

European Alternative Fuels Observatory EAFO

Alternative Fuels Market Developments in Europe: 2025 Review and Early 2026 Signals - A European Alternative Fuels Observatory (EAFO) Webinar



- **12:30-12:35 - Introduction to EAFO and webinar objectives** Overview of EAFO and the scope of the session. (**Zlatko Kregar**, DG MOVE & **Harm Weken**, FIER)
- **12:35-12:50 - Vehicle market developments: 2025 review and early 2026 signals** Trends in vehicle registrations and fleet evolution across road transport, highlighting key market dynamics and forward-looking signals. (**Jose Pontes**, EAFO & **Mate Csukas**, FIER)
- **12:50-13:00 - Recharging infrastructure market** Latest developments in EU recharging infrastructure, including deployment trends, heavy-duty charging infrastructure, and charging price evolution across Member States. (**Sjors Martens**, Eco Movement)
- **13:00-13:05 - Onshore Power Supply (OPS) in European maritime ports** Status of installed and planned OPS infrastructure in EU ports and its relevance for decarbonisation of maritime transport. (**Roland Teixeira** & **Dima Khalife**, EOPSA)
- **13:05-13:15 Q&A and discussion**

Introduction to the European Alternative Fuels Observatory (EAFO)

Harm WEKEN (FIER Sustainable Mobility)

EAFO 4.0 Group Members



Subcontractors and external partners



The European Alternative Fuels Observatory

AF Market Trends and Outlook

Mate Csukas (FIER), José Pontes (EAFO), Edwin Bestebreurtje (FIER),
FIER Sustainable Mobility, Helmond, Netherlands

European Alternative Fuels Observatory (EAFO)



Agenda

European Market Overview (-2025)

Market Signals in 2026

Regional Breakdown of Global BEV sales



The screenshot shows the EAFO website with the following elements:

- European Commission logo and search bar at the top.
- Navigation menu: Home, Transport modes, Maps, Markets and policy, Interactive tools, General information, Contact.
- Sub-navigation: View, Edit, Revisions.
- Current article: "Germany's BEV Fleet Surpasses 2 Million Units: Major Milestone in Electrificati..." (3 of 5).
- Section: "Road: reports by country" with a description: "View interactive infographics containing up-to-date statistics on infrastructure and fleet data for road vehicles, private and commercial. Available for all EU countries, including a EU27 summary view." and a "Choose country" dropdown menu.
- Section: "Other transport modes" with a description: "Information and data visualisations on infrastructure rollout and fleet statistics for rail, shipping and aviation. Available on an EU level." and icons for Rail, Maritime (sea), Inland waterways, and Aviation.

Alternative fuels in Europe

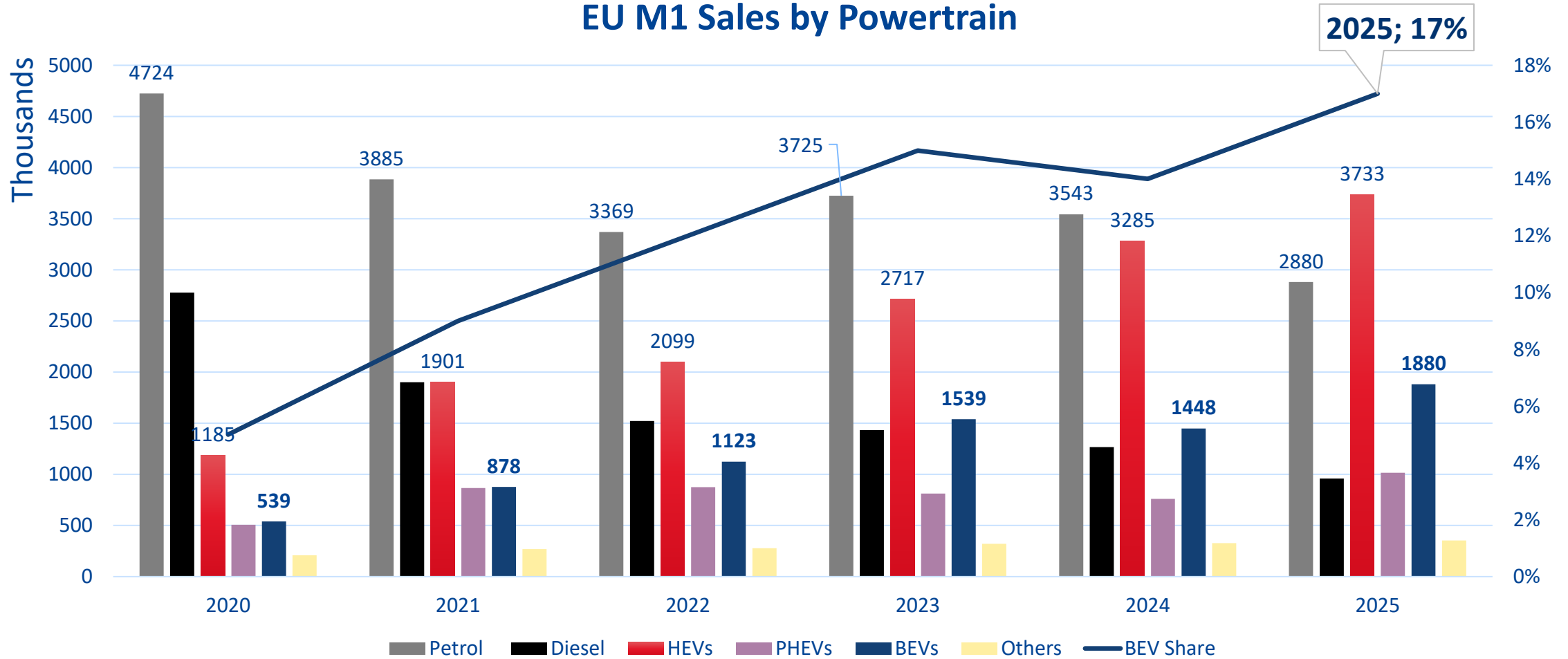
The European Alternative Fuels Observatory (EAFO) is the European Commission's key reference portal for alternative fuels, infrastructure and vehicles in Europe.

[Read more >](#)

Fuel composition of EU27 car (M1) market 2020-2025

Petrol and diesel declining, HEVs are dominant, BEV share at 17% in 2025

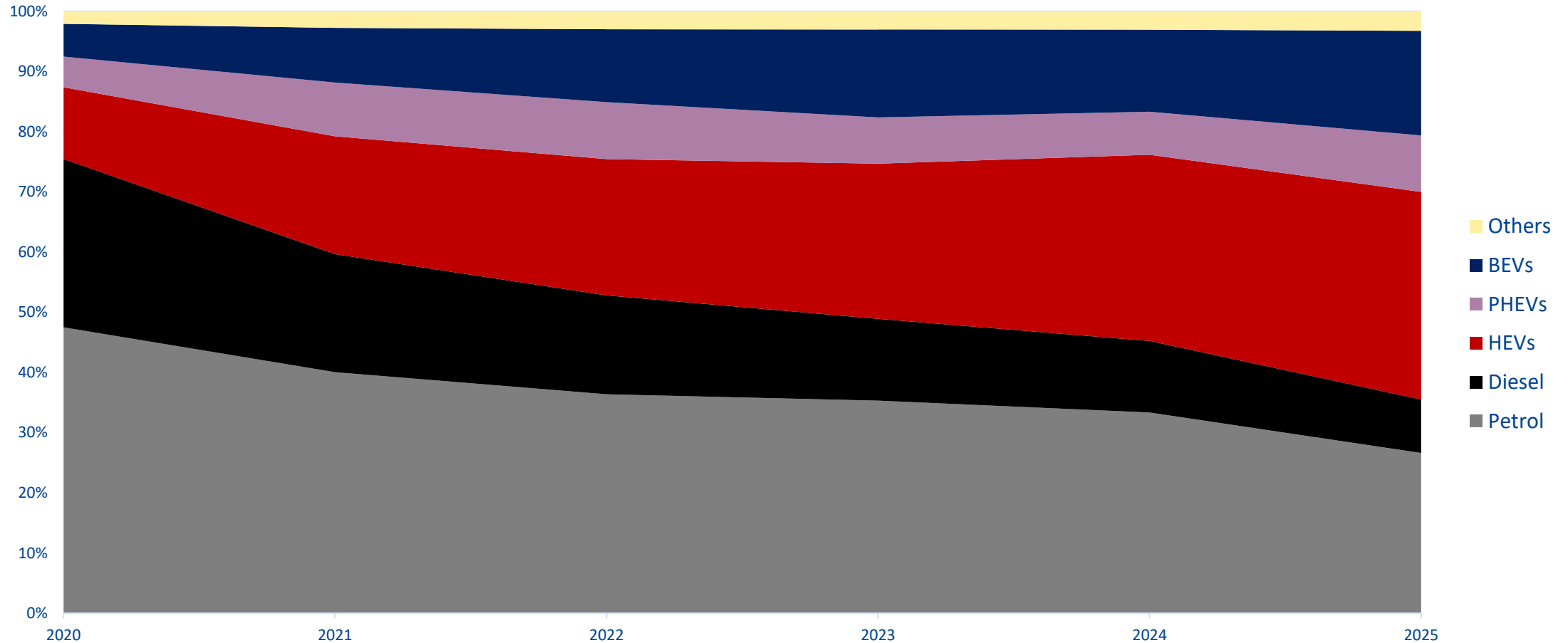
EU M1 Sales by Powertrain



In 5 years, we have transitioned from a market where Petrol and Diesel represented over 75% all new car sales.

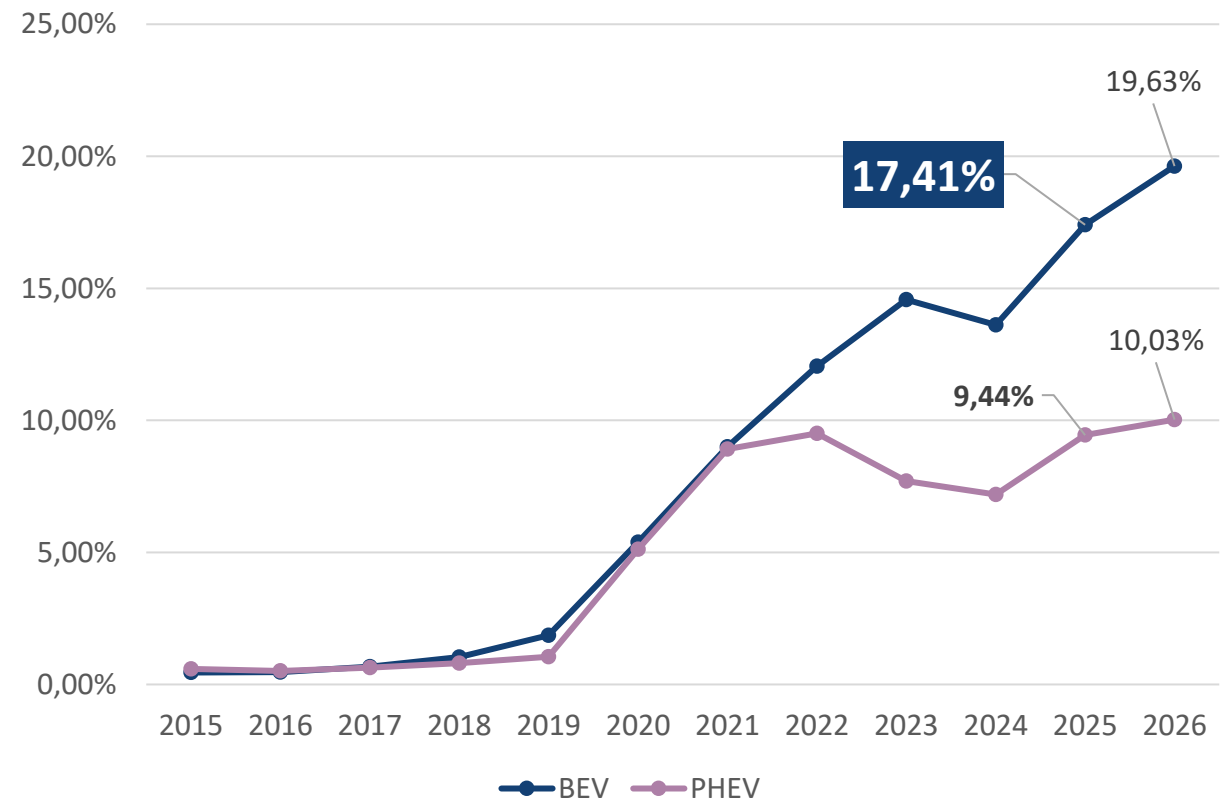
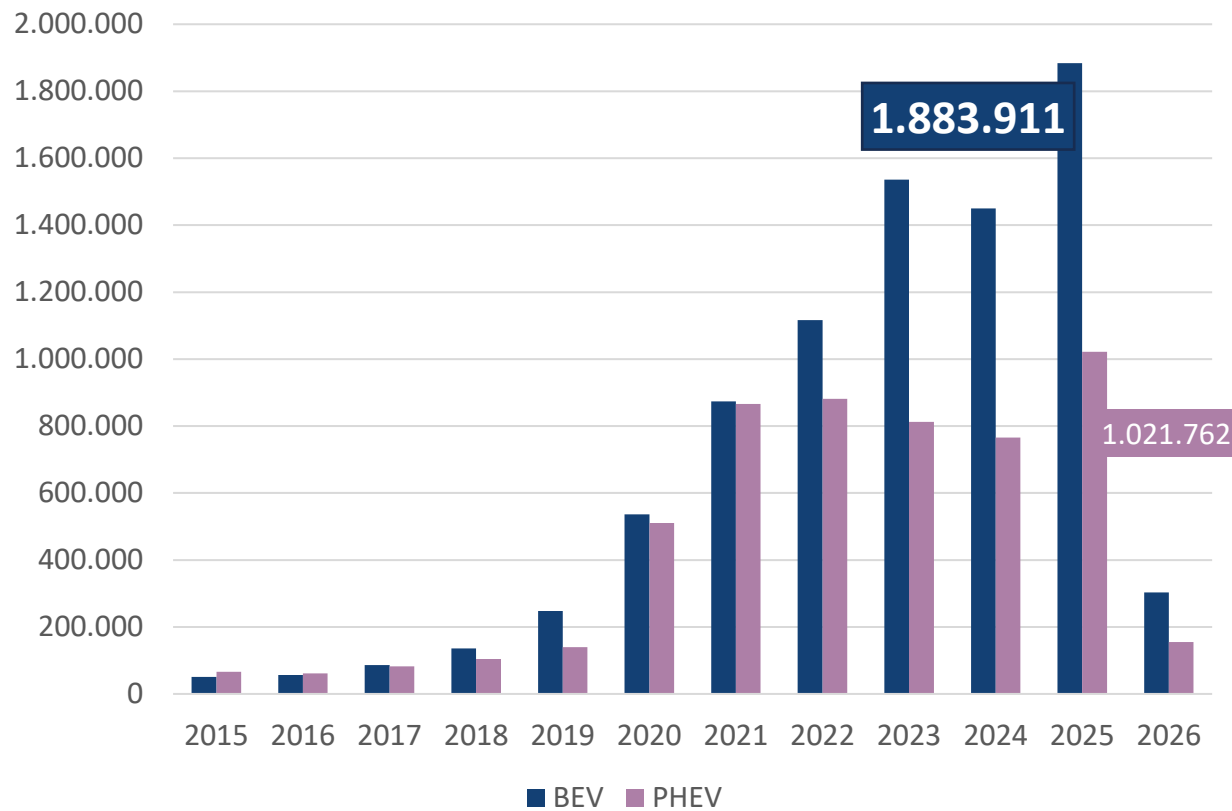
To a new reality, where they only represent 36% of sales, less than half.

EU27 M1 Sales by Powertrain



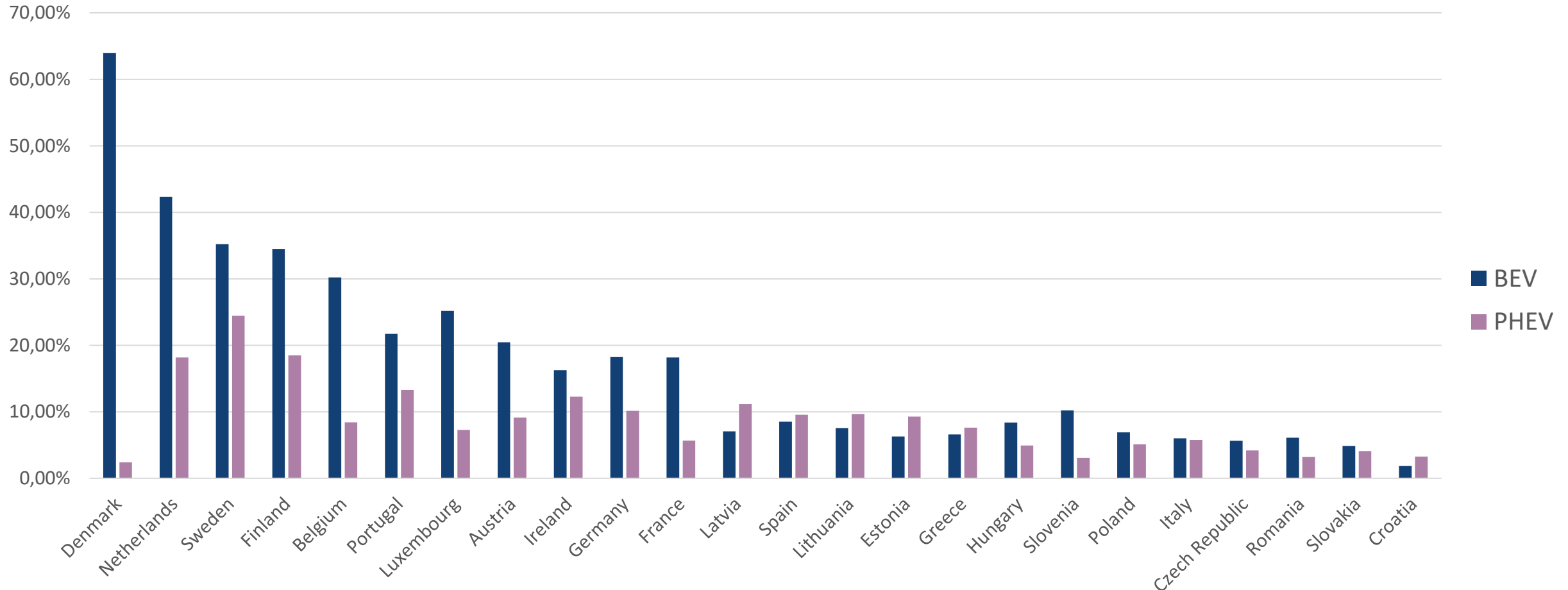
AF uptake in Europe: Vehicle registrations (M1)

AF registrations until February 2026 for European Union



5 countries are above 30% BEV market share, 12 countries are above 10%

Market Share (%) of BEV and PHEV passenger cars (M1) and vans (N1) as a percentage of the total sales in 2025*

