

Electric Vehicles
Submission 15 - Attachment 4

Country/ Type of vehicle	2013 Market Share % [units/total new registrations]	2014 Market Share % [units/total new registrations]	2015 Market Share % [units/total new registrations]	2016 Market Share % [units/total new registrations]	Rechargers at 01.01. 2017 Population	Notes	References
Norway							
BEV	5.79 [8,232/142,151]	12.55 [18,098/144,202]	17.12 [25,792/150,686]	15.67 [24,224/154,603]	Fast: 1117 Other: 7040 Population: 5,194,000	Incentives have gradually increased since 1990 to ensure economic benefit for zero emission vehicles. <ul style="list-style-type: none"> Exemptions (BEVs): vehicle purchase tax (VAT 25%) (including for leasing from 2015); first time registration tax; annual car taxes to 2018 Exemptions (PHEVs): vehicle purchase tax (VAT 25%) max €10,000 Soft incentives for BEVs (locally applied): Free public recharging; Free parking in public car parks; road and public ferry tolls exemption; free access to bus lanes Government support for deployment of recharge infrastructure including fast chargers every 50km on highways 50% reduced company car tax Note: Mitsubishi Outlander PHEV was the top selling EV in 2016	(European Commission, 2017) (ACEA, 2016) (Bu, 2015) (Bjerkan, Nørbech, & Nordtømme, 2016) (AVERE, 2012)
PHEV	0.23 [324/142,151]	1.17 [1,680/144,202]	5.19 [7,819/150,686]	13.37 [20,664/154,603]			
All EVs	6.0 [8556/142,151]	13.7 [19,778/144,202]	22.3 [33,611/150,686]	29.04 [44,888/154,603]			
Hong Kong	2013	2014	2015	2016			
All EVs	0.09 [34/38,119]	2.17 [843/38,843]	6.31 [2646/41,922]	8.76 [3023/34,490]	Fast: 274 Other: 1299 Population: 7,378,000	<ul style="list-style-type: none"> BEV: Exemption from first registration tax (until 31/3/17) Enterprises which procure EVs allowed 100% profits tax deduction for capital expenditure on EVs in first year of procurement. Government support for deployment of recharge infrastructure Government provided information website including locations of car retailers and rechargers. Note: Figures do not include government vehicles	(HK Gov Transport Department, 2016) (HK Gov EPD, 2017)

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Netherlands	2013	2014	2015	2016			
BEV	0.53 [2251/419,388]	0.7 [2664/390,402]	0.6 [2543/449,350]	1.0 [3737/382,825]	Fast: 612 Other: 26,088* *Of these 11,768 operate 24/7 Population: 16,933,000	Note: Government focus has shifted to encourage more BEVs, fiscal incentives for PHEVs will gradually reduce 2015-2020 until same as regular cars <ul style="list-style-type: none"> BEVs: Exemption first time registration tax (BPM) and annual road tax (MRB) PHEVs: First time registration tax (BPM) is progressive based on emissions and 50% reduction in annual road tax (<51gCO₂/km) Local support for rechargers Some access to parking for BEVs in Amsterdam, and free for 1 year in Rotterdam Note: Figures include light delivery vans, and PHEVs include range extended EVs.	(ACEA, 2016) (RVO, 2017) (Western Automation, 2016)
PHEV	4.81 [20,164/419,388]	3.2 [12,425/390,402]	9.2 [41,226/449,350]	5.4 [20,740/382,825]			
All EVs	5.3 [22,415/419,388]	3.9 [15,089/390,402]	9.7 [43,769/449,350]	6.4 [24,477/382,825]			
Iceland	2013	2014	2015	2016			
BEV	1.1 [80/7274]	2.16 [206/9520]	2.77 [389/14,008]	2.04 [376/18,442]	Fast: 30 Other: 11 Population: 329,000	<ul style="list-style-type: none"> No purchase tax (VAT 25.5%) (from 2012) for first US\$47,000 of BEV price Import excise duty exempt for BEVs and partially exempt for PHEVs (from 2006) No annual tax for BEVs Free 2 hours parking for EVs in Reykjavik and Akureyri Plan to install 80 new recharger stations in all municipalities Note: Figures include all passenger vehicles except buses	ACEA 2016 (European Commission, 2017) EAFO (Iceland Monitor, 2016)
PHEV	0.33 [24/7274]	0.29 [28/9520]	1.21 [170/9520]	4.24 [782/18,442]			
All EVs	1.43 [104/7274]	2.45 [234/9520]	3.98 [559/14,008]	6.3 [1157/18,442]			

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Sweden	2013	2014	2015	2016			
BEV	0.16 [1,112/269,558]	0.4 [1,207/303,948]	0.86 [2,978/345,108]	0.79 [2945/372,318]	Fast: 1084 Other: 1,654 Population: 9,816,000	<ul style="list-style-type: none"> • 2012-15 Swedish government provided a SEK 40,000 rebate on purchase of BEVs and PHEVs for individuals and companies, • From 2016 BEVs receive SEK 40,000 rebate, PHEVs (<50g CO₂/km) receive SEK20,000 • 5 year reduction on annual car tax 2013 – 17, dependent on emissions • 40% reduction in income tax levied for company car use; • Government procurement policy to attain fossil free car fleet by 2030. 	(ACEA, 2016) (European Commission, 2017)
PHEV	0.41 [444/269,558]	1.14 [3,472/303,948]	1.66 [5,712/345,108]	2.81 [10,470/372,318]			
All EVs	0.57 [1,556/269,558]	1.54 [4,679/303,948]	2.52 [8,690/345,108]	3.6 [13,415/372,318]			
Switzerland	2013	2014	2015	2016			
BEV	0.37 [1127/305,928]	0.43 [1292/300,110]	0.95 [3065/321,855]	1.01 [3214/317,318]	Fast: 484 Other: 3,399 Population: 8,265,000	<ul style="list-style-type: none"> • EVs exempt from car import tax of 4% • Various Cantons have other fee waivers • Information about EVs distributed by government partners. 	(ACEA, 2016) (European Commission, 2017)
PHEV	0.07 [218/305,928]	0.28 [837/300,110]	0.79 [2558/321,855]	0.81 [2585/317,318]			
All EVs	0.44 [1,345/305,928]	0.71 [2,129/300,110]	1.74 [5,623/321,855]	1.82 [5,799/317,318]			
Belgium	2013	2014	2015	2016			
					Fast: 480 Other: 1,335 Population: 11,259,000	<ul style="list-style-type: none"> • EVs pay lowest rate of annual circulation tax of €74 instead of €1,900 • Flanders only: registration tax exemption for EVs < 51g CO₂/km; Zero Emissions Bonus purchase grant of €4,000 from 1 Jan 2016 • Company car expenses tax deductions: 120% for BEVs; 100% for PHEVs <61g CO₂/km; PHEVs >60g CO₂ progressive deductions 90%-50% 	(ACEA, 2016) (European Commission, 2017)
BEV	0.37 [494/ 486,065]	0.24 [1169/482,939]	0.27 [1358/501,066]	0.38 [2,052/539,519]			
PHEV	0.07 [319/ 486,065]	0.18 [852/482,939]	0.49 [2451/501,066]	1.36 [7,338/539,519]			
All EVs	0.44 [813/ 486,065]	0.42 [2021/482,939]	0.76 [3809/501,066]	1.74 [9,390/539,519]			

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Austria	2013	2014	2015	2016		
BEV	0.2 [654/319,026]	0.42 [1,271/303,318]	0.54 [1,677/308,555]	1.16 [3,826/329,604]	Fast: 473 Other: 2356 Population: 8,662,588	<ul style="list-style-type: none"> • For private vehicles <€50,000: purchase subsidy €4,000 per BEV, €1,500 per PHEV with electric range >40km • For company or municipal vehicles: purchase subsidy €3,000 per BEV, €1,500 per PHEV • All cars <90g CO₂/km exempt from registration tax • BEVs are 100% exempt from all relevant federal taxes, except VAT • Circulation tax is calculated on the basis of the engine's horsepower. PHEVs pay only for the ICE part • In-kind benefits for private usage of company cars 0% tax (formerly 18%). PHEV's remain at 18%. Cars > 130gCO₂ /km raised to 24% (threshold reduces 3 g CO₂/km every year until 2020) • Company BEVs exempt from VAT (eligible for pre-tax deduction) • Some large cities have free EV parking • The Austrian Automobile Club ÖAMTC publishes the incentives granted by local authorities • Government support for recharger installation
PHEV	0.06 [184/319,026]	0.14 [434/303,318]	0.36 [1,101/308,555]	0.38 [1,237/329,604]		
All EVs	0.26 [838/319,026]	0.56 [1,705/303,318]	0.9 [2,778/308,555]	1.54 [5,063/329,604]		

(European Commission, 2017)
(ACEA, 2017)
(ACEA, 2016)
(OAMTC, 2016)

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France	2013	2014	2015	2016			
BEV	0.49 [8,779/1,790,456]	0.59 [10,561/1,795,885]	0.9 [17,269/1,917,226]	1.08 [21,776/2,015,177]	Fast: 1,593 Other: 14,290 Population: 67,063,000	<ul style="list-style-type: none"> • Diesel Scrappage Scheme: 11⁺ year diesel changed to BEV grants an extra €4,000; changed to PHEV grants an extra €2,500 • Road registration tax exemptions/ reductions • BEVs exempt company car tax, PHEVs exempt company car tax for 2 years after registration. • Government support for recharger installation • Local subsidies may also apply 	(ACEA, 2016) (European Commission, 2017)
PHEV	0.05 [863/1,790,456]	0.12 [2,070/1,795,885]	0.29 [5,518/1,917,226]	0.37 [7,429/2,015,177]			
All EVs	0.54 [9,642/1,790,456]	0.71 [12,631/1,795,885]	1.19 [22,787/1,917,226]	1.45 [29,205/2,015,177]			
United Kingdom	2013	2014	2015	2016			
BEV	0.11 [2,552/2,264,737]	0.27 [6,688/2,476,435]	0.38 [9,936/2,633,503]	0.39 [10,375/2,692,786]	Fast: 2247 Other: 10,376 Population: 65,081,000	<ul style="list-style-type: none"> • EVs<50gCO₂/km and 70⁺ mile range grants up to £8,000; PHEVs <70 mile electric range and emissions 50-75gCO₂/km £2,500 (car price cap £60,000) • EVs exempt annual circulation tax • EVs reduced company car tax • EVs London Congestion Charge exemption • Incentives to install home / workplace /on-street chargers • Government procurement programs • Free resident parking (some London boroughs) 	(ACEA, 2016) (ACEA, 2017) (European Commission, 2017) (UK DfT, 2015) (City of Westminster, 2016)
PHEV	0.04 [956/2,264,737]	0.32 [7,914/2,476,435]	0.71 [18,737/2,633,503]	1.06 [28,618/2,692,786]			
All EVs	0.15 [3,508/2,264,737]	0.59 [14,602/2,476,435]	1.09 [28,673/2,633,503]	1.45 [38,993/2,692,786]			

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China	2013	2014	2015	2016			
All EVs	0.1 [17,742/17,900,000]	0.27 [53,082/19,710,000]	0.84 [176,627/21,150,000]	1.44 [351,861/24,380,000]	Total: 81,000 Population: 1.382 billion	Note: Gradual subsidy phase out, to be complete after 2021 <ul style="list-style-type: none"> Government support 30% EV procurement for government departments 2015-16 Government subsidies for production of Chinese BEVs and PHEVs: From 2012 exemption from annual car taxes, 5 cities trial for EVs purchaser subsidy. From 2015 no taxes for commercial EVs and 50% tax deduction for private vehicles. No restrictions on using EVs and PHEVs on high pollution days. Government support for recharger installation 	(State Council People's Republic of China, 2016) (Statista, 2017) (Gu, 2014) (FlorCruz, 2015) (Xinhua News, 2015) (Xinhua News, 2016)
Finland	2013	2014	2015	2016			
BEV	0.05 [50/103,314]	0.17 [185/106,259]	0.22 [242/108,844]	0.19 [225/118,986]	Fast: 265 Other: 706 Population: 5,475,000	BEV: pay only 5% registration tax (based on CO ₂ emissions)	(European Commission, 2017) (ACEA, 2017) (ACEA, 2016)
PHEV	0.16 [168/103,314]	0.27 [291/106,259]	0.38 [415/108,844]	1.01 [1207/118,986]			
All EVs	0.21 [218/103,314]	0.44 [476/106,259]	0.6 [657/108,844]	1.2 [1432/118,986]			
Portugal	2013	2014	2015	2016			
BEV	0.16 [166/105,921]	0.14 [196/142,826]	0.36 [639/178,503]	0.38 [1,089/207,330]	Fast: 58 Other: 1,192 Population: 10,311,000	<ul style="list-style-type: none"> EVs exempt from registration tax and annual circulation tax dependent on emissions BEV: €2,250 grant to exchange end of life ICV for BEV PHEV: €1,125 grant to exchange end of life ICV for PHEV Company cars: VAT is tax deductible for EVs < €50,000 Free parking in Lisbon 	(ACEA, 2016) (ACEA, 2017) (European Commission, 2017)
PHEV	0.04 [44/105,921]	0.07 [103/142,826]	0.3 [541/178,503]	0.53 [784/207,330]			
All EVs	0.2 [210/105,921]	0.21 [299/142,826]	0.66 [1,180/178,503]	0.91 [1,873/207,330]			

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United States	2013	2014	2015	2016			
All EVs	0.6 [97,507/15.5M]	0.7 [122,438/16.4M]	0.7 [116,099/17.4M]	0.9 [158,455/17.5M]	Fast: 1912 Other: 15,411 Population: 323,127,513	<ul style="list-style-type: none"> • Wide range of incentives offered: • Federal income tax credit US\$7,500 & 8 states offer income tax incentives on purchase of BEV or PHEV • 6 other states offer purchase rebates • 3 other states offer reductions on vehicle purchase or registration tax • 2 states offer free parking for EVs • California also offers deductions on battery charging • 9 states have free access to bus or HOV lanes • Federal and some states have EV procurement policies • Government support for recharger deployment • 10 states offer rebates for private installation of rechargers. • Federal support for information dissemination. <p>Note: nearly 50% of US EV sales are in California Note: Figures include Light Duty Vehicle Classes 1,2, & 3 trucks, up to 14,000 lbs</p>	(Plug in America, 2017) (Pontes, 2017) (US DoE, 2017b) (US DoE, 2017a) (Kane, 2016) (US DoC, 2017) (US DoE, 2016)
Japan	2013	2014	2015	2016			
All EVS	1.06 [30,587/2,872,111]	1.17 [33,390/2,860,472]	0.94 [25,328/2,704,485]	0.8 [22,375/2,765,491]	Fast: 6958 chargers (Sept 2016) Population: 127M	Note: Figures include standard and small cars but not mini/kei cars Note: Until 2014, the Japanese government offered generous subsidies (up to US\$10,000) on EV purchase.	(Pontes, 2017) (JAMA, 2017) (Loveday, 2016) (Kane, 2016)

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Germany	2013	2014	2015	2016			
BEV	0.19 [5464/2,952,431]	0.28 [8,390/3,036,773]	0.38 [12,097/3,206,042]	0.34 [11,243/3,351,607]	Fast: 1,810 Other: 22,857 Population: 81,276,000	<ul style="list-style-type: none"> • Purchase subsidies for cars under €60,000 (max 400,000 cars)(ends in 2020): BEVs €4,000 grant; PHEV €3,000 • Tax deductions on company cars • Exemptions from ownership tax for first 10 years for cars registered before 1 Jan 2016; exempt for 5 years for cars registered until 31 Dec 2020 • Local incentives for BEVs may include: free parking, reserved parking, bus lane use 	(European Commission, 2017) (ACEA, 2016) (ACEA, 2017)
PHEV	0.06 [1656/2,952,431]	0.14 [4,401/3,036,773]	0.35 [11,111/3,206,042]	0.40 [13,369/3,351,607]			
All EVs	0.25 [7120/2,952,431]	0.42 [12,791/3,036,773]	0.73 [23,208/3,206,042]	0.74 [24,612/3,351,607]			
Denmark	2013	2014	2015	2016			
BEV	0.27 [497/181,896]	0.81 [1,533/188,612]	2.19 [4,524/206,998]	0.55 [1,223/222,927]	Fast: 422 Other: 2114 Population: 5,673,000	<ul style="list-style-type: none"> • BEV registration tax reductions up to DKK10,00 (\$1,470) • Municipalities and businesses get \$1,470 - \$3,675 subsidy on EV purchase by Danish Energy Agency • Tax rebate for installation of home recharger • Connection charge 50% discount public recharging stations • Local incentives include: <ul style="list-style-type: none"> • Payment up to DKK5,000 (\$475) to parking lots to provide preferential parking to EVs • Dedicated parking for EVs • Fleet owners DKK2-4,000 per vehicle from utilities. 	(European Commission, 2017) (Levring, 2015) (ACEA, 2016)
PHEV	0.01 [11/181,896]	0.05 [100/188,612]	0.21 [444/206,998]	0.08 [179/222,927]			
All EVs	0.28 [508/181,896]	0.86 [1,633/188,612]	2.4 [4,968/206,998]	0.63 [1,402/222,927]			

	2013	2014	2015	2016			
Australia							
All EVs	0.03 [292/899,965]	0.13 [1130/883,943]	0.12 [1108/9224,154]	0.02 [215/927,274]	Fast:37 Other: 671 Population: 24,168,303	Note: Figures include BEVs & PHEVs <ul style="list-style-type: none"> • Threshold for application of 33% Federal luxury car tax (new cars sold above Au\$63,184) rises to Au\$75,375 for cars <7L/100km fuel consumption • Low level state based annual car taxes exempt for EVs in state of Victoria. • State of Queensland commenced limited infrastructure support ACT government Green Vehicles Duty Scheme registration duty exemption for vehicles emitting <130g CO ₂ /km	(ATO, 2016) (VicRoads, 2016) (O'Rourke, 2015) (ACT Govt, 2016) (FCAI, 2017) (PlugShare, 2016)

Table S2 : Market penetration of EVs by market, number of chargers, population, notes on government measures to encourage uptake, and references

References for Table S2

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Note: The figures used in Table S2 were as published at the time the documents were retrieved.