (or modal) household characteristics for the lowest and highest income quintiles in the UK respectively. The split and tariffs of charging at home, on rapid/ultra-rapid and standard on-street charging are based on Zapmap data.[45]

  - We have updated our approach for the following assumptions: We have updated our 'after Iran war' figures to use October 2026 fuel prices, domestic energy prices from the October to December Price Cap, and public charging costs from ZapMap's October Price Index.[46;47;48] We have not included the cost of eVED in either the 'before' or 'after' Iran war estimates (unlike our 2026 Progress Report estimates) because this analysis is intended to show the current costs of EV ownership. However, households will still save on running costs even once eVED comes into effect.

* This is true for our three main representative household archetypes: high income, low income, and typical households.

Figure 5 All households with home-charging save by switching to an EV; a typical household saves £800 a year.



Description: All household archetypes who switch to an electric car save money provided they have access to at-home charging. A typical household with at-home charging can save over £800 a year. Low-income households save less due to lower mileage but still save. High-income households save less as we assume that they are purchasing a new rather than used car, but this is offset by higher mileage so they make more running cost savings and still save overall. This includes the cost of buying a car.
Source: CCC analysis; Ofgem (2026) *Energy price cap (default tariff) levels*; Department for Energy Security and Net Zero (2026) *Monthly and annual prices of road fuels and petroleum products*.
Notes: (1) Energy prices before the Iran war draw on the energy price cap for Q2 2026 and petrol prices from February 2026. (2) Prices for October 2026 draw on the energy price cap for Q4 2026 and petrol prices from October 2026 (DESNZ). (3) These savings are representative of a household that switches from a petrol car to an electric car with access to off-street charging, accessing an off-peak time-of-use tariff. We assume that 86% of energy demand is met by home charging, 10% by fast public charging, and 6% by slow public charging. Approximately 65% of households have access to off-street parking in Great Britain. (3) We assume that low-income and typical households purchase used cars, whereas high-income households purchase new cars.

3. Fossil fuel impacts

- Based on the Department for Transport's (DfT's) initial emissions impact assessment, reducing the mandate's headline targets implies increasing UK reliance on petrol and diesel by the equivalent of between 5 and 15 million barrels of oil in 2030 (Table 1). This rises to 22 million barrels of oil in 2035, the middle of the sixth carbon budget period.

Table 1
Additional fossil fuel demand implied by proposed options to reduce headline targets for cars and vans

Headline target in 2030	Additional petroleum product demand in 2030 (barrels of oil equivalent)	Additional demand in 2030 as a share of 2025 road transport petroleum product demand	Additional cost in 2030 at October 2026 crude oil prices
Option 1: **70% (cars)** **60% (vans)**	5 million	1.9%	£0.5 billion
Option 2: **60% (cars)** **50% (vans)**	9 million	3.4%	£0.8 billion
Option 3: **50% (cars)** **40% (vans)**	15 million	5.5%	£1.3 billion

Source: CCC analysis; Department for Energy Security and Net Zero (DESNZ) (2026) *Greenhouse gas reporting: conversion factors;* DESNZ (2026) *Digest of UK Energy Statistics (DUKES;* Findpetrol.co.uk (2026) *UK fuel price index monthly fuel price report 2026*.
Notes: (1) Additional barrels of oil equivalent (boe) fuel demand calculated from the additional greenhouse gas (GHG) emissions for options 1-3 in the Government's published emissions impact assessment in the Zero Emission Vehicle Mandate Review (2026), using the latest gross calorific GHG emissions factors published by DESNZ. In the absence of data on the impact assessment's assumed future split of fuel demand across petrol and diesel, the gross calorific content emissions factor for petrol is applied to the additional emissions from cars, and the analogous figure for diesel is applied to the additional emissions for vans. These are summed to give total additional barrels of oil equivalent, rounded here to the nearest million. (2) 2025 petroleum product demand in road transport was derived from DESNZ's published aggregate energy commodity balance for 2025 (DUKES 1.1. Gross calorific values for petroleum products for road transport) (3) Additional costs were calculated using October 2026 Brent crude oil prices accessed from Findpetrol research and currency exchange rates accessed from HMRC's October 2026 monthly exchange rates, rounded to the nearest £0.1 billion.

4. Effect of inflated incentives for plug-in hybrids

- UK sales of plug-in hybrids (PHEVs) have accelerated following 2025 changes to the mandate.
  - PHEVs are now the fastest-growing UK market segment for cars and have a sales share of 14% in the 12 months to September 2026, compared to around 10% in the EU.[49]
  - In 2025, the cap on CO_2 transfers within the mandate was significantly expanded and extended (from phasing out in 2027 to phasing down to 50% by 2029).[50]
  - At the same time, a decision was made to retain application of a Utility Factor for PHEVs which has consistently been found to underestimate real-world emissions by up to a factor of seven.[51] This means that OEMs are credited with an outsized CO_2 credit for each PHEV they sell, lowering the number of EVs they need to sell to comply with the mandate. This has a distorting effect on the market.

- Prior to these decisions, PHEV car sales grew by 19% between 2023 and 2024. Following these decisions, PHEV sales increased by 35% between 2024 and 2025, and 41% in the year to October 2026 (compared to the same period last year). The market share of PHEV vans has increased from 0% in 2024 to 5% between January and October 2026 (the latest data available at time of writing).[52]

- A separate design choice in the mandate gives new entrants an advantage from selling PHEVs. For OEMs with no sales in the UK before 2024, their emissions baseline against which CO_2 improvements are credited is set based on the UK industry average in the preceding year.[53] This means they can generate significant CO_2 improvement credits by selling PHEVs, providing a distorted incentive. Chinese brands accounted for 43% of PHEV sales in 2026 to June, compared to 21% of EV sales.[54]

5. Developments in the new van market

- Sales of new electric vans are not on track to deliver the current ZEV mandate. However, flexibilities have enabled compliance to date, and growth of EVs has accelerated in 2026.

  - In 2025, electric van sales grew by 36% to reach a 9.5% market share.[55] This was below the implied target once CO_2 transfers were accounted for (11%), but other flexibilities, such as car-van transfers, enabled compliance.[56]

  - Electric van sales have picked up in 2026, growing by 27% so far compared to the same period last year. EVs have a market share of 11% in the year to date, compared to the 16% estimated implied target after accounting for expected use of CO_2 transfers.[57;58]

- Electric vans are increasingly attractive on a Total Cost of Ownership (TCO) basis when at-home or depot charging is an option, but expensive public charging and operational readiness are key barriers for much of the market.

  - Where drivers can charge at home overnight or at depots, electric vans can deliver savings for many use-cases on a TCO basis.[59;60] However, the high cost of public charging means the switch isn't economical for many.

  - Operational hurdles, in particular the cost of downtime during charging, and range and payload limitations of early models have also prevented businesses making the switch.[61]

- Advances in the range, charging speed, and payload capabilities of newer models are eroding these barriers, but further action is required.[62;63]

  - Government can help address practical barriers, such as ensuring the certified battery-range of electric vans is reflective of real-world use conditions and ensuring public charging bays are suitable for commercial vehicles.

  - Accelerating depot grid connections and implementing recommendations from the Cost of Public Charging Review are key to improving access to affordable charging, which would improve the business case for adoption.

6. Emissions impacts

- Based on the Department for Transport's (DfT's) initial emissions impact assessment, weakening the headline targets has the potential to put the Carbon Budget and Growth Delivery Plan (CBGDP) at a deficit against meeting the Sixth Carbon Budget, creating a gap of up to 4.2% above the legislated budget (Table 2). It could also increase the current gap between the CBGDP and the 2030 Nationally Determined Contribution (NDC) from 26.2 $MtCO_2e$ to up to 31.8 $MtCO_2e$. This increases the gap from 10.3% of the 2030 NDC target to up to 12.5%.
  - Additional emissions from the illustrative Options 1-3 range between 1.9–5.6 $MtCO_2e$ in 2030, and 3.2–8.4 $MtCO_2e$ per year on average across the Sixth Carbon Budget (2033–2037).
  - Most of the emissions impact is associated with lower electric car sales, which could potentially increase emissions by between 1.4 –4.1 $MtCO_2e$ in 2030. This increases the gap to meeting the 2030 NDC by up to 1.6 percentage points.
  - Options to reduce the headline targets for electric vans has a more modest impact of between 0.5–1.5 $MtCO_2e$ in 2030. This increases the gap to meeting the 2030 NDC by up to 0.6 percentage points.
  - The additional emissions from Option 3 in 2030 (5.6 $MtCO_2e$) are equivalent to the annual emissions savings of approximately 2.8 million residential heat pump retrofits and are greater than the total annual emissions from the UK's paper and glass sectors in 2025 (5 $MtCO_2e$).
  - Note this is based on the DfT's initial assessment of the illustrative options. We have validated their estimates against our own modelling, and they appear to be broadly accurate. The final emissions impact assessment, when final measures are confirmed, could change.
- The roll-out of electric cars and vans, supported by the ZEV mandate, is the biggest source of abatement in the CBGDP pathway, delivering 19% of the emissions reductions required in 2030 and 21% of the emissions reduction in 2037, the end of the Sixth Carbon Budget.
  - Electrification and the expansion of low-carbon electricity supply deliver 55% of the total emissions reduction required in the CBGDP by the Sixth Carbon Budget period. The largest contribution to electrification comes from EVs.

Table 2
Emissions impact of proposed options on meeting UK 2030 NDC and Sixth Carbon Budget

		2030 NDC (in-year emissions)		Sixth Carbon Budget (2033 – 2037)	
	Option	Emissions gap, $MtCO_2e$ (added emissions, $MtCO_2e$)	Gap as % of 2030 NDC (added gap, p.p.)	Annual average emissions gap, $MtCO_2e$ (added emissions, $MtCO_2e$)	Gap as % of CB6 (added gap, p.p.)
Cars	Current policies	26.2	10.3%	-0.4	-0.2%
	Option 1 (70%)	27.6 (+1.4)	10.9% (+0.6)	2.0 (+2.4)	1.0% (+1.3)
	Option 2 (60%)	28.7 (+2.5)	11.3% (+1.0)	3.8 (+4.2)	2.0% (+2.2)
	Option 3 (50%)	30.3 (+4.1)	11.9% (+1.6)	6.0 (+6.4)	3.1% (+3.3)
	Option 4 (Flex)	26.1 (-0.1)	10.3% (+0.0)	-0.1 (+0.3)	0.0% (+0.2)
Vans	Current policies	26.2	10.3%	-0.4	-0.2%
	Option 1 (60%)	26.7 (+0.5)	10.5% (+0.2)	0.3 (+0.7)	0.2% (+0.4)
	Option 2 (50%)	27.2 (+1.0)	10.7% (+0.4)	1.0 (+1.4)	0.5% (+0.7)
	Option 3 (40%)	27.7 (+1.5)	10.9% (+0.6)	1.6 (+2.0)	0.8% (+1.0)
	Option 4 (Flex)	26.2 (+0.0)	10.3% (+0.0)	-0.3 (+0.1)	-0.1% (+0.1)
Total	**Current policies**	**26.2**	**10.3%**	**-0.4**	**-0.2%**
	Option 1	**28.1 (+1.9)**	**11.1% (+0.7)**	**2.8 (+3.2)**	**1.4% (+1.6)**
	Option 2	**29.7 (+3.5)**	**11.7% (+1.4)**	**5.2 (+5.6)**	**2.7% (+2.9)**
	Option 3	**31.8 (+5.6)**	**12.5% (+2.2)**	**8.0 (+8.4)**	**4.2% (+4.4)**
	Option 4	**26.2 (+0.0)**	**10.3% (+0.0)**	**0.1 (+0.5)**	**0.0% (+0.2)**

Source: CCC analysis; DfT (2026) *Zero-emission vehicle mandate review*.
Notes: (1) Emissions estimates are based on DfT's initial emissions impact assessment of the consultation options. (2) The 2030 NDC target excludes emissions from International Aviation and Shipping (IAS). The Sixth Carbon Budget includes IAS emissions. (3) P.p. stands for percentage points. (4) 'Current policies' reflects policies in the Carbon Budget and Growth Delivery Plan (CBGDP). (5) Negative values indicate overperformance against targets.

Endnotes

[1] The Society of Motor Manufacturers and Traders (2026) *Electric vehicle data*. https://www.smmt.co.uk/vehicle-data/electric-vehicle-registrations/. (Accessed: 5 November 2026).

[2] Department for Transport (2026) *Zero emission vehicle mandate review*. https://www.gov.uk/government/consultations/zero-emission-vehicle-mandate-review.

[3] The Society of Motor Manufacturers and Traders (2026) *Britain's decarbonisation decade takes EVs from niche to normal*. https://www.smmt.co.uk/britains-decarbonisation-decade-takes-evs-from-niche-to-normal/. (Accessed: 5 November 2026)

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