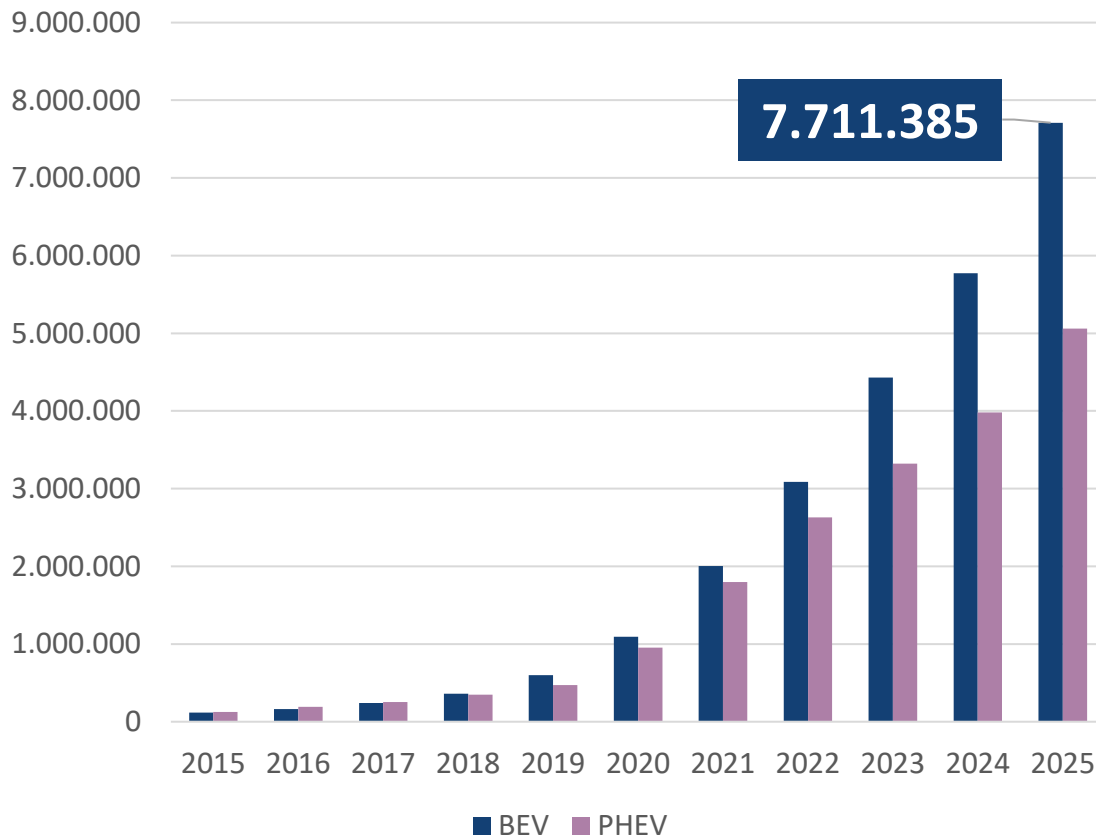


*Including estimates

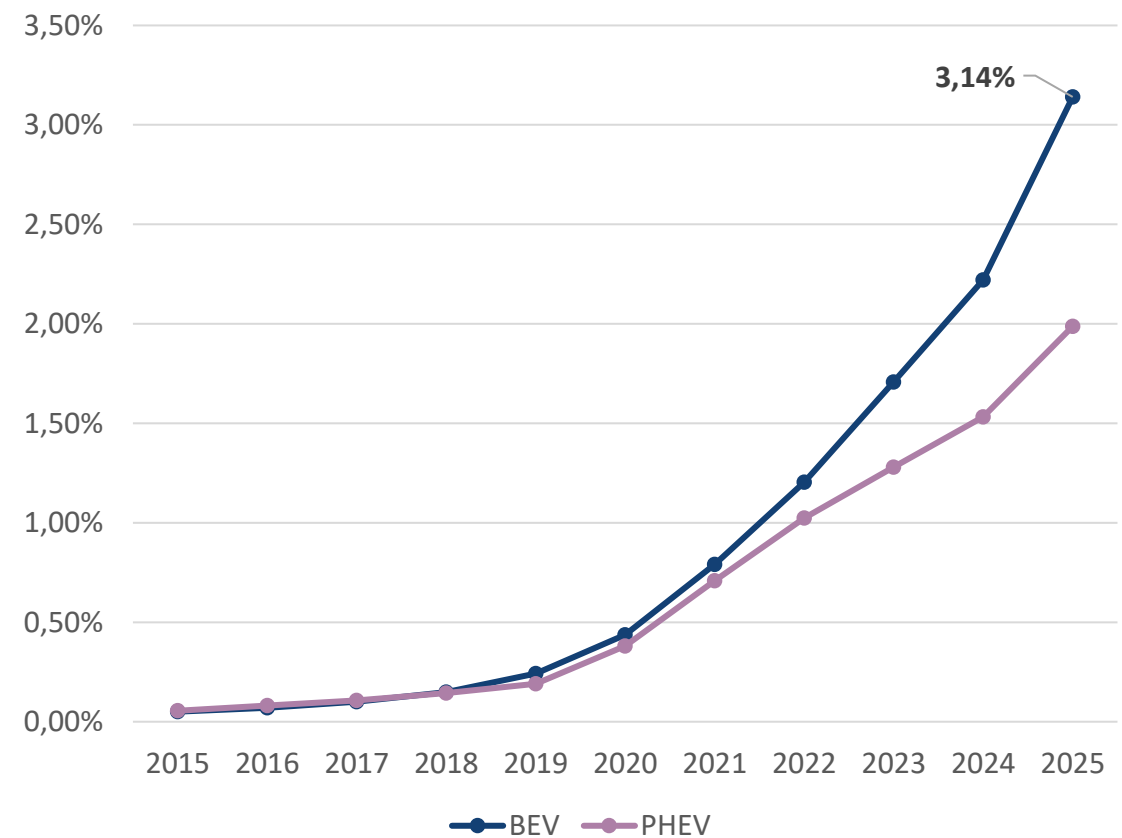
Plug-in-electric vehicle fleet to reach 12 million in 2025, with over 5% fleet share in 2025.

AF passenger car Fleet in the European Union (EU-27)

Passenger car AF Fleet European Union (EU-27)

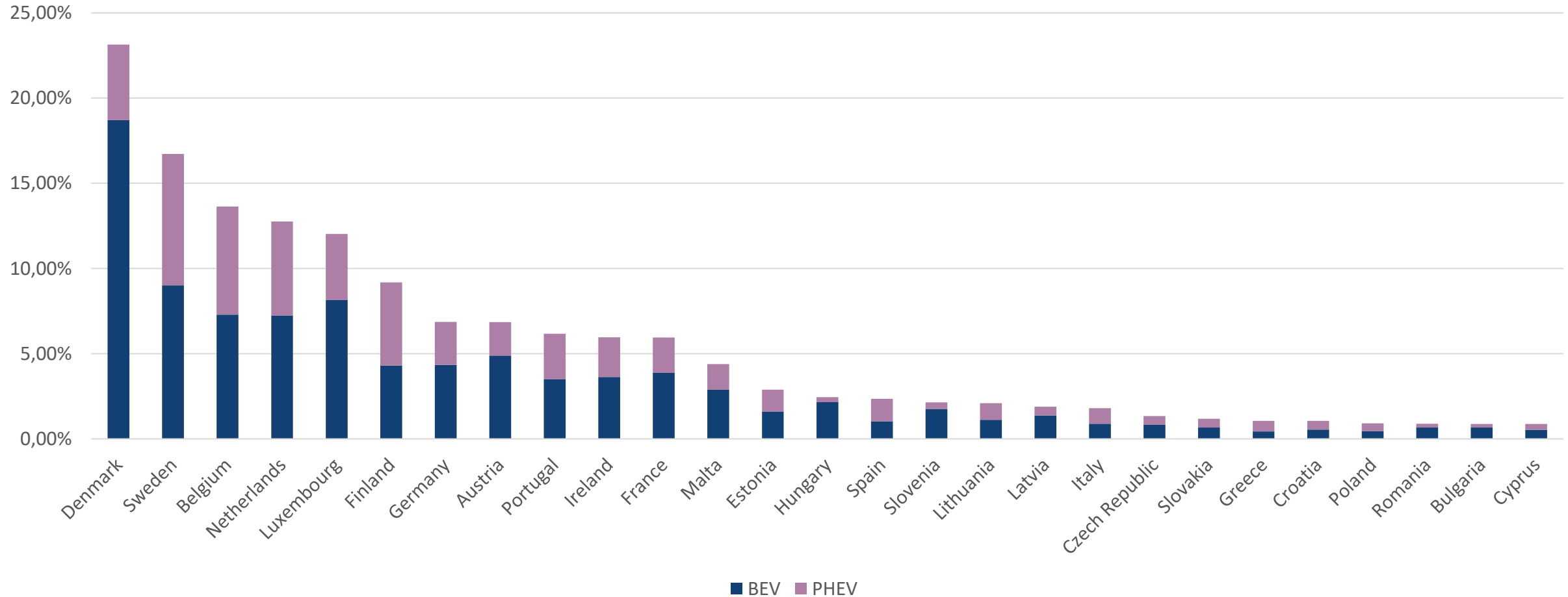


Passenger car AF Fleet Share European Union (EU-27)



11 countries are above 5% PEV fleet, 5 countries are above 10%

Fleet of PEV (BEV + PHEV) passenger cars (M1) and vans (N1) as a percentage of the total fleet in 2025*

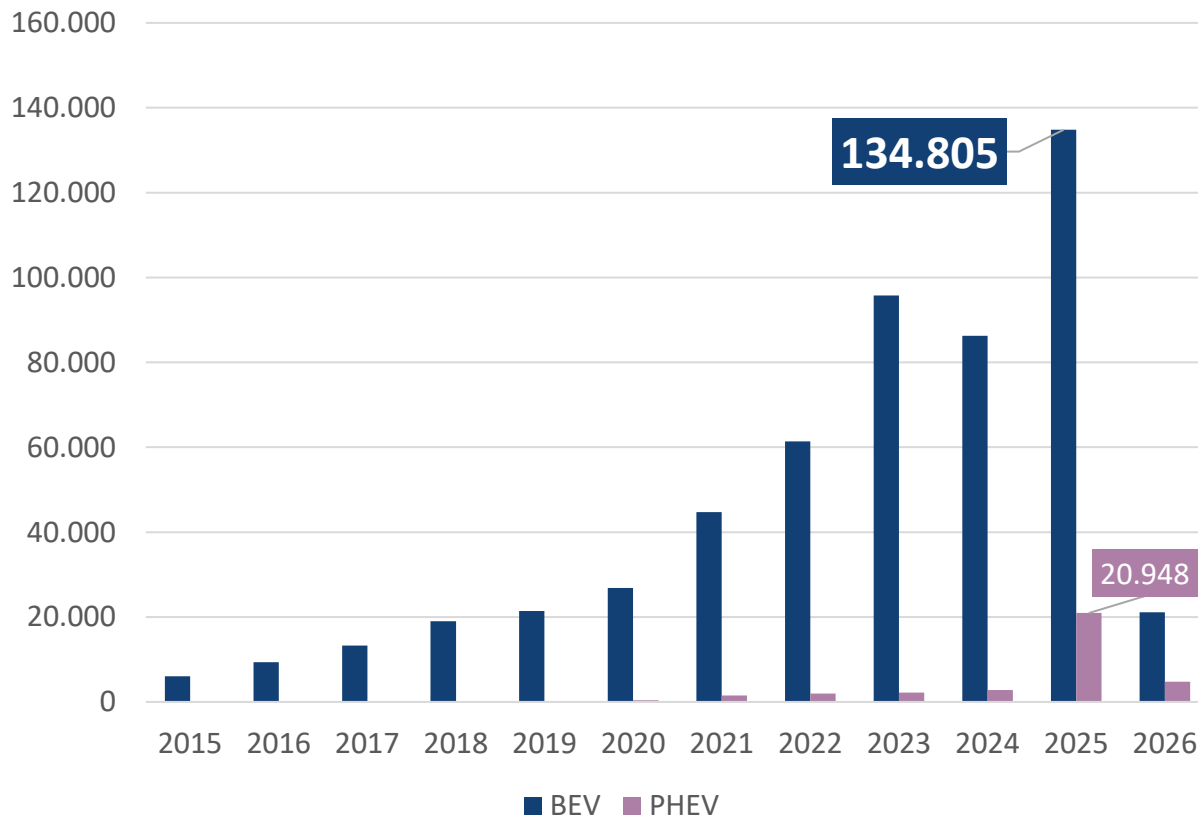


*Including estimates

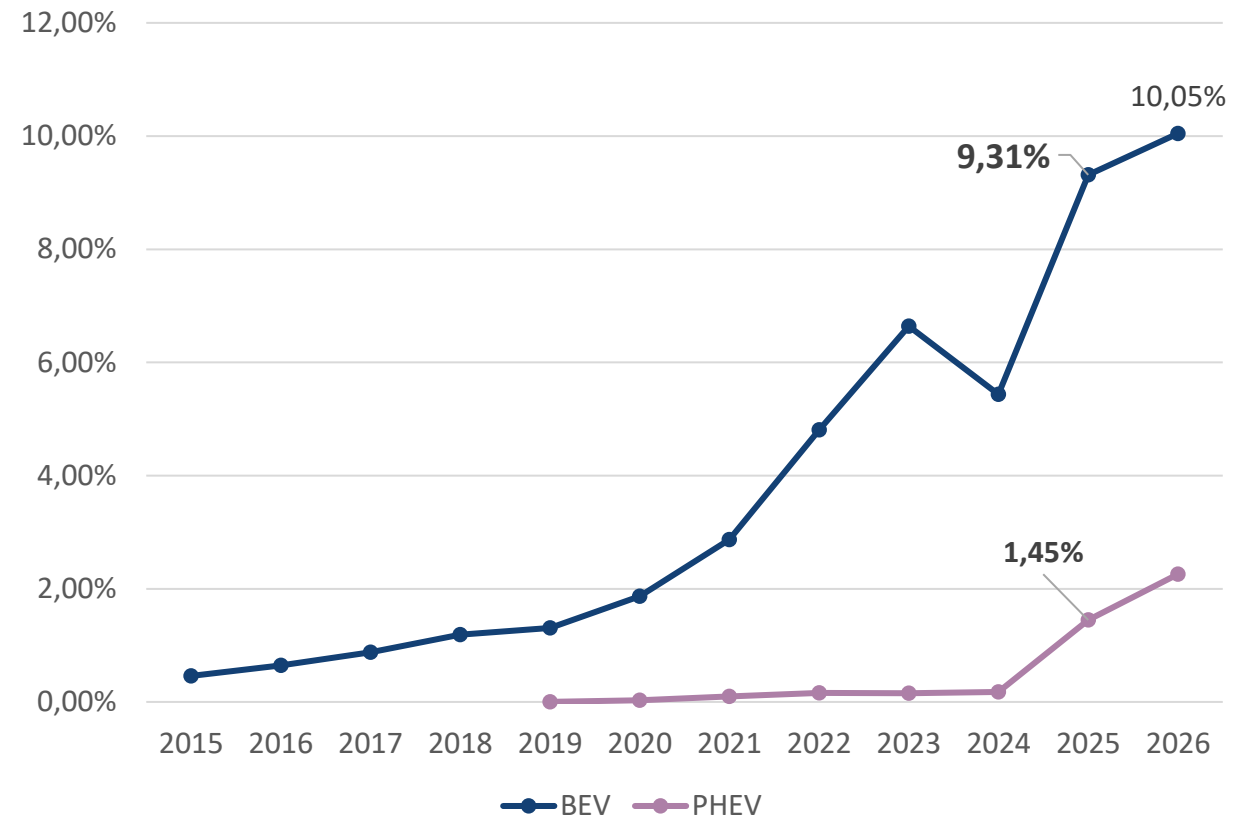
AF uptake in Europe: Van registrations (N1)

AF registrations until February 2026 for European Union

Vans AF Registration European Union (EU-27)



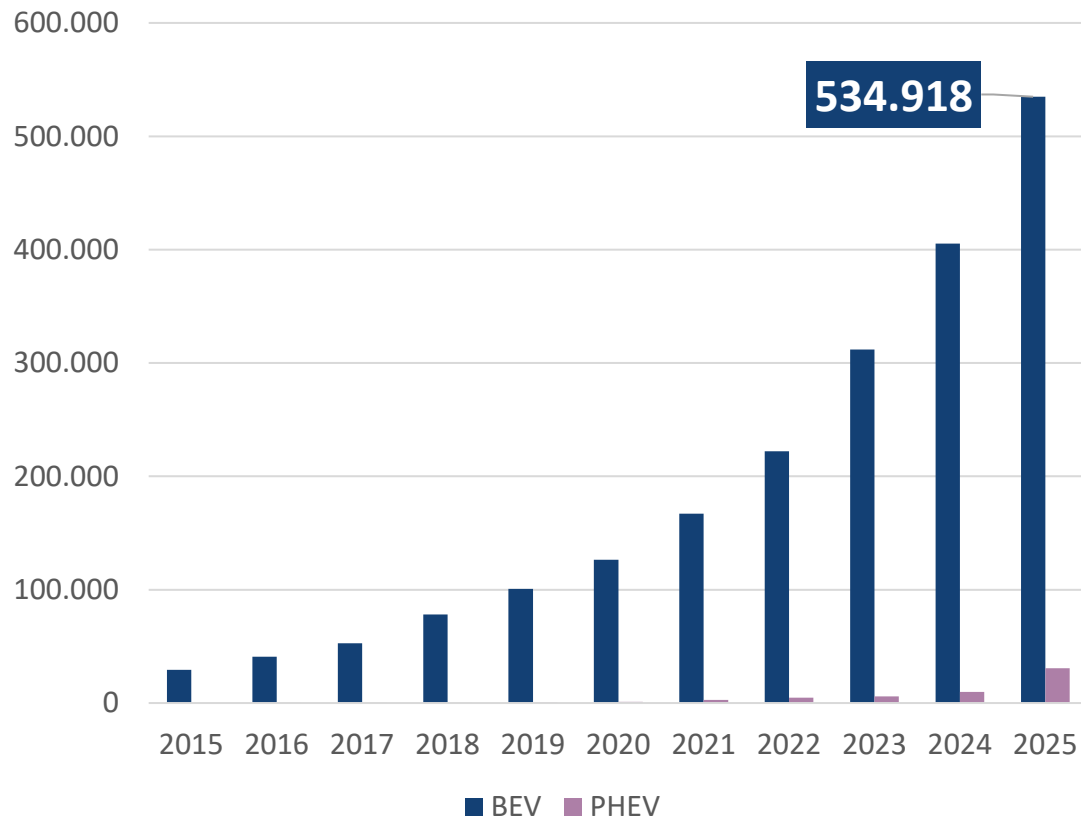
Vans AF Market Share European Union (EU-27)



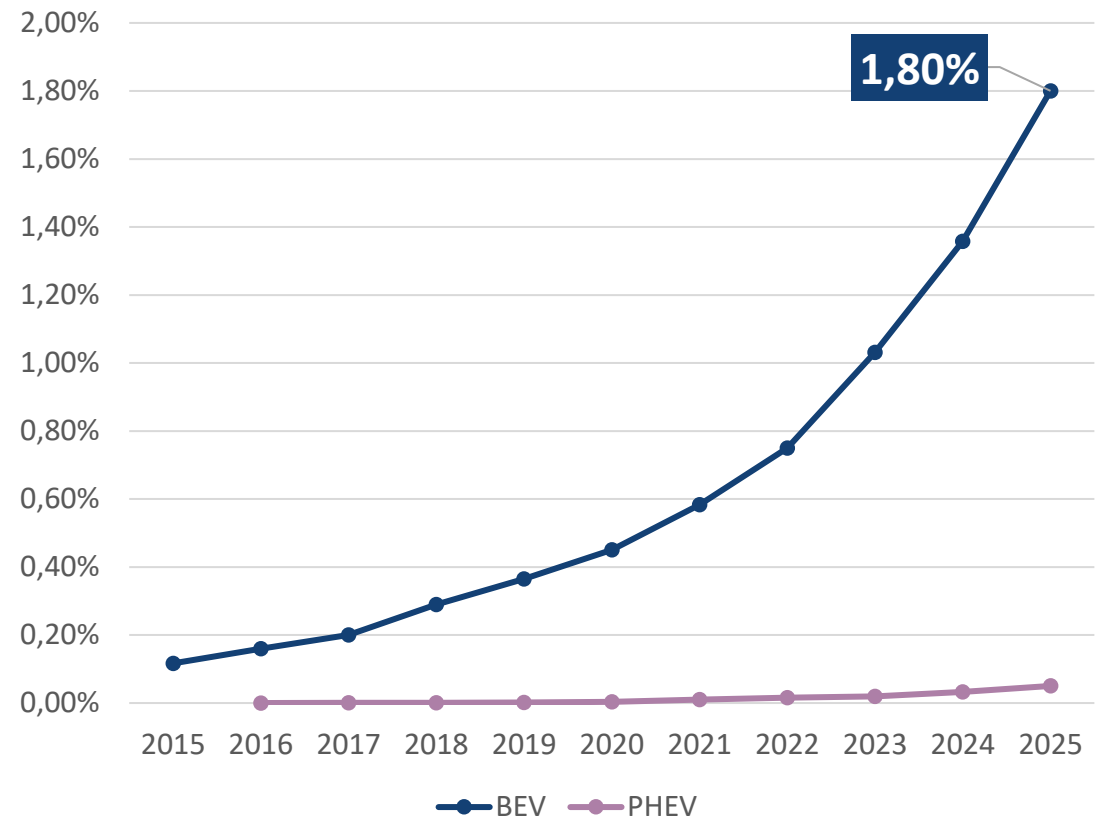
BEV vans are the dominant AF powertrain, over half million in the EU and over 1,8% fleet share.

AF Vans (N1) Fleet in the European Union (EU-27)

Vans AF Fleet European Union (N1) (EU-27)



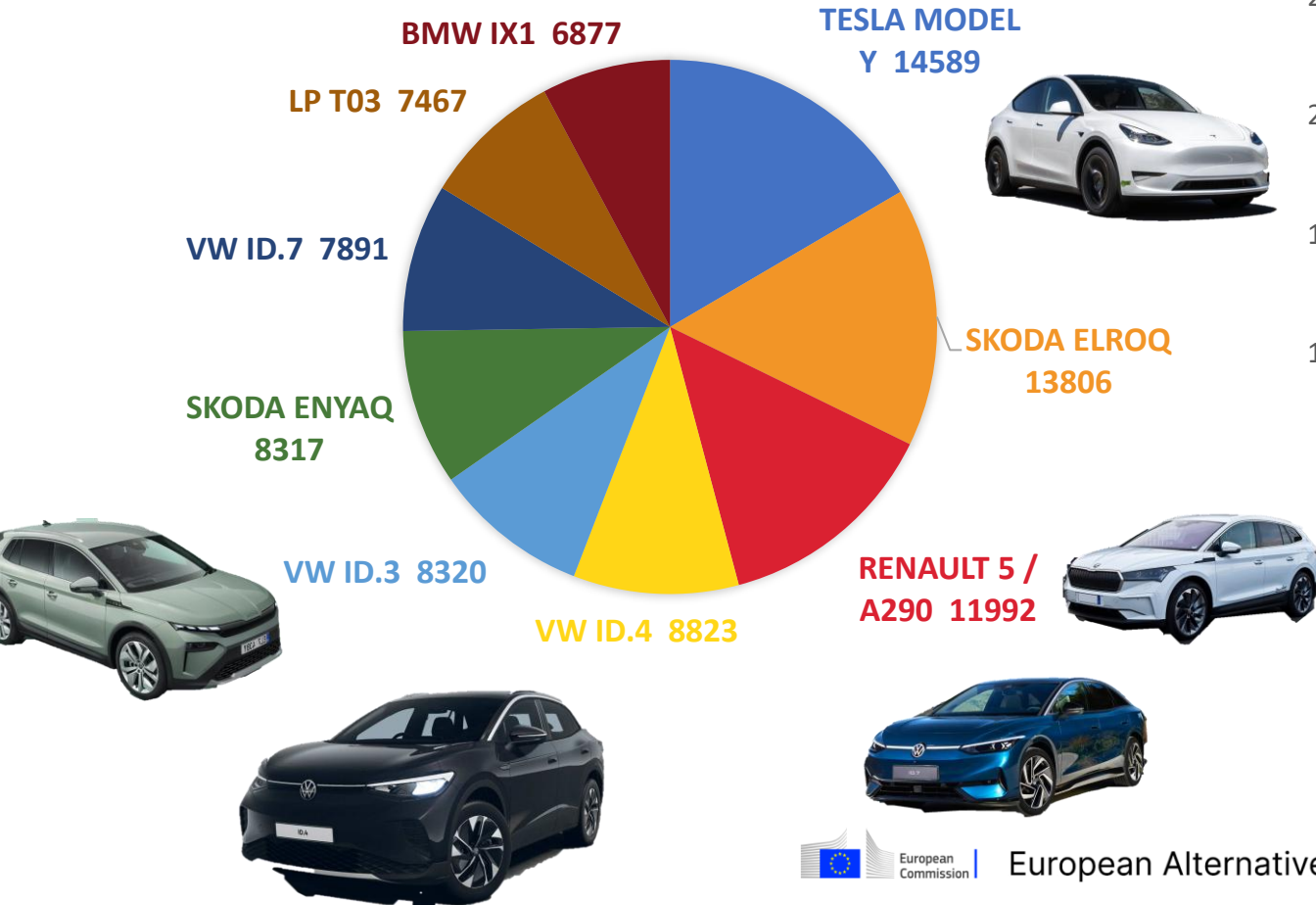
Vans AF Fleet Share European Union (N1) (EU-27)



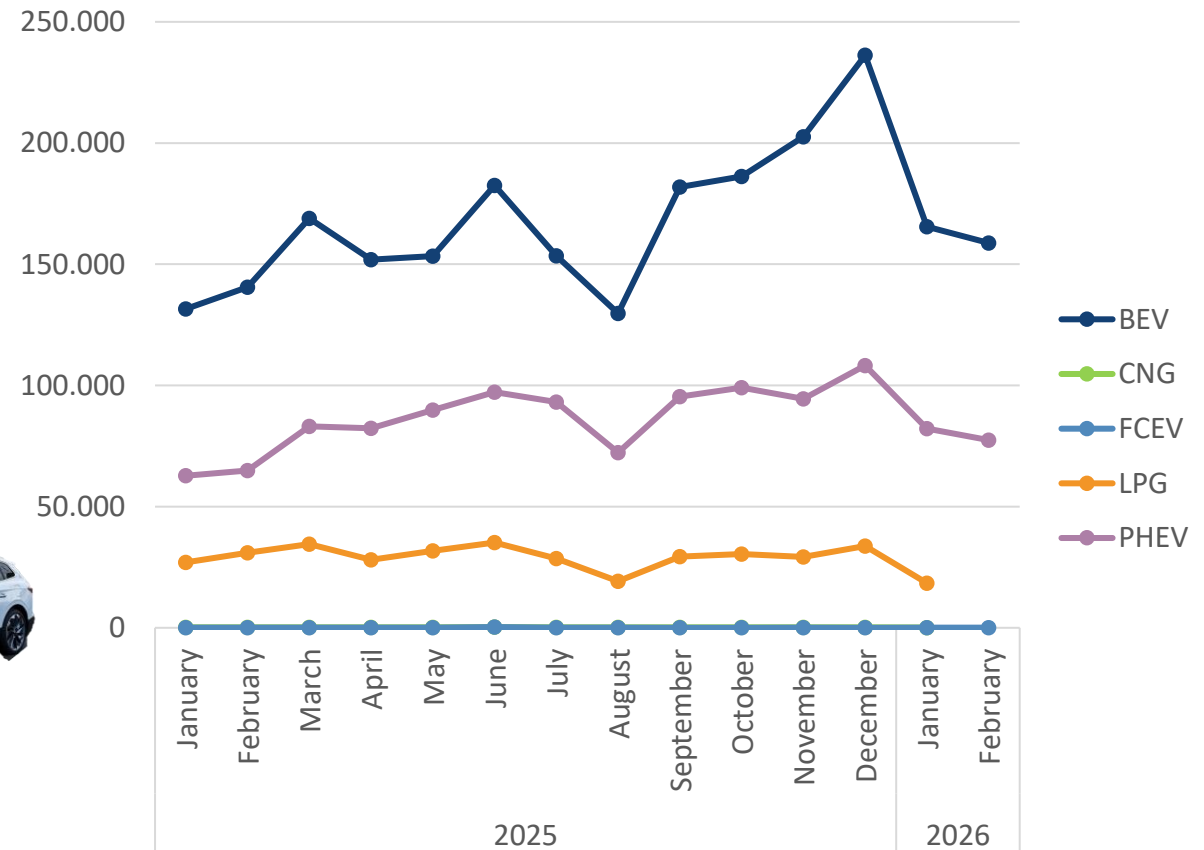
Vehicles and fleet 2025-2026

TOP 10 Models and monthly market share in EU27

TOP 10 BEV Models (YTD 2026)



Monthly Registrations (2025/2026)

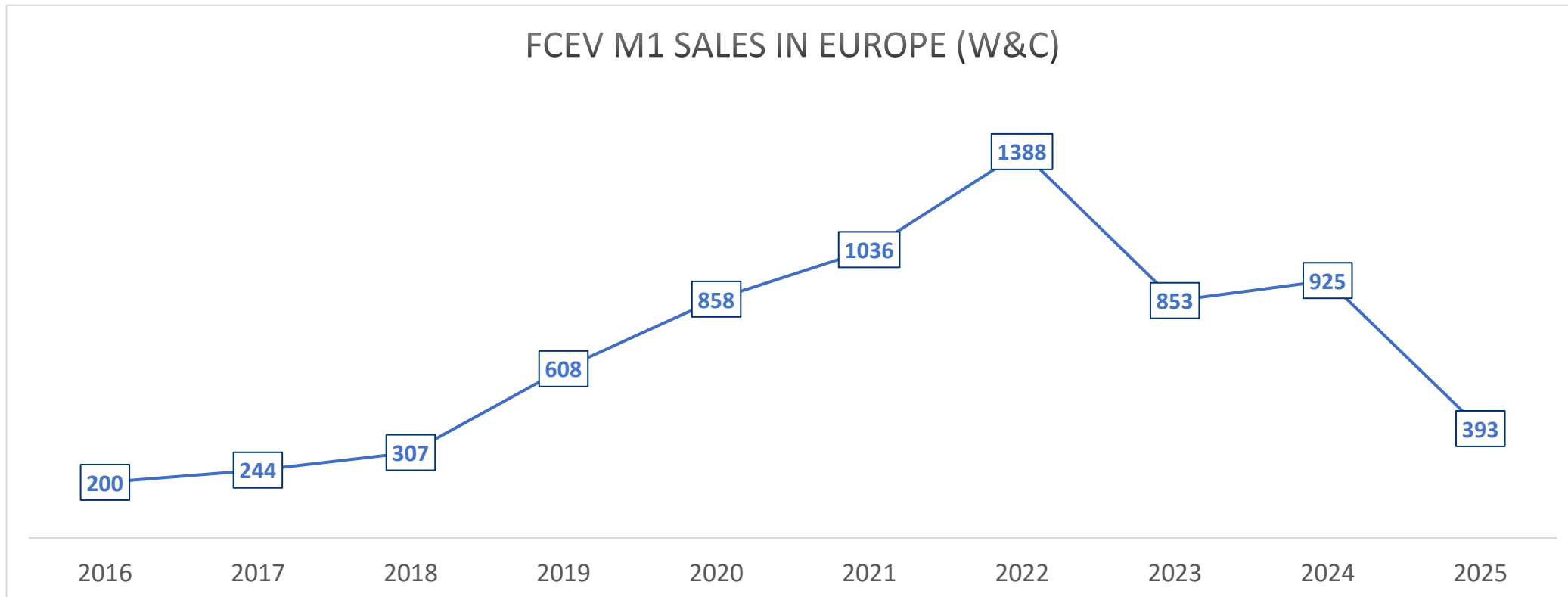


FCEV (H2) car sales declined since 2022

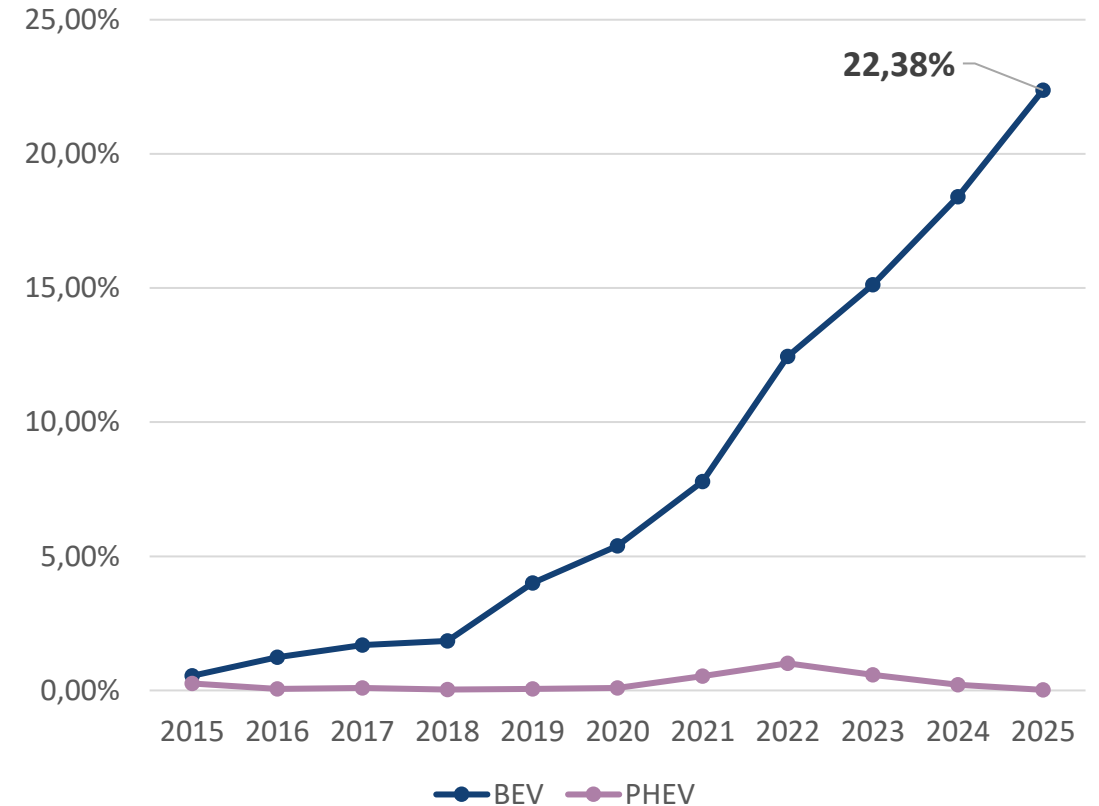
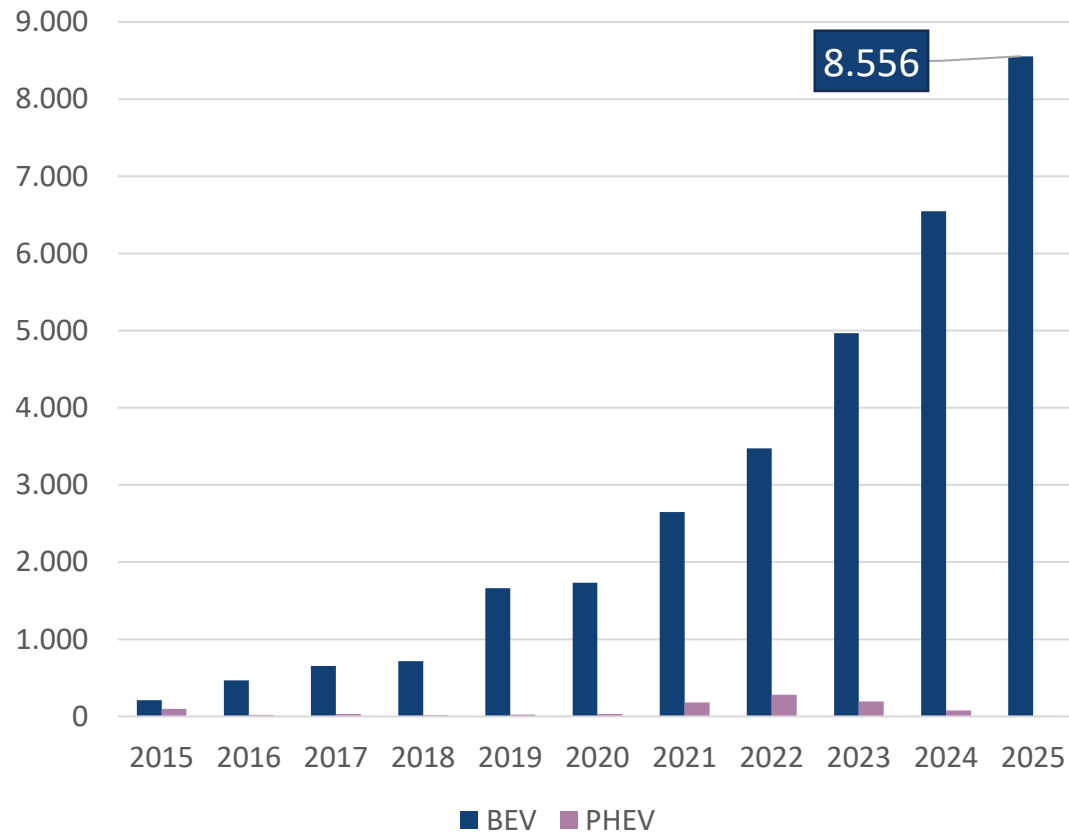


Fuel Cell Electric Vehicle sales in Europe

- FCEV sales have declined from their peak in 2022 by over 70%.
- 2025 was particularly low as the Toyota Mirai II was already 4 years old and the Nexu was waiting for the new generation, set to land in 2026, so expect a rebound this year.



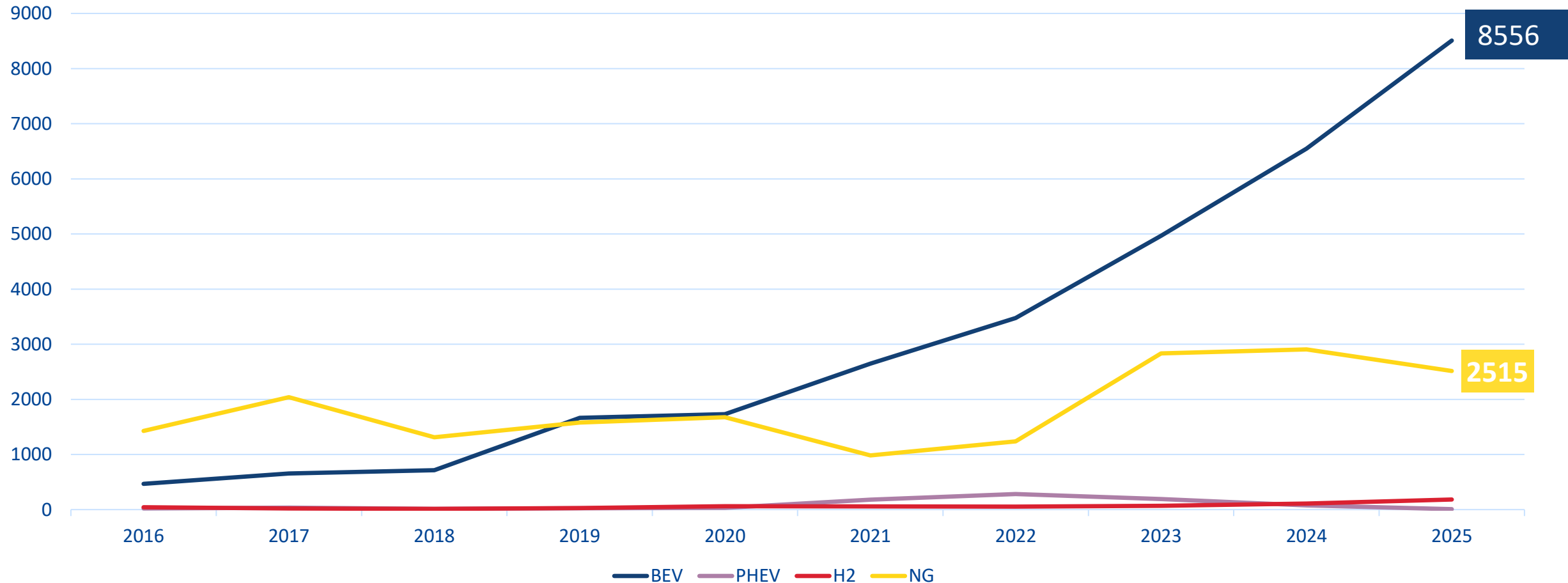
The BEV Bus registrations are steadily growing, passed 8.500 units in 2025, with 22,4% market share
The city bus market share is even higher (50%+).



EU Bus Sales by AF Powertrain

BEV sales are growing since 2020

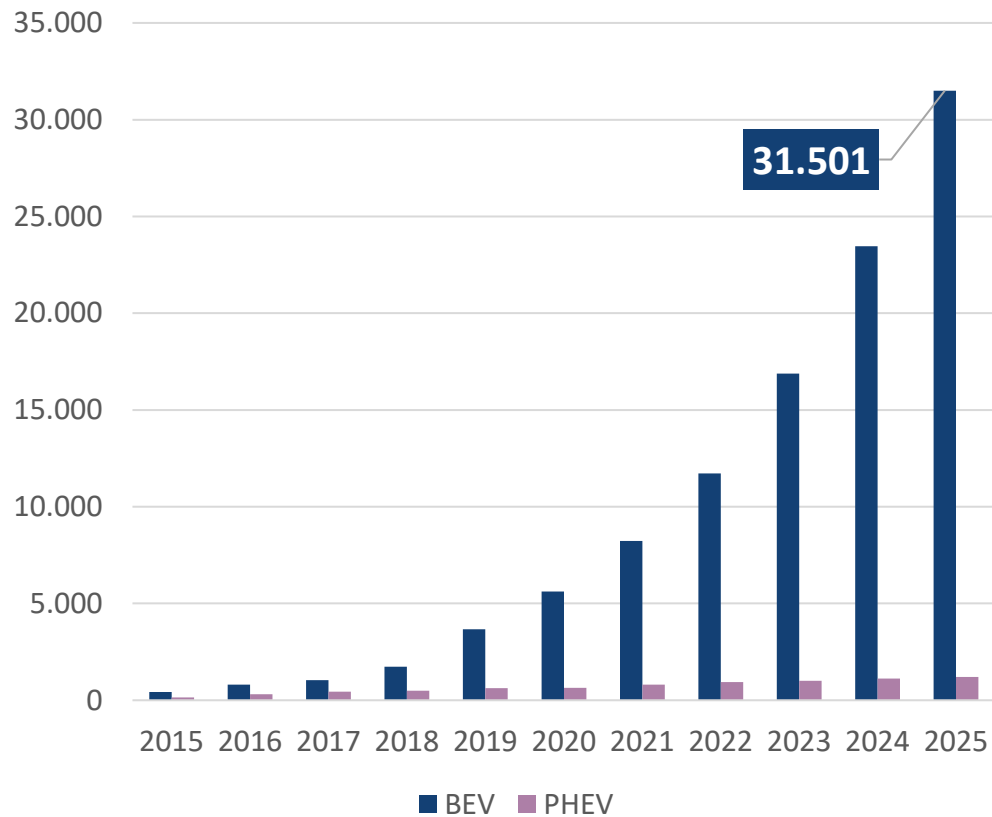
EU Bus Sales by Powertrain



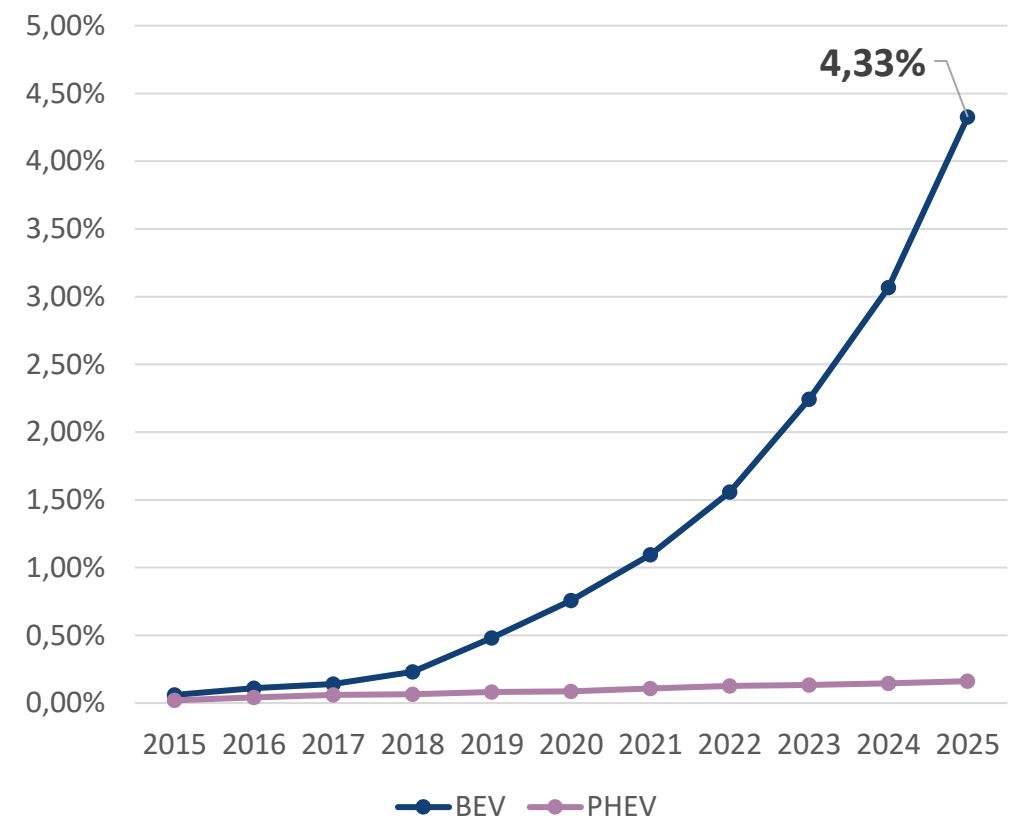
The AF Bus fleet is steadily growing, passed 30.000 BEV buses in 2025, closing to 4,5% fleet share

Uneven distribution of coach and city bus fleets

Bus AF Fleet European Union (EU-27)



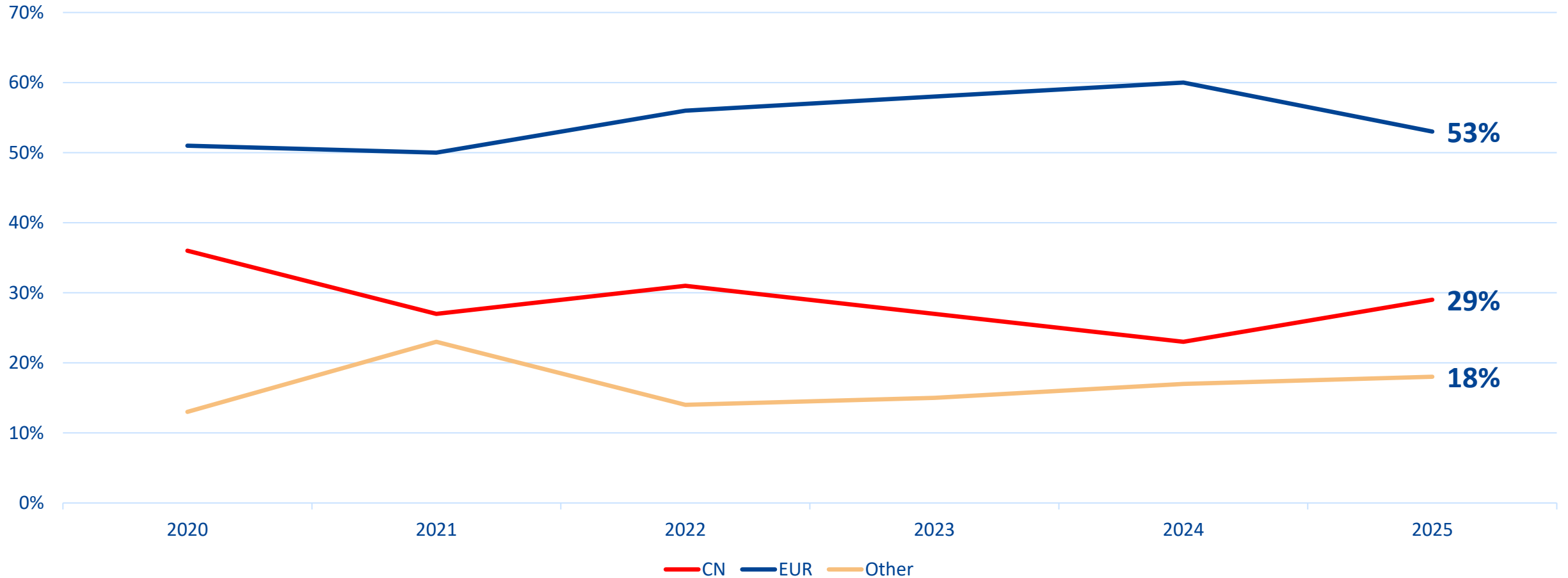
Bus AF Fleet Share European Union (EU-27)



European origin bus sales decreased 7% in 2025

Chinese made BEV bus sales grew by 6%

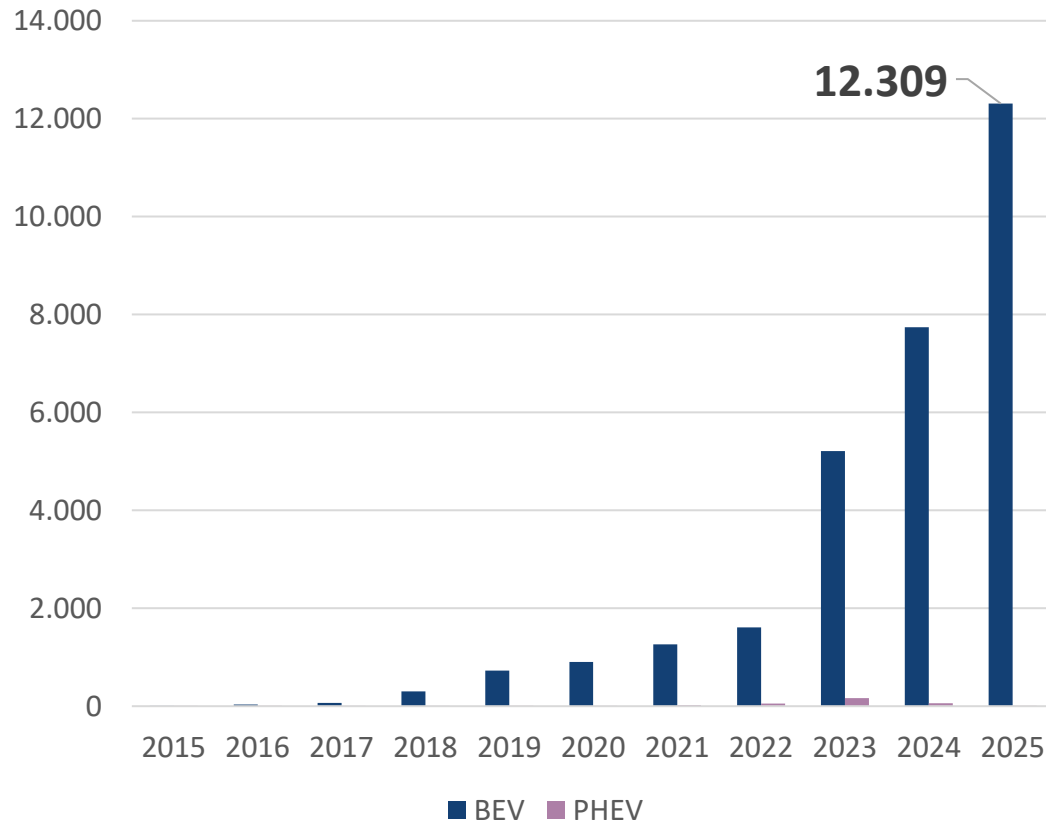
BEV Bus Sales by origin



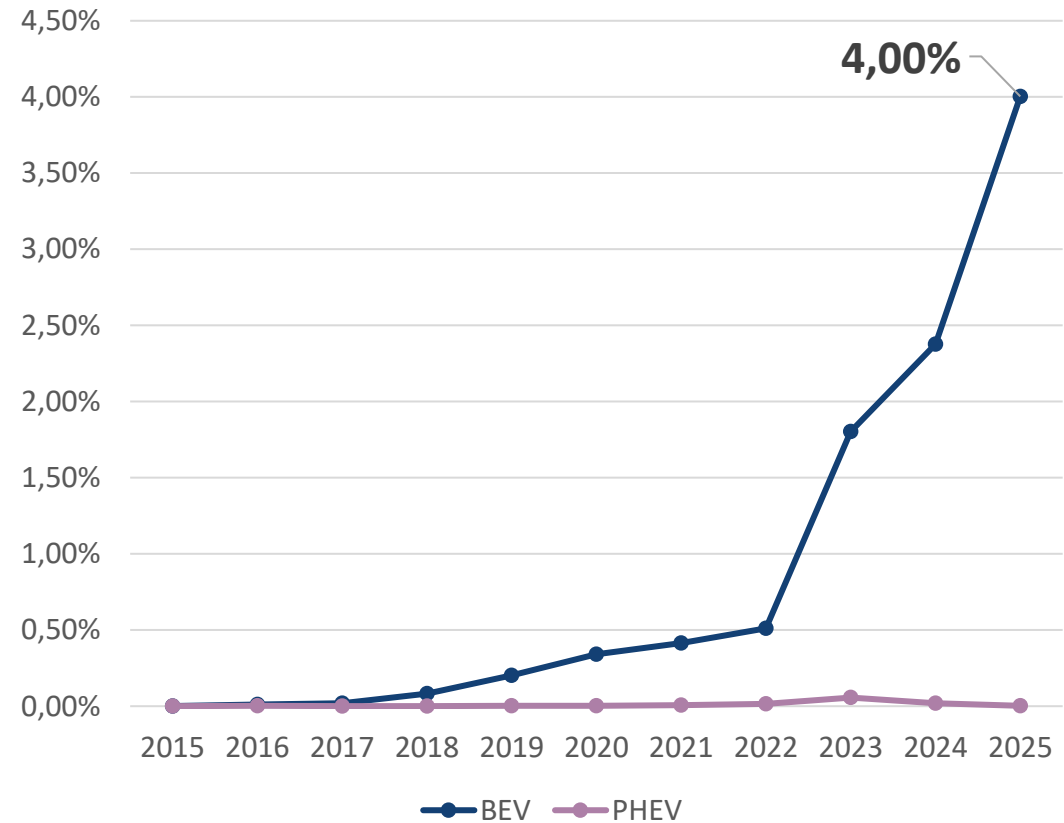
Heavy Duty Trucks BEV market share reaches 4% in 2025

BEV & PHEV HDV Truck registrations until Q4 2025 for European Union

HDV Truck Registrations (new sales)



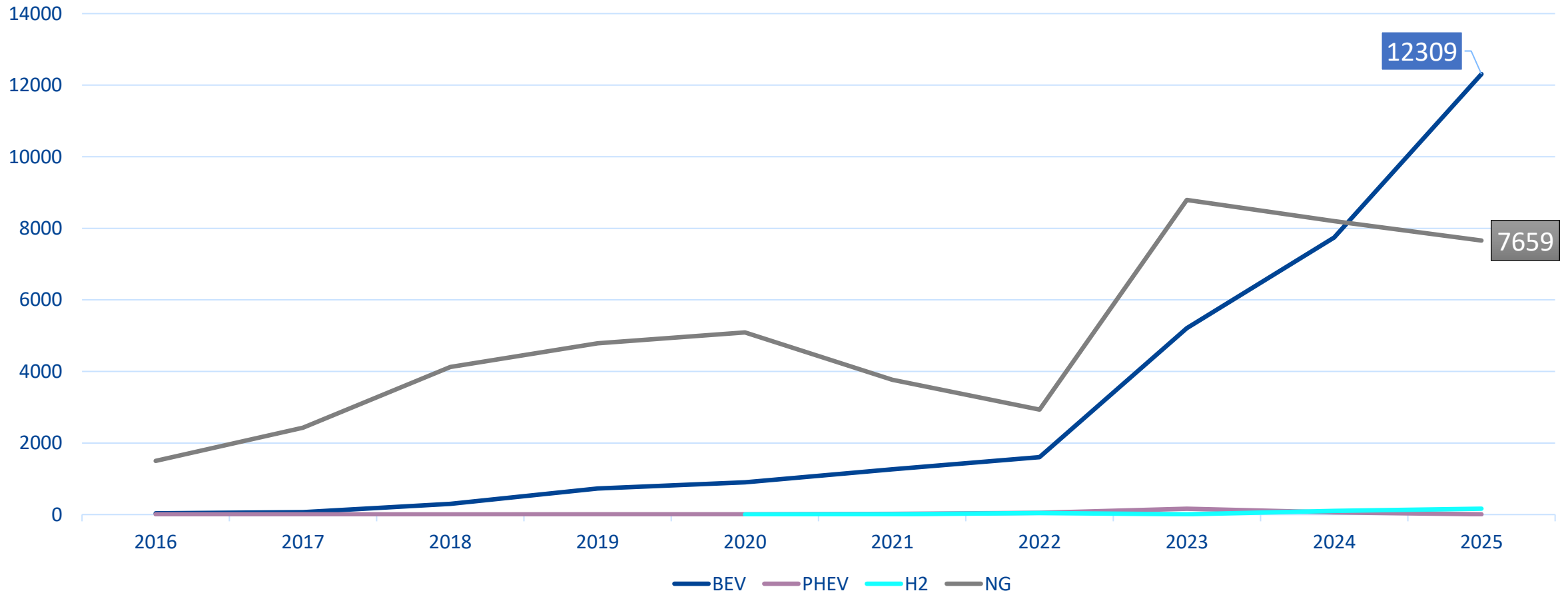
HDV Truck Market Share (%) of new sales



EU HDV Truck Sales by AF Powertrain

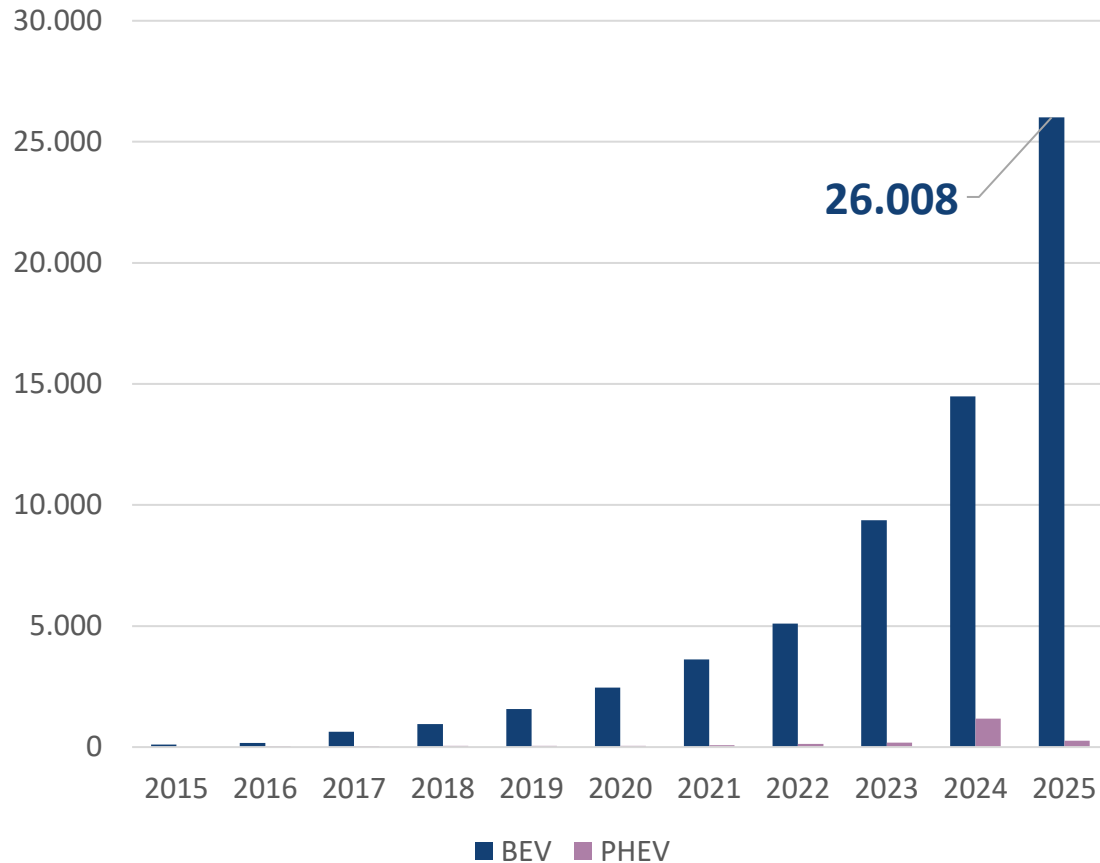
BEV sales surged since 2022, natural gas vehicles declined since 2023

EU27 AF Truck sales by powertrain

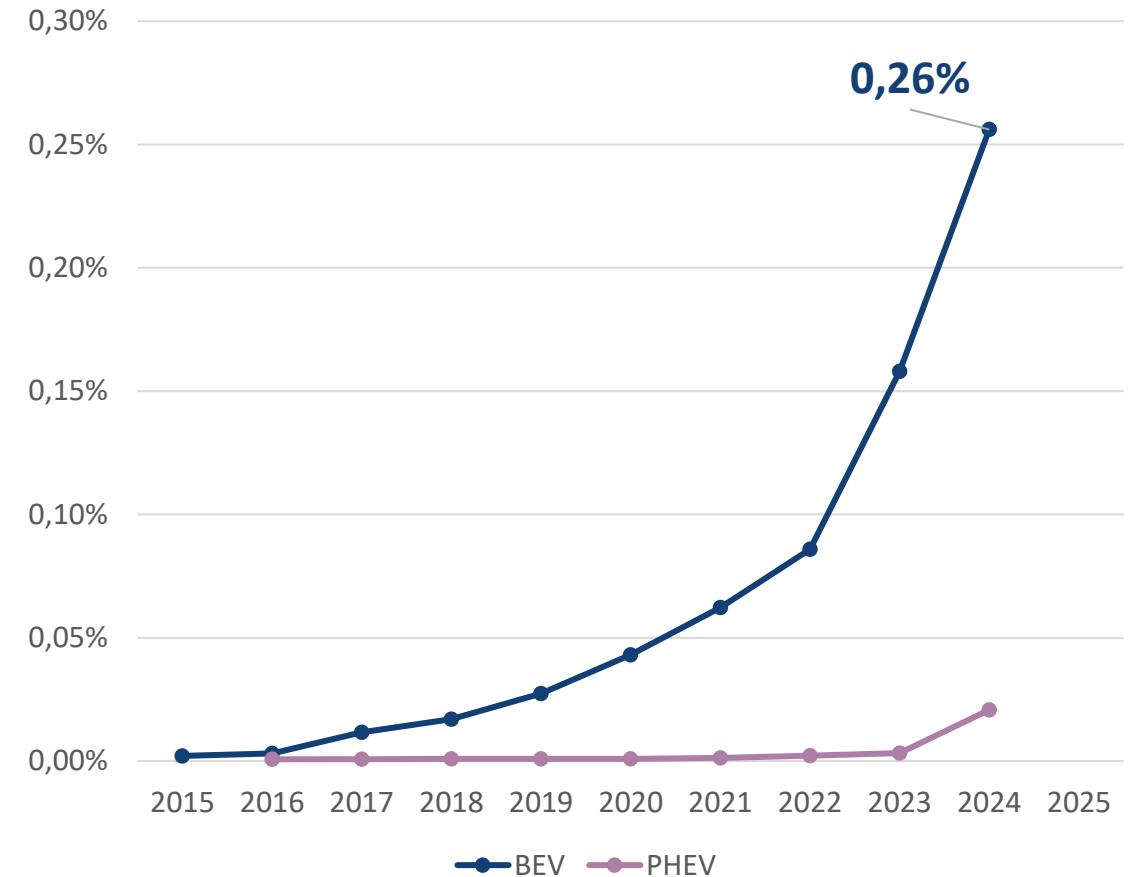


HDV Trucks (N2+N3) BEV sales growing steadily, but still marginal.

HDV Truck AF Fleet European Union (EU-27)

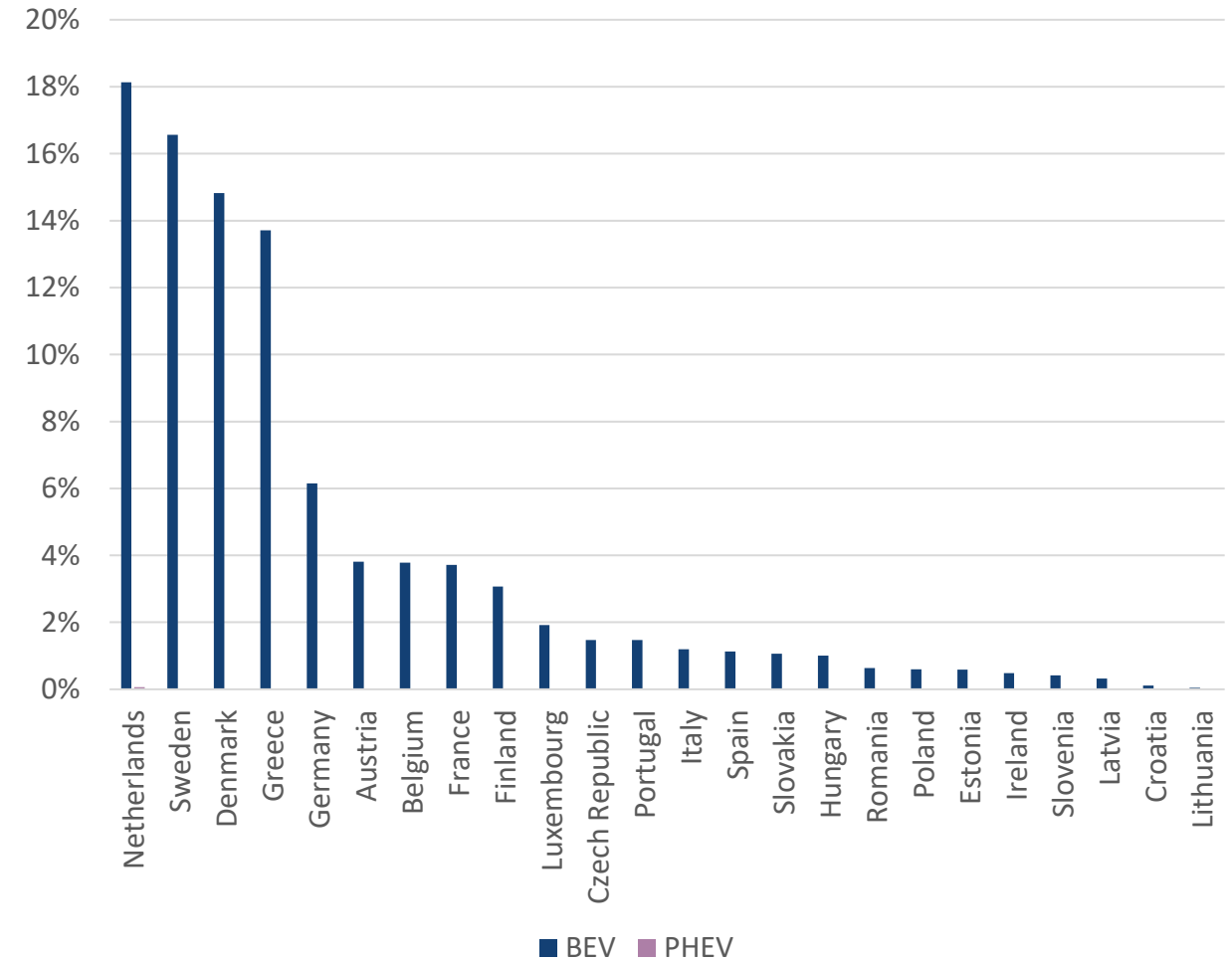
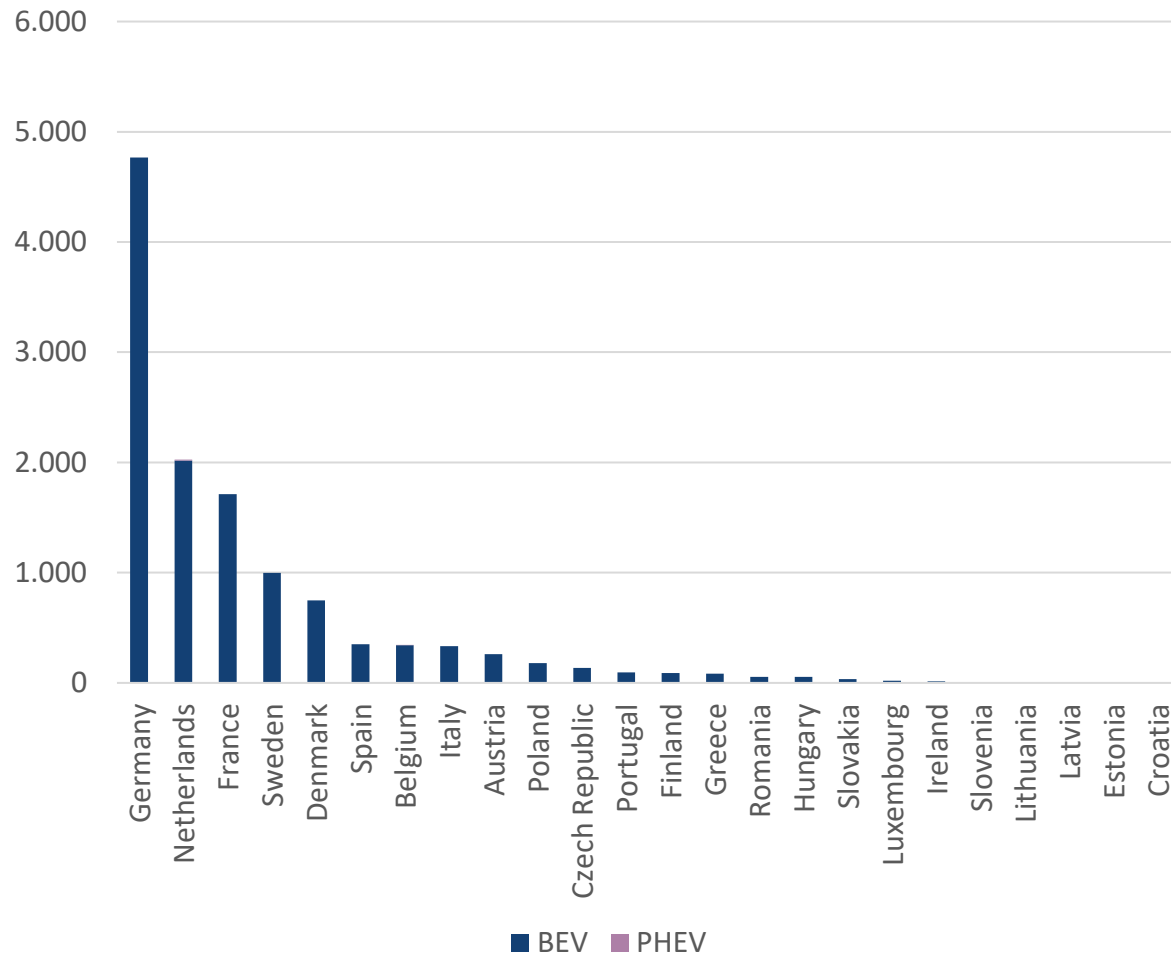


HDV Truck AF Fleet Share European Union (EU-27)



HDV Truck BEV Country registrations (2025)

Germany leads with 4.766 registrations. Netherlands highest market share (18,1%)



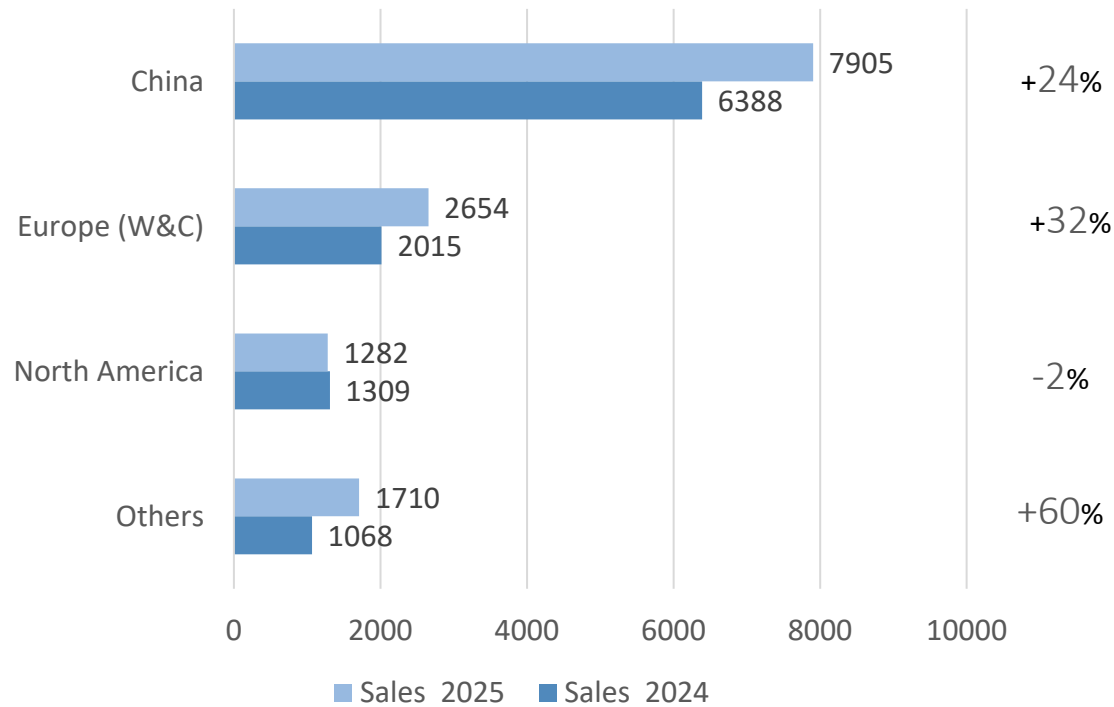
BEV growth continued in 2025, but regional dynamics shifted to other global regions

Key grower markets were observed in Latin America (Colombia, Brazil*)

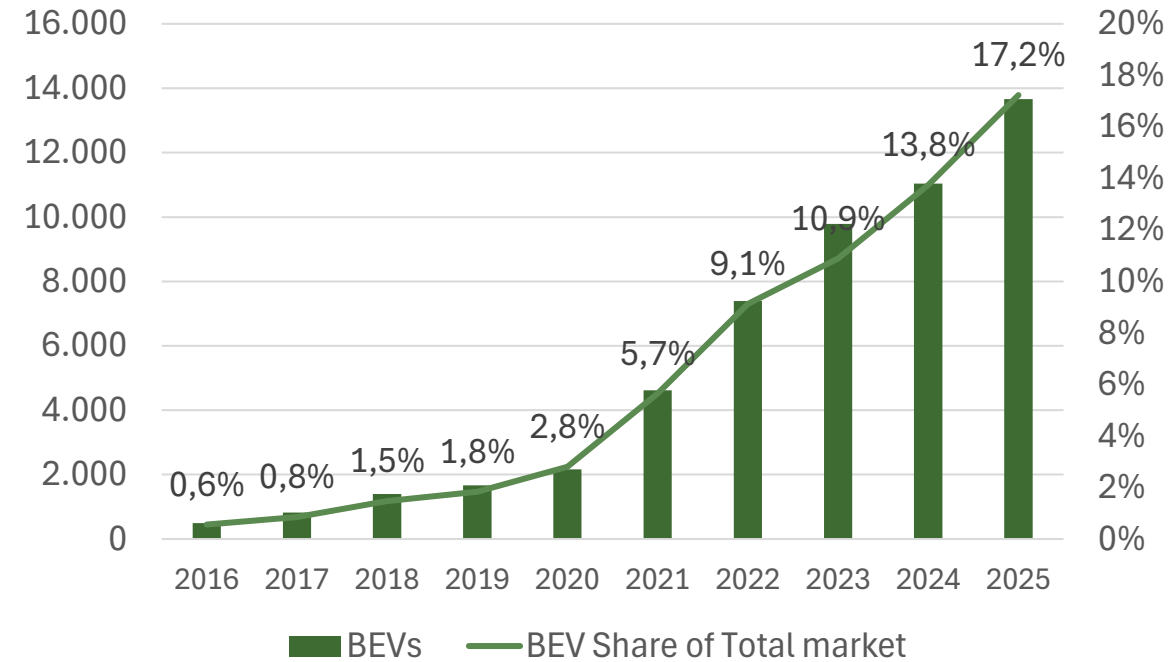


BEVs + PHEVs grew +17% in 2025, supported by strong growth in Europe and RoW countries

BEV Sales and % Growth



Global M1 BEV Sales



Road Transport – AF Infrastructure Market (EV & H2)

Sjors Martens (Eco-Movement)

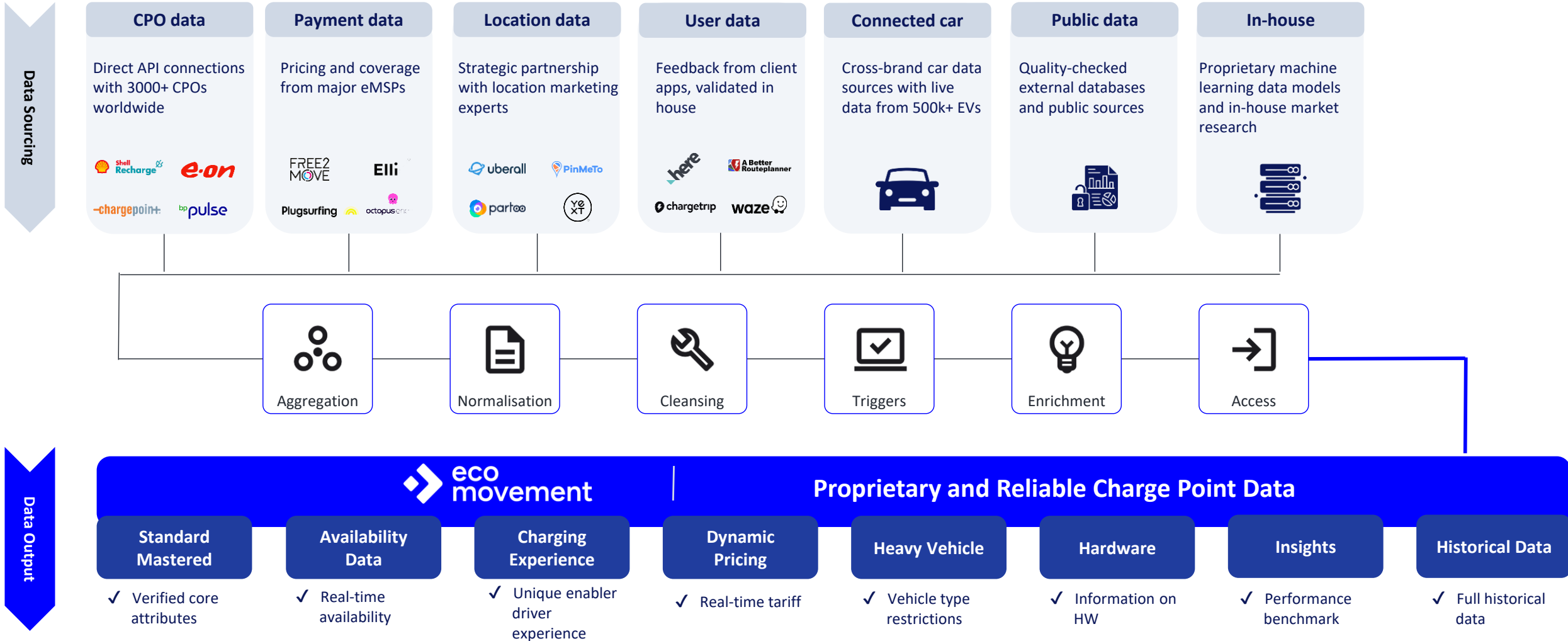


Sjors Martens

**Chief Commercial
Officer**

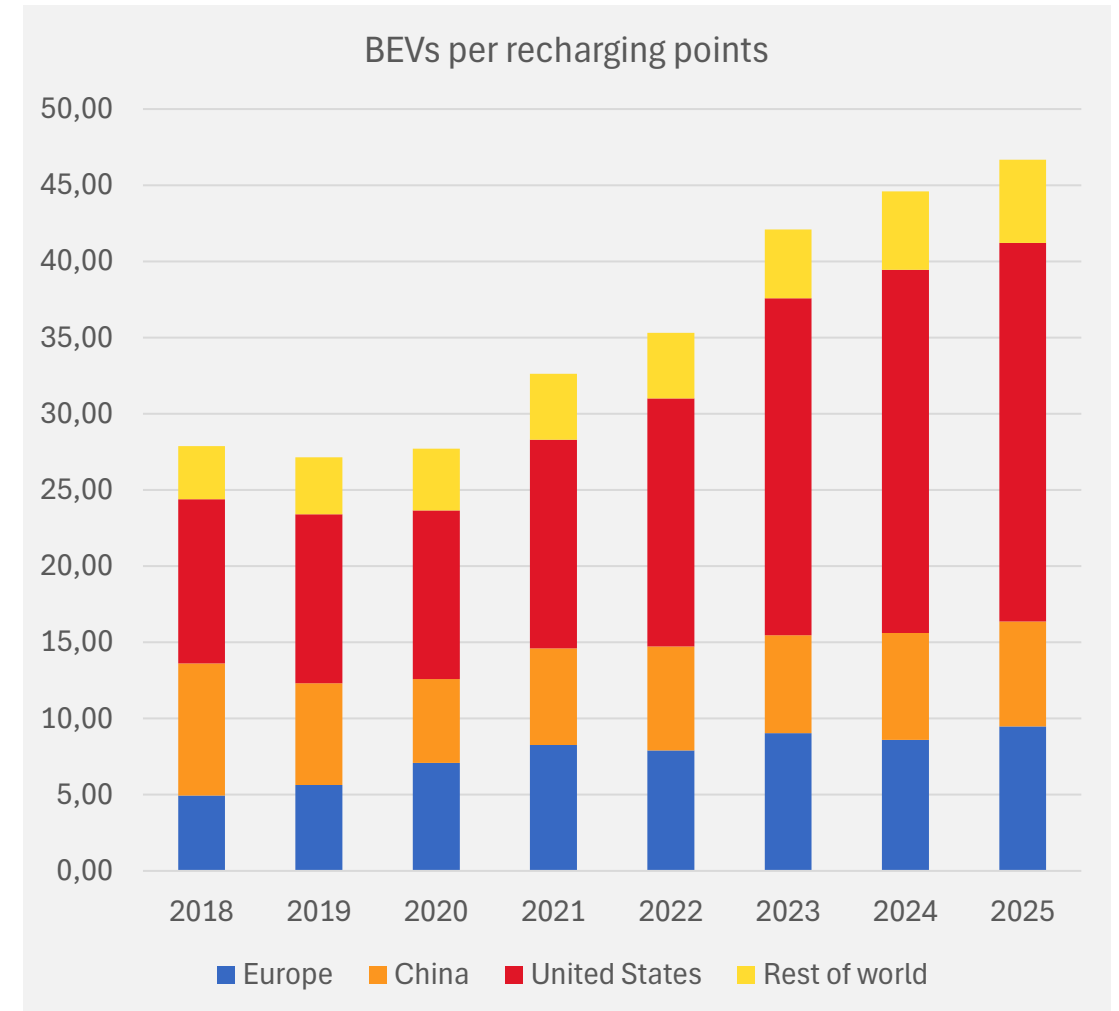
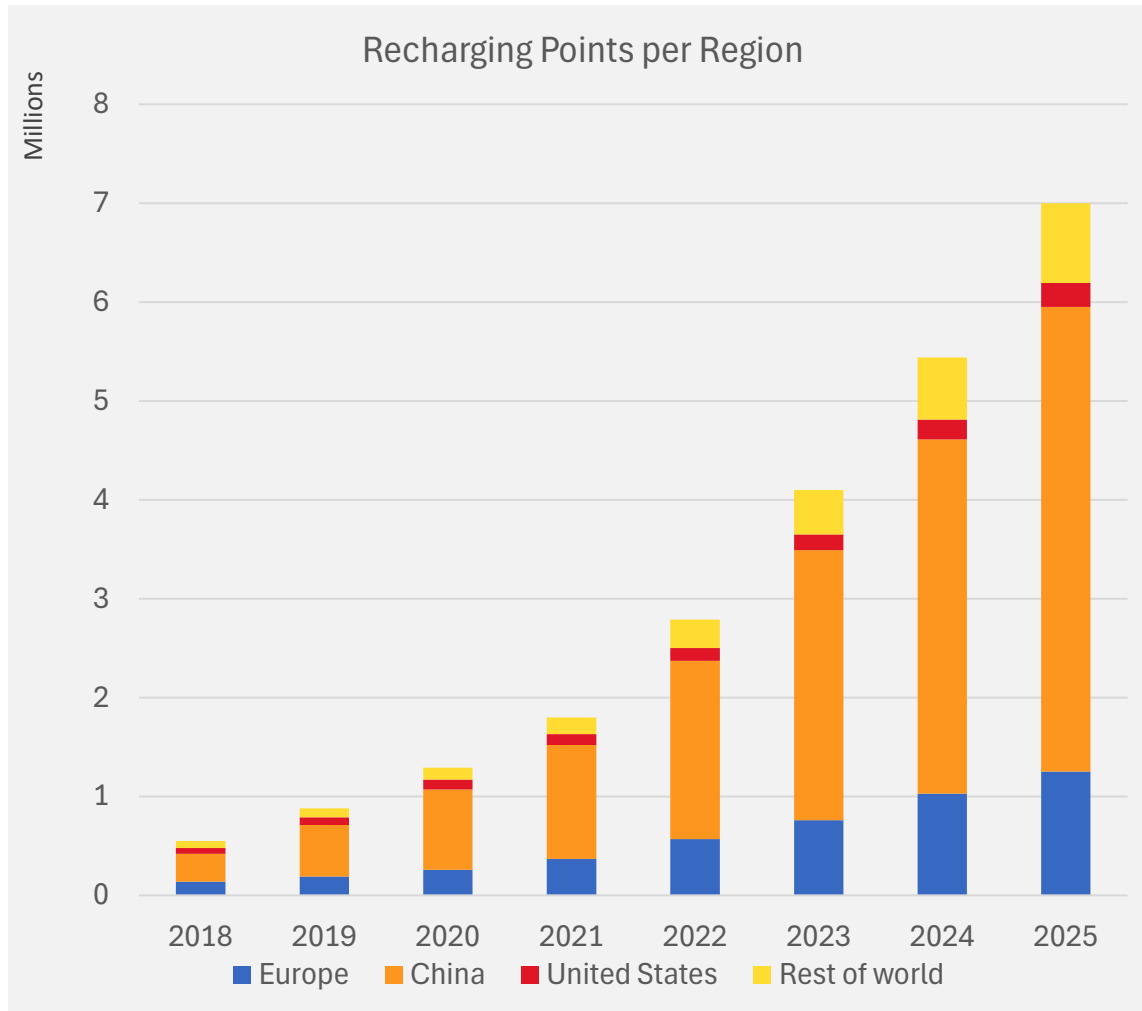


We combine CPO data with additional sources to create unique charge point information



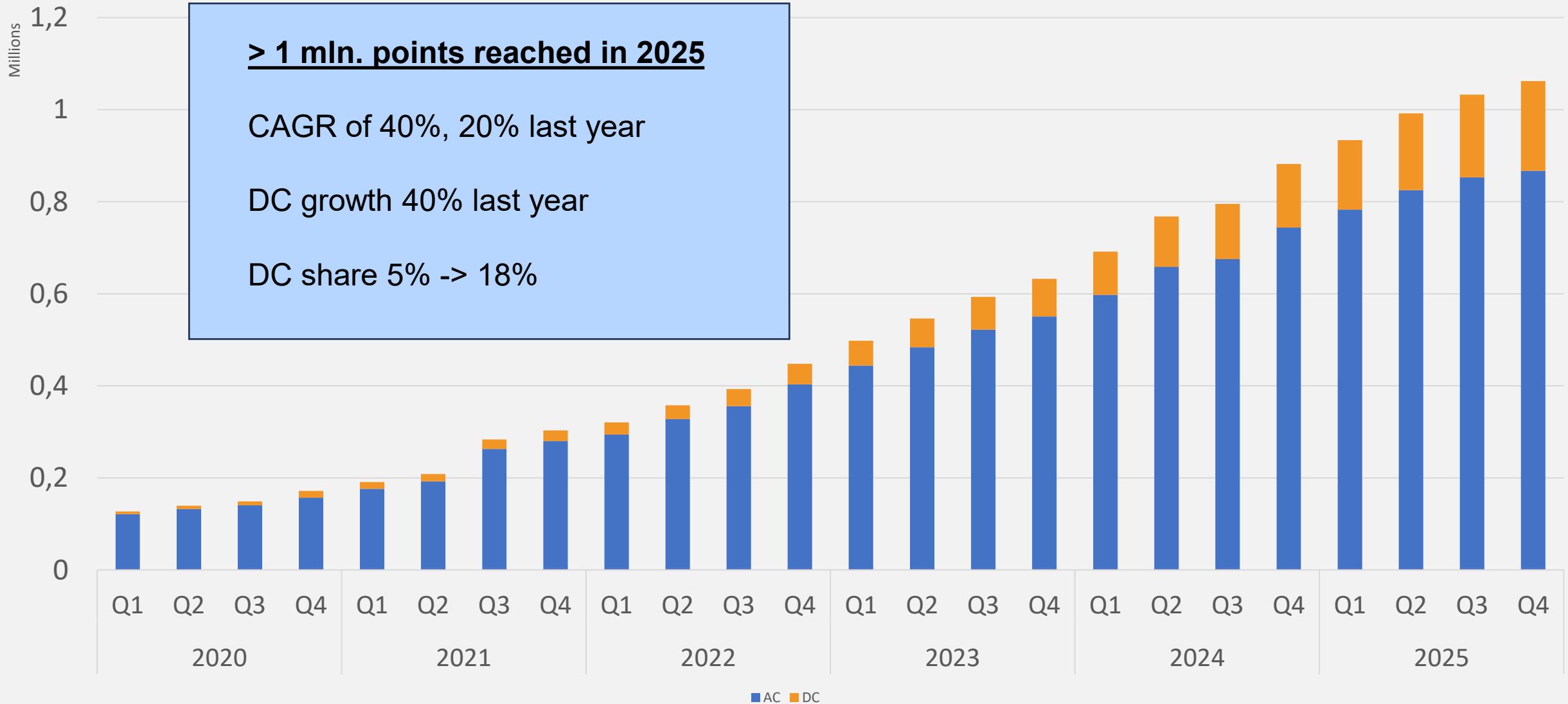
Europe in a global perspective

Publicly available recharging points and BEV ratios (2018-2025)



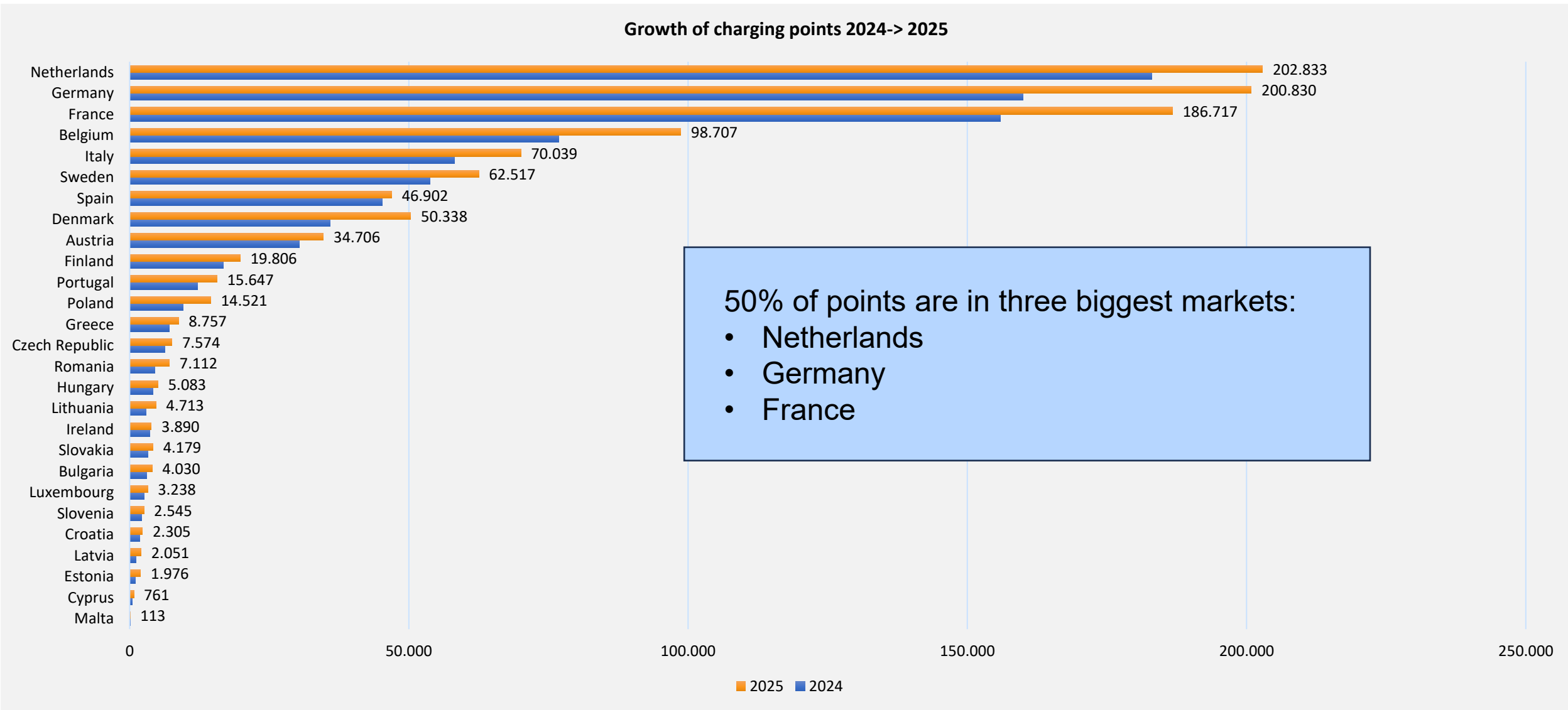
Quarterly growth of overall European recharging points

Publicly accessible recharging points



Growth of recharging points 2024 - 2025

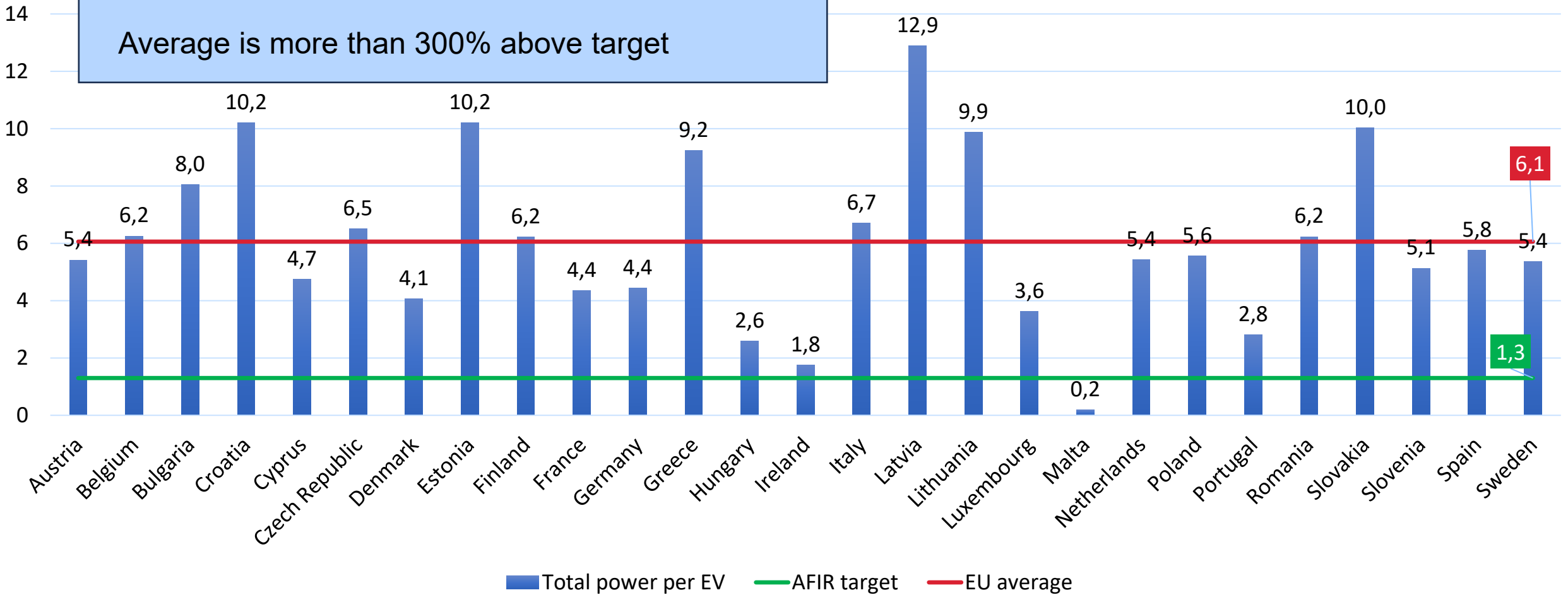
20,3% YoY growth in 2025, with regional differences



Installed capacity (Total Power Output – kW) per BEV

Publicly accessible recharging points

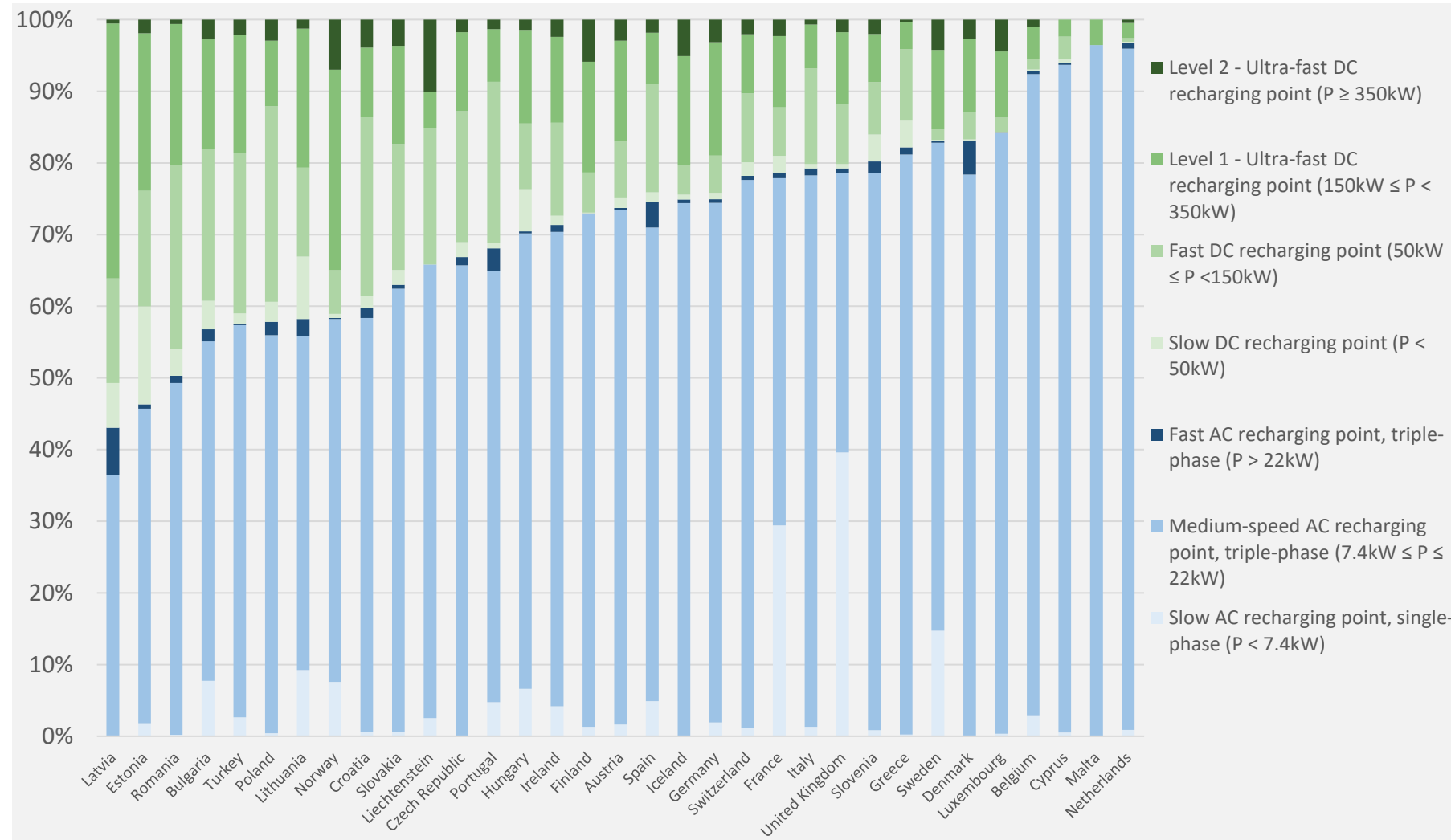
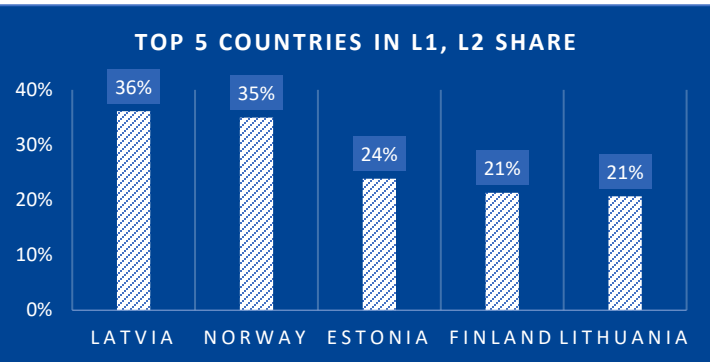
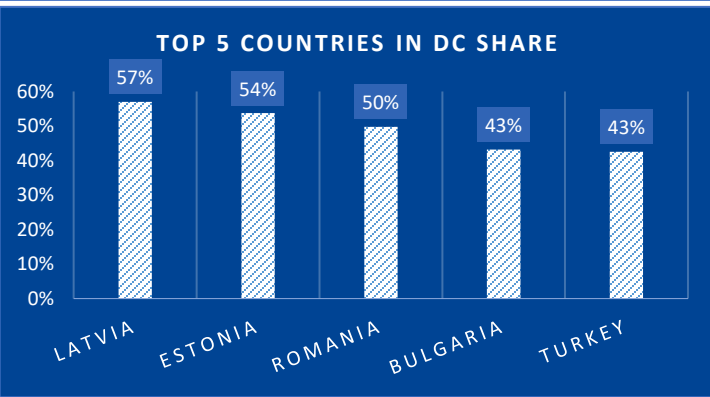
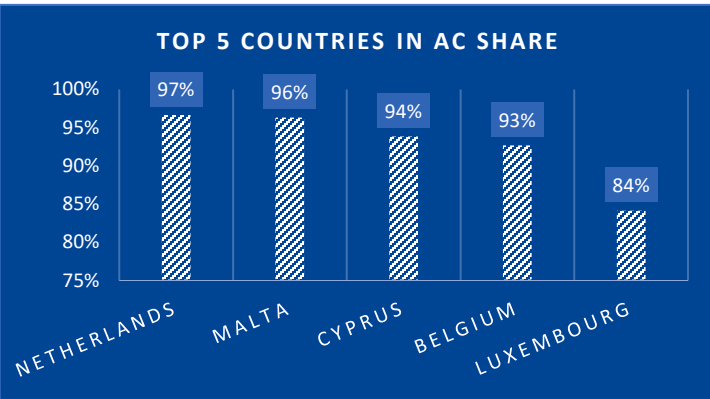
Except for Malta all countries reach AFIR target
Average is more than 300% above target



■ Total power per EV — AFIR target — EU average

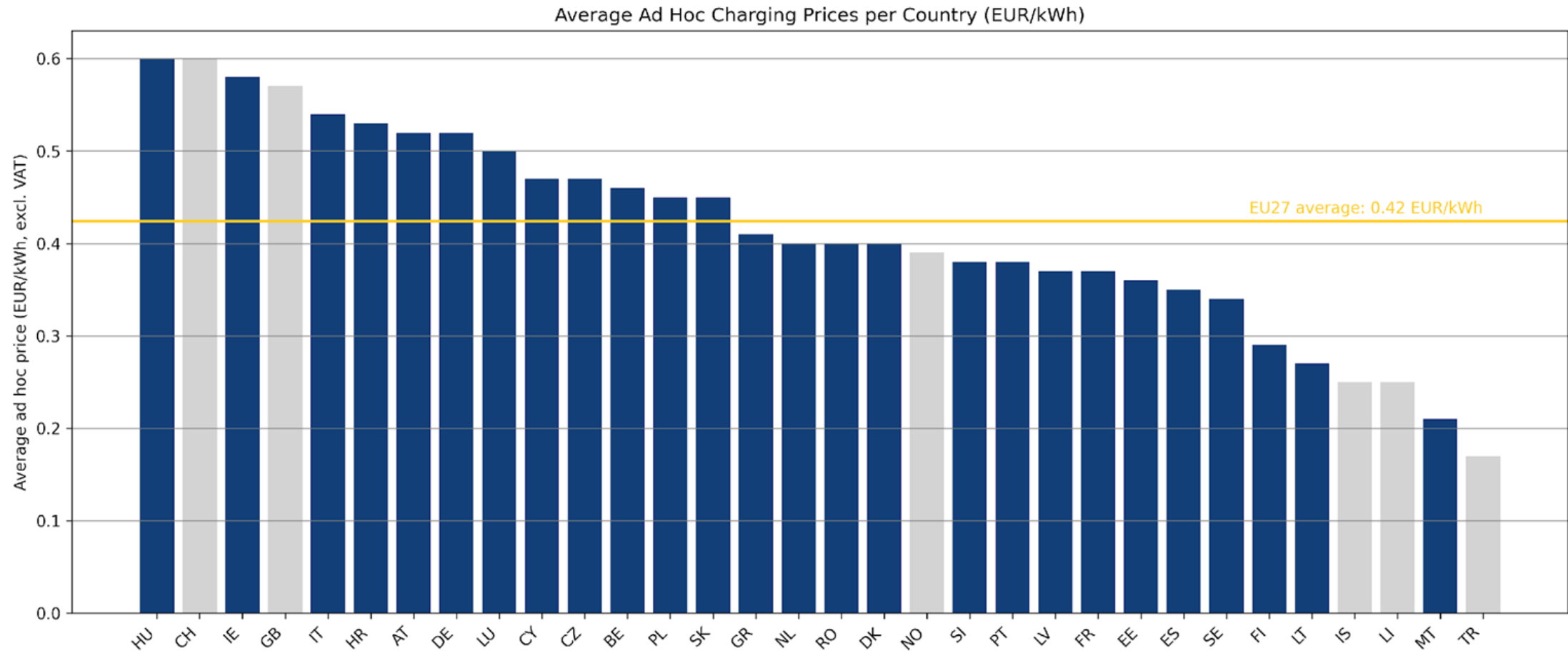
Recharging speed distribution per country

Latvia 57% DC, while Netherlands only 3% DC



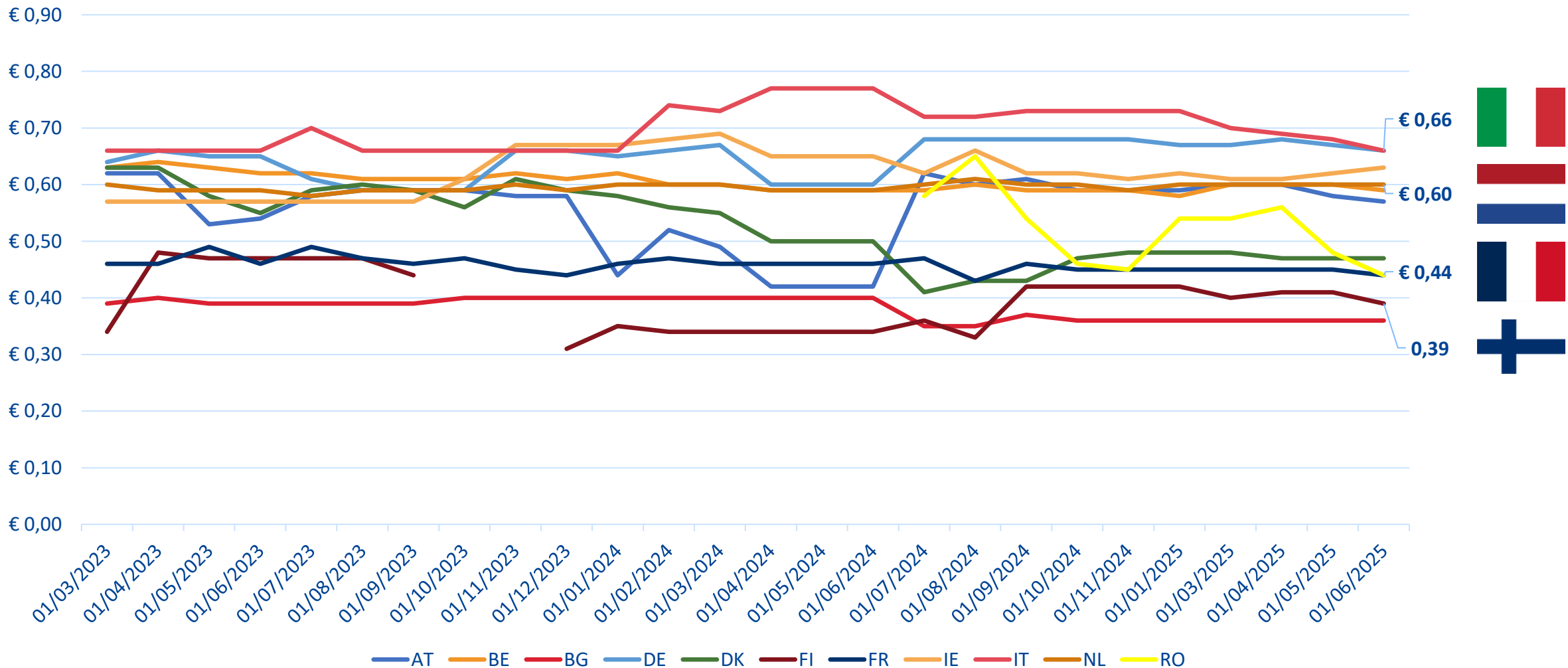
Recharging Prices: significant scatter between Member States from 0,21 EUR in Malta to 0,6 EUR in Hungary

Average, CPO, adhoc charging energy fee (EUR / kW, excl. VAT)



Recharging Prices: significant scatter between Member States from 0,39 EUR in Finland to 0,66 EUR in Italy and Germany

Average, CPO, adhoc annual ultra fast charging energy fee (EUR / kW)



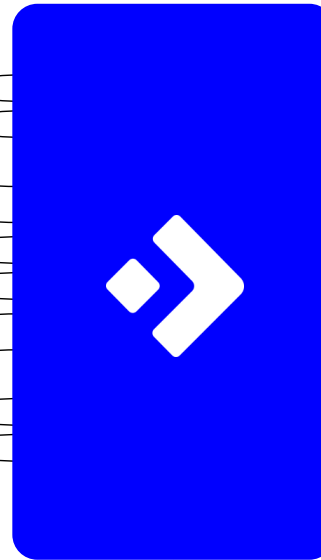
Eco-Movement acts as a centralized platform for data on Recharging Infrastructure for HDV

3000+ CPO networks



> Complemented with data from verified industry sources

Tailored Platform for Charge Point Data



Eco-Movement Clients of HDV Data provide feedback

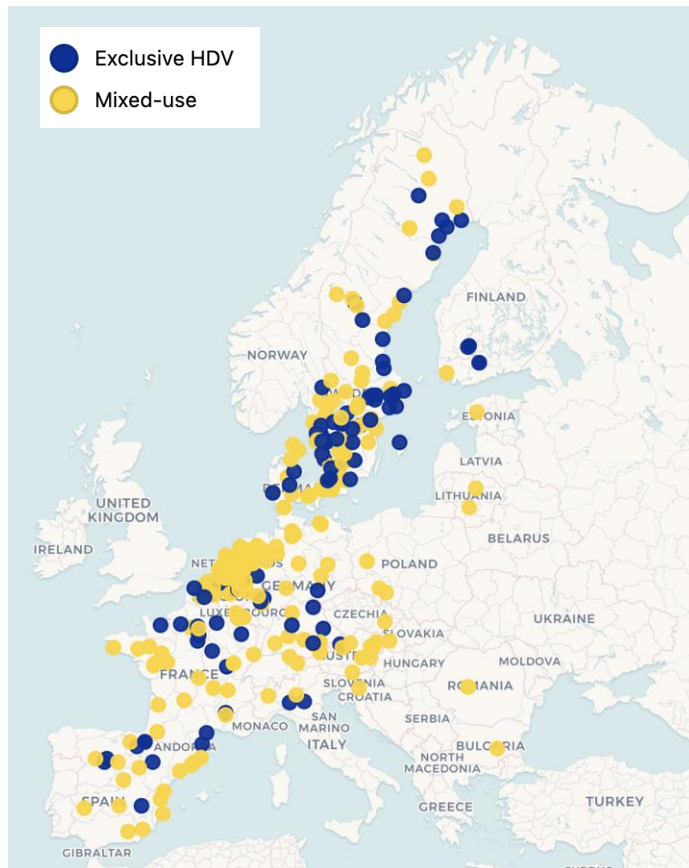
- > Truck OEMs (manufacturers)
- > Fleets and Fleet service providers
- > Charge Point Operators
- > Consultants
- > Governments and Institutions

Feedback Data

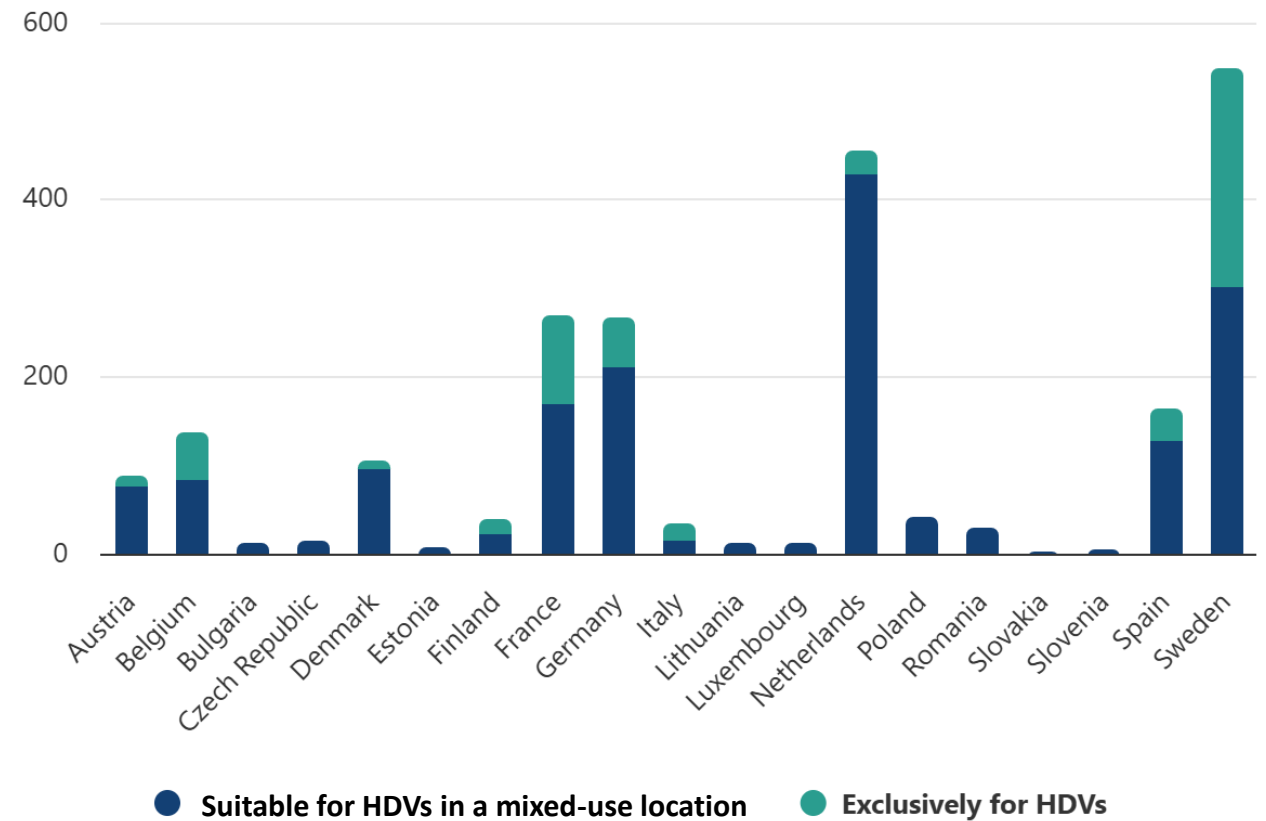
Overview of HDV Recharging Infrastructure

EU27 as of end of February 2026

HDV Recharging Locations in Europe

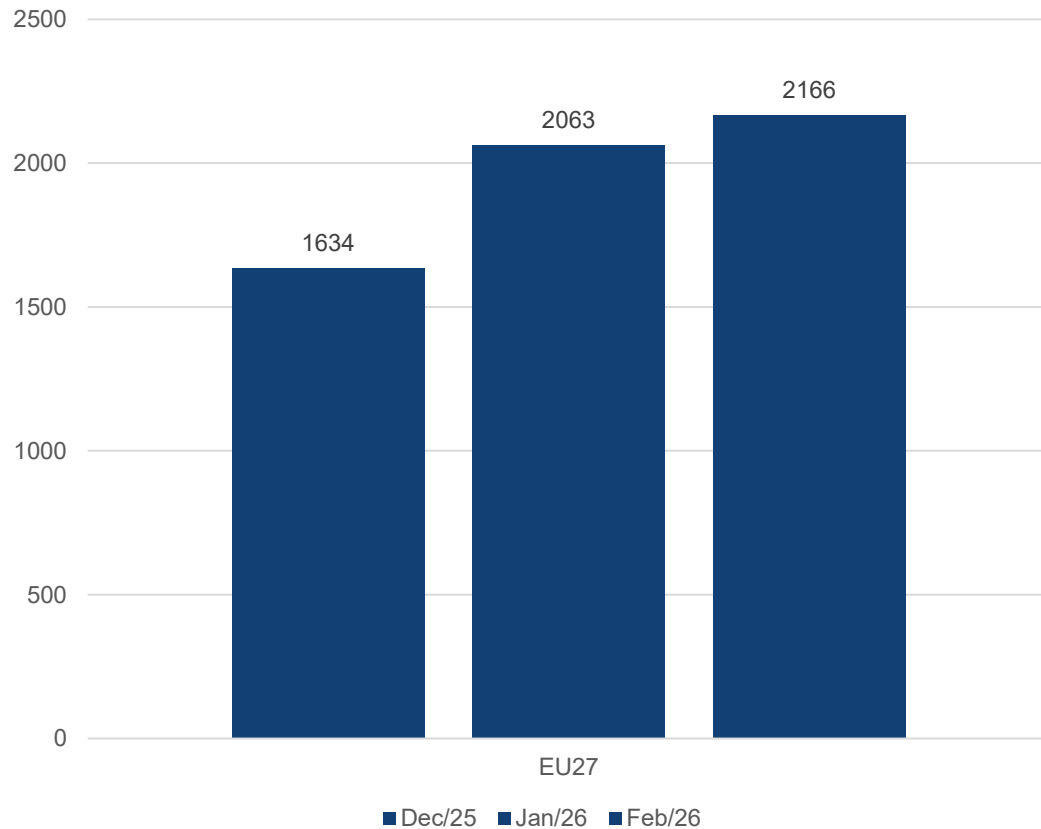


Number of recharging points in compliant (>= 350kW) locations per country

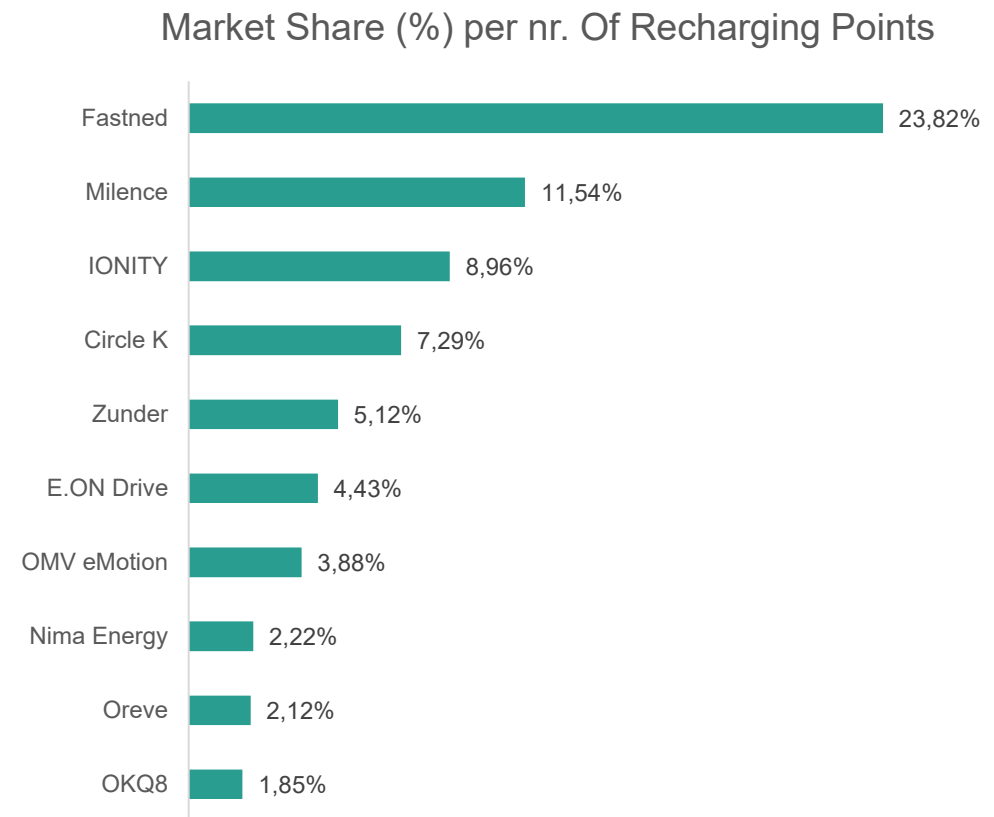


EU27 as of end of January 2026

Number of compliant HDV Recharging Points (12/2025 – 02/2026) in EU27

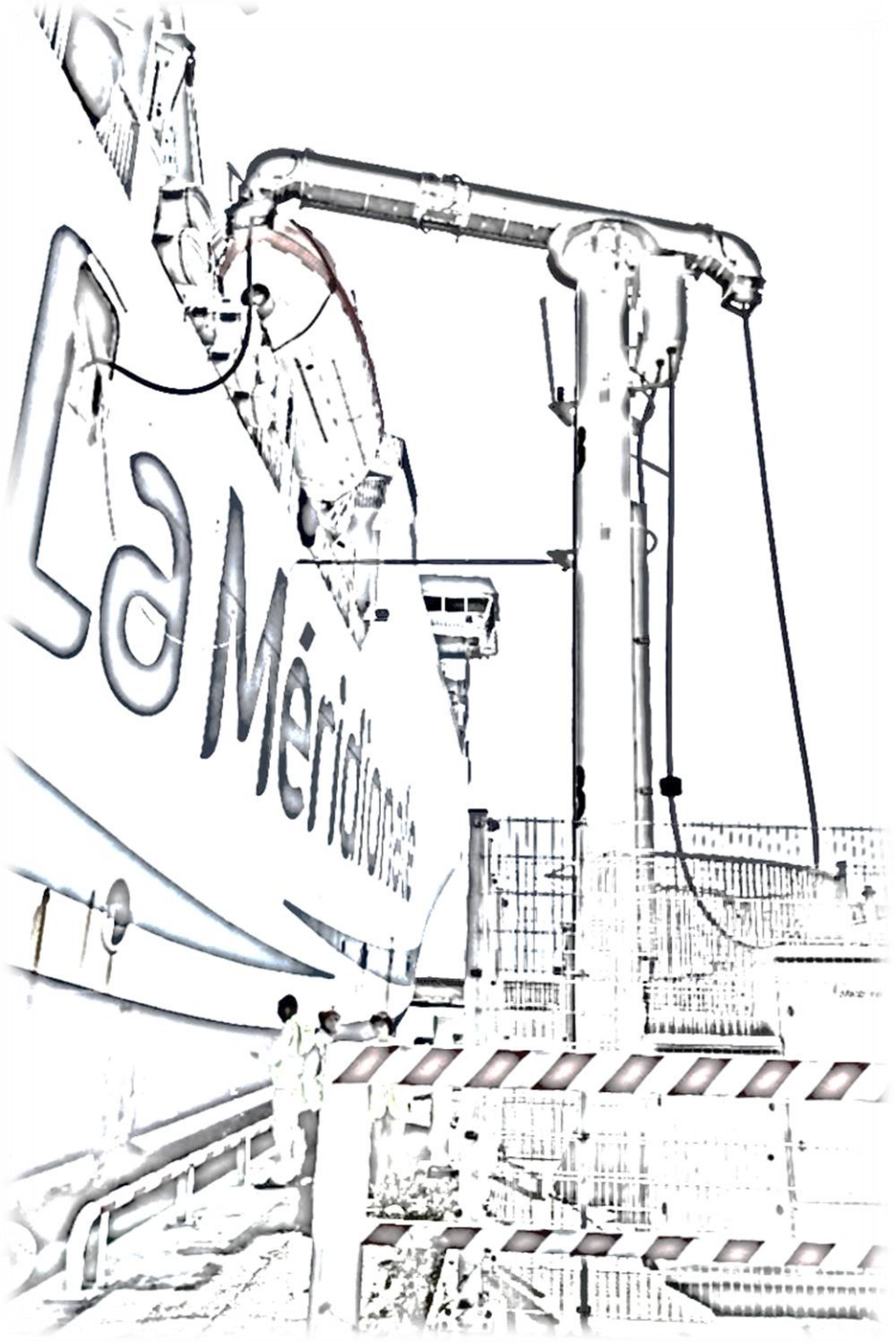


CPO Market Share (%) per nr. Of Recharging Points



Onshore Power Supply in Maritime Ports

Roland Teixeira & Dhima Khalife (EOPSA)



EOPSA

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European
Commission

European Alternative
Fuels Observatory

AFIR

Alternative fuels infrastructure regulation explained

The goal of the regulation is to ensure that there is enough infrastructure for cars, trucks, ships and planes to recharge or refuel with alternative fuels (e.g. hydrogen, liquefied methane) with good enough coverage across the Union as to avoid range anxiety.

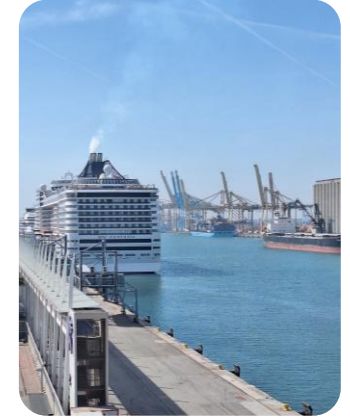
How does it contribute to the goal of climate neutrality?

Transport is responsible for around 25% of greenhouse gas (GHG) emissions in the EU.

Mode	Contribution
Aviation	14.4%
Sea	13.5%
Road	10.5%
Other	10.5%



5000GT



Trends

Grid Package



Batteries



Social Pressure



Resilience



EOPSA Outreach

interim results = ongoing process !

Port Engagement Status

53

Ports Replied

Responses received from surveyed ports

62

No Reply

Ports that have not yet responded

~190

AFIR Threshold

Ports potentially in scope of AFIR requirements

Validated OPS Capabilities

21

Operational OPS

Total ports with active OPS

7

Cruise

Ports servicing cruise vessels

11

Passenger

Ports servicing passenger vessels

3 (*)

Containers

(Hamburg/ Borg/ Dunkerque)



EUROPEAN ONSHORE POWER SUPPLY ASSOCIATION

(*) BCN



(*)Cold Ironing / SSE

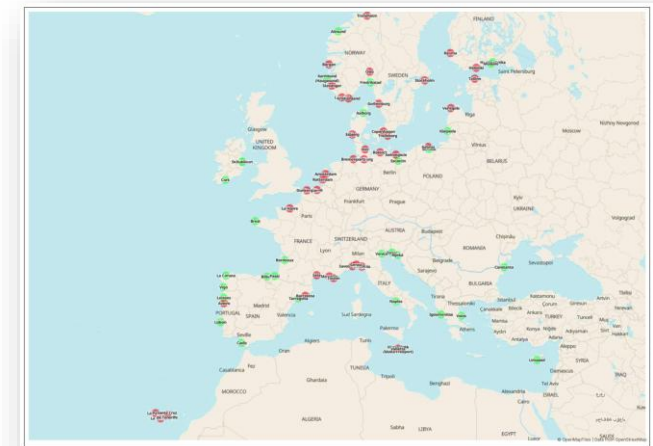
Basis of EAFO Data

INSTALLED OPS

Country	Ports (validated)
France	Le Havre; Marseille; Dunkerque; Toulon; Sète
Netherlands	Rotterdam; Amsterdam
Germany	Hamburg; Kiel; Rostock; Bremenports
Estonia	Tallinn
Denmark	Copenhagen; Esbjerg
Spain	Barcelona; La Palma; La Gomera; Santa Cruz de Tenerife
Finland	Helsinki; Inkoo; Rauma
Italy	La Spezia; Savona–Vado; Genova
Latvia	Ventspils
Malta	Valletta
Norway	Oslo; Borg , Lyngdal; Trondheim; Kristiansand; Stavanger; Bergen
Sweden	Stockholm; Gothenburg; Trelleborg, Nynashamn, Kapellskär
Poland	Gdynia ; Świnoujście
Portugal	Aveiro

PLANNED OPS

Country	Ports
Slovenia	Koper
France	Cherbourg Dunkerque, Brest; Bordeaux, ;
Poland	Szczecin; Gdańsk, Świnoujście
Portugal	Lisboa; Leixões
Spain	Cadiz; Bilbao; Pasaia; Vigo; La Coruña; Tarragona, Valencia (MSC)
Romania	Constanța
Norway	Fredrikstad; Karmsund (Haugesund); Ålesund
Ireland	Dublin; Cork
Italy	Napoli; Venezia
Finland	HaminaKotka (Mussalo)
Cyprus	Limassol
Denmark	Aalborg
Lithuania	Klaipeda
Croatia	Rijeka
Malta	Marsaxlokk
Greece	Volos; Igoumenitsa
Belgium	Ghent, Antwerp, Zeebrugge, Ostende



EOPSA

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LET'S GET CONNECTED



Closing Remarks and Q&A