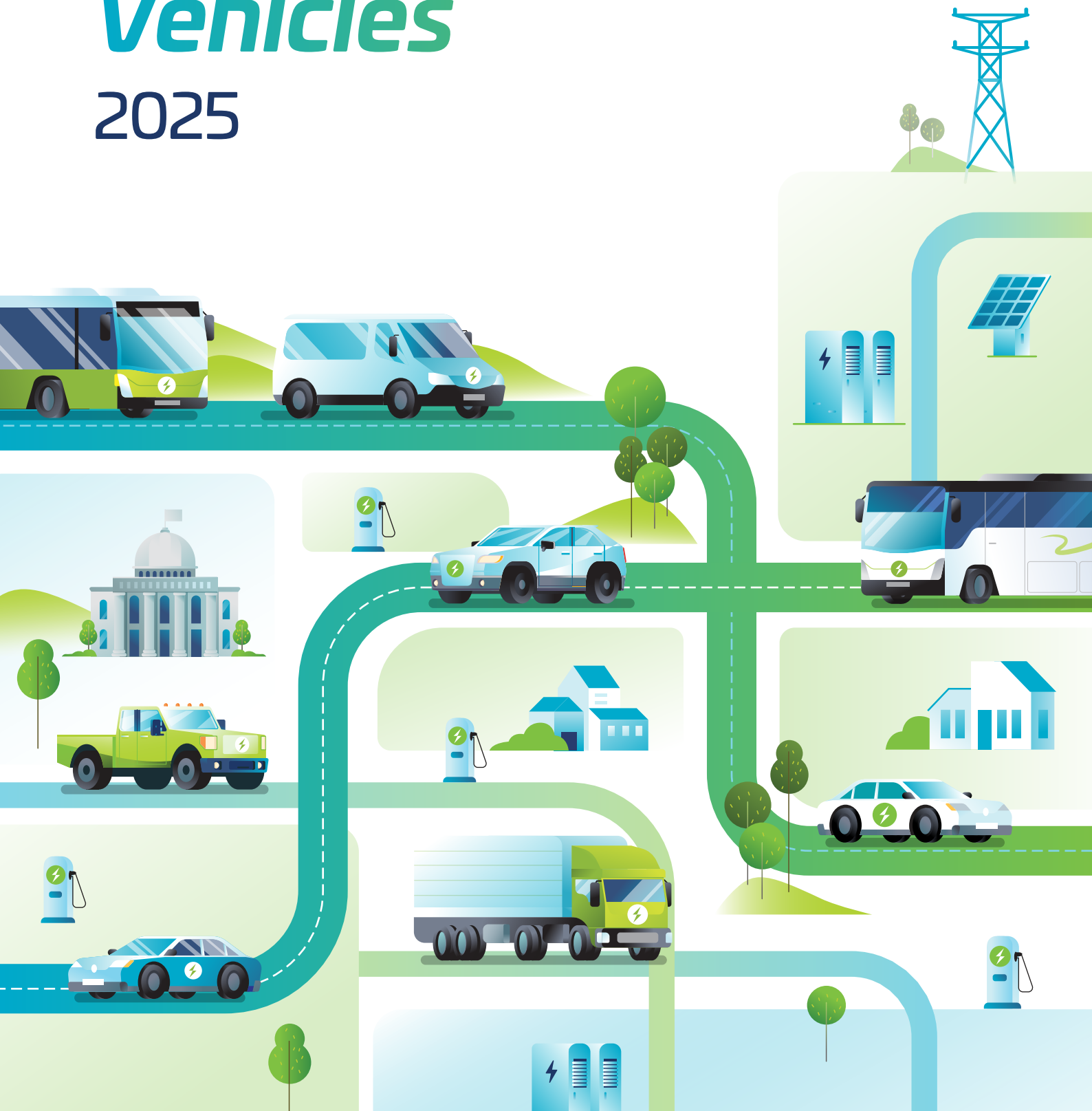
ELECTRIC VEHICLE COUNCIL

State of Electric Vehicles

2025



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ELECTRIC VEHICLE COUNCIL

State of EVs - Highlights

Sales Highlights

GROWING SALES

	Same Period Last year	This Year	%	
Total EVs sold	58,507	72,758	24.4%	↑

TOP SELLING EVs

Tesla Model Y	10,431
BYD Shark 6	10,424
BYD Sealion 6	4,375
BYD Sealion 7	3,756
Tesla Model 3	3,715

12.1% of all new cars sold are EVs

26.3% ACT leads Australia with EVs making up a quarter of all new car sales

Greater market share than ever before:

+25.4% increase
up from 9.6% during same period 2024

Market Growth

MORE CHOICE

Range
400-600+ KM ↑

V2G
2 Bidirectional inverters expected to have CEC approval by end of year

4 OEMs Trialling V2G Offerings ↑

Available EV Models

	Same Period Last year	This Year	%	
Utes/ Vans	5	18	260%	↑
Trucks	18	27	50%	↑
Buses	24	28	16.6%	↑

Charging

	Same Period Last year	This Year	%	
Locations	>1,060	>1,272	20%	↑
Plugs	>3,436	>4,192	22%	↑

Electric Vehicle Policy Scorecard

FED 8/10	ACT 6/10	NSW 6/10
NT 3/10	QLD 3/10	SA 4/10
TAS 3/10	VIC 5/10	WA 4/10

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Our Team at the EVC

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Australians are choosing EVs in record numbers.

The first half of 2025 tells this story through data: record sales, unprecedented choice, and growing infrastructure.

From outer suburbs to regional towns, families are discovering EVs save money, cut emissions, and expand their options.

Record Sales: In the first six months of 2025, Australians bought 72,758 EVs, up 24.4% on the same period in 2024. EVs now account for 12.1% of all new car sales. June 2025 was the strongest month ever with EVs making up almost 16% of new sales. Australia's EV fleet has now passed 370,000 vehicles on the road, up from just 180,000 two years ago.

Diverse Buyers: The real story is who is driving. Growth in outer suburbs continues to outpace inner suburbs. The second-hand market is opening options up to new buyers, with reports of 300% sales growth. Families in regional towns are plugging in at new highway chargers. Tradies are snapping up new plug-in utes and vans, with 18 models available in 2025, up from just 5 last year. Fleet managers are rolling out electric trucks, with companies like Linfox already putting electric prime movers to work. This is no longer an inner-city story — it's a national story.

More Choice: The New Vehicle Efficiency Standard helped deliver 153 EV models (94 BEVs, 59 PHEVs) compared to just 12 months ago. Electric light commercial vehicles jumped from 5 to 18 models—increasingly addressing new, practical needs designed for Australia's lifestyle. PHEVs provide the crucial bridge: 25,000 sold in six months, tripling 2024 volumes and addressing range anxiety for some buyers.

Growing Infrastructure: 1,272 fast-charging locations (20% growth) and 800 high-powered charging plugs (22% increase). Our Charge@Large platform now tracks 2,100 charging units across 9 networks in real-time, building the transparency that drives consumer confidence.

A Turning Point for Australia

The May Federal Election reaffirmed Australians' support for cleaner, cheaper transport—but turning that mandate into lasting momentum means defending the FBT exemption and shaping fair road pricing. The Government's 2035 emissions reduction target of 62-70% and the crucial importance of EVs in achieving that target means that we need to re-double our efforts with policy reforms that will get 5 million EVs on the roads by 2035. The EVC has outlined some reforms that are immediately available to government based on our previous advocacy. We are also working with member and the broader community to develop a refresh Policy Platform to provide a roadmap to the 2035 targets for governments and industry.

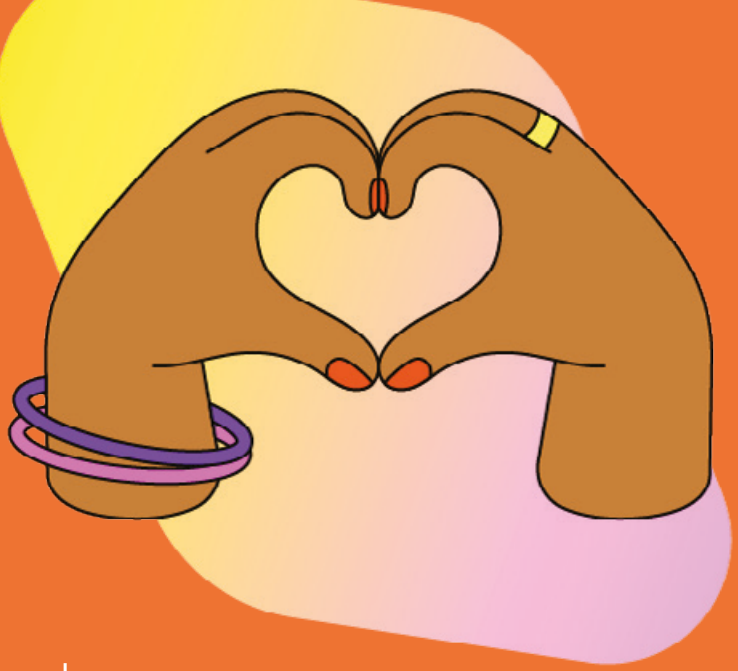
This is the decisive moment. We are moving from the early adopters to the early majority — the riskiest stage of any transition. Yet every state and territory wound back incentives in the past year. Internationally, no country has reached mass EV adoption without sustained government backing through the early majority phase. To withdraw too early — before EVs hit at least 30% of new sales — risks stalling momentum.

Compared to last year's year-end release, we've returned to the original financial year reporting, helping government, industry and households absorb the data and act on the findings. Australians want cleaner, cheaper cars — and they are choosing them in record numbers. The challenge is clear: momentum is real, but it is not guaranteed.

If we double down now, we can lock in the benefits for all Australians: cheaper transport, energy independence, new jobs across the EV supply chain, and cleaner, healthier communities.

Julie Delvecchio
CEO, Electric Vehicle Council

Electric employee benefits



Looking for ways to enhance your employee value proposition and support your organisation's sustainability goals at the same time? The Origin 360 EV employee benefits program is free to join and fully managed by Origin.

Partner with us to unlock exciting deals for your employees.

What work perks are available?

Help employees with everyday expenses and make the transition to renewable energy easier.

- Special electricity and gas offers
- Partner perks with brands like LG
- Discounts on Origin internet
- Electric Vehicle charger installation discounts
- Origin solar and battery discounts
- Electric Vehicle subscriptions

Don't miss out on these exciting offers

Scan the QR code for more information and to express your interest today.

origin

3 The Year to Date

Australia's electric vehicle (EV) market is proving its resilience in 2025. Despite a cost-of-living crisis, tariff chaos in the global automative market, evolving commercial dynamics in the local charging infrastructure market, and premature withdrawal of government incentives, EVs are going from strength to strength with more options than ever before.

Highlights

Thanks largely to the New Vehicle Efficiency Standard (see page 15), Australians have enjoyed a wider range of new and updated EV models, from affordable compacts to family SUVs, and work-ready utes, and more expansive access to EV charging, with a greater diversity of options for all types of motorists emerging.

This is intensifying competition among manufacturers, leading to more competitive pricing and better value for consumers. As automakers vie for market share, they are rolling out EVs with new features and better performance to win buyers. With continued roll out of various new EV innovations like V2G-inverters, kerbside charging, smart powerpoint charging, and our very own consumer charging app, Charge @ Large-there has never been a better time to buy an EV.

This wave of competition has delivered better deals for consumers through better deals which has accelerated EV adoption in 2025. Plug-in vehicles[1] are outpacing sales from 2024 on almost every metric (see Section 3.1). Market share for EVs reached an all-time high in June 2025, capturing almost 16% of new car sales – the most successful month for EVs on record.

Almost 73,000 EVs were sold in the first half of 2025, compared with 114,000 for all of 2024. Momentum is accelerating: as of June 2025, sales have already reached 64% of the total sales recorded in all of 2024. Our trajectory points to a new record.

So far, 2025 is shaping up to be **the Year of the PHEV**. Plug-in Hybrid Electric Vehicles are surging in popularity, marking a pivotal shift in the nation's automotive landscape. Sales of PHEVs in the first six months of 2025 reached over 25,000 units, more than tripling sales from the same period in 2024. This growth has turbocharged sales volumes for plug-in vehicles, although Battery Electric Vehicles (BEVs) remain the most popular EVs, by far.

Several factors are driving the PHEV trend. PHEVs provide many of the benefits of electric driving while retaining the extended range of internal combustion engines (e.g. for long-distance trips). Additionally, 'PHEV FOMO' (Fear of Missing Out) may have contributed to a spike in sales before the April 1 expiration of the Fringe Benefits Tax (FBT) exemption for PHEV, but it may also be possible that increased PHEV product offerings are contributing to sales increases. Since then, however, sales have rebounded to over 6,000 per month.

Are PHEVs really EVs?

Find out why plug-in hybrids are critical to Australia's EV story on page 26

1 In line with the same definition adopted by the IEA and other international bodies, electric vehicles (EVs) include both Battery Electric Vehicles (BEVs) and Plug-in Hybrid Electric Vehicle (PHEVs).

EV drivers now have more ways to plug in than ever before. Australia's fast-charging network is growing quickly, proving that public charging demand is real. Most drivers (about 80%) still charge at home, with energy retailers offering tailored deals, while shops and tourism operators are finding that charging can attract customers. Nevertheless, debate has sharpened this year over the appropriate market design and the extent to which regulated monopolies should contribute to EV charging infrastructure. One thing is clear: well-placed, well-used charging is good for drivers, good for the grid, and, when managed smartly, great for cutting emissions.

The **Federal Election in May** saw Australians backing cleaner, more affordable electric vehicles. This public mandate validates the Australian Government's leadership in reducing emissions and getting Australians into cleaner, cheaper electric vehicles.

The outcome gives the EV industry clarity and investment certainty, knowing that key policies (like fuel efficiency standards, trading credits and support for the clean energy transition) will continue into this term.

Sadly 2025 saw the return of "ute tax" misinformation, yet another scare campaign that Australians voted against overwhelmingly. For almost a decade, electric vehicles have been politicised, harming EV investment, Australia's clean energy transition, and the cost of living for motorists. Given EV buyers now come from all walks of life — across outer suburban areas, regional towns, and our cities — the industry calls on all political leaders to unite in supporting EVs as a pathway to help households save money, create cleaner neighbourhoods, and offer Australians more choice.

Other highlights so far in 2025

Outer suburbs overtake the inner city on EV uptake

Electric Vehicle Council

ARENA launches *National Roadmap for Bidirectional EV Charging*

Australian Renewable Energy Agency (ARENA)

Synergy and Horizon Power complete WA EV Network - Australia's longest charging network

Synergy

EVs to the rescue during Ex-Tropical Cyclone Alfred

MyCar

Launch of Charge@Large – Australia's first app showing real-time status of EV chargers

Charge @ Large

Linfox commits to Volvo's Australian-built electric trucks

Volvo Trucks

Headwinds

Australia's EV sector has been battered by the same turbulent forces impacting the rest of the economy. Unprecedented tariff policies out of the USA sent shockwaves through the global automotive industry and undermined investment certainty. Sales of all new vehicles were dampened by high interest rates and the cost-of-living. While EVs weathered the storm better than other vehicle categories, sales of BEVs are broadly flat year-on-year, as confidence and buying intention have weakened. Even the increased competition in the Australian market has been a double-edged sword with consumer anticipation for updated models and household cost of living pressures escalating, both potentially delaying purchases.

When many of these popular models did launch, the EV market showed signs of recovery, from around May 2025. This also coincided with the arrival of several new brands entering the Australian market for the first time. While the EV sector hopes this rebound is part of a long-term trend, Australia still has a lot of work to do to reach its EV sales targets and emissions goals.

State Governments Holding Back the Transition

Since the last State of EVs report in 2024, every state and territory has withdrawn demand-side support for EVs that have already proven successful in helping more Australians into cleaner, more affordable vehicles. This is despite the Federal Government's 2035 emissions reduction targets and prior commitments by many of the same state and territory governments to deep emissions cuts and EV sales targets – some as close as 50 months away.

In the past 12 months alone we have seen:

- The end of zero-interest EV loans in the ACT and higher stamp duty for EV drivers
- The Queensland Government walk back EV targets for its own government fleet (QFleet); still no public target at all for South Australia's government fleet
- The end of WA's Zero Emission Vehicle Rebate, one of Australia's most successful programs
- Fleet grants dry up under Round 5 of NSW's Fleets Incentive and Tasmania's DeliverE program
- Ongoing delays to the rollout of workplace charging in Victoria

Australians need all three levels of governments supporting the uptake of electric vehicles as we move from early adopters to the early majority phase. Internationally, no jurisdiction has achieved mass market uptake of EVs without sustained and reliable government support. The EVC considers any backtracking on policy incentives before at least 30% EV penetration to be premature. Australia's EV industry stands ready to partner with government to accelerate uptake, achieve emissions goals and help more Australians unlock the benefits of going electric.

Electric Vehicles under attack

Recent months have seen a sustained campaign undermining the policy supports that have helped thousands of Australian families unlock the benefit of going electric. The Productivity Commission has recently proposed scrapping the Electric Car Discount, which lowers the cost of EVs for working Australians under novated leases. The PC has overstated the budgetary costs of the Electric Car Discount, at the same time significant tax breaks continue to be provided for polluting petrol and diesel vehicles. The industry responded with advocacy led by the EVC to government outlining the economic benefits of the Electric Car Discount. This success of this coordinated advocacy was reflected in the Minister for Energy ruling out any changes to the Discount in 2027.

In tandem, tax reform conversations have focused on a road user charge for electric cars and trucks. The EVC has always supported a fair, equitable approach to funding Australia's roads. The EVC congratulates the Federal and State Treasurers for agreeing in September that future road pricing reforms "should not be designed to deter the uptake of electric vehicles". This is a critical signpost in ongoing conversations and must shape the development of any model. The EVC will continue advocating for the EV industry and road pricing reforms that recognise the economic, health and national security benefits of electric vehicle adoption.

In September, the Federal Government announced its 2035 emissions reduction target of 62-70% below, based on 2005 levels which will require 20x as many EVs on the road, meaning more than 5 million EVs by 2035. While the Federal Government has been setting ambitious and necessary targets, state and territory governments need to match that vision by stepping up to support the transition.

Other challenges so far in 2025

Over half of Australians are still falling for persistent EV myths

ABC News

Transport emissions overtake pre-COVID levels – they are projected to be Australia's largest source of emissions within 5 years

Department of Climate Change, Energy, the Environment & Water

Livingstone Shire Council dumps plan to install EV chargers following a single discredited TV report

ABC News

Looking forward on EV policy

Australia's EV transition is now underway. Market share – for both BEVs and PHEVs – continue to break records month-by-month but may not be enough to reach most governments' EV targets. The NVES has resolved Australia's EV supply problem in some segments, but demand continues to suffer from consumer hesitancy and misinformation. EVs will continue flowing strongly into the second-hand market.

All levels of government must recommit to EV support, develop nationally consistent policies and lower the barriers that continue to hamper electrification across the transport sector. With oil prices surging, hip pockets hurting and just five years left in the 'decisive decade' for climate change, Australia must now double down on its EV transition during the rest of 2025.

State of EVs 2025

This report provides a snapshot of Australia's EV market from January to June 2025. It aggregates the latest sales and registration data for light vehicles in Australia together with aggregate numbers on the rollout of Australia's fast public EV charging infrastructure. It also includes the Electric Vehicle Council's annual assessment of EV policies in each of the state and territories and at the federal level.

This edition builds on our State of EVs 2024, released in December 2024 and subsequent reporting on full year sales. This year, the report's scope has been narrowed to focus more squarely on the market for electric vehicles themselves and the supporting charging infrastructure.

The Electric Vehicle Council thanks all our collaborators – across our membership, government, industry, NGOs and consumer groups – and we look forward to further accelerating Australia's transition to electrified transport during the rest of 2025.

This report would not exist without the commitment of our members. Every chart, every data point, every insight is built on the backing of the manufacturers, fleets, energy providers, charging networks, and innovators who are members and choose to stand together through the Electric Vehicle Council.

If we want cleaner, cheaper transport and the jobs that come with it, we need a strong, collective voice. To those not yet part of this effort: now is the time to join us.

Email us at office@evc.org.au

AGL. Making EVs easy.

With EV subscriptions, expert advice and home charging solutions – it's never been easier to drive electric.

Everything you need to electrify your drive

- Flexible EV subscriptions
- Quality chargers and installation
- EV Night Saver plan

Learn more

agl Join the change

New Vehicle Efficiency Standard (NVES)

For generations, Australia has lagged the rest of the world on a simple policy that reduces both fuel costs and emissions: fuel efficiency standards for the vehicles we drive. This finally changed in 2025 with the introduction of the New Vehicle Efficiency Standard (NVES).

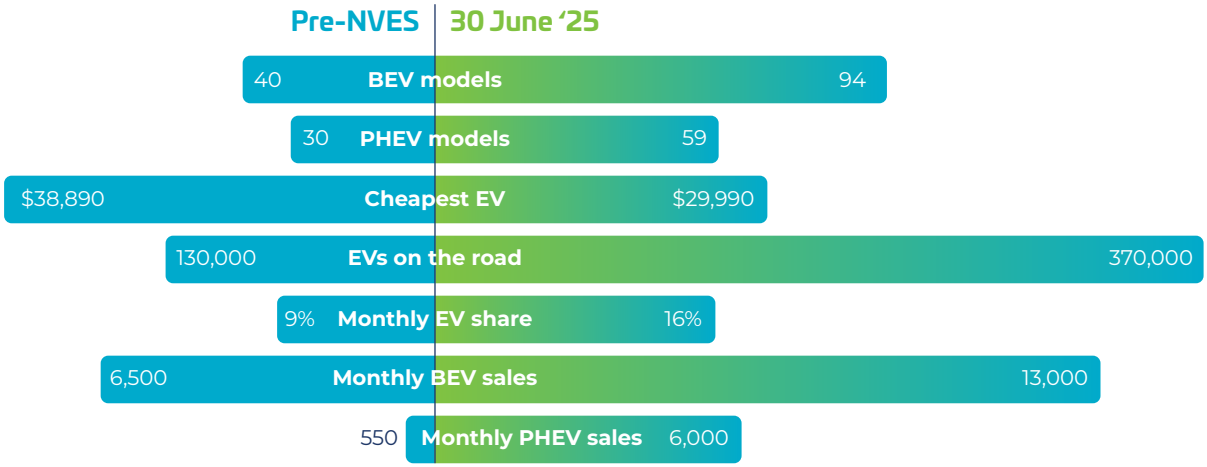
Going forward, car manufacturers must ensure the average emissions of the vehicles they sell remain below an annual emissions intensity target. If they exceed the limit, they need to buy credits from companies that are below the emissions limit to avoid financial penalties.[2]

The NVES inherently rewards automakers for selling low-emission vehicles, such as EVs. By creating a structured incentive for automakers to prioritise EVs and more efficient petrol and hybrid models, the policy helps bring down prices through increased supply and competition. This expansion in choice not only supports consumer demand but also ensures that cleaner, lower-cost transport is accessible to a wider range of Australians, including those in outer suburbs and regional areas who tend to drive longer distances.

The EV Council has been advocating for NVES for almost a decade. Before its introduction, Australia has had no enforceable fuel efficiency standard, which meant that manufacturers had little incentive to supply their most efficient or innovative vehicles to Australia. As a result, Australians have often been offered older, less efficient cars and the country was becoming a "dumping ground" for high-emission, petrol-guzzling vehicles.

This has changed since the adoption of NVES, Australia now offers over 150 electric vehicle models, including battery electric vehicles (BEVs) and plug-in hybrid electric vehicles (PHEVs) – giving drivers a genuine choice in the EV market. We congratulate the Federal Government, in particular Ministers King and Bowen, and the Prime Minister for their efforts in delivering NVES and bringing cleaner, cheaper-to-run cars to Australians.

The NVES is a foundational policy for both environmental and economic progress. It enables Australia to align with global standards, supports the uptake of clean technology and delivers tangible savings to households. As Australia confronts rising living costs and the reality of climate change, the NVES represents a crucial step in ensuring that cleaner, cheaper-to-run vehicles become the norm rather than the exception.



Pre-NVES refers to April 2023, when a national fuel efficiency standard was first announced.

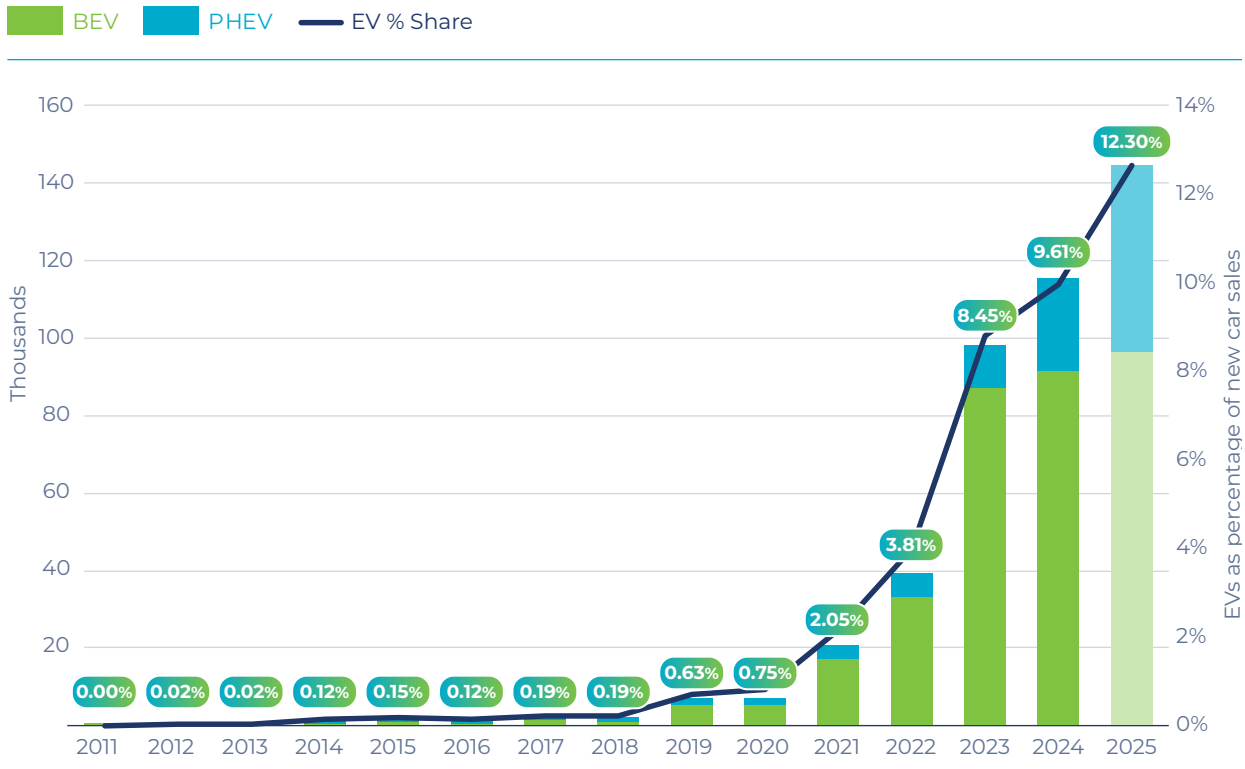
2 The full suite of compliance penalties commence in 2028.

3.1 Electric Vehicle Sales

In 2025, sales of electric vehicles continue to grow. Even as Australia's broader car market has shrunk by around 5,000 units in the first six months, EVs continue to post record sales in both volume and percentage terms. The year started slowly, with monthly sales falling below 2024 levels in January and February but has since rebounded; every subsequent month has beat last year's unit volumes with the traditional EOFY peak in June smashing the previous monthly record by more than 4,000 sales. This amounted to almost one in six new vehicles sold in Australia.

In the face of sustained misinformation and scare-mongering, Australians had already purchased 72,758 EVs by 30 June 2025, 14,000 units more than the same period in 2024. This corresponds to growth of approx. 24.4% year-on-year. EVs now account for 12.1% of all new car sales in Australia, marking an increase from the 9.6% in 2024. As noted above, PHEVs have been the stand-out growth story with sales up 218% year-on-year. In contrast, BEVs have plateaued relative to 2024's record first half with 3,314 fewer sales, reflecting weakness in Australia's broader new car market.

Tracking EV Sales



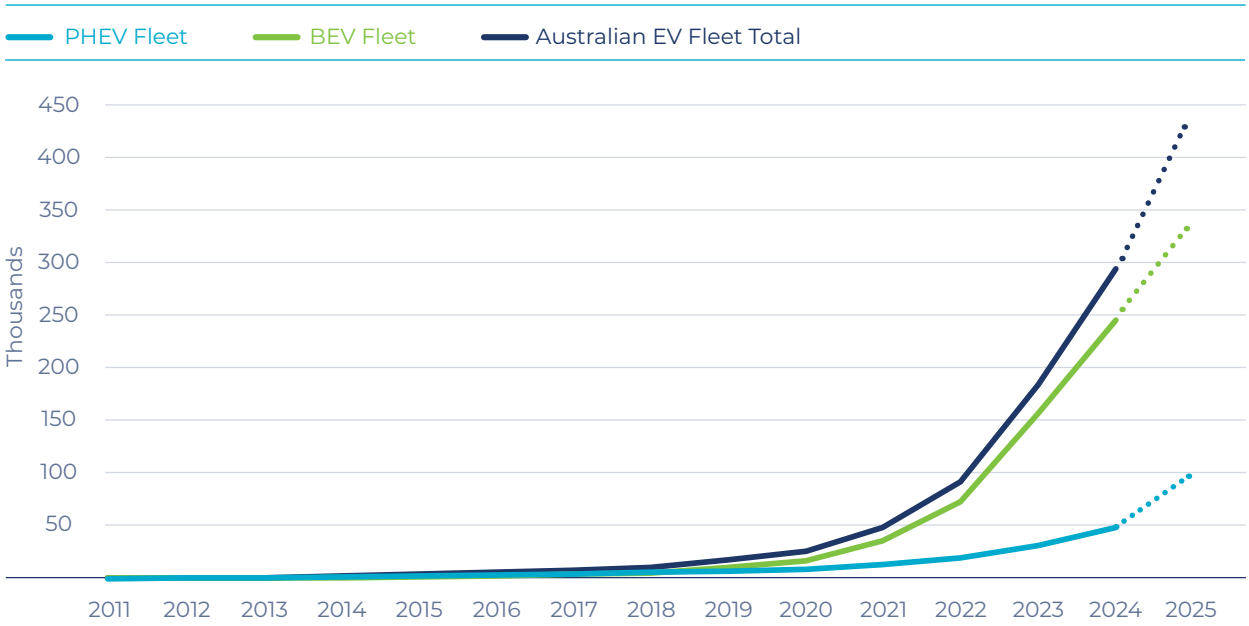
Sources: EVC Vehicles Sales Report, AAA EV Index, VFACTS. Includes projections for full year 2025.

Still, if the trends in the first six months of 2025 continue, Australia is on track for another record-breaking year of EV sales. 2024 was the first year to break through the 100,000-sales barrier in a calendar year; in 2025 this occured in September – three months earlier than in 2024. A conservative estimate puts EVs sales for the full 2025 year between 11.4% and 12.3% of total car sales.

Australia's electric car fleet

Australia has already surpassed 300,000 EVs in the national vehicle fleet earlier in 2025. As at June 2025, almost 370,000 passenger EVs were estimated to be on the road and in September, the total fleet went past 410,000.

Australia's growing EV fleet

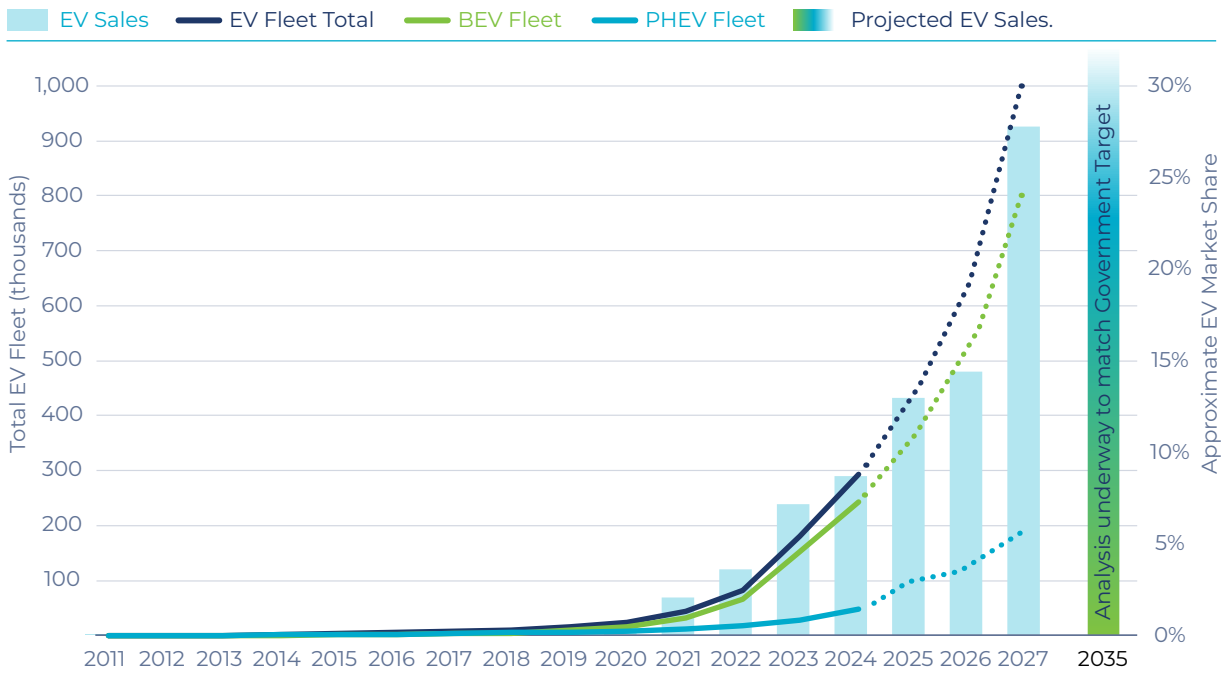


EVs in Fleet	Annual Sales	Needed
~440,000 by EOY	**~145,000** in 2025	**240,000** in 2026 **320,000** in 2027

Sources: EVC Vehicles Sales Report, AAA EV Index, VFACTS.

Nevertheless, Australia is currently not on track to achieve the EV uptake required to achieve government emissions reduction targets. With approximately 20 million cars on Australian roads, Australia will need over 50% of all new car sales to be EVs by 2030. To align with this target, the EVC continues to advocate for a national target of 1 million EVs by the end of 2027. Currently, only 2% of the cars on Australian roads have a plug, and EV sales are at 12%. Bridging the gap will require Australia to increase EV sales to at least 16% in 2026 and 26% in 2027. Government decision-makers and the broader EV industry will need to redirect policy initiatives squarely at the mass market.

Where the EV Fleet needs to go in the next 2 years to align with Net Zero by 2050



Note: the figures provided above are not forecasts but illustrate a feasible scenario that Australia will need to follow to provide the best possible chance of achieving our climate targets, including net zero by 2050, through lower transport sector emissions.

The graph above demonstrates the trajectory of EV growth in Australia to 2025 and projects the path that Australia must follow to have the best chance of achieving climate targets, including net zero emissions by 2050, through lower transport sector emissions. While growth has been solid in recent years, we need a steep upward trajectory to meet our interim target of 1 million EVs on Australian roads by 2027.

A coming of age – adoption curve/mass uptake

EVs are no longer a novelty in Australia. In fact, you are likely to find at least one waiting at most major intersections in Australia's big cities. Certain EV brands are now household names, EV headlines reliably trigger public interest and most Australian drivers have at least considered driving an EV. It is worth reflecting on the speed with which EVs are becoming a normal part of daily Australian life.

However, this does not mean Australia has reached mass EV uptake.

When discussing EV innovation adoption, there is no shortage of reference to technology adoption models such as the one proposed by Everett M Rogers in the *Diffusion of Innovation*. When it comes to EVs, empirical market focus has been indisputably on early adopters – the segment of the population most willing and likely to take on technological risks and accept innovations into their lives with open arms.

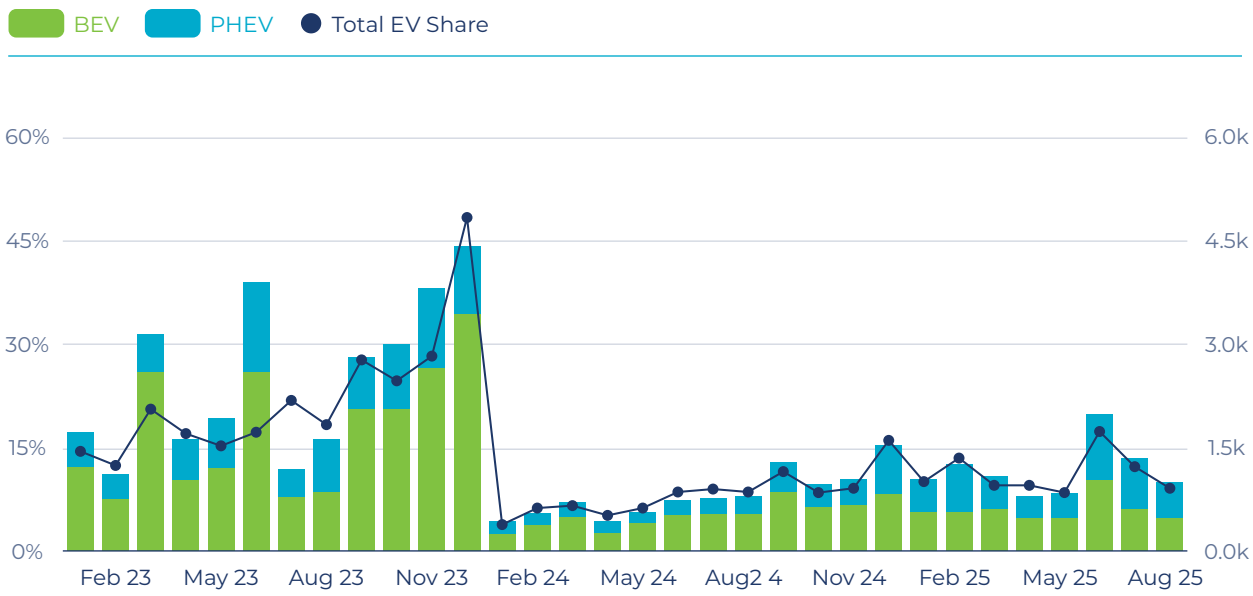
At barely 2% of vehicles on Australian roads, it is far too early to expect electric vehicles to be the natural choice for Australian drivers. Sales growth to date can broadly be attributed to innovators, early-adopters and corporate fleet customers facing pressure to reduce their carbon footprint. Making the jump to an early majority of consumers is notoriously fraught and is arguably the most perilous step in any major technological shift.

However, over time, with market growth and maturity, technology acceptance moves toward new category of consideration – the early majority. This cohort of users is characterised by their willingness to accept some risk and new challenge, but not with the same gusto as the early adopter.

Countries that have already achieved more mature EVs adoption have all provided consistent, long-term policy certainty and incentives for everyday motorists. In contrast, many countries that have withdrawn EV support prematurely or changed policy direction have not yet seen uptake recover and may have pushed back their 'mass adoption' moment indefinitely. When directional leadership on EVs isn't clear – such as where backflips in government commitments have occurred – this can result in investment uncertainty or disrupt the market for prospective drivers of market growth and impacts, affects industry. In Australia, the numbers reveal a clear trend, but the 'teething issues' we see in the EV indicate an evident period of period.

Recognising these analyses are never perfectly applied, EV fleet sizing and behavioural research indicates Australia is moving toward the mainstreaming of EVs, meaning beyond the early adopter phase Gregory Moore referred to this as "the chasm' – the awkward, make-or-break middle period of acceptance for a new technology when the market is still figuring itself out before becoming mainstream.

Beware Premature EV Policy Changes - EV Sales in New Zealand



EV Sales in New Zealand graph (https://evdb.nz/ev-stats)

New Zealand had been a leader in EVs until recently with up to 50% of new vehicles sales being electric in 2023. However, EV uptake fell in 2024 primarily due to the end of the Clean Car Discount (rebates), which removed a key financial incentive, combined with the introduction of a road user charge for electric vehicles.

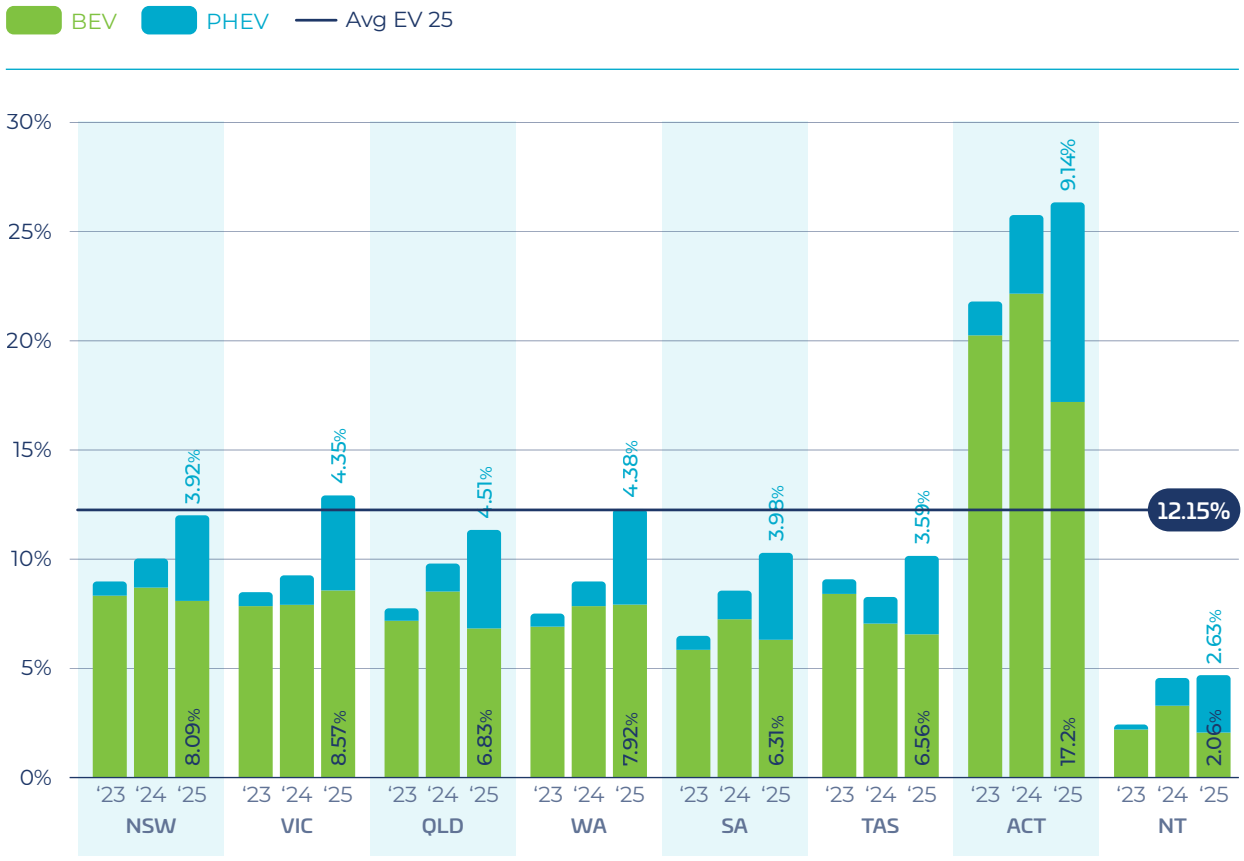
The NZ example demonstrates a clear lesson for Australian politicians and policy makers. The decisions taken by them over the next 12-18 months will determine how well Australia overcomes the 'chasm' towards early majority uptake and will make or break Australia's emissions commitments in the 5 remaining years of the 'decisive decade' for climate action.

Electric car sales across States and Territories

As shown below, all states and territories continue to see EV penetration rise as a percentage of new vehicle sales. However the composition of BEVs to PHEVs is evolving rapidly. The ACT continues to lead the country on EV sales with market share reaching 26.3% for the first six months of 2025. Victoria (12.9%) and WA (12.3%) are the other states exceeding the national average of 12.2%. With the exception of the Northern Territory, all states and territories have recorded an EV market share above 10% for the first time.

In percentage terms, Victoria's EV share has grown by 40% since 2024. Despite strong unit sales overall, the ACT's EV market has barely grown in the last 12 months and has the slowest growth rate in Australia, at barely 2%.

EV Market Share by State (Jan-Jun)



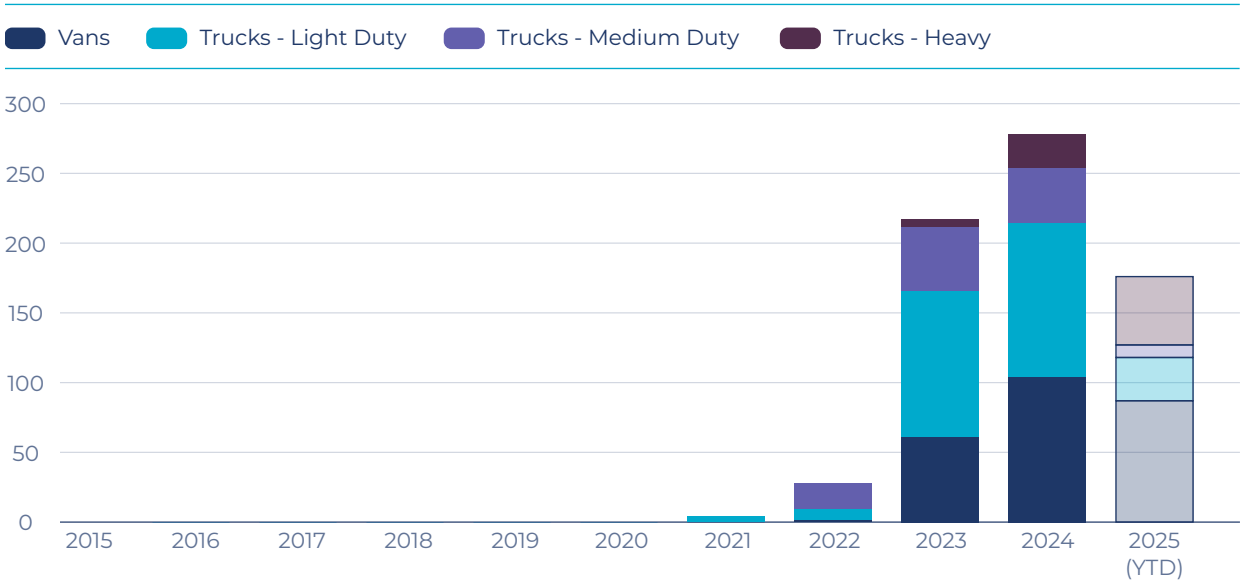
Sources: EVC Vehicle Sales Report, AAA EV Index.

Van & Truck Sales

Sales of electric heavy vehicles are also growing at a historic pace, although off the back of a much lower base than passenger vehicles. The small volumes make sales of electric freight vehicles highly susceptible to bulk purchases by individual fleet customers.

Vans and light-duty trucks account for the majority of electric freight vehicles to date given their strong operational fit with last-mile deliveries and urban duty cycles. Sales of heavier electric trucks have progressed more slowly to date but may see annual sales growth as high as 50% by year's end.

Sales of Electric Vans & Trucks



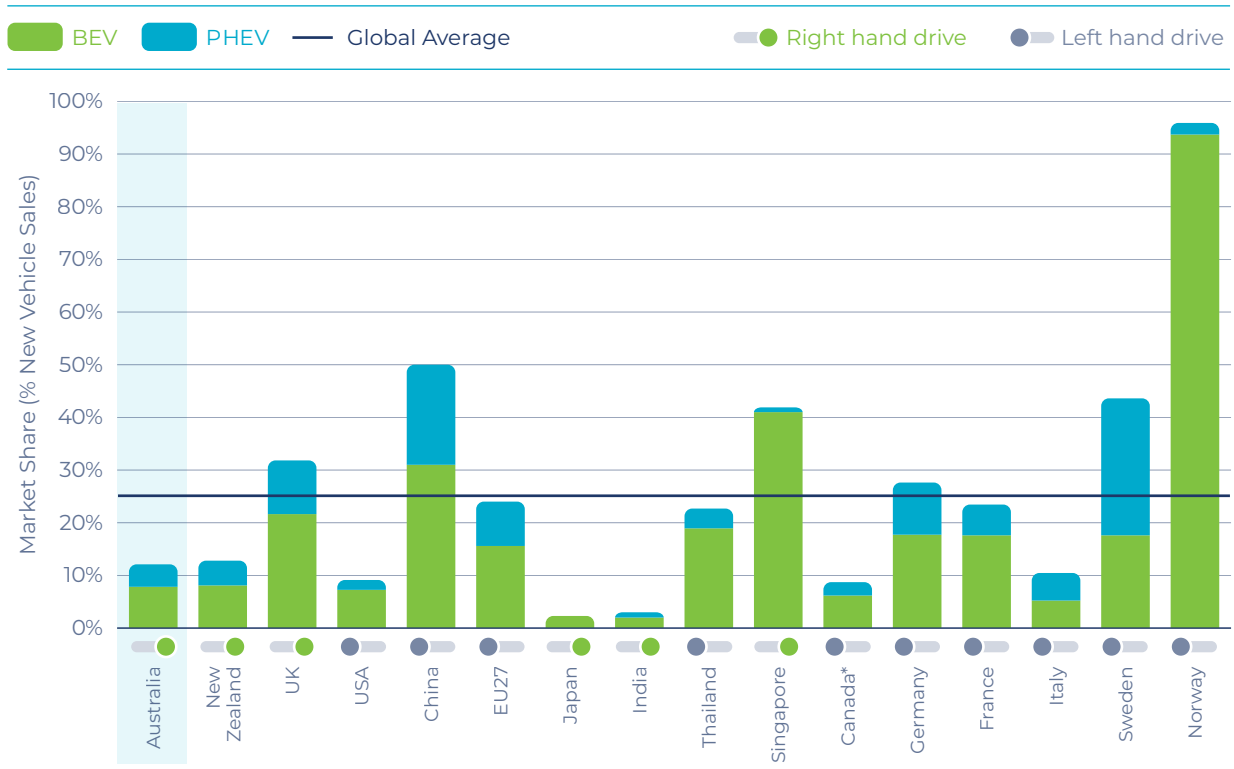
Source: Truck Industry Council, Sales Dashboard, 2025. "Vans": 3.5t-8t GVM; "Light Duty": trucks between 3.5t-8t GVM; "Medium Duty": trucks between 8t-17t GVM; "Heavy Duty": trucks above 17t GVM.

International benchmarks

Australia's EV adoption rate is now comfortably in double-figures, on both a monthly and annual basis. Despite this improvement, Australia remains well behind the global average. Worldwide, adoption of EVs is expected to break through 25% market share for the full 2025 calendar year.[3] In advanced markets like China, this is projected to be as high as 60%.[4]

Australia is by no means a leader in EV uptake: plug-in vehicles famously make up almost all car sales in key Scandinavian markets, 50% in China and roughly a third of new registrations in the UK. But at around 12% EV penetration across the first half of 2025, Australia is no longer a global laggard, either. Domestic market share is now outpacing uptake in the USA and in other major automotive markets, such as Japan and India.

Global EV Uptake - Selected Markets (Jan-Jun 2025)



**Includes only figures for Q1 2025 (Jan-Mar).

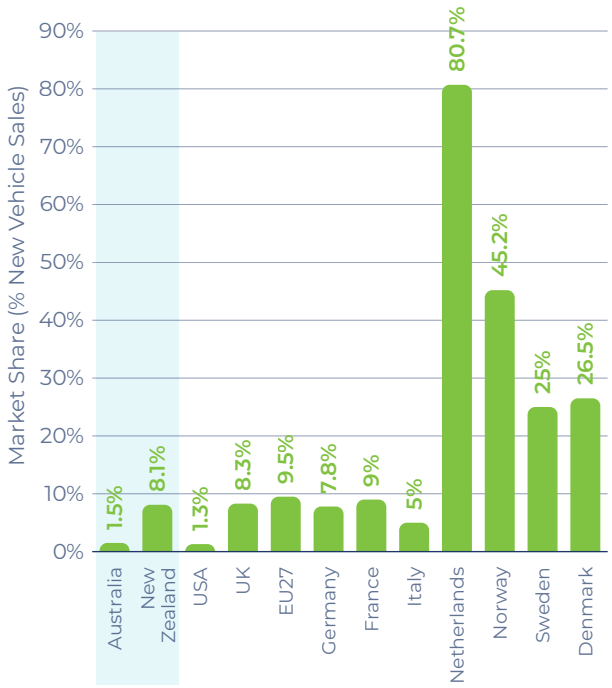
Sources: International Energy Agency, Ministry of Transport (New Zealand), NewAutomotive, Argonne National Laboratory, ACEA, Electric Vehicle Association of Thailan, Thai Auto News, Land Transport Authority (Singapore), Cleantechnica, Statistics Canada, Mobility Sweden, OFV Statistikk/Statens Vegvesen, EVC Vehicle Sales Report, AAA EV Index.

Internationally, the sale of electric vans and trucks trail uptake in the passenger market, but here Australia is well behind comparable markets. Other countries have successfully boosted uptake of electric trucks with generous subsidies and trade-in schemes (e.g. China), lifelong operational advantages (e.g. Europe) and zero-emission zones, phased in over several years (e.g. UK, Netherlands). Noticeably, none of these policy levers are in place in Australia.

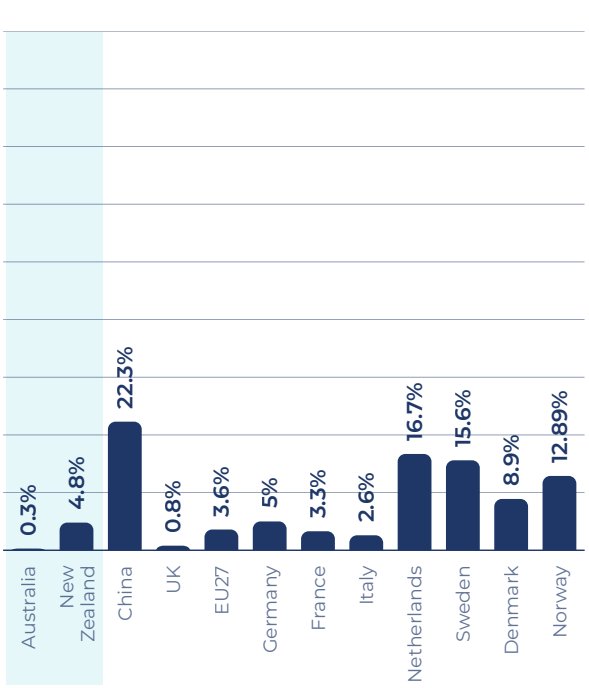
3 Bloomberg NEF, Electric Vehicle Outlook 2025, June 2025

4 International Energy Agency, Global EV Outlook 2025, May 2025

Electric Light Commercial Vehicles Uptake -
Selected Markets (Jan-Jun 2025)



Electric Truck Uptake -
Selected Markets (Jan-Jun 2025)



*IEA FY2025 forecast in the International Energy Agency's *Global EV Outlook 2025.*
Sources: Truck Industry Council, Ministry of Transport (New Zealand), International Energy Agency, NewAutomotive, Argonne National Laboratory, ACEA, Mobility Sweden, OFV Statistikk/Statens Vegvesen.
Sources: Truck Industry Council, Ministry of Transport (New Zealand), Reuters, NewAutomotive, ACEA, OFV Statistikk/ Statens Vegvesen,Mobility Sweden.

Good Things Come in 3s.

Charge at Superchargers,

at home,

and where you park.

TESLA

3.2 Electric Vehicle Model Availability

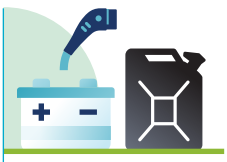
While the full impact is not yet clear, the introduction of the New Vehicle Efficiency Standard has already proven successful in boosting the supply of EV models in Australia. From family SUVs to electric utes, from vans to compact hatchbacks, Australians are now getting access to some of the world's most popular, most affordable EVs. Today, there are over 150 different EV models currently on sale in Australia with new product launches almost every other month.

The growing adoption of PHEVs in Australia during 2025 reflects a strategic step towards a more sustainable automotive future. By bridging the gap between conventional vehicles and fully electric models, PHEVs serve as a practical solution for reducing emissions, particularly in certain market segments and challenging applications.

What's in a name?

There is a lot of confusion and misinformation around EV terminology. Battery Electric Vehicles (BEVs) and Plug-in Hybrid Electric Vehicles (PHEVs) are both types of electric vehicles, as the names suggest. However, they operate quite differently in how they use electricity and fuel. They are also different from conventional 'hybrid' vehicles, which (unlike the name suggests) run exclusively on fossil fuels:

BEV
Battery electric vehicle
A BEV is 100% powered by a battery 100% of the time.



PHEV
Plug-in hybrid electric vehicle
A PHEV has two power trains — a battery and an internal combustion engine vehicle. The driver can choose to drive on the battery to a certain range or use the engine.

"Hybrid"
A hybrid vehicle is actually just an efficient petrol vehicle – it has an engine with a small electric motor and battery, charged only through regenerative braking and the engine itself—**it cannot be plugged in.**

✓ Has a plug	✓ Has a plug	✗ Has a plug
✓ Rechargeable battery	✓ Rechargeable battery	✗ Rechargeable battery
✗ Petrol/diesel engine	✓ Petrol/diesel engine	✓ Petrol/diesel engine
✓ Large electric range (400-600km)	✗ Large electric range (400-600km)	✗ Large electric range (400-600km)
✓ Zero tailpipe emissions	✗ Zero tailpipe emissions	✗ Zero tailpipe emissions

The key difference between a plug-in hybrid EV and other hybrid vehicles lies in how they use and recharge their electric power. A *plug-in* hybrid has a larger battery that can be recharged by plugging into an external power source, allowing it to drive longer distances on electric power alone before the petrol engine takes over. This means PHEVs offer more electric-only driving capability than conventional hybrids and can be significantly more fuel-efficient, on the condition they are regularly charged.

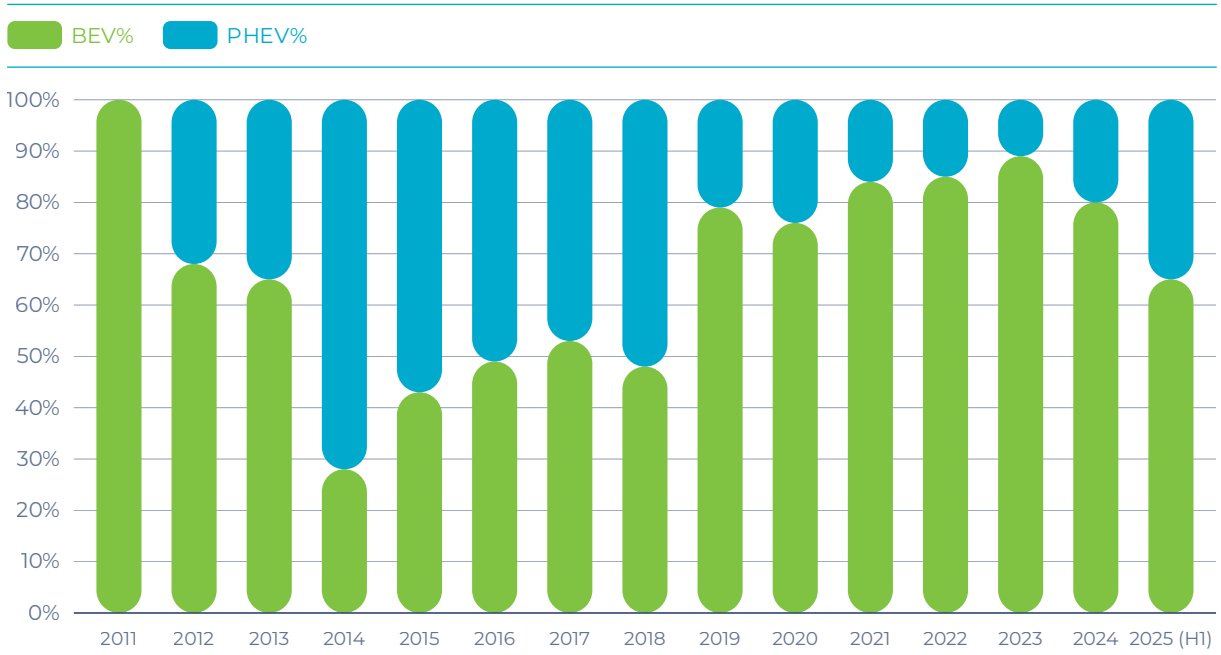
For more definitions, please see the Glossary at Appendix A.

Top selling electric car models

Despite the remarkable growth in PHEVs in 2025, the overwhelming majority of EV sales in Australia continue to be fully-electric BEV models. BEVs still outnumber PHEVs almost two-to-one, although there are significant month-to-month variations; March 2025 saw the gap narrow to within 5 percentage points of an even 50:50 split. Even for the year to date, PHEVs represent around 35% of total EV sales.

The popularity of PHEVs is not spread evenly across Australia's EV market. In particular, utes and SUVs are popular sales categories where buyers are showing a preference for the flexibility provided by a plug-in hybrid drivetrain. These are also segments where PHEVs face less competition from equivalent BEV models. It remains to be seen whether the popularity of PHEVs will endure as more fully electric utes and SUV models enter the Australian market.

BEV vs PHEV split

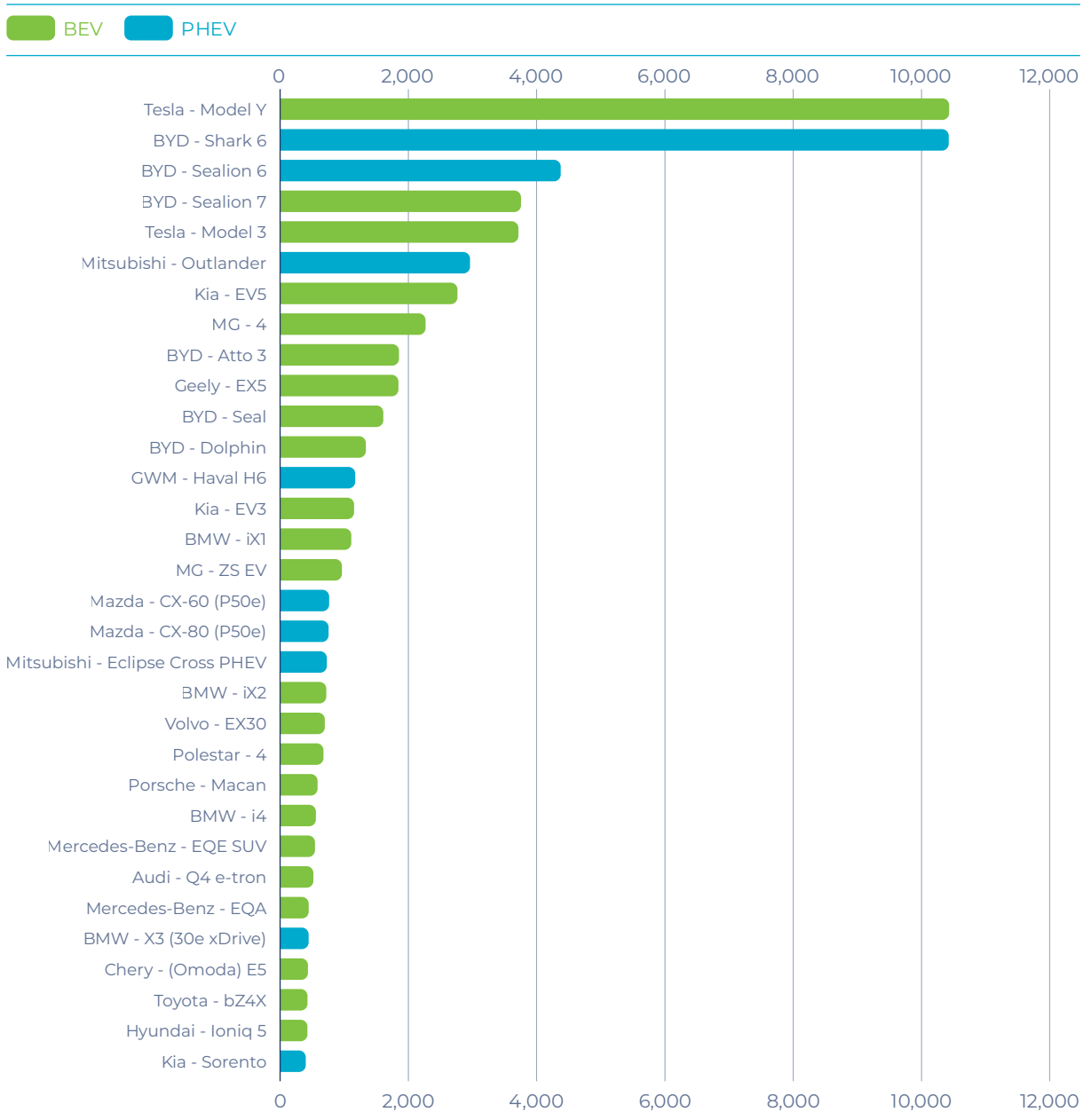


Sources: EVC Vehicle Sales Report; VFACTS.

As of 30 June 2025, EV sales have been dominated by two individual models: the Tesla Model Y (BEV) and the BYD Shark 6 (PHEV). The two EVs were neck-and-neck at the end of financial year and combined, the pair account for some 30% of Australia's total EV market.

The operation of the penalties of the New Vehicle Efficiency Standard from July 1 will undoubtedly see an expansion in the number of EV models available in Australia, as well as more aggressive marketing of EVs already in the market.

Best Selling EVs (Jan-Jun 2025)



Sources: EVC Vehicle Sales Report, CarExpert, OEM-Supplied Data

Electric cars

In 2025, Australians enjoy access to greater numbers of EVs than ever before. Driven by the advent of the NVES and stiff new competition, the number of electric models available on the Australian market has exploded in 2025. There are now 153 electric car models, comprising 94 BEVs and 59 PHEVs.

This increase in supply has led to more affordable EV options across different vehicle makes through increased competition. We expect this trend to continue expanding further as automakers ramp up both promotion of existing EVs and new offerings to minimise NVES penalties, which officially came into operation on 1 July 2025.

The EVC has compiled a summary of our members' current EV offerings in Australia. You can find a full list of all available EV models at Appendix D.

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price

AUDI

A5 e-hybrid quattro 270kW — PHEV

25.9 kWh	97 km	Sedan
150 min*	5.1 sec	$89,900

A5 e-hybrid quattro 270kW — PHEV

25.9 kWh	97 km	Avant
150 min*	5.1 sec	$92,900

e-tron GT S e-tron GT — BEV

105 kWh	558 km	Sedan
18 min	3.4 sec	$209,900

e-tron GT RS e-tron GT — BEV

105 kWh	522 km	Sedan
18 min	2.8 sec	$264,900

e-tron GT RS e-tron GT performance — BEV

105 kWh	528 km	Sedan
18 min	2.5 sec	$309,900

Q4 e-tron 45 e-tron — BEV

82 kWh	514 km	SUV
28 min	6.7 sec	$84,900

*full charge

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price

AUDI

Q4 e-tron 55 e-tron quattro — BEV

82 kWh	489 km	SUV
28 min	5.4 sec	$99,900

Q4 e-tron Sportback 45 e-tron — BEV

82 kWh	531 km	SUV
28 min	6.7 sec	$86,500

Q4 e-tron Sportback 55 e-tron quattro — BEV

82 kWh	503 km	SUV
28 min	5.4 sec	$99,900

Q5 55 TFSI e quattro — PHEV

17.9 kWh	55 km	SUV
150 min*	5.3 sec	$105,984

Q5 Sportback 55 TFSI e quattro — PHEV

17.9 kWh	55 km	SUV
150 min*	5.3 sec	$113,984

Q6 e-tron e-tron — BEV

83kWh	462 km	SUV
21 min	7.0 sec	$99,900

Q6 e-tron e-tron performance — BEV

100 kWh	558 km	SUV
22 min	6.6 sec	$115,500

Q6 e-tron e-tron quattro — BEV

100 kWh	542 km	SUV
21 min	5.9 sec	$122,500

Q6 e-tron SQ6 e-tron — BEV

100 kWh	568 km	SUV
21 min	4.3 sec	$151,400

*full charge

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price

AUDI

Q6 e-tron Sportback e-tron — BEV

83 kWh	489 km	SUV
21 min	7.0 sec	$99,900

Q6 e-tron Sportback e-tron quattro — BEV

100 kWh	569km	SUV
21 min	5.9 sec	$127,500

Q6 e-tron SQ6 Sportback e-tron — BEV

100 kWh	585 km	SUV
21 min	4.3 sec	$156,400

Q8 TFSI e quattro 360kW — PHEV

17.9 kWh	74 km	SUV
150 min*	5.0 sec	$154,284

Q8 e-tron 50 e-tron — BEV

95 kWh	411 km	SUV
28 min	6.0 sec	$140,090

Q8 e-tron SQ8 e-tron — BEV

114 kWh	489 km	SUV
31 min	4.5 sec	$173,090

Q8 e-tron Sportback 55 e-tron — BEV

114 kWh	417 km	SUV
31 min	5.6 sec	$166,090

Q8 e-tron SQ8 Sportback e-tron — BEV

114 kWh	430 km	SUV
31 min	4.5 sec	$180,090

*full charge

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price

BMW

i4 eDrive35 — BEV

Battery (kWh)	Electric Range	Body
70 kWh	430 km	Gran Coupé
Charge time (10-80%)*	**0-100km/h**	**Starting Price**
32 min	6 sec	$87,800

i4 eDrive40 — BEV

Battery (kWh)	Electric Range	Body
84 kWh	520 km	Gran Coupé
Charge time (10-80%)*	**0-100km/h**	**Starting Price**
30 min	5.7 sec	$102,900

i4 M50 — BEV

Battery (kWh)	Electric Range	Body
95 kWh	465 km	Gran Coupé
Charge time (10-80%)*	**0-100km/h**	**Starting Price**
30 min	3.9 sec	$133,900

i5 eDrive40 — BEV

Battery (kWh)	Electric Range	Body
84 kWh	550 km	Sedan
Charge time (10-80%)*	**0-100km/h**	**Starting Price**
30 min	6 sec	$155,900

i5 M60 xDrive — BEV

Battery (kWh)	Electric Range	Body
84 kWh	506 km	Sedan
Charge time (10-80%)*	**0-100km/h**	**Starting Price**
30 min	3.8 sec	$215,900

i5 M60 xDrive Touring — BEV

Battery (kWh)	Electric Range	Body
84 kWh	503 km	Wagon
Charge time (10-80%)*	**0-100km/h**	**Starting Price**
30min	3.9 sec	$219,900

i7 xDrive60 — BEV

Battery (kWh)	Electric Range	Body
106 kWh	625 km	Sedan
Charge time (10-80%)*	**0-100km/h**	**Starting Price**
34 min	4.7 sec	$306,900

i7 M70 xDrive — BEV

Battery (kWh)	Electric Range	Body
106 kWh	576 km	Sedan
Charge time (10-80%)*	**0-100km/h**	**Starting Price**
34 min	3.7 sec	$344,900

iX xDrive45 — BEV

Battery (kWh)	Electric Range	Body
94.8 kWh	522 km	SUV
Charge time (10-80%)*	**0-100km/h**	**Starting Price**
34min	5.1 sec	$142,900

*PHEV charged from 0-100% at max AC charge rate

Battery (kWh) Electric Range Body Charge time (10-80%)* 0-100km/h Starting Price

BMW

iX1 eDrive20 BEV

67 kWh	464 km	SUV
29 min	8.6 sec	$80,600

iX1 xDrive30 BEV

67 kWh	400 km	SUV
29 min	5.6 sec	$86,800

iX2 eDrive20 BEV

67 kWh	427 km	SUV
29 min	8.6 sec	$84,700

iX2 xDrive30 BEV

67 kWh	395 km	SUV
29 min	5.6 sec	$87,600

M5 Sedan PHEV

18.6 kWh	68 km	Sedan
3h15min*	3.5 sec	$261,700

M5 Touring PHEV

18.6 kWh	65 km	Wagon
3h15min*	3.6 sec	$265,700

X3 30e xDrive SUV PHEV

22.1 kWh	91 km	SUV
2h15min*	6.2 sec	$104,800

X5 xDrive50e PHEV

29.5 kWh	101 km	SUV
3h*	4.8 sec	$153,600

XM Label PHEV

29.5 kWh	98 km	SUV
3h*	3.8 sec	$309,900

*PHEV charged from 0-100% at max AC charge rate

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price

BYD

DOLPHIN Essential — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
44.90 kWh	340 km	Hatchback	42 min	12.3 sec	$29,990

DOLPHIN Premium — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
60.48 kWh	427 km	Hatchback	43 min	7.0 sec.	$36,990

ATTO 3 Essential — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
49.92 kWh	345 km	SUV (compact)	50 min	7.9 sec	$39,990

ATTO 3 Premium — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
60.48 kWh	420 km	SUV (compact)	50 min	7.3 sec	$44,990

SEAL Dynamic — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
61.44 kWh	460 km	Sedan (mid-size)	45min	7.6 sec	$46,990

SEAL Premium — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
82.56 kWh	570 km	Sedan (mid-size)	45 min	5.9 sec	$52,990

SEAL Performance — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
82.56 kWh	520 km	Sedan (mid-size)	45 min	3.8 sec	$61,990

SEALION 6 Essential — PHEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
18.3 kWh	92 km*	SUV (mid-size)	NA	8.5 sec	$42,990

SEALION 6 Premium — PHEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
18.3 kWh	81 km*	SUV (mid-size)	NA	5.9 sec	$52,990

* NEDC

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price

BYD

SEALION 7 Premium — BEV

82.56 kWh	482 km	SUV (mid-size)
NA	6.7 sec	$54,990

SEALION 7 Performance — BEV

82.56 kWh	456 km	SUV (mid-size)
NA	4.5 sec	$63,990

* NEDC

Battery (kWh) | Electric Range | Body | Charge time (0-80%) | 0-100km/h | Starting Price (RRP)(plus ORC)

Cupra

Leon VZe — PHEV

20 kWh	121 km	Wagon
26 min	7.3 sec	$69,990

Formentor VZe — PHEV

10.9 kWh	58 km	SUV
213 min	7 sec	$64,990

Terramar VZe — PHEV

20 kWh	110 km	SUV
26 min	7.3 sec	$77,990

Tavascan Endurance — BEV

77 kWh	531 km	SUV
28 min	6.8 sec	$60,990

Tavascan VZ — BEV

77 kWh	505 km	SUV
28 min	5.5 sec	$74,490

Battery (kWh) | Electric Range | Body | Charge time (0-80%) | 1-100km/h | Starting Price

DEEPAL

S07* RWD (19-Inch Wheels) BEV

79.97 kWh	475 km	Wagon
35 min	7.9 sec	$53,900

S07* RWD (20-Inch Wheels) BEV

79.97kWh	475 km	Wagon
35 min	7.9 sec	$55,000

E07 PLUS RWD BEV

89.98 kWh	642 km	Wagon
15 min	6.7 sec	$64,900

S07* PERFORMANCE AWD BEV

89.98 kWh	626 km	Wagon
15 min	3.96 sec	$73,900

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price (MRLP)

MERCEDES-BENZ

EQA 250+ City Edition BEV

70.5 kWh	578 km	SUV
35 min	8.6 sec	$80,700

EQA 250+ Night Edition BEV

70.5 kWh	578 km	SUV
35 min	8.6 sec	$85,800

EQA 250+ BEV

70.5 kWh	578 km	SUV
35 min	8.6 sec	$85,800

*Based on vehicle's maximum DC charging rate
^Based on vehicle's maximum AC charging rate (25%-100%)

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price

MERCEDES-BENZ

EQB 250+ City Edition — BEV

70.5 kWh	564 km	SUV
35 min	8.9 sec	$85,400

EQB 250+ Night Edition — BEV

70.5 kWh	564 km	SUV
35 min	8.9 sec	$90,000

EQB 250+ — BEV

70.5 kWh	564 km	SUV
35 min	8.9 sec	$90,000

EQE 300 sedan — BEV

89 kWh	633 km	Sedan
32 min	7.3 sec	$135,200

EQE 300 SUV — BEV

90.5 kWh	606 km	SUV
32 min	7.3 sec	$136,600

EQE 350 4MATIC sedan — BEV

90.5 kWh	658 km	Sedan
32 min	6.3 sec	$155,400

EQE 350 4MATIC SUV — BEV

90.5 kWh	574 km	SUV
32 min	6.6 sec	$146,700

EQE 53 4MATIC+ SUV — BEV

90.5 kWh	485 km	SUV
32 min	3.7 sec	$194,100

EQE Mercedes-AMG EQE 53 4MATIC + Sedan — BEV

90.5 kWh	515 km	Sedan
32 min	3.5 sec	$217,000

*Based on vehicle's maximum DC charging rate
^Based on vehicle's maximum AC charging rate (25%-100%)

Battery (kWh) Electric Range Body Charge time (10-80%)* 0-100km/h Starting Price

MERCEDES-BENZ

EQS 450 4MATIC sedan BEV

108.4 kWh	664 km	Sedan
31 min	5.6 sec	$222,400

EQS 450 4MATIC SUV BEV

118 kWh	698 km	SUV
31 min	6.1 sec	$198,200

EQS Mercedes-Maybach EQS 680 SUV BEV

118 kWh	662 km	SUV
31 min	4.4 sec	$331,600

G-Class G 580 with EQ-Technology BEV

116 kWh	567 km	SUV
32 min	4.7 sec	$249,900

GLA 250 e PHEV

12.9 kWh	65 km	SUV
28 min	7.9 sec	$78,000

C-Class C 350 e PHEV

19.5 kWh	104 km	Sedan
20 min	6.1 sec	$98,200

C-Class C 63 S E Performance SUV PHEV

4.84 kWh	15 km	Sedan
75 min^	3.4 sec	$193,100

GLC 63 S E Performance SUV PHEV

4.84 kWh	14 km	SUV
75 min^	3.5 sec	$194,000

GLC 63 S E Performance Coupé PHEV

4.84 kWh	14 km	Coupe
75 min^	3.5 sec	$200,700

*Based on vehicle's maximum DC charging rate
^Based on vehicle's maximum AC charging rate (25%-100%)

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price

MERCEDES-BENZ

E-Class E 53 HYBRID 4MATIC+ — PHEV

21.22 kWh	100 km	Sedan
20 min	3.8 sec	$199,000

*Based on vehicle's maximum DC charging rate
^Based on vehicle's maximum AC charging rate (25%-100%)

Battery (kWh) | Electric Range | Body | Charge time (0-80%) | 1-100km/h | Starting Price

POLESTAR

2 Standard range Single motor — BEV

69 kWh	546 km	Sedan
34 min	6.5 sec	$62,400*

2 Long range Single motor — BEV

82 kWh	659 km	Sedan
28 min	6.2 sec	$78,000

2 Long range Dual motor — BEV

82kWh	596 km	$66,400*
28 min	4.5 sec	$71,400*

2 Long range Dual motor -Performance — BEV

82 kWh	568 km	Sedan
28 min	4.2 sec	$80,380*

3 Long range Single motor — BEV

111 kWh	706 km	SUV
30 min	7.6 sec	$118,420*

3 Long range Dual motor — BEV

111 kWh	636 km	SUV
30 min	5.0 sec	$132,720*

Battery (kWh) | Electric Range | Body | Charge time (0-80%) | 1-100km/h | Starting Price

POLESTAR

3 Long range Dual motor - Performance — BEV

111 kWh	567 km	SUV
30 min	4.7 sec	$144,420*

4 Long range Single motor — BEV

100 kWh	620 km	SUV
30 min	7.1 sec	$78,500*

4 Long range Dual motor — BEV

100 kWh	580 km	SUV
30 min	3.8 sec	$88,350*

4 Long range Dual motor - Performance — BEV

100 kWh	580 km	SUV
30 min	3.8 sec	$95,550*

Battery (kWh) | Electric Range* | Body | Charge time (10-80%) | 0-100km/h | Starting Price

SKODA

Elroq 60 Select — BEV

63 kWh	395 km	SUV
24 min	8.0 sec	TBC

Elroq 85 Select — BEV

82 kWh	529 km	SUV
28 min	6.6 sec	$54,990

Elroq 130 Years Edition — BEV

82 kWh	529 km	SUV
28 min	6.6 sec	$64,990

*WLTP, Combined Test Cycle

Battery (kWh) | Electric Range* | Body | Charge time (10-80%) | 0-100km/h | Starting Price

SKODA

Enyaq 60 Select — BEV

63 kWh	410 km	SUV
24 min	8.1 sec	TBC

Enyaq 85 Sportline — BEV

82 kWh	547 km	SUV
28 min	6.7 sec	TBC

Enyaq 85 Sportline — BEV

82 kWh	561 km	Coupe
28 min	6.7 sec	TBC

Kodiaq Select — BEV

25.7 kWh	110 km	SUV
26 min	8.4 sec	TBC

*WLTP, Combined Test Cycle

Battery (kWh) | Electric Range | Body | Charge time (0-100%) | 0-100km/h | Starting Price

TESLA

Model 3 Rear-Wheel Drive — BEV

60 kWh?	520 km (WLTP)	Sedan
	6.1 sec	$54,900 (w GST)

Model 3 Long Range — BEV

79 kWh?	629 km (WLTP)	Sedan
	4.4 sec	$64,900 (w GST)

Model 3 Performance — BEV

79 kWh?	528 km (WLTP)	Sedan
	3.1 sec	$80,900 (w GST)

Battery (kWh) | Electric Range | Body | Charge time (0-100%) | 0-100km/h | Starting Price

TESLA

Model Y Rear-Wheel Drive — BEV

60 kWh?	466 km (WLTP)	SUV		
	5.9 sec	$58,900 (w GST)		

Model Y Long Range — BEV

79 kWh?	551 km (WLTP)	SUV		
	4.8 sec	$68,900		

Battery (kWh) | Electric Range | Body | Charge time (10-80%) | 0-100km/h | Starting Price

Volkswagen

ID. 4 Pro — BEV

82 kWh	544 km	SUV		
24 min	8.1 sec	TBC		

ID. 4 GTX 4MOTION — BEV

82 kWh	511 km	SUV		
22 min	5.4 sec	$69,990		

ID. 5 Pro — BEV

82 kWh	543 km	SUV		
22 min	6.7 sec	$62,990		

ID. 5 GTX 4MOTION — BEV

84 kWh	522 km	SUV		
22 min	5.4 sec	$72,990		

ID. Buzz Pro SWB — BEV

79 kWh		People Mover		
26 min	7.6 sec	$87,990		

ID. Buzz Pro LWB — BEV

86 kWh		People Mover		
26 min	7.9 sec	$91,290		

Battery (kWh) Electric Range Body Charge time (10-80%) 0-100km/h Starting Price

Volkswagen

ID. Buzz GTX — BEV

86 kWh		People Mover
26 min	6.4 sec	$109,990

Battery (kWh) Electric Range Body Charge time (10-80%)* 0-100km/h Starting Price

VOLVO

EX30 Plus Single Extended Range — BEV

69 kWh	462 km	SUV
28 min (153kW DC)	5.3 sec	$59,990

EX30 Ultra Single Extended Range — BEV

69 kWh	462 km	SUV
28 min (153kW DC)	5.3 sec	$66,290

EX30 Ultra Twin Motor Performance — BEV

69 kWh	445 km	SUV
28 min (153kW DC)	3.6 sec	$71,290

EX40 Ultra Single Motor Extended — BEV

82 kWh	520 km	SUV
28 min (153kW DC)	7.3 sec	$76,990

EX40 Ultra Twin Motor — BEV

82 kWh	485 km	SUV
28 min (153kW DC)	4.8 sec	$81,990

EX90 Plus Twin Motor — BEV

111 kWh	570 km	SUV
30 min (153kW DC)	5.9 sec	$124,990

Battery (kWh) | Electric Range | Body | Charge time (10-80%)* | 0-100km/h | Starting Price

VOLVO

EX90 Ultra Twin Motor Performance — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
111 kWh	570 km	SUV	30 min (153kW DC)	4.9 sec	$134,990

XC60 Plus T8 Plug-In Hybrid — PHEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
19 kWh	89 km (Electric range)	SUV	180 min (6.4kW AC)	4.8 sec	$92,990

XC60 Plus T8 Plug-In Hybrid — PHEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
19 kWh	89 km (Electric range)	SUV	180 min (6.4kW AC)	4.8 sec	$101,990

XC90 Plus T8 Plug-In Hybrid — PHEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
19 kWh	77 km (Electric range)	SUV	180 min (6.4kW AC)	5.3 sec	$120,990

XC90 Ultra T8 Plug-In Hybrid — PHEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
19 kWh	77 km (Electric range)	SUV	180 min (6.4kW AC)	5.3 sec	$130,990

ES90 Plus Single Motor — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
92 kWh	554 km	Passenger Car	22 min (300kW DC)	6.6 sec	$88,880

ES90 Ultra Single Motor — BEV

Battery (kWh)	Electric Range	Body	Charge time (10-80%)*	0-100km/h	Starting Price
92 kWh	554 km	Passenger Car	22 min (300kW DC)	6.6 sec	$107,990

For a full list of models available in Australia in mid-2025, please refer to Appendix D.

PICKLES AUCTIONS

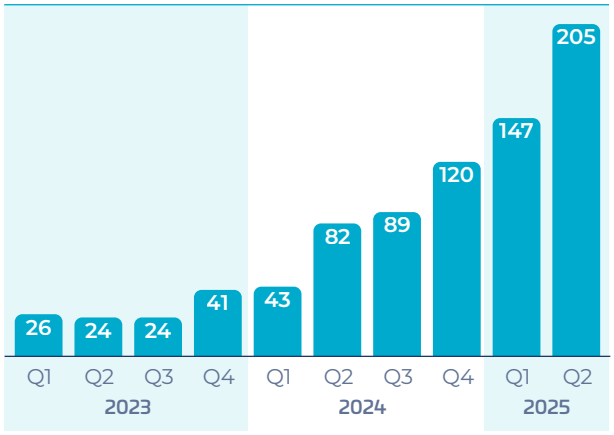
Accelerating EV Adoption Through Confidence in the Used Market

As Australia's electric vehicle (EV) market matures, the second-hand segment is emerging as a key driver of broader adoption. With new EVs still priced beyond reach for many Australians, used models are offering a more affordable – and increasingly trusted – pathway to clean transport.

This shift has been fuelled by turnover from early adopters, including fleet management companies, government departments and corporate fleets. The result is a growing supply of second-hand EVs typically around 2.5 years old, with about 30,000 km on the odometer, and retailing for under $40,000 – a compelling combination of quality, value and sustainability.

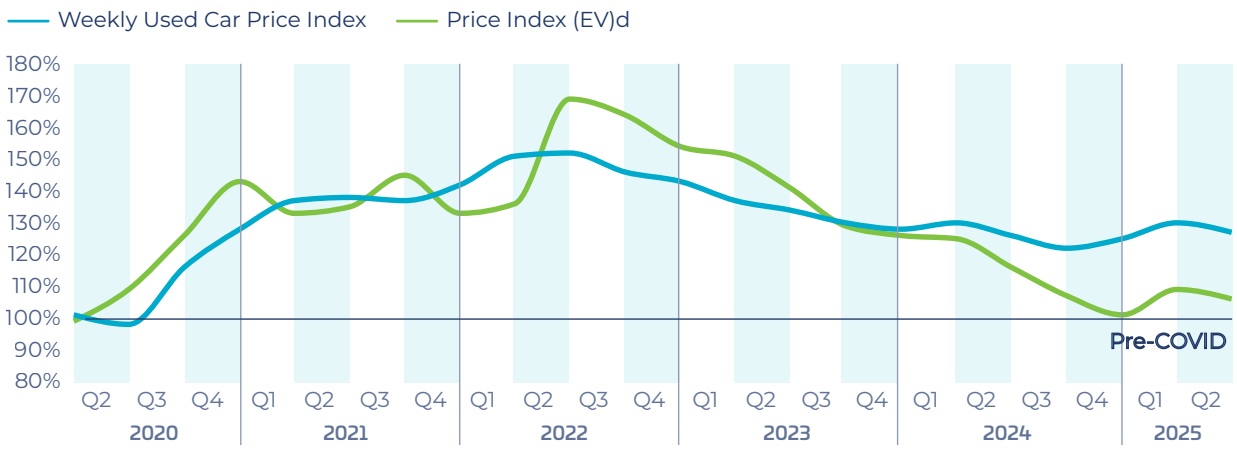
Pickles, Australia's leading marketplace for used cars, trucks, and salvage assets, is playing a central role in enabling this transition. With more than $3.1 billion in annual sales and over 70,000 vehicles sold each year, Pickles recorded a 300% increase in used EV volumes over the past financial year, now selling more than 200 battery electric vehicles (BEVs) each quarter across its 20+ national sites.

EV assets sold



Yet some barriers remain. Historically, only 30% of Pickles' used EVs have been purchased by dealers – well below the 70% average for internal combustion engine (ICE) vehicles. Concerns around historic resale values and battery health have held back broader trade participation.

EV used car price index



Those concerns are now being addressed. Since mid-2024, used EV prices have stabilised, and dealer uptake has risen above 40%. Confidence is also being strengthened by greater access to battery health data.

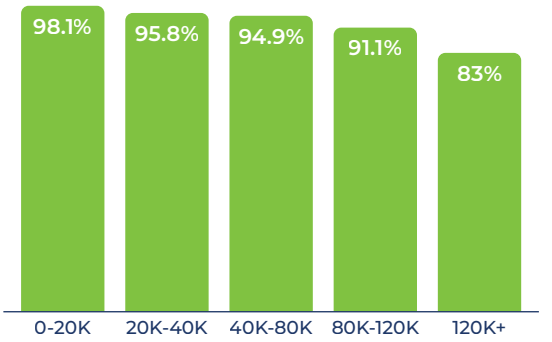
In 2023, Pickles launched its national Battery Health Assurance Program, testing the State of Health (SoH) of more than 850 BEVs. Results to date are promising: the average SoH across all vehicles exceeds 96%, while BEVs older than four years still maintain over 93% health.

To translate those insights into buyer confidence, Pickles became the first Australian auction platform in July 2025 to include Battery SoH Certificates with all used EV listings. These reports provide transparency on OEM and third-party readings, voltage and cell consistency, and estimated driving range – giving both private buyers and dealers the confidence to bid with certainty.

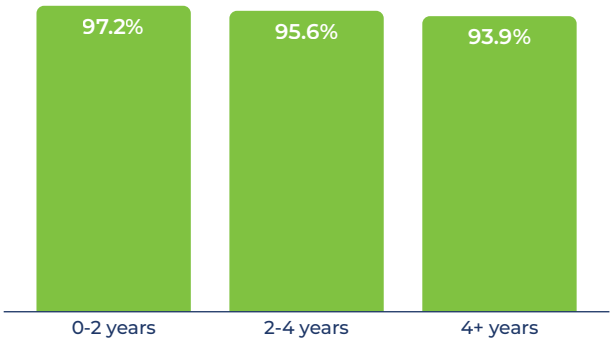
Internationally, similar programs have had a measurable impact. In the UK and Europe, battery certification has led to over 1,000 dealers purchasing a used EV for the first time.

With Australia's used car market turning over 2.5 to 3 million vehicles annually – two to three times the volume of new car sales – enabling confidence in used EVs is key to accelerating adoption at scale.

Avg battery health % by km bracket



Avg battery health % by age



Electric utes and vans

2025 may well go down as the year that electric utes went mainstream. For the first year, electric utes are now available as both BEVs and PHEVs, with the extended range, towing capability and vehicle-to-load charging already acting as significant drawcards for new market segments.

Comparatively, electric vans have gained less attention during 2025 despite a comparatively wider range available. Full battery electric BEVs are the most common with total-cost-of-ownership approaching parity with diesel variants, depending on loads and duty cycles.

In total, there are now 8 electric utes and 13 electric vans (plus variants) available in Australia, including:

Battery (kWh) | Electric Range | Body | Charge time (10-80%) | Starting Price (RRP)

BYD

SHARK 6 Premium — PHEV

29.58 kWh	100 km (NEDC)	Ute
26 min	$57,900	

Battery (kWh) | Electric Range | Body | Charge time (20-80%) | Starting Price (MRLP)

FARIZON

SV SWB Low Roof — BEV

83 kWh	376 km	Van
36 min	$71,490	

SV LWB Low Roof — BEV

83 kWh	355 km	Van
36 min	$73,490	

SV LWB High Roof — BEV

83 kWh	319 km	Van
36 min	$76,490	

Battery (kWh) Electric Range Body Charge time (10-80%)* Starting Price (MRLP)

MERCEDES-BENZ

eVito panel van 112 LWB — BEV

60 kWh | 283 km | Panel Van

35 min | $98,951

eVito Tourer 129 MWB Roof — BEV

90 kWh | 430 km | MPV

45 min | $137,515

EQV 300 MWB — BEV

90 kWh | 430 km | MPV

45 min | $162,797

Volkswagen

D. Buzz Cargo — BEV

79kWh | Van

26 min | $79,990

For a full list of models available in Australia in 2025, please refer to Appendix D.

SHARK ATTACK

When the BYD SHARK 6 launched in late 2024, it was already making a splash, winning 'Car of the Year' awards in both Australia and New Zealand. Few could have predicted, however, just how popular it would prove. In the first half of 2025, the BYD SHARK 6 has already smashed records as one of the most popular vehicles on the roads, in the top 5 of all ute sales, easily the most popular electric ute and it has even come close to being the sales leader out of all EV models, BEVs and PHEVs combined.

> *We always believed the SHARK 6 would hit a sweet spot in the market but the speed and scale of its success have been phenomenal," says BYD's Chief Operating Officer, Stephen Collins. "This is a vehicle built for modern Australians: people juggling careers, families, side hustles, and weekend escapes. They want performance without compromise, and they're telling us loud and clear."*

Looking at the numbers, BYD has good reason to be confident about the success of this model. In the first instance, utes are easily the most popular segment in the Australian car market today. Meanwhile, PHEVs are proving popular with first-time EV buyers. Combining a popular drivetrain with the most popular vehicle category unlocks a thriving new market that has arguably been ripe for the picking.

Digging deeper, however, the first-half success of the SHARK 6 reveals some more intriguing demographics:

- **Not your traditional ute buyer** – SHARK 6 drivers are 196 times more likely to have a side hustle. They're entrepreneurial multi-taskers, full-time professionals who are also building businesses, freelancing, or monetizing hobbies on the side. They're not just looking for transport; they want a mobile extension of their work ethic. That means towing on weekdays, hauling gear on weekends, and squeezing in a delivery or a film shoot in between.
- **60% male, aged 25–44, urban & digitally fluent** – SHARK 6 buyers are typically millennial men in the prime of their careers, many with young families. They're values-driven, ambitious, and active, and they're not just buying another boring ute. They want something that speaks to their identity: rugged enough for outdoor use, innovative and efficient for tight city streets, and progressive enough to reflect their growing climate-conscious choices. These are men who grew up on PlayStation, stream YouTube for how-tos, and discover brands via Google, not your typical dealership billboards.

- **Entertainment is non-negotiable** – BYD SHARK 6 buyers don't just watch sport, they live it. From e-sports to fantasy leagues to Supercars and AFL, they engage across platforms. Their go-to media includes streaming TV, cinema in high-immersion formats that match their always-on, always-scrolling lifestyle. They're also socially plugged in: Facebook, Instagram, and YouTube dominate their media mix, which makes influencer partnerships and snackable video content powerful conversion tools.

Of course, the electric ute market is already heating up with plug-in versions from popular legacy marques and new entrants eyeing the Australian market too. Whether the SHARK 6 will retain its crown depends on these same competition factors disrupting the broader auto industry. For BYD's part, Chief Marketing Officer, Kate Hornstein, is confident:

> *We're not just watching a new vehicle category emerge, we're watching an entire mindset shift. The SHARK 6 isn't winning on novelty; it's winning because it reflects how Australians live and move today. The next phase of growth will come from meeting this audience where they are, tech-focused, values-driven, and unwilling to compromise on utility or identity. And that's exactly where we're heading."*

Telematics to shape greener transport futures

Data-driven efficiencies

By providing visibility over a fleet, managers can find ways to reduce costs and mitigate environmental impacts. Real-time analytics enable immediate adjustments, which can help reduce carbon footprint and meet environmental targets. Detailed data on maintenance, fuel consumption and driver behaviours can help businesses unlock more efficiencies. And by reducing unnecessary idling and optimising routes, telematics can help reduce emissions and operational costs.

Geotab's Sustainability Centre helps fleet managers monitor indicators ranging from fuel usage to emissions, and compares fleet fuel economy with a benchmark of similar fleets in the Geotab ecosystem. It provides the hard data needed to validate green initiatives to stakeholders and regulatory bodies.

Easy electrification

As governments worldwide push for lower emissions, the transition to EVs is accelerating. In practice, EVs are more likely to be integrated into a fleet slowly, with managers transitioning when they retire their oldest and least efficient vehicles. Fleet Management Systems make it simple for managers to figure out which vehicles to replace, providing guidance on which EVs provide the greatest long-term financial benefits and environmental impact by turning complex vehicle data into clear, actionable insights.

Determining which vehicles are best suited for EV replacement is a critical step in fleet electrification. Geotab's Electric Vehicle Suitability Assessment gathers real-world data about a fleet's vehicles and matches usage statistics with manufacturer data in each market to provide clear recommendations for electrification.

The road ahead

Fleet Management Systems stand at the centre of modern fleet operations and Geotab is committed to enabling real and measurable progress towards sustainability, while helping businesses manage their costs.

For more information, visit **geotab.com/au/**

GEOTAB®

Electric trucks

There are now more than 25 distinct models of electric trucks (over 4.5t) currently on offer in the Australian market, although variations in weight, wheelbase and body type increase the range of available options. This is up from around 18 models in 2024, thanks to both the arrival of new brands specialising in e-trucks and a growing electric range from established OEMs.

This expanded choice is most notable at the lighter end of the truck market, with rigid electric trucks accounting for over 80% of available electric models. The range of more heavy-duty rigid trucks and prime mover models has remained stable but more fully electric models are expected to launch in this segment within the next 18 months.

In total, there are now 5 electric prime movers and 22 electric rigid trucks (plus variants) available in Australia, including:

FARIZON

H9E 4.5T Rigid – light — BEV

Tare (t)	GVM (t)	Payload (t)
2.5	4.5	2
Steer Axle (max. t)	**Axle Configuration**	**Battery**
2.4	4x2	100kWh
Electric Range	**Charge time (20-80%)**	
300km	50min	

H9E 8T SWB Cab chassis - med — BEV

Tare (t)	GVM (t)	Payload (t)
3.4	8	4.6
Steer Axle (max. t)	**Axle Configuration**	**Battery**
3	4x2	100kWh
Electric Range	**Charge time (20-80%)**	
232km	50min	

H9E 8T LWB Cab chassis - med — BEV

Tare (t)	GVM (t)	Payload (t)
3.9	8	4.1
Steer Axle (max. t)	**Axle Configuration**	**Battery**
3	4x2	162kWh
Electric Range	**Charge time (20-80%)**	
352km	60min	

FUSO

eCanter 515 Rigid - light — BEV

Tare (t)	GVM (t)	GCM (t)
2.7	4.5	4.5 (1.5T towing with lower GVM)
Payload (t)	**Steer Axle (max. t)**	**Axle Configuration**
1.8	2.6	4x2
Battery	**Range (loaded)**	**DC Charge (h)**
41.3 kWh	<100km	0.6

eCanter 615 Rigid - med — BEV

Tare (t)	GVM (t)	GCM (t)
3.2	6	6 (1.5T towing with lower GVM)
Payload (t)	**Steer Axle (max. t)**	**Axle Configuration**
2.8	2.6	4x2
Battery	**Range (loaded)**	**DC Charge (h)**
83 kWh	<150km	0.73

eCanter 818 Rigid - med — BEV

Tare (t)	GVM (t)	GCM (t)
3.3	7.5	7.5 (1.5T towing with lower GVM)
Payload (t)	**Steer Axle (max. t)**	**Axle Configuration**
4.3	3.1	4x2
Battery	**Range (loaded)**	**DC Charge (h)**
83 kWh	<150km	0.73

FUSO

eCanter 918 Rigid - med — BEV

Tare (t)	GVM (t)	GCM (t)
3.5	8.5	8.5 (1.5T towing with lower GVM)
Payload (t)	**Steer Axle (max. t)**	**Axle Configuration**
5	3.4	4x2
Battery	**Range (loaded)**	**DC Charge (h)**
83 kWh	<150km	0.73

eCanter 918 Long Range Rigid - med — BEV

Tare (t)	GVM (t)	GCM (t)
4	8.5	8.5 (1.5T towing with lower GVM)
Payload (t)	**Steer Axle (max. t)**	**Axle Configuration**
4.5	3.4	4x2
Battery	**Range (loaded)**	**DC Charge (h)**
124 kWh	<240km	1.3

MERCEDES

eActros 300 Rigid – heavy — BEV

Tare (t)	GVM (t)	GCM (t)
8.2	19	19
Payload (t)	**Steer Axle (max. t)**	**Axle Configuration**
10.8	8	4x2
Battery	**Range (loaded)**	**DC Charge (h)**
336kWh	<300km	1.25

eActros 300 Rigid - heavy — BEV

Tare (t)	GVM (t)	GCM (t)
9.6	27	27
Payload (t)	**Steer Axle (max. t)**	**Axle Configuration**
17.4	7.1	6x2
Battery	**Range (loaded)**	**DC Charge (h)**
336 kWh	<300km	1.25

eActros 300 Prime Mover — BEV

Tare (t)	GVM (t)	GCM (t)
8.4	19	40
Payload (t)	**Steer Axle (max. t)**	**Axle Configuration**
10.6	8	4x2
Battery	**Range (loaded)**	**DC Charge (h)**
336 kWh	<220km	1.25

eEconic Rigid - heavy — BEV

Tare (t)	GVM (t)	GCM (t)
9.2	27	27
Payload (t)	**Steer Axle (max. t)**	**Axle Configuration**
17.8	8	6x2
Battery	**Range (loaded)**	**DC Charge (h)**
336 kWh	<150km	1.25

VOLVO

FL Electric 4x2 Rigid — BEV

Base Spec Tare (t)	Wheelbase (mm)	GVM (t)
6.5	3800-6500	18.6
GCM (t)	**Steer Axle (max. t)**	**Battery**
18.6	7.1	280-375 kWh
Range (loaded)	**DC Charge (h)**	
<450km	2.3	

FE Electric 4x2 Rigid — BEV

Base Spec Tare (t)	Wheelbase (mm)	GVM (t)
7.7	4300-6100	19
GCM (t)	**Steer Axle (max. t)**	**Battery**
19	8	280-375 kWh
Range (loaded)	**DC Charge (h)**	
<275km	2.3	

FE Electric 6x2 Rigid — BEV

Base Spec Tare (t)	Wheelbase (mm)	GVM (t)
9	4300-6100	26
GCM (t)	**Steer Axle (max. t)**	**Battery**
26	8	280-375 kWh
Range (loaded)	**DC Charge (h)**	
<275km	2.3	

FM Electric 6x4 Rigid — BEV

Base Spec Tare (t)	Wheelbase (mm)	GVM (t)
10	4300-5600	31.5
GCM (t)	**Steer Axle (max. t)**	**Battery**
50	8.5	360-540 kWh
Range (loaded)	**DC Charge (h)**	
<300km	2.5	

FMX Electric 6x4 Rigid — BEV

Base Spec Tare (t)	Wheelbase (mm)	GVM (t)
10	4300-5600	31.5
GCM (t)	**Steer Axle (max. t)**	**Battery**
50	8.5	360-540 kWh
Range (loaded)	**DC Charge (h)**	
<300km	2.5	

FM Electric 6x4 Prime Mover — BEV

Base Spec Tare (t)	Wheelbase (mm)	GVM (t)
12.1	3900	29
GCM (t)	**Steer Axle (max. t)**	**Battery**
50	8.5	450-540 kWh
Range (loaded)	**DC Charge (h)**	
<300km	2.5	

FMX Electric 6x4 Prime Mover — BEV

Base Spec Tare (t)	Wheelbase (mm)	GVM (t)
12.1	3900	29
GCM (t)	**Steer Axle (max. t)**	**Battery**
50	8.5	450-540 kWh
Range (loaded)	**DC Charge (h)**	
<300km	2.5	

FH Electric 6x4 Prime Mover — BEV

Base Spec Tare (t)	Wheelbase (mm)	GVM (t)
12	3900	29
GCM (t)	**Steer Axle (max. t)**	**Battery**
50	8.5	450-540 kWh
Range (loaded)	**DC Charge (h)**	
<300km	2.5	

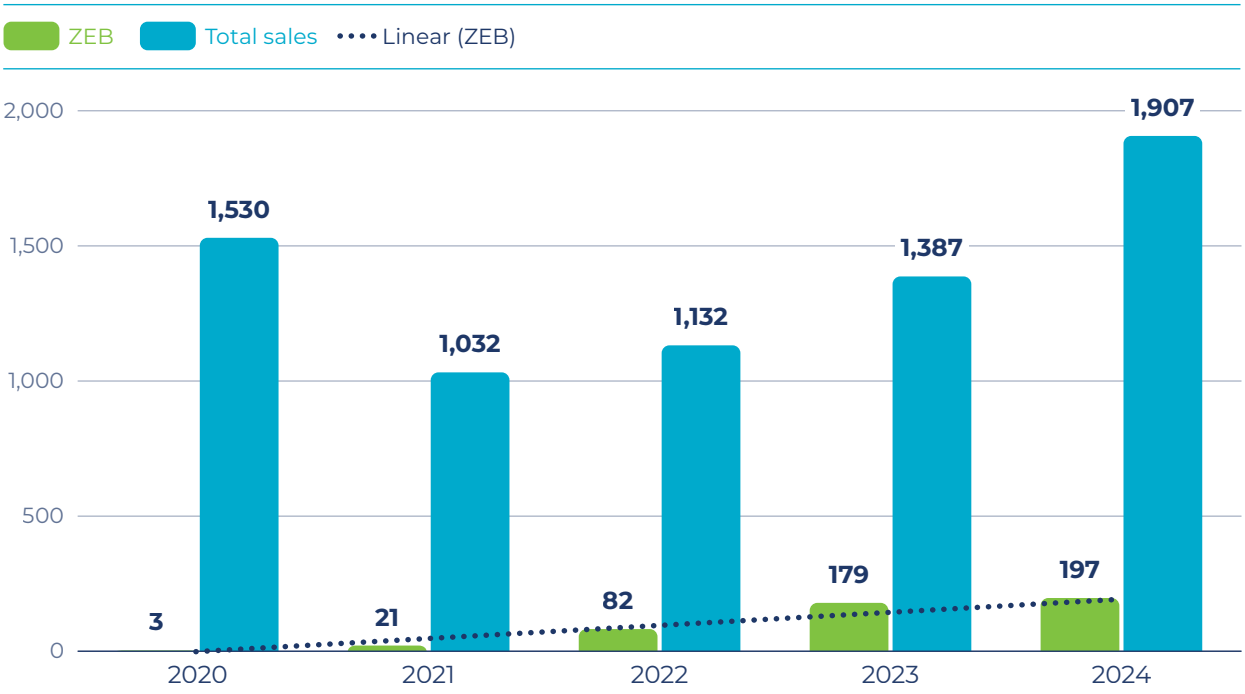
For a full list of models available in Australia in 2025, please refer to Appendix D.

Electric buses

There are around 30 different electric bus models available on the Australian market, as of mid-year 2025. Although private charter and coach operators are active parts of the market, the Australian bus sector remains dominated by large government fleets and public transport operators. Approximately 60% of finished bus models are targeted at urban transit use cases.

Sales of zero emission buses (mostly EVs) reached 10.3% in 2024, a massive increase from the 0.2% market share seen in 2020. 2025 will mark a decisive shift in e-bus adoption for public transit fleets. State and territory net zero commitments are starting to step up with the Victorian, Queensland and WA governments all committed to procuring exclusively zero emission buses from this year.

Bus deliveries



Graph supplied by the Bus Industry Confederation
*Refers to zero emission buses. May include limited numbers of hydrogen fuel cell buses

As part of their net zero commitments, many governments are including local content requirements in their procurement contracts, generating onshore manufacturing activity in electric buses. This continues to be a bright spot in broader EV supply chain policy and a possible template for other vehicle segments.

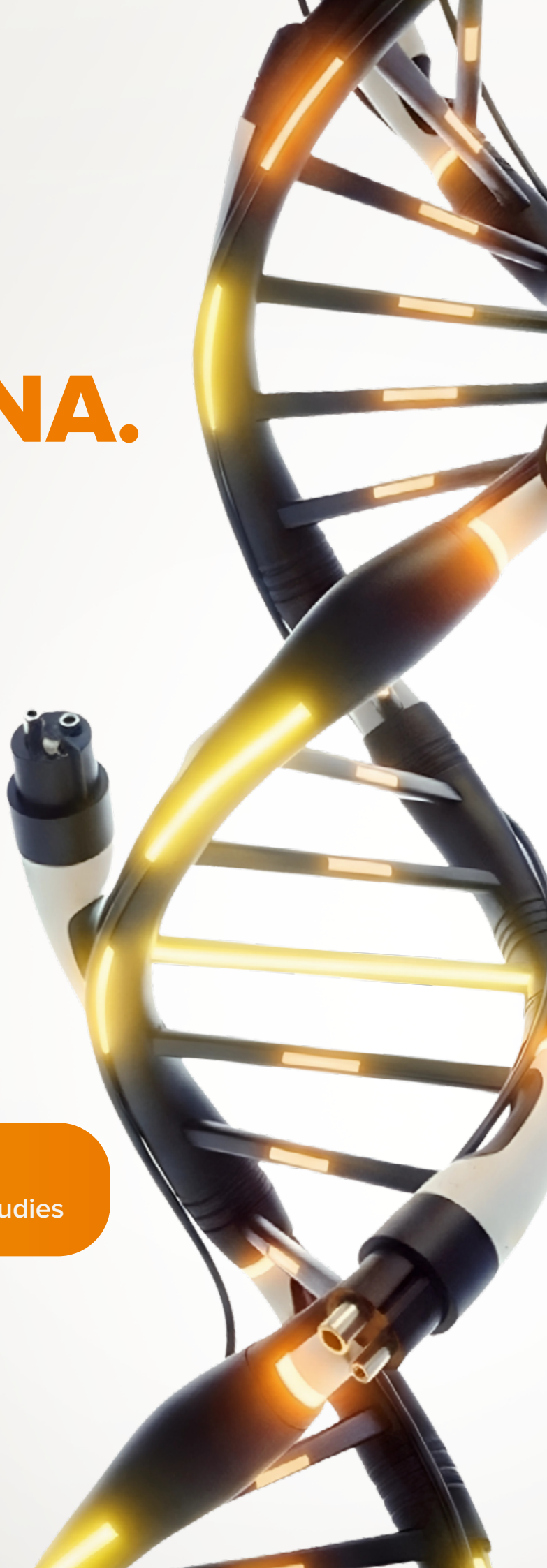
For a full list of electric bus models available in Australia in 2025, please refer to Appendix D.

JETCHARGE

Innovation is in our DNA.

From first design to every charge in service, innovation runs through everything we build. It's the strand that connects every project, every site, every step of Australia's electric vehicle transition.

See the stories behind Australia's EV transition at jetcharge.com.au/case-studies



3.3 Charging Infrastructure

Charging terminology explainer

When comparing figures from past years and different sources, the terminology matters. We want to make sure that we use consistent terminology when describing EV charging solutions. In past State of EVs, the EVC has reported on the number of locations and the number of chargers; DC, fast (24-99kW) and DC ultra-fast (100kW+). AC charging presents differently and is an area we hope to report on again imminently.

The EVC has consulted with the federal Department of Climate Change, Energy, the Environment and Water (DCCEEW) and agreed to use an industry-led, standards-based terminology (IEC,ISO,AS/NZS3000). Standards Australia has published AS/NZS 5396:2024 *Electric vehicle (EV) chargers for residential use* and AS/NZS 5397 *Electric vehicle (EV) chargers for commercial applications* technical specifications. It is a non-mandatory standard, behind a pay wall and did not go through a public consultation process, therefore its terminology has not been considered here. There are international standards published by the International Electrotechnical Commission (IEC) and International Organisation for Standardisation (ISO) that align on terminology and Australian standards should align with this. AS/NZS3000:2018 The wiring rules aligns with these.

However, it is also important to align terminology for a broad public audience to build community understanding of chargers and charging. The EVC will therefore align with the following terminology moving forward:

- **"Location"** meaning the number of locations where public EV supply equipment or EVSEs can be found. This is sometimes called a "site".
- **Charger** or **"EVSE"** (electric vehicle supply equipment) meaning the physical piece of equipment providing dedicated functions to supply EVs. An EVSE may have one or multiple vehicle connectors (IEC 62196:2022). EVSE are colloquially known as "chargers" but these have not been included as a separate data point in this *State of EVs*.
- **Plug** or a **"vehicle connector"** is the part inserted into the vehicle inlet (there are different kinds of vehicle connectors). NB. not all Mode 3 EVSE have a vehicle connector. In cases where the vehicle connector is BYO, the adaptor on the EVSE is instead called a socket outlet, but this report will still count them as a vehicle connector. (IEC 62196:2022). Vehicle connectors are typically referred to as "plugs".

- A **bay** can be a parking space but may not be dedicated to EVs and may have different connectors. There may be fewer bays than there are connectors.

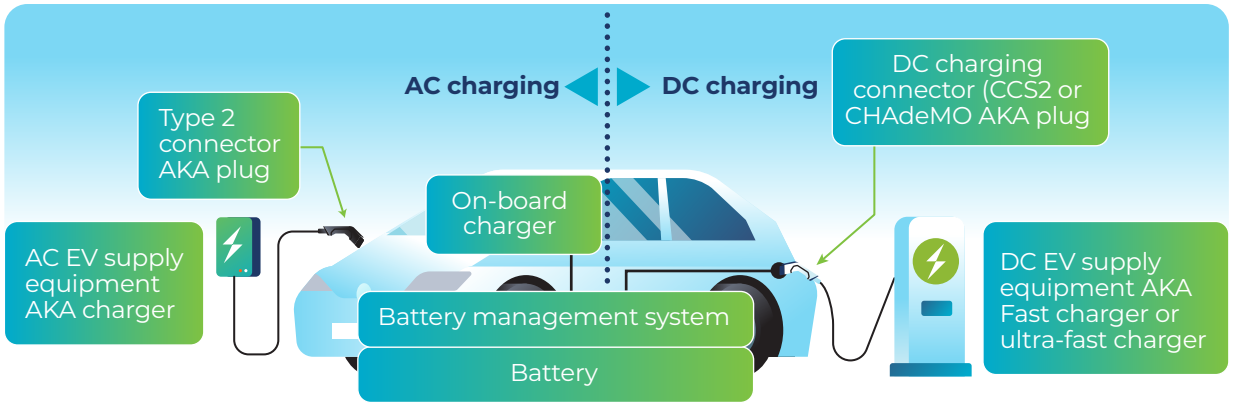
Charging terminology

Clarifying data from the International Energy Agency (IEA)

The IEA typically reports the number of plugs, or as they refer to them, "charging points". Due to a terminology misunderstanding, the IEA Global EV Outlook 2025 published an incorrect number of plugs in Australia by using the number of DC sites, instead of the number of DC charger plugs, which has since been corrected. There may be more work to do to ensure the number of ac plugs or 'charging points' in the total figure is also correct. It is possible that to the number of AC points has been similarly underestimated – a statistic the EVC is working hard behind the scenes to review and resolve.

The EVC will continue to work with these important global bodies to ensure accurate data reporting, as these feed into important policy decision making.

Electric Vehicle Supply Equipment



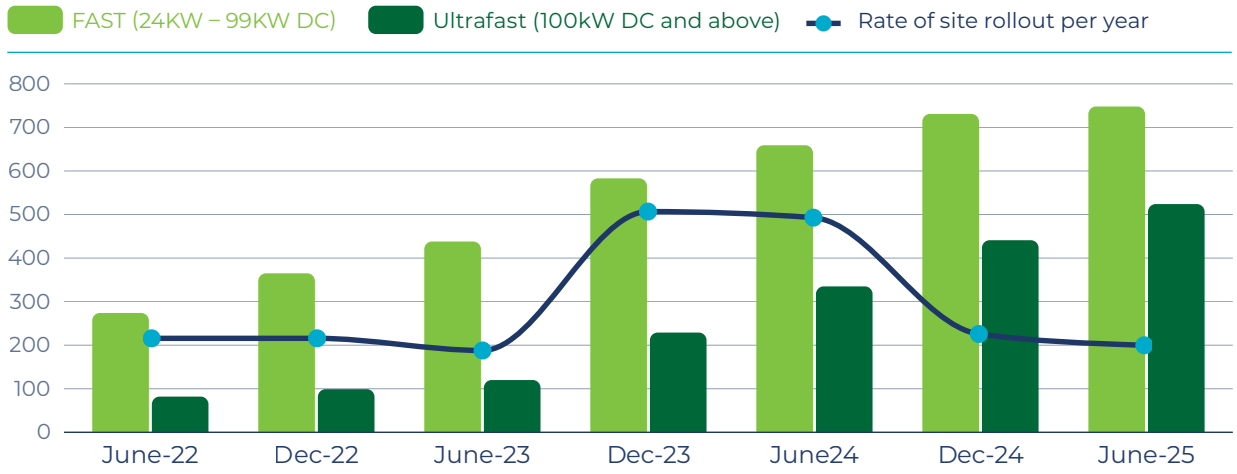
For the purposes of this State of EVs, we will report number of locations, number of DC fast EVSE (24-99kW) and number of DC ultra-fast EVSE (100kW+).

Public charging equipment in Australia continues to expand. As of mid-2025, the number of high-power public charging locations was around 1272. When looking comparatively at high-power plugs from 2024 to 2025, the number went from 3,436 to 4,192. This amounts to a 22% increase compared to the same time last year. Note that Plugs does not necessarily relate to

the number of charging bays in place, as some chargers may have multiple charging bays per plug and some will have no dedicated charging bays.

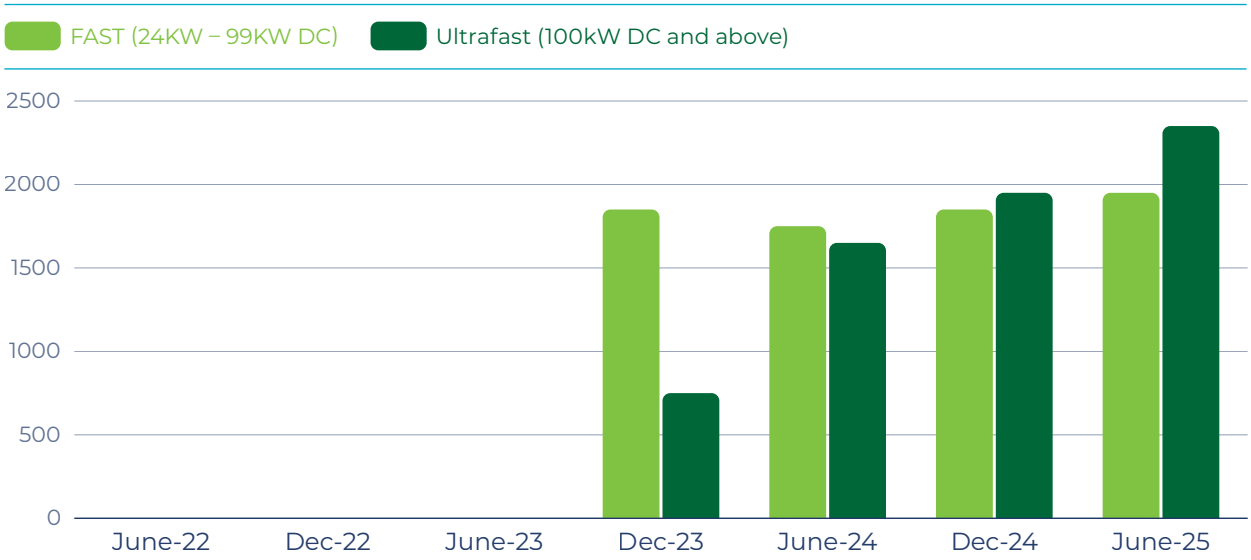
The graphs show that the rate of new charging locations peaked in the first quarter of 2024 before easing to reflect a more stable level of market activity. However, this does not indicate a slowdown in infrastructure investment. Rather, the market is shifting toward location densification, with more chargers, connectors, and bays being installed per site. Previously, the focus was on expanding coverage and filling network gaps. More recently, operators have been developing larger sites and prioritising the rollout of ultra-fast charging to support growing EV adoption. As the average number of connectors and bays per location continues to rise, tracking connectors over time will provide a more accurate measure of market capacity and will be the preferred indicator going forward.

Fast and ultra-fast public charging locations over time



Note that the data included above is drawn from a range of sources to inform this report. The Electric Vehicle Council has made reasonable efforts to ensure accuracy, but we have not independently verified every location.

Fast and ultra-fast public charging connectors over time



Note that the data included above is drawn from a range of sources to inform this report. The Electric Vehicle Council has made reasonable efforts to ensure accuracy, but we have not independently verified every location.

Home and other (non-public) charging

Australia EV owners mostly charge at home, consistent with global industry trends. However, as the market expands and more types of motorists seek to take on an EV, the need for broader types of charging is expanding. Some examples of private charging include stations in private car parks such as in office space or other commercial venues, in apartment building or in a strata title premises where a renter might seek permission to charge their EV on a temporary basis.

If one things is for sure, the broadening of charging technologies, offerings, use cases, and locations is evolving – and its great to see more choice for end users!

Public charging

As with private charging, public charging is also evolving. The market now includes solutions along highway corridors, in shopping malls, on kerbsides and more. While the focus of our reporting recently and in this document has been on fast charging sites, there are a substantial amount of non-fast charge sites (AC) which comprise most of the offerings. We have presented a summary of the market data we have been able to access most readily, but acknowledge there is a bigger picture (and likely more installs) that haven't been accounted for to date.

Data access

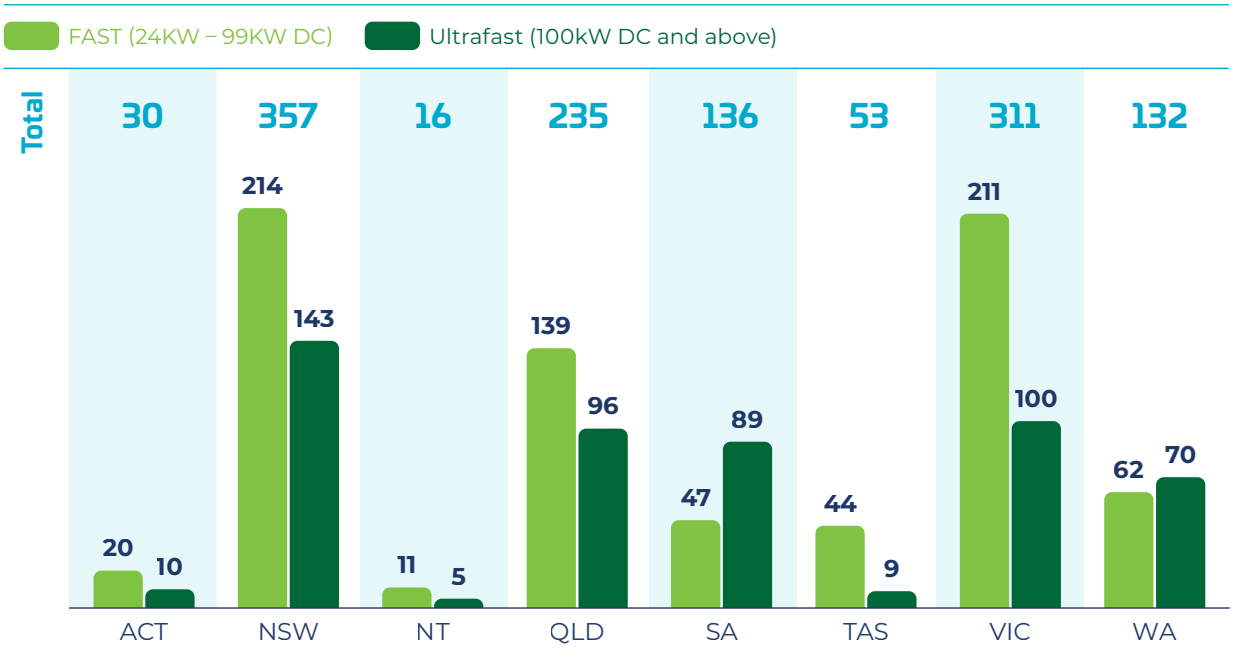
From where we sit today, data integrity on EVSE installations is challenging. No single source of truth represents a view of all public EV charging infrastructure, making it difficult to fully represent market growth without clear, consistent and trustworthy data on fast, ultra fast, and other forms of public charging.

As of this year, the EVC has been working with industry to collate and prepare data across all local charge point operators with a view to providing consolidated reporting. Our aspiration is to report a market snapshot that includes AC charging and build from there on reporting market growth. The EVC continues to call on industry to work with us to support these objectives.

High power public charging locations by region and power level as of mid-2025

Plans for the continued rollout of high-power public charging continue to be announced. Hundreds of locations have already been deployed, and hundreds more are planned for deployment in the coming years to fill the gaps.

Below we have included a breakdown of the number of fast and ultra-fast charging sites across Australia.



Note that the data included above is drawn from a range of sources to inform this report. The Electric Vehicle Council has made reasonable efforts to ensure accuracy, but we have not independently verified every location.

In particular, we would like to especially acknowledge peer review of data analyses components of the EV charging sections by Ross De Rango (Vehicle Charging Solutions), Dr Andrew Simpson (Verdant Vision), Ben Haddock (Arup) and Sophie Lennard (Arup).

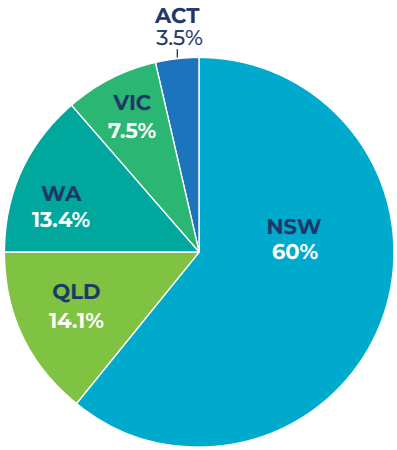
CHARGE @LARGE

EVC's CHARGING APP

In March 2025 the Electric Vehicle Council launched Charge@Large. Charge@Large is Australia's first charge-point data aggregation tool that provides real-time visibility of public charging infrastructure. Unlike global platforms like PlugShare, which rely on crowd-sourced and often outdated information, Charge@Large integrates live data from multiple charge point operators (CPOs), offering accurate, dynamic updates on charger availability across brands.

Through its user-friendly app, Charge@Large lets drivers find any registered public charging station in real time, eliminating the need to check multiple platforms. Behind the scenes, a reporting dashboard gives policymakers and planners powerful insights into network performance, helping identify hot spots, black spots, and areas needing investment. This supports smarter, more equitable infrastructure planning at a time when lack of charging visibility remains a key barrier to EV uptake.

Charge@Large was designed with support from the forward-thinking NSW and WA governments, designed to provide a visualisation portal showing live availability status of public EV charging equipment and provides uptime and utilisation reporting to relevant government departments.



Proportion of Chargers on Charge@ Large shared by State

CURRENT STATUS

Charge@Large currently has over 4,000 downloads and represents more than 2,100 EVSE units across 9 CPO networks. Currently, 60% of the 2,100 chargers represented on Charge@Large reside in New South Wales, however the national coverage of chargers on the platform is growing rapidly as more EVSE installations are rolled out and more CPO networks are onboarded. The Electric Vehicle Council also facilitates the reporting of utilisation and uptime of co-funded EVSE under relevant government grant programs as well as aggregated measures of the broader EVSE network to government departments.

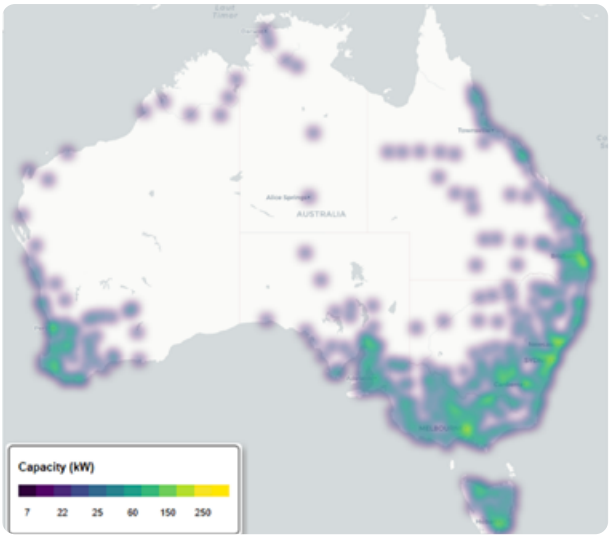
The Electric Vehicle Council works with charging operators to collate data on EVSE and build a comprehensive picture of publicly available DC and AC chargers in Australia, sourced directly from operators or via the Charge@Large platform. A complete view of charging infrastructure is essential for effective policy, equitable access, and coordinated investment. Accurate data enables governments, grid planners, and industry to identify gaps, track progress, and build consumer confidence in the public charging network.

On the platform

Up Next

Illustrating the true potential of this platform, the below graphic presents an updated data representation of whole EVSE network capacity and operational metrics. Based on the data compiled to date, charging capacity (kW) is shown as a heatmap to illustrate distribution across the country, noting that not all sites have been represented. This visualisation highlights overall patterns of capacity, providing a tool to observe areas of concentration, lower coverage, and relative scale.

EVSE Charging across Australia



Reproduced with permission from contributing charge point operators

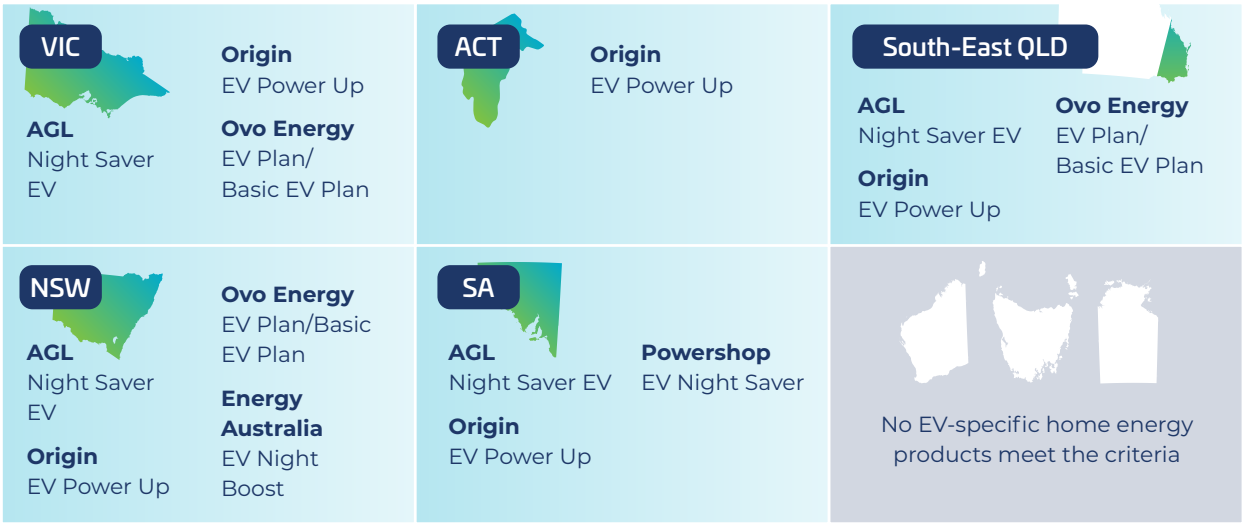
The EVC aims to collate a comprehensive dataset on EVSE, both DC and AC chargers, through continued engagement with charge point operators and advocacy on greater data transparency. Charge@Large will evolve to complement existing efforts to map ideal locations for infrastructure with real world use-case data to better inform government decision-making on future investments in EV charging infrastructure. The EVC also consults with numerous industry experts and seeks peer review on all analytical works. In particular we wish to acknowledge the peer review contributions of this analysis by Ross De Rango (Vehicle Charging Solutions), Dr Andrew Simpson (Verdant Vision), Ben Haddock (Arup) and Sophie Lennard (Arup).

Home Charging Plans

EV owners can substantially reduce their running costs by accessing electricity tariffs designed specifically for home charging. To support consumers in identifying the most cost-effective options, the EVC maintains the Home EV Plans tool, which compares eligible offers from energy retailers across Australia. The tool highlights plans that provide overnight charging rates of less than 10 c/kWh—equivalent to roughly $1.50–$2.00 per 100 km, and where peak-period rates remain within 30% of an average standard flat-rate offer. These thresholds ensure that featured plans deliver meaningful savings for EV charging without disproportionately penalising other household electricity use.

While EV-specific energy products are becoming more common in some jurisdictions, their availability remains uneven. In 2025, energy plans meeting the EVC's criteria are available in several eastern states, with examples including tariffs that pair low off-peak charging rates with time-of-use structures. However, some regions currently have no EV-specific home energy products meeting the eligibility thresholds and criteria described above. This disparity underscores the importance of continued engagement with retailers and policymakers to encourage the expansion of competitive EV-charging tariffs nationwide.

The eligible home EV plans are shown below as visual comparisons of eligible plans across states and territories. In 2025 compared to 2024, New South Wales remains the most competitive market, with a range of offers from AGL, Origin, Ovo Energy, Powershop, and Energy Australia meeting the EVC's criteria. The ACT continues to feature Origin's EV Power Up plan, while Victoria, South-East Queensland, and South Australia offer a smaller set of options, including AGL and Origin's EV plans featured in these states. In contrast, regional Queensland, Western Australia, Tasmania, and the Northern Territory continue to have no EV-specific home energy products that meet the criteria. By making this information accessible and comparable, the EVC aims to empower EV owners to make informed decisions, save money, foster competition among retailers, and ultimately accelerate the transition to electric transport.



Please note that in the image above, the names of the retailers and their products are listed together. For example, AGL is the retailer, and just below it, its home EV plan (i.e., Night Saver EV). It is noteworthy to state that evEnergy Saver plan by ActewAGL in the ACT also provides a plan for overnight charging but at a charging rate greater than 10 c/kWh (i.e., 12 c/kWh) along with a free weekend charging window (i.e. between noon and 2 pm on Saturdays and Sundays). As the plan currently is not meeting the criterion of overnight charging being less than or equal to 10 c/kWh; it is not listed.

Vehicle-to-X (including V2G)

Vehicle-to-X: Powering Your Home and Putting Your Car to Work

Vehicle-to-X describes using your EV's battery to provide power from the car to something else (noted by 'X' which can include the grid (V2G), home (V2H) or load (V2L) such as an electric tea kettle when you're camping.

Electric vehicles are no longer just about getting from A to B. With new technology called **vehicle-to-grid (V2G)** and **vehicle-to-home (V2H)**, your car can now double as a powerful battery. That means your EV can do more than drive. With V2H, your car can power your home, keeping the lights on during a blackout, cutting energy bills by using stored electricity at peak times, and maximising the value of your solar system by storing energy during the day and using it later. With V2G, your car can send power back to the electricity grid when demand is high, earning rewards while also helping to lower electricity costs across the community.

Benefits for EV owners

The most immediate benefit is saving money on household energy bills. By charging your EV when electricity is cheap (such as overnight or from your solar panels) you can then use that stored power in your home during expensive peak periods. On top of that, V2G allows you to sell excess energy back to the grid, creating a new income stream from a vehicle that would otherwise just be sitting in the driveway.

Another major advantage is peace of mind. Your car battery can provide backup power during blackouts, keeping essential appliances and devices running when the grid goes down. And perhaps most importantly, V2G and V2H make your car a true energy asset, not just a means of transport. Every time your vehicle's battery is used in this way, it helps reduce reliance on fossil fuels and strengthens Australia's transition to clean, renewable energy.

Where things are at in Australia

Some EVs currently sold in Australia are already "bidirectional capable," meaning they have the hardware required to send energy back into a home or the grid. However, the Ford F-150 Lightning (sold locally by AUSEV) is so far the only vehicle for sale openly advertising V2G capability in the Australian market. The EVC has been in touch with several EV manufacturers, who said it's still unclear how big the sales opportunity from supporting V2G is, because the technology has not been rolled out at scale anywhere in the world. A handful of brands have recently announced trials with retail electricity partners to further test the market viability of V2G offerings. Origin Energy has packaged its subscription offering with a V2G enabled bidirectional inverter in partnership with BYD. AGL is offering discounted bi-directional EV chargers and the installation for the first 50 eligible trial participants of the V2G program partnered with BYD, Hyundai, Kia, and Zeekr. And Amber Electric's $3.2M ARENA funded program has pioneered real world V2G programs across Australia since June of 2024.

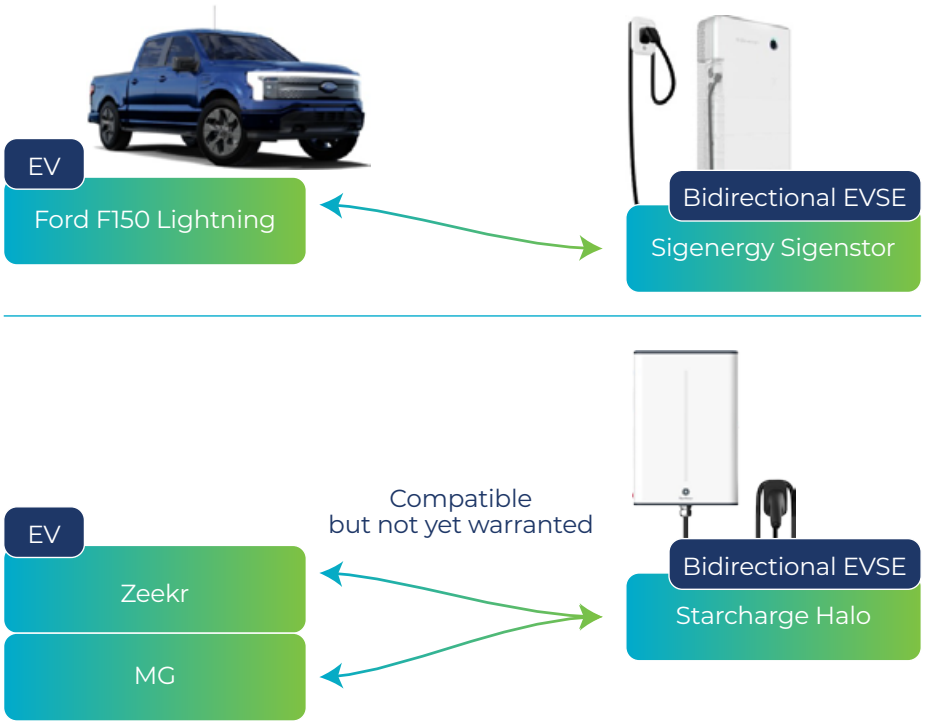
Energy Retailers Trialling V2G

OEMs Getting Early Runs

Credit: Danny Thai, zecar.com

These developments provide a clear sense that V2g is coming, and soon. The rollout of bidirectional chargers—specialised devices that enable V2G and V2H—is also gathering pace. Chargers from companies like Starcharge and V2Grid Australia are already progressing through the approval process, and Sigenergy's SigenStor has been officially accredited by the Clean Energy Council. Queensland-based company RedEarth plans to launch Ambibox's V2G charger in 2025, with both single-phase and three-phase models available. Prices for these chargers are expected to fall to around $5,000–6,000, with other entrants such as T-Power and Wallbox preparing to introduce new models as well. Major electricity networks such as Ausgrid have begun approving bidirectional chargers, which means EV owners are able to connect their cars directly to the grid for V2G operations.

Current compatible EVs and bidirectional EVSE



Ambibox DC V2G charger[5]

5 https://www.ambibox.de/en/ambicharge/11-kw-dc-wallbox

What's next

For now, V2G is expected to be most common in homes and workplaces, where drivers can use their cars to store solar energy during the day and power their home or export it back to the grid during evening peak times. As the technology matures, it may expand into public charging stations, giving EV owners even more flexibility in how they use their vehicle's battery. Australia is slightly ahead of many other countries in setting up standards for this technology, particularly for DC V2G.

While Australia is a relatively small market, this regulatory progress makes it an attractive test bed for global companies, which could help accelerate the availability of V2G and V2H solutions here. The EVC anticipates a typical residential V2G use case to be exporting stored solar during the evening peak period and receiving a feed-in tariff. The EVC supports 2-way Time-of-use (ToU) tariffs that reward drivers for feeding back into the grid at peak times. Drivers also have the option to join a virtual power plant or join a retailer that accesses the electricity spot-market to increase their revenue.

Bottom line: With V2G and V2H, your EV can lower your bills, earn you money, and keep your home running in an outage – all while helping Australia shift to cleaner energy.

Your **road to electric** starts with exclusive deals.

CommBank's EV Access Program helps Aussies earning less than $100,000 p.a. or eligible essential workers such as nurses, teachers and firefighters, afford an eligible electric or plug-in hybrid vehicle with a discounted rate.*

Learn more at **commbank.com.au/evap** and start your electric or hybrid vehicle search today.

Can

*Applications subject to credit approval. T&Cs, eligibility and lending criteria apply. For more information visit commbank.com.au/evap
Commonwealth Bank of Australia ABN 48 123 123 124 AFSL and Australian credit licence 234945.

4 Assessment of EV Transition

Each year the EVC reports on developments in the Australian EV market and assesses each jurisdiction's performance in accelerating the EV transition.

To compare how each government is tracking against different EV-related issues, here we provide a breakdown of how we rate their performance on a scale of 0 - 100% across 37 metrics. Each of these metrics are then weighted to provide subcategory scores out of 10, and in turn, an overall summary score out of 10.

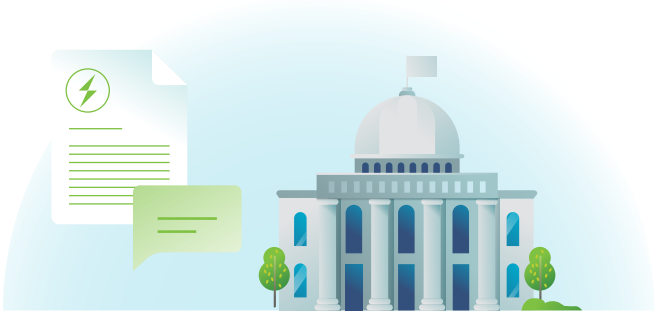
This year's assessment follows a more streamlined structure, focusing on each government's overarching ambition for EVs as part of the growing clean energy revolution, before evaluating policies for discrete vehicle segments. As per the 2024 report, charging infrastructure is assessed as a standalone category. Some previous metrics (e.g. on micromobility, Distribution Network Service Providers, industry development, critical minerals etc.) have either been recategorised under other headings or scoped out of the assessment entirely.

The 2025 assessment covers public announcements communicated in the following policy areas in FY25. Any announcements made in FY26 will be considered in *State of EVs 2026*.

- Government Ambition
- Passenger Vehicles
- Freight Vehicles
- Buses
- Energy Infrastructure

	FED	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Government Ambition	9/10	9/10	8/10	6/10	5/10	6/10	7/10	8/10	7/10
Passenger Vehicles	6/10	6/10	6/10	4/10	3/10	3/10	2/10	3/10	3/10
Freight Vehicles	5/10	3/10	4/10	1/10	1/10	1/10	1/10	5/10	1/10
Buses	5/10	7/10	8/10	1/10	8/10	6/10	2/10	7/10	8/10
Energy Infrastructure	6/10	5/10	5/10	2/10	2/10	4/10	2/10	3/10	4/10
Overall	8/10	6/10	6/10	3/10	3/10	4/10	3/10	5/10	4/10

4.1 Government Ambition



Scoring for 'general ambition' is based on measurable targets for EV adoption (e.g. sales targets, fleet transition goals), emissions reduction plans specific to the transport sector and clear policy commitments by each government. A high level of ambition is demonstrated through strong commitments to increase EV uptake across all vehicle segments, backed by comprehensive strategies that include financial incentives, regulatory support and infrastructure investment.

EV Strategy

While, most Australian governments have some kind of strategy guiding their EV policies, the clarity and ambition of these overarching plans differs markedly. Best practice is to provide a clear roadmap for accelerating consumer adoption with realistic pathways for implementation. EV strategies should ideally set clear targets that align with national and international climate goals, ensuring long-term consistency in policy direction. The Federal Government's acceptance of the Climate Change Authority's 62-70% emissions cut by 2035 implies a 20x increase in EV uptake and 5 million EVs on the road by 2035. EV strategies need targets in order to provide direction to consumers and certainty for industry.

EV strategies must also look beyond passenger vehicles. EV policies for road freight and heavier vehicle segments continues to be a major gap across most Australian jurisdictions.

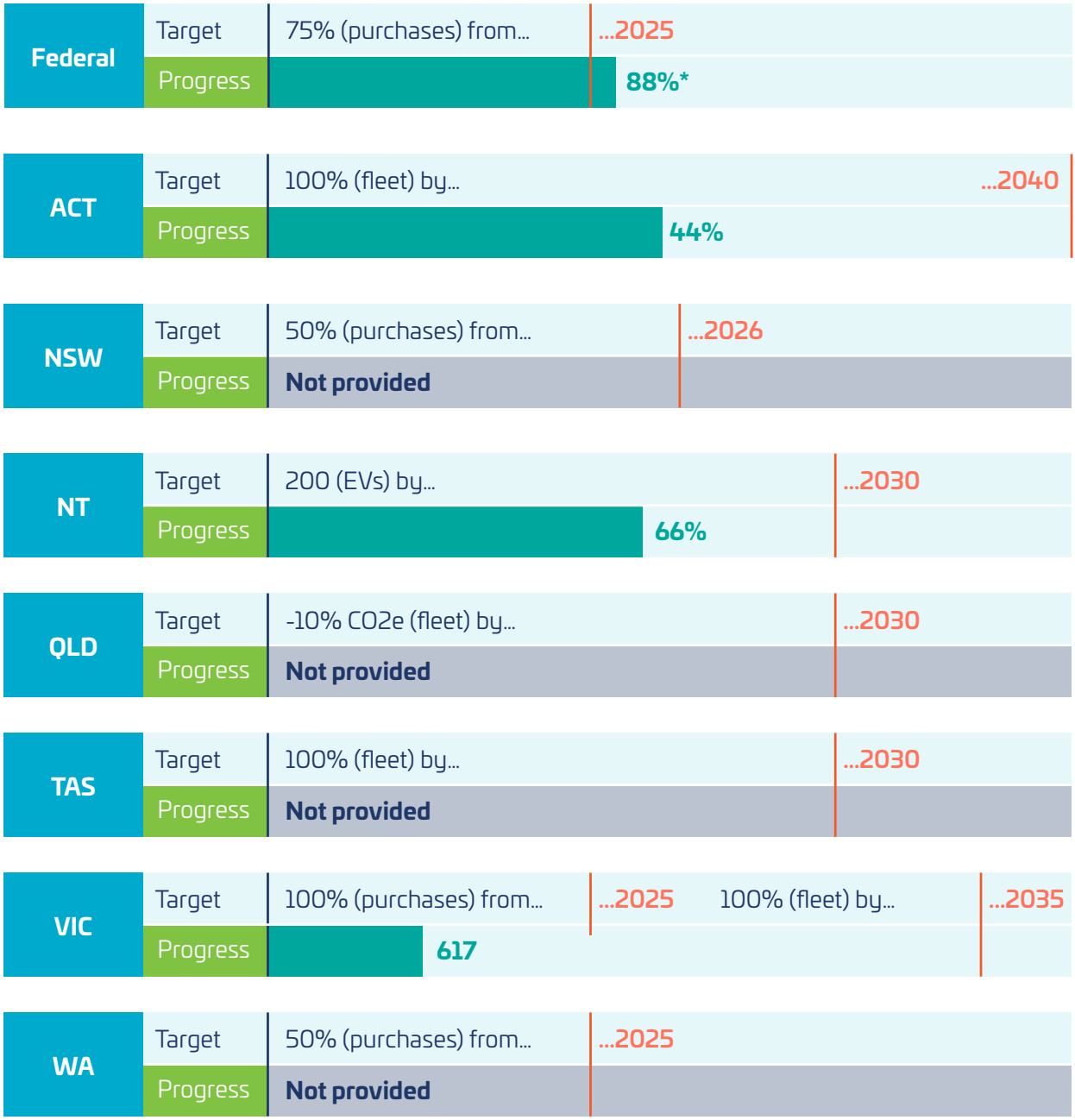
Key evaluation questions:

- Does the government have an overarching EV strategy? How ambitious is it?
- Is the strategy fit-for-purpose? Does it offer a genuine plan for accelerating EV uptake?
- What targets and goals are part of the strategy?
- How does the government's strategy treat non-passenger vehicles?

Progress towards fleet targets

Governments have a responsibility to walk the talk. Combined, Australian governments make up the single biggest buyer of new vehicles in Australia and have outsized influence on the make-up of the broader on-road fleet. The gold standard is for governments to not only aim for a high percentage of new fleet *purchases* (ideally 100%) but also a timeline for transitioning their entire fleets to EVs (e.g. by 2027). A summary of government fleet targets is set out at page 72.

Once committed, however, governments must also provide regular updates of their progress toward achieving these goals. Transparent implementation of a fleet transition strategy helps demonstrate the opportunities and challenges of large-scale fleet electrification and can encourage private fleet operators to follow suit. All state and territory governments, plus the Federal Government, were invited to provide an update to their fleet transitions as part of this assessment.



*As of Q1 2025. NB: targets associated with the Federal Government's recently announced 2035 plan have not been included. NB: South Australia does not have a publicly reported EV target for its government fleet

Key evaluation questions:

- What commitments has the government committed for electrifying its own fleet?
- How ambitious are these commitments? When has a fully electric government fleet been promised?
- What commitments have been made for non-passenger vehicles? What about government-procured transport services?
- How much progress has the government made on its EV targets? Are they on track?

Clean energy transition

Electric vehicles do not exist in a vacuum. Governments' EV plans take place alongside seismic changes in Australia's energy system, new challenges and opportunities in clean industries all against the backdrop of the worsening climate crisis. By now, governments should have gone beyond a commitment to 'net zero' with clear plans for reducing emissions across all sectors, including transport.

This section of the scorecard assesses how governments are progressing towards a net zero economy, including transport-specific goals for emission reduction. Best practice is to establish interim targets and measures to ensure accountability and progress toward long-term goals. Strong government ambition should also provide targeted support for the industries of the future, including investments in clean energy, EV manufacturing and skills development. The broader clean energy transition is essential to ensuring Australia can enjoy the full benefits that EVs offer.

Key evaluation questions:

- Is Net Zero legislated? By when?
- Does the government have a Renewable Energy Target? How clean is the grid that EVs charge from?
- What is the government doing to boost investment confidence for green industries?
- Has the govt provided any support for EV manufacturing?
- What skills or training initiatives is the government providing to support the jobs of tomorrow?

Total EV funding

This assessment evaluates the relative level of investment that governments allocate to support the EV transition, taking into account the size, population, and economic capacity of each jurisdiction. Recognising that not all states and territories have the same budgetary resources, this approach aims to ensure a fair comparison of funding efforts relative to each jurisdiction's scale.

All states and territories, plus the Commonwealth, were invited to provide details of their current funding for EVs as of mid-year 2025. While best efforts have been made to quantify aggregate financial support, some funding initiatives cannot be neatly broken down and may not be entirely attributable to EV support.

	FED	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
EV Strategy	75%	100%	90%	75%	75%	75%	75%	75%	65%
Progress towards fleet targets	100%	90%	50%	80%	50%	25%	50%	80%	50%
Clean energy transition	100%	100%	80%	25%	40%	90%	90%	75%	100%
Total EV Funding	100%	75%	90%	50%	50%	60%	80%	70%	80%
Overall	**9/10**	**9/10**	**8/10**	**6/10**	**5/10**	**6/10**	**7/10**	**8/10**	**7/10**

4.2 Passenger Vehicles

2025 has seen a significant and premature collapse in policy support for passenger EVs (cars, SUVs, utes and other 'light' vehicles. Governments around Australia are quickly approaching their net zero and 2030 targets (many of them legislated) and yet none of them are on track to achieve the level of EV uptake that these commitments demand. The sheer size of Australia's passenger vehicle fleet (approx. 20 million) makes it both a considerable challenge and an enormous opportunity. If policymakers adopt the best-practice initiatives outlined below, electrification will prove to be the latter.

Progress towards sales target

The gold standard for EV policy involves setting clear future targets for EV sales that align with broader emission reduction commitments. Some jurisdictions target sales of *new* vehicles and others may target EV uptake as a percentage of the on-road fleet. Either way, good targets should comprise measurable milestones, interim benchmarks, and a firm commitment to achieving a high percentage of EV sales. This provides a strong market signal for consumers and industry alike. The real benefit of a target, however, is achieving it. In addition to evaluating the strength of each jurisdiction's EV commitment, this metric also evaluates the government's progress towards achieving it. Where figures have not been provided by governments themselves, the EV Council has made an estimate of EV penetration.

The Federal Government has not set an EV target but has implemented the New Vehicle Efficiency Standard. Although the NVES itself does not set targets for any specific vehicle fuel type, the consequent increase in the supply of low and zero emission vehicles, has been accounted for in the scoring. NB: As a point in time analysis (as of 30 June 2025), the Federal Government's recently announced targets under its 2035 climate plan were not taken into account.

Key evaluation questions:

- Has the government committed to an EV sales target? Has this been legislated?
- How ambitious is the government's target?
- Is the target aligned to the government's emissions reduction commitments?
- How close is EV uptake to the government's target, as of 30 June 2025?

Availability of financial incentives for households

No jurisdiction has achieved mass uptake of EVs without consistent and accessible purchase incentives. Leading international markets demonstrate that sustained support for EV purchases have successfully driven adoption to critical mass. Equally, the premature withdrawal of incentives has been proven to damage uptake immediately, with long-term implications.

While purchase incentives are always temporary, Australian governments need to come back to the table and consider reasonable incentives lest EV uptake stalls. These measures improve the affordability of EVs – the primary barrier to increased EV adoption. Governments should also consider how financial incentives could be targeted at used EVs to benefit the majority of Australians that do not purchase cars new but also assist in reducing depreciation.

The gold standard for a financial incentive for households includes the provision of rebates, zero interest loans, or other incentives that effectively reduce the upfront costs associated with purchasing an electric vehicle.

Key evaluation questions:

- What incentives does the government currently offer for buyers of EVs?
- How much is offered? Will this materially impact buyer behaviour?
- How easy are the incentives to access? Is support available at the point-of-sale or does it require a retrospective application process?
- How is the government supporting EV sales in Australia's second-hand market?

FEATURE

FBT under threat

Arguably, the most decisive and impactful demand-side EV policy is now under threat. Australia's Electric Car Discount exempts most EVs from Fringe Benefit Tax (FBT) when provided by employers for private use. The policy has been the cornerstone of EV uptake with some estimating it has been responsible for 1 in every 4 sold in Australia since its implementation in 2022. The FBT exemption is a major EV incentive that makes EVs more affordable and attractive for fleets, companies and eligible individuals.

Independent analysis by Magenta Advisory demonstrated that the Electric Car Discount contributed to an estimated 105,500 additional EV purchases between 2022-2024. The policy delivers $2.25 in societal benefits for every $1 in cost (2022-2025), improving to $3 per $1 for 2026-2030.

The Electric Car Discount has been a game-changer for fleet decarbonisation and EV affordability – for many employees, salary sacrificing offers the only affordable way to access an EV in the near term. Furthermore, increasing sales volumes through novated leasing helps EVs flow faster into the second-hand market, where most Australians will buy their next car.

Recent policy commentary has overstated the budgetary impact of the Electric Car Discount while ignoring the significant tax breaks still bestowed on high-end diesel and petrol vehicles that deliver no discernible policy benefit, neither on carbon abatement nor to the public.

As the only nationwide incentive helping Australians into EVs, the EVC is calling on the Federal Government to maintain this important policy lever until EVs adoption has comfortably mainstreamed. Momentum can stall if critical policies are unwound and any changes to the FBT exemption could single-handedly jeopardise Australia's EV goals.

Incentives for fleets and businesses (public and private)

With fleets making up around half of new vehicle sales, any government EV strategy must address this important market. Incentives are particularly important for fleet operators as they often purchase vehicles in larger volumes, making them critical players in driving overall market demand. They are also turned over faster than the average car, acting as a major supply source for the second-hand market.

The gold standard for incentives targeting fleets and businesses includes providing tailored rebates, tax exemptions, and other financial support mechanisms designed to encourage the early adoption of electric vehicles. Fleet-specific programs should facilitate the procurement of a wide range of electric vehicle types, from passenger cars to light commercial vehicles.

Key evaluation questions:

- Does the government offer standalone incentives for businesses and/or corporate fleets?
- How significant is the support? Is it commercially attractive enough to genuinely drive uptake?
- What vehicle categories does the government's scheme include?
- What provision is made for chargers and EV supply equipment?

Available behavioural incentives

The sticker price of EVs may be the most important driver for many car buyers, but incentives need not be limited to the point of sale. Behavioural 'nudges' that make owning an EV more advantageous are important tools in any governments policy arsenal. In particular, state governments wield significant policy discretion at the point of registration, for arbitrage between different price signals that encourage motorists into EVs.

Governments should also consider non-monetary measures, such as preferential lane access for EVs, the creation of zero-emission zones, toll amnesties and exemptions or discounts on parking. Such incentives not only make EV ownership more attractive but also help to reduce emissions in areas with high traffic density.

Key evaluation questions:

- How does the government treat EV registrations? Do EVs cost more or less to register each year?
- What incentives does the government offer to accelerate turnover of older vehicles?
- How high is stamp duty and other vehicle charges for EVs?
- What access benefits do EVs enjoy over other vehicles?

Education and awareness initiatives

At this stage of the transition, most people are aware of EV technology but there remains significant misinformation and confusion. Governments have a critical role in ensuring accurate, up-to-date information reaches a wide audience and actively dispelling myths that inhibit EV adoption.

Active campaigns and communication measures, together with hands-on opportunities to experience EVs help to build confidence and garner community support for the transition to an electrified transport system. It is essential that the real advantages of Australia's shift towards EVs are communicated clearly and effectively to both businesses and the general public.

Key evaluation questions:

- What government resources on EVs are available? How accessible and clear are they?
- What about guidance on charging?
- How does the government communicate to businesses on EVs? What dedicated resources are provided?
- How often does the government run drive days, EV awareness sessions or community outreach activities?

New National EV Resource Hub

The Federal Government has launched a new public website dedicated to providing motorists with easy-to-use information about EVs. Comprising fast facts, charging tips and links to various government initiatives, **ev.gov.au** will be an evolving hub of EV consumer resources with new content already under development. The website is now live and open for public feedback at **energy.gov.au/electric-vehicles**.

Data sharing on vehicle registration and driving/ charging patterns

Data on EV sales and EV registrations is fundamental to tracking progress in the EV transition. By sharing this information, governments can increase transparency about EV deployment, support better-informed policy decisions, and enable more precise planning for future transport and energy needs. It is also critical for refining models of EV adoption and charging behaviour, ensuring that the infrastructure roll-out keeps pace with demand across Australia.

Best practice is to publish anonymised registration data for EVs on a monthly basis. Ideally this is detailed to the postcode level, using nationally consistent vehicle types, drivetrain categories and registration parameters. Unlike other major markets, as of 2025 Australia still does not have an integrated registration system to track the vehicles that Australians are buying.

Key evaluation questions:

- How/when does the government publish sales and/or registration data for EVs?
- Is the government's dataset broken down into BEVs and PHEVs?
- How accessible is this dataset? Is it available free of charge to the public?
- Is the data consistent with other jurisdictions? Is the government using bespoke, unaligned metrics?

Passenger vehicles scorecard

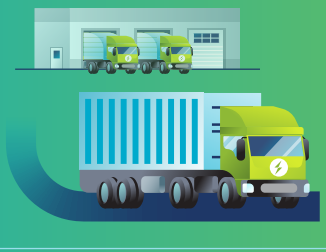
	FED	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Progress towards sales target	30%	85%	70%	30%	70%	70%	30%	70%	30%
Availability of financial incentives for households	75%	25%	0%	0%	0%	0%	0%	0%	50%
Incentives for fleets & businesses	75%	20%	50%	0%	0%	0%	20%	0%	0%
Behavioural nudges	70%	80%	90%	90%	50%	60%	0%	25%	0%
Education and awareness	90%	100%	100%	80%	50%	50%	60%	90%	90%
Data sharing	30%	95%	100%	80%	70%	0%	80%	50%	50%
Overall	**6/10**	**6/10**	**6/10**	**4/10**	**3/10**	**3/10**	**2/10**	**3/10**	**3/10**

4.3 Trucks & Vans

Electric trucks and freight vehicles continue to be the poor cousin of EV policy. The National EV Strategy mostly excludes heavy vehicles. A 'Transport and Infrastructure Net Zero Roadmap' has not progressed in 4 years. Access for electric trucks remains limited and fragmented across borders.

And yet, road freight powers the entire Australian economy while also accounting for almost a quarter of transport's carbon footprint. As demand for last-mile deliveries grows and the national freight task expands, trucking will become an even greater source of emissions without a concerted effort to accelerate electrification.

Given the diversity in Australia's trucking task, the shift to EVs will follow different pathways for different duty cycles. Electrification is already progressing in last-mile delivery applications particularly light-duty vehicles, which account for over 80% of the trucks on Australian roads:

	Last Mile Delivery	Point-to-Point	Long-Haul
DUTY CYCLE			
TASK	Final deliveries to end customers	Freight between distribution centres, transfer hubs & intermediate locations	Interstate freight and linehaul services
LOAD	Fast moving consumer goods; postal services; B2B deliveries	Fresh food/cold chain; bulky goods; containerised freight; industrial products	Commodities; raw materials; containerised freight; agricultural products
ROUTE	Typically short-range urban routes with multiple stops, in high traffic areas	Mostly highway driving on medium-haul regional routes	Long-distance, cross-border highway driving across multiple driver shifts with limited downtime
VEHICLE SEGMENT	Vans, light rigid trucks, semi-trailers	Heavy rigid trucks, semi-trailers, B-/A-double configurations	Various multi-trailer combinations and road trains

Speed of Electrification

While Australia's largest companies will soon need to report on their corporate supply chain emissions, there is still a clear absence of national leadership to support transitioning heavier vehicle fleets to EVs. Government initiatives must rise to match the investments already being made by industry, through a combination of ambitious policy measures, such as those outlined below.

Electric vehicle strategy for freight

What works for passenger EVs will not always work for electric vans and trucks. Freight vehicles play a fundamentally different role in Australian society warranting a standalone strategy for electrification.

A successful strategy should also consider the diverse needs of the freight industry, acknowledging variations in duty cycles, business models, transported goods, and operational requirements. This means supporting a range of electric vehicle types, from light vans to prime mover combinations, to meet the specific needs of each application.

The gold standard for an electric vehicle strategy for freight requires targeted commitments and practical actions to increase adoption of electric trucks and vans. This may include sales mandates and/or fleet targets, aligned with broader emission reduction goals. Successful strategies should also remove regulatory barriers that damage the operational viability of integrating them into commercial fleets.

Key evaluation questions:

- Does the government have a dedicated plan for electrifying freight vehicles? Does its broader EV strategy meaningfully include vans and trucks?
- Has the government differentiated electrification pathways for the distinct duty cycles in Australia's road freight task?
- What goals or measurable targets has the government set?
- What regulatory harmonisation is promised? How are compliance obstacles addressed in the government's strategy?

ACT Endorses Global Push to Decarbonise Trucks & Buses

In May, the Australian Capital Territory became the first Australian jurisdiction to endorse a global push to accelerate uptake of zero emission heavy vehicles. **The Global Memorandum of Understanding on Zero-Emission Medium- and Heavy-Duty Vehicles** includes the UK, Canada, New Zealand and 37 other countries, committed to *"working together to enable 100% zero-emission new truck and bus sales by 2040"*. The MoU also targets an interim goal of 30% zero-emission vehicle sales by 2030 with the ultimate aim of achieving net-zero carbon emissions by 2050. The ACT is the first sub-national government in Australia to endorse the MoU which, while not binding, provides strong strategic direction for freight operators in the broader Canberra region. An ACT spokesperson said: "We have made great progress in transitioning to zero-emissions light vehicles, and the ACT now leads the country in electric vehicle uptake per capita. This MOU extends our ambition to medium- and heavy-duty zero-emissions vehicles, as more models become available to the Australian market."

The EVC has been an endorser of the Global MoU since 2022.

Available financial incentives

Electric trucks and vans reduce running costs over time but their upfront sticker price can be prohibitive for many smaller operators. This barrier is particularly acute in Australia where the vast majority of Australian trucks are owned by small businesses. ARENA has been one of the only financiers of heavy EV deployments to date but complex grant applications and lengthy timeframes effectively exclude resource-constrained SMEs.

This contrasts with international best practice, where government support is built into the purchase price. For example, New Zealand's Low Emissions Heavy Vehicle Fund, whereby grants and application requirements are negotiated between the government and truck dealers/retailers; an individual buyer simply sees a reduced sticker price. Similar schemes have also proven successful in Europe and various US states.

The gold standard for incentives targeting truck and van customers are policies that reduce the price premium of EVs over their diesel equivalents. Apart from vouchers, grants or subsidies, this can include tax concessions (e.g. instant asset write-off, accelerated depreciation), low-interest finance and/or resale value guarantees (e.g. at the end of a lease term).

Key evaluation questions:

- Does the government offer support to fleets purchasing an electric van/truck?
- How accessible are these incentives, especially to smaller operators?
- How much is the purchase incentive? What is the value over the vehicle's lifetime?
- What tax, depreciation or other financial incentives does the government offer to lower the capex on electric vans/trucks?

Victoria's Freight Sector Innovation Fund

As part of its recently launched Victorian Freight Plan, the Victorian Government has announced a dedicated fund to help more freight operators realise the long-term operating benefits of going electric. The Freight Sector Innovation Fund was approved in June 2025 and will commence in FY2025-26. It is aimed at supporting industry to begin the transition to low-emissions freight vehicles. Through this initiative, the Victorian Government has committed $8m over 2 years to a co-investment model focused on small and medium transport operators. The *Victorian Freight Plan's* other decarbonisation initiatives can be accessed here.

Accelerating fleet turnover

Like the passenger market, EV policy for heavy vehicles assumes a static rate of fleet turnover without concrete incentives to accelerate the retirement of older vehicles. This is particularly concerning for road freight given the average age of light trucks in Australia is 10 years, increasing to 16 years for heavier vehicles.[6] A truck purchased today will likely still be on the road well after 2040 absent any new policy initiatives to renew the national on-road fleet.

Fleet turnover strategies have proven effective internationally in reducing the average age of the on-road fleet. For example, Hong Kong's system of combining age-based registration bans with purchase incentives has resulted in one of the youngest freight fleets in Asia. More recently, China has seen a spectacular uptick in zero-emission truck sales thanks largely to its recently renewed trade-in program.[7]

The gold standard for accelerating fleet turnover is providing tailored "carrots and sticks" to accelerate the electrification of the on-road vehicle fleet. Incentives are particularly important for larger operators whose fleet renewal strategies can result in large order volumes, driving overall sales and market certainty. Wherever possible, policy design should minimise any payload penalties compared to equivalent diesel vehicles. Incentives should be structured to ensure that EV adoption by fleets contributes to the development of a viable second-hand truck market, helping to make EV vans and trucks more affordable to other commercial fleets.

Key evaluation questions:

- What incentives does the government offer business fleets to upgrade their vans/trucks (i.e. carrots)?
- What accelerated retirements schemes are in place (i.e. sticks)?
- Do government agencies offer any form of scrappage incentive?
- What price signals are offered by registration authorities (e.g. older vehicles relative to newer vehicles)?

Electric heavy vehicle road access

Providing certainty over where electric trucks can operate is an essential precondition for increasing uptake. Electric trucks require a supportive regulatory environment that proactively facilitates operations and route-planning for early-adopter fleets.

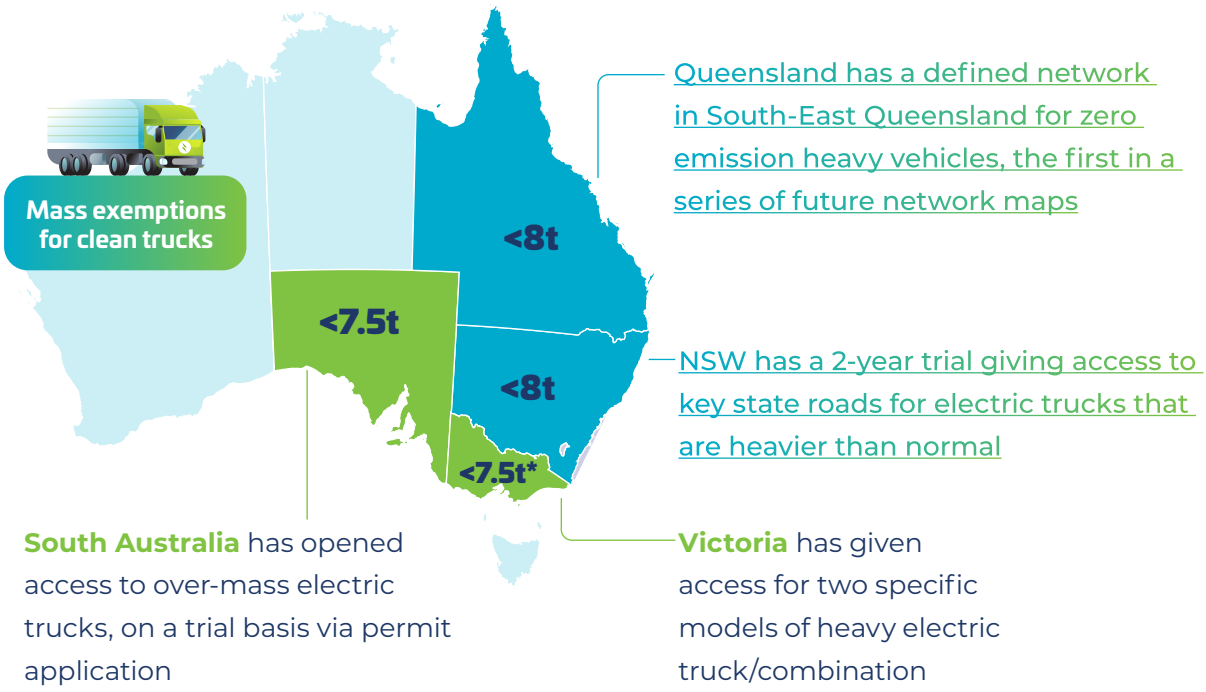
Authorities in both the USA and Europe have amended their access rules to allow electric trucks (whose batteries are typically heavier) onto public roads, in recognition of the health, environmental and broader community benefits they offer. In Australia, however, some

6 BITRE, *Road Vehicles Australia*, January 2024

7 International Council on Clean Transportation, China's expanded incentives for scrapping and replacing transportation equipment in 2025, May 2025

of the most advanced, most powerful electric trucks are banned from public roads all around the country. Where exemptions do exist, operators face a hodgepodge of regulatory arrangements, including:

- Inconsistent mass and access requirements across Western Australia, Northern Territory and the states/territories covered by the Heavy Vehicle National Law
- Five different access schemes across NSW/ACT, Victoria, Queensland, South Australia and Tasmania each with different permit processes, eligibility rules and application requirements (see graphic below)
- 530 different sets of access restrictions for electric trucks on the council roads managed by Australia's different Local Governments



Despite some early attempts at deregulation in 2024, there have been no access improvements for heavy electric vehicles in 2025, resulting in a fragmented and almost unusable regulatory regime for early adopter fleets. Proactive coordination is required across federal, state and local road managers to align what has become a disjointed patchwork of access arrangements.

The gold standard is as-of-right access for electric heavy vehicles to federal, state and local road networks, up to a maximum of 8 tonnes on the steer axle. Exemptions should be made on a case-by-case basis for any specific infrastructure assets that may be materially impacted by the increased mass. Concessions and access maps should form an integrated network that is operationally useful to trucking fleets.

Key evaluation questions:

- What restrictions do heavy electric trucks face on government-managed roadways?
- What concessions or exemptions has the government introduced?
- Are these temporary or permanent? How onerous is it for operators to access these exemptions?
- How consistent are the government's rules with other jurisdictions/the gold standard?

Operational benefits

Over their lifetime, electric freight vehicles are likely to deliver on-road savings through reduced fuel bills, less maintenance, greater uptime and possibly even retention of drivers. However, governments have a role to play in building on these operational advantages to further support the business case for going electric.

In addition, behavioural 'nudges' can offer non-monetary benefits that encourage the use of electric trucks and vans. Measures like discounted registration, preferential lane access, zero-emission zones in urban areas, exemptions from truck curfews and toll discounts all make freight EVs more attractive and practical for businesses. If designed well, such policies can even be cost neutral for cash-strapped governments. The gold standard for operational benefits includes a mix of concessions and behaviour nudges that combine to reduce costs and offer an operational advantage to fleets adopting the cleanest vehicle technology.

Key evaluation questions:

- Does the government offer concessions for buying/registering an electric van or truck?
- What price signals are built into annual registration fees to incentivise EV adoption?
- How does the government prioritise access for zero emission freight vehicles?
- What tools or information resources has the government delivered for fleet operators?

Freight Vehicles Scorecard

	FED	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Electric Vehicle Strategy for Freight	20%	90%	75%	0%	5%	5%	10%	100%	25%
Available Financial Incentives	10%	25%	50%	0%	0%	0%	30%	80%	0%
Strategy to accelerate fleet turnover	10%	0%	0%	0%	0%	0%	0%	0%	0%
Electric Heavy Vehicle Road Access	60%	0%	50%	0%	50%	30%	10%	50%	0%
Operational benefits	20%	20%	20%	50%	0%	0%	0%	10%	0%
Overall	**5/10**	**3/10**	**4/10**	**1/10**	**1/10**	**1/10**	**1/10**	**5/10**	**1/10**

Driving Change: *Coles & Linfox lead the way with electric prime mover*

Coles and Linfox have been partners for more than 60 years, successfully delivering groceries to millions of Australians across the country. Their latest achievement of introducing the first electric prime mover truck into the retailer's transportation network has prevented more than 28 tonnes of CO2 emissions since its deployment in November 2024[1].

Since beginning its tenure, the trailblazing Electric Vehicle (EV) has already clocked up more than 25,000 kilometres, delivering almost 10,000 pallets of groceries to Coles stores across Victoria—all without burning a single drop of diesel.

Awarded the International Truck of the Year 2024, The Volvo FH can travel up to 300km on a single charge and is quieter to run, meaning reduced noise pollution for customers in residential areas, and requires no idling, eliminating further emissions and fuel consumption.

Coles Chief Operations and Supply Chain Officer Matt Swindells said the EV has been an important step in Coles' decarbonisation journey, as it continues to work with partners to reduce its Scope 3 emissions which occur in the retailer's supply chain and make up the majority of its overall emissions profile.

> *Our first EV prime mover is currently doing about 25 deliveries from our Distribution Centre in Victoria each week to hundreds of stores across the state,"* said Matt.
>
> *"Linfox has been an early adopter of EV transport technology, and this partnership has enabled us to lower emissions on our roads, as well as in our supply chain, and contribute to driving change in the industry."*

L-R Coles Chief Operations & Sustainability Officer, Matt Swindells with Linfox Chief Executive Officer Australia & New Zealand, Mark Mazurek

Linfox CEO Australia and New Zealand Mark Mazurek said the partnership represented a significant and exciting milestone in Coles and Linfox's ongoing efforts to reduce their carbon footprints and create a more sustainable future.

> *Linfox is proud to work with Coles to reduce our carbon footprint. Without their commitment to sustainability and adaptability, this wouldn't be possible," said Mark.*
>
> *"This fully electric prime mover is charged on site and is at the forefront of automotive technology. We're proud to be leading the industry towards a more sustainable future with initiatives just like this."*

[1] Compared with an equivalent FH diesel prime mover consuming 42L/100km. This calculation is based on recorded kilometres, converted to litres of diesel and then into tonnes of CO_2-e.

4.4 Buses

Buses are a small but significant part of the on-road fleet. Unlike commercial freight vehicles, approximately 80% of buses in Australia are operated by state governments, as part of public transport systems. Given their widespread presence in urban areas, electrifying bus fleets is essential for reducing emissions (greenhouse gases, noxious pollution and noise) and improving air quality in cities. This makes it crucial to have clear strategies in place that support the integration of electric buses into these networks, as well as their role within broader multi-modal transport systems.

Nevertheless, Australia's bus market also comprises a wide range of private bus and coach operators, each of which will undertake its own electrification journey. This report assesses policy support for these private bus fleets too. Given its limited role in public transit provision, the Commonwealth has not been assessed under some subcategories.

Electric vehicle strategy for buses

As the major purchasers of buses Australia-wide, government procurement has a substantial impact on what buses service our communities. Given that all Australian governments have committed to net zero targets, it is essential that they lead the transition by reducing emissions from their own vehicle fleet with clear and ambitious plans for integrating electric buses into their public transport systems.

The gold standard for an electric bus strategy is a multi-year commitment to electrify public transit fleets as soon as possible. Together with the associated charging infrastructure, governments' bus strategies should focus on accelerating turnover of older, polluting diesel buses for 100% electric buses. Ideally, there should be a firm end-date for new diesel bus purchases. The aim is for the majority of buses to be electrified by the mid-2030s, either via defined procurement milestones or targets for the entire on-road fleet.

Key evaluation questions:

- Does the government have an electric bus strategy? How ambitious is it?
- Are there clear targets for ebus procurement? How soon?
- Has the government committed to ending diesel operations?
- How is the government supporting charging facilities for the growing electric bus fleet?

EV uptake in the public transport fleet

Like government strategies for the passenger fleet, e-bus targets are only as good as their implementation. Public buses are often a good early use-case for EVs. Their predictable routes and scheduled downtime can make decarbonising buses more straightforward than other heavy vehicles, allowing for efficient charging optimisation strategies and minimal disruption to service.

Governments should therefore be well underway in delivering electric buses onto their network but transparency in how deployments are progressing are a key indicator of the government's ambition. All state and territory governments were invited to provide an update to their bus fleet transitions and this input forms the basis of this assessment metric.

Availability of financial incentives

Beyond public transport fleets, governments should also support private bus operators to electrify their own fleets. Policies could include financial incentives such as rebates, low-interest loans, and tax concessions. Similar to other commercial vehicles, these incentives should be designed to offset the higher capital costs of electrification (for vehicles and charging solutions) and to reduce operational costs (e.g. fuel bills, maintenance, depreciation etc.).

To date, governments have focused on electrifying buses for public transit, but similar support is needed to scale up the electrification of private bus fleets, particularly SMEs and operators servicing regional communities.

Key evaluation questions:

- What financial support is the government providing coach and/or charter bus operators?
- How accessible is this support to industry participants?
- Has the government made any other investments in the electric bus value chain?

Buses scorecard

	FED	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Electric Vehicle Strategy for Buses	10%	90%	90%	20%	100%	85%	35%	90%	90%
Public transport fleet uptake	NA	90%	80%	0%	75%	50%	25%	75%	80%
Availability of Financial Incentives	40%	0%	50%	0%	60%	25%	0%	0%	75%
Overall	**5/10**	**7/10**	**8/10**	**1/10**	**8/10**	**6/10**	**2/10**	**7/10**	**8/10**

NRMA ROAD TRAVEL REWARDS

Upgrading our national EV charging network

We're enhancing key sites across the country by replacing old chargers with faster, more reliable units that meet the evolving needs of our growing EV community.

Each visit to a refreshed charging site means a smoother, more dependable charging experience. It's not just about powering vehicles — it's about giving our members confidence in the future of sustainable transport.

These upgrades reflect our long-term commitment to building the infrastructure that supports the shift to cleaner mobility.

Our promise to members

- Boost charger reliability and performance
- Minimise downtime across the network
- Support the growing EV community
- Future-proof infrastructure

As EV adoption grows, we remain committed to creating a more connected, reliable and member-first charging experience.

Leading the way in accessible charging

We met with Bianca from Get Skilled Access (GSA), an organisation that champions accessibility and inclusion. Her lived experience and professional insights helped us better understand the challenges faced by people with disabilities when accessing EV infrastructure.

After testing our accessible EV charging station at Liverpool Catholic Club, Bianca found the experience surprisingly seamless. She noted the generous space and how easy it was to move around the vehicle.

"You're setting a new standard, which is really exciting." By prioritising accessibility, we're not only supporting individuals with disabilities, but also enhancing usability for the wider community.

Setting a new standard

As EV adoption grows, inclusive infrastructure will be essential to ensure everyone can access them. That's why we're taking proactive steps to shape a more equitable future by:

- Commissioning design guidelines for accessible EV bays.
- Engaging independent experts to validate our approach.
- Developing policy positions to guide future investment and regulation.
- Adopting the 'Use Last' method, meaning accessible bays are available to all but prioritised for those who need them.

4.3 Energy Infrastructure

As the transport transition navigates the adoption chasm, sufficient charging infrastructure is required in many settings to enable many use cases, giving consumers choice and confidence in the transition. Governments can help by publishing information, issuing policy, legislation and incentives to ensure the rate of the rollout adequately keeps up with EV uptake. Go too fast and it will unnecessarily cost consumers, go too slow and hold up the transition.

The EVC has identified key policy areas for governments to focus on. While private home charging remains the dominant form of charging utilised by EV motorists in Australia, it isn't considered in this assessment of government support apart from its inclusion in the sections on strata, CER integration and tariffs.

Public fast charging

Public fast charging sites represent the most visible type of charging infrastructure and is what flashes up in most people's minds when they think about road tripping in an EV.

The scores are slightly down in Federal and Queensland jurisdictions as we appreciate the great work on CEFC contributions and Hume Link and turn our attention to what's next.

As described in Section 3, public fast charging sites and charger numbers have continued to increase through FY24/25, though at a tempered growth rate. It is important to note the lag time between announcement of infrastructure investment and when sites are ultimately live and available for use – a process which can sometimes be measured in months, if not years. That means many of the new sites we are seeing today are products of prior investments. Australia needs to keep up the pace and ensure public fast charging site growth is visible, as it is a proven way to increasing consumer confidence.

Barriers persist in the smooth rollout of fast charging sites, including ongoing issues with protracted connection timelines and reluctance of DNSPs in Queensland and Victoria to allow second lines of supply, a measure that can help improve cost efficiency. The Victorian Service and Installation rules have been revised recently to this end; it remains to be seen whether it results in better outcomes for Charge Point Operators (CPOs) and ultimately consumers.

Other public charging

Typically AC chargers, public charging (other than fast charging) is equally important, albeit often less visible. This is the type of charger one uses when stopped for the night, to watch a movie or do some shopping. It happens at a slower rate, but the vehicle was going to be parked for a while in any case.

As detailed earlier, numbers of chargers and vehicle connectors in this segment are plentiful, in part thanks to ARENA funding for kerbside charging, and NSW government kerbside grants. However, without a reliable count available, nor national analysis on the right ratios for public charging access in different use cases and geographies, it's hard to characterise the true maturity of the local market. The EVC is committed to supporting better data outcomes for cost-effective public charging growth.

Barriers to the continued rapid deployment of chargers in this segment include securing approvals from local councils for land, altering a car parking space to a designated EV charging space, DNSP connection approvals and wait times.

Kerbside charging is a special case, usually referring to AC chargers mounted on an electricity pole, but could be fixed to the footpath. Kerbside chargers in residential streets and shopping strips stand to benefit predominantly occupants of suburbs with lower levels of off-street parking and residents of strata style living accommodation where there is no access to a power point where the car is parked. Future applications of kerbside charging could include DC chargers. Numbers have continued to expand in 24/25 despite industry uncertainty surrounding future ownership models potentially expanding to distribution networks, whose power poles could provide a clear option to support market expansion in areas of need. A ringfencing waiver proposed by CPU in Victoria has triggered consultation looking into whether DNSPs should be allowed to own EV charging infrastructure in this space, leaving regulators to work through the appropriateness of expanding the energy market roles and responsibilities in the transition.

Federal and NSW governments score well in this area. The two NSW kerbside grant rounds have been excellent for consumers in metropolitan NSW and while applications are no longer open, the program is currently commencing the second tranche of co-funded installations. All states and territories should look at how this style of support could be replicated in their jurisdictions.

Destination charging refers to AC chargers located in the carparks of places like shopping centres, gyms, entertainment complexes, tourist attractions and potentially accommodation, though these are not always available to the public. Charging of this nature typically fits well with the solar generation curve and should be a focus for governments looking to support EV charging infrastructure.

Numbers have continued to grow, partly supported by NSW destination charging grants (Round 3 is now closed). Again, this is a formula that should be closely examined by other state and territory governments.

Workplace charging an be another form of AC public charging, but is often reserved for employees only. This policy area is so important, it is called out specifically below.

Workplace charging

Chargers at the workplace are another visible demonstration to workers, many of whom drive cars, that the future of transport is here and offers a lower cost and more convenient option for them.

Workplace charging for the most part fits nicely within the solar production curve which presents additional benefits to the electricity network;

- driving down emissions by avoiding thermal generation peak periods
- increasing network utilisation by steering load into super off-peak periods
- decelerating electricity cost increases by delaying network augmentation and flattening out the peaks.

A challenge for workplace charging is the split-incentive between the property owner and the business operating at the premises. The EV charging needs of one renting business operator may not suit the needs of the next lessee. These pressures can be alleviated through careful planning of locations. AC chargers that are somewhat portable through a preference for 32A 3-pin or 5-pin plug and socket connections will help. DC chargers that are in sections of the carpark unlikely to be altered from lessee to lessee may also help.

The Federal government, ACT government and WA government score strongly in this area, an increase from last year which is encouraging to see. The Federal government has the Community Energy Upgrades fund and the DRIVEN Charger Rebate Scheme. ACT has the business EV charger rebate and WA has the long-standing Charge Up EV Charging Grants Program as well as the EV chargers in government buildings investment. The EVC encourages other states and territories to get on board.

Dedicated charging for heavy vehicles

Dedicated charging for heavy vehicles requires significant electrical infrastructure which may include: high powered charging equipment (~1.5MW), new switch boards, large network connections and/or new substations. Heavy vehicles also require space to manoeuvre and pull up alongside EV chargers, particularly when they are towing trailers.

Governments, CPOs, Landholders and DNSP/TNSPs need to work together to identify locations that make sense for this application but also intersect with sufficient power supply that will allow solutions to scale. One of the most significant deployments of such infrastructure to date has been in Victoria. Dedicated ‘pull-through’ electric charging bays for trucks were installed as part of a large ARENA project focused on hydrogen refuelling. Sadly, such facilities are hard to come by on Australia’s broader road network.

EV readiness in building development

The National Construction Code (NCC) 2022 has EV readiness requirements for certain building classes, mainly relating to sufficient energy delivery for the typical driver using the building, electricity load management and distribution boards of a size equipped to service a proportion of the carparks in that building, including any circuit protection and metering that may be required in future. These are infrastructure provisions most cost effectively delivered at the build stage.

The Draft NCC 2025 goes further by providing the additional wiring option of busduct, a small increase to the number of carparks to be serviced for some building types as well as EV chargers installed for a small proportion of the carparks to service EV owners in the near term.

The National Construction Code is supported by the Federal Government and implemented by the states and territories on different timelines. The NCC has come under pressure from the Productivity Commission's investigation into housing prices. At the time of writing the government is intending to pause further changes to the NCC until 2029.[8] The EVC is concerned about the risk posed by a pause in NCC2025 implementation, particularly as these proposed changes are embroiled in broader building industry reforms (e.g housing). A lot of good work has gone into evidencing and writing the requirements in that document. To have the benefits of those changes delayed would be a waste and detrimental to the accelerating EV market growth.

Federal, ACT and NSW governments scored strong results in the area, having additional policy measures to the NCC.

Retrofit programs and enabling charging for rentals/strata

The EVC routinely receives correspondence from residents of strata style accommodation explaining the difficulty they experience in retrofitting EV charging infrastructure in their building carparks. EV ready buildings go some way to alleviating the challenges, particularly around cost, how the energy will be paid for and building electricity load management. On occasion, the problem has arisen from seeking an assessment from the fire service, who have called up the 'special hazard' clause of the NCC. This is a mischaracterisation of the intended use of this clause, more pointed towards explosives factories and the like. Vehicles with lithium-ion batteries in them are commonplace in carparks, have been for years and are not special. Extra requirements due to the presence of EV chargers is not relevant and discriminates against vehicles with an inlet, when they should be encouraged.

The support of state and territory governments is required to ensure fire services interpret the NCC as is intended, and clarify that EV chargers do not invoke the special hazard clause. The knowledge and tools required to safely handle lithium-ion battery fires are already available. Governments can also support fire services with the training and equipment they

8 Government pauses national construction code changes | Master Builders Association

need to deal with EV fires, even though instances in carparks are exceedingly rare.[9]

Again, NSW and ACT lead the charge on retrofit programs, with history of support, plans for future funding and low-interest loans. The federal government also gets a mention for their commitment to the CEFC investment in the Household Energy upgrade (HEUF) program.

V2G enablement

As described in the V2X section, V2G is an important enabler for EV uptake and emissions reduction.

SA have been the most supportive state for some time, with state-based direction from the Office of the Technical Regulator (OTR) and SA Power Networks (DNSP) allowing bidirectional EVSE to be installed on their network. They are also investing $13.8M in the Energy Masters trial. WA are also heavily invested in Project Jupiter which will trial putting in place the technical infrastructure and energy market reforms needed so commercial VPPs can operate at scale, including support for V2G technologies as they mature and become more affordable to consumers.

The Federal Government has supported the national roadmap for Bidirectional EV Charging, released in February 2025, which will be important in outlining the steps for the future of V2G.

So the series of measures implemented in Jupiter will try to future-proof VPP platforms so that EVs can be added later – after the term of Project Jupiter (end 2027).

We need governments to provide incentives towards the purchase of bidirectional EVSE. There is already product in market. The introduction of incentives will bring more product into the market and more EVs warranted for V2X.

Network tariffs

Electricity pricing is complex and unfortunately isn't always transparent for energy users. Household electricity prices are normally comprised of two components – network and retail tariffs – each making up a part of the whole you see on your normal bill. Each component of the end price can be shaped to encourage user behaviour such that it aligns with the lowest cost service delivery. Reforms are in discussion to network tariffs as most network tariffs in Australia are not designed with EV use in mind.

Review of network tariffs makes sense as we have learned that private charging of EVs will occur at lower cost and at the right times to suit the electricity network if network tariff windows are correctly aligned with the wholesale market. When prices are appropriate to attract consumers onto time-of-use (ToU) tariffs.

Likewise with public EV charging. Sharp ToU prices will enable CPOs to influence consumer charging behaviour to a degree. Dynamic pricing will allow CPOs to warn EV drivers of

9 02.1 EV battery fire data | EV Fire Safe

impending high prices and to a degree load manage their infrastructure to take pressure off the network, though not so much that drivers will be severely inconvenienced.

Two-way tariffs that incorporate both an export charge for excess solar during the day and an export reward for export at peak time need not be inextricably linked when there are other tariffs available to the same consumer that do not feature the export charge. This would disincentivise V2G participation. These issues have received little traction with DNSPs through the AER regulatory process. Governments can assist by doing their own advocacy here, to ensure regulated distribution companies are acting in the interests of consumers.

The NT government is planning trials for EV-specific charging tariffs. The Victorian government has published online guidance for EV owners on the Victorian Energy Compare website.

Sharing of charging infrastructure data

It will be useful for DNSPs and CPOs to know where EV chargers are on the network. This aids DNSPs in planning electricity network maintenance and upgrades to achieve lowest cost adequate outcomes. CPOs will be able to better plan where their next infrastructure deployment will be best utilised. DNSPs could also share to higher level of detail, where capacity is on their networks, and even which poles are suitable to host EVSE.

On private EV charging infrastructure, concerns have been raised about the ability of DNSPs to understand where EVSE are behind the meter. Some DNSPs are experimenting with Non-Invasive Load Monitoring (NILM) technologies using smart meter data, to identify Mode 3 chargers. This is to identify clustering of EVSE in an area where consumers' charging behaviours may demand network augmentation.

Concerns have been raised about the inadequacy of the DER register (DERR) to accurately collect data where bidirectional EVSE are retrofitted to an existing solar and storage system for example. Low visibility of CER is manageable at a small scale, where consumer behaviour is being influenced by clever ToU tariffs and two-way tariffs. Where this is not in place, networks could come under strain and electricity markets will not run as efficiently as possible.

Governments can support thinking and solutions around these concerns to deliver win-win outcomes for all parties. The Federal Government gets a call out for their work on the EV website, in collaboration with the states and territories (https://www.energy.gov.au/electric-vehicles) and energy infrastructure map (https://evciroadmap.evenergi.com/).

Other policy areas

This year the EVC attempted to score governments on areas such as; "Energy policy related to EVs" and "CER".

Energy policy related to EVs ultimately did not make the report due to a distinct lack of policy in this area. Absence of an EV charging roadmap for example or any policy positions other than those called out in the topics here, shows more thought is required on this front. The EVC hopes to bring this category into the report in future years.

It is evident that there are different ideas about what constitutes good policy for EVs when it comes to the very broad area of CER. For example, some governments put forward their plans and rule changes for CER integration into the market as a positive step for EV energy infrastructure. This is a complex and vexed issue. On the one hand, government support to make it possible for EV charging infrastructure to integrate with the network/market is very important. On the other hand, the EVC would not support mandates that CER be integrated. Consumers have spoken: most want a simple relationship with their electricity supply,[10] and they don't want to hand over control of their assets because trust in the electricity market has been eroded by price gouging, changing consumer's tariffs without warning, continuous reductions in feed-in-tariffs etc.[11]

Firstly, virtual power plants (VPPs), home energy management systems (HEMS) and other platforms that allow CER integration need to be supported to make all possible markets available to them. This will allow the greatest level of value to be passed on to CER owners and consumers alike. Secondly, consumers need to be supported to take up CER and register it with a VPP, HEMS or similar platform that makes it an excellent investment if they want to, *and* it must be obviously an excellent investment, to ensure the majority of CER owners want their CER integrated with the market.

It is not clear from the policy positions provided, which side of the issue governments favour, mandates or support. The EVC will endeavour to investigate this more clearly for future editions of State of EVs.

Energy Infrastructure Scorecard

	FED	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Public Fast Charging	50%	100%	100%	25%	75%	100%	75%	50%	75%
Other Public Charging	100%	75%	75%	25%	0%	50%	0%	50%	75%
Workplace Charging	50%	100%	50%	25%	25%	25%	50%	25%	100%

10 submission-doc-aemc-pricing-review-electricity-pricing-consumer-driven-future-discussion-paper.pdf

11 Utilities want control of consumer solar and batteries to help reverse price spikes they just engineered | RenewEconomy

Dedicated public Charging for Heavy Vehicles	100%	0%	0%	0%	0%	0%	0%	25%	0%
EV Readiness in Building Development	75%	100%	75%	50%	50%	25%	50%	25%	50%
Retrofit Programs And Enabling Charging for Rentals/Strata	50%	75%	75%	0%	0%	0%	25%	0%	0%
V2G Enablement	50%	0%	0%	0%	0%	75%	0%	25%	25%
Network Tariffs	0%	0%	0%	25%	0%	0%	0%	25%	0%
Sharing of Charging Infrastructure Data	50%	25%	50%	25%	25%	25%	25%	25%	25%
Overall	**6/10**	**5/10**	**6/10**	**2/10**	**2/10**	**4/10**	**2/10**	**4/10**	**4/10**

SUV practicality now with extra spark

With elegant design & elevated comforts, the new ID. 4 Pro combines the practicality of a mid-size SUV with the benefits of electrification. It comes with a remarkable 544km WLTP combined range*, generous amounts of interior space, and a suite of intelligent IQ.DRIVE safety systems^.

on ev

^Safety technologies are designed to assist the driver, but should not be used as a substitute for safe driving practices.
*Electric vehicle range has been calculated in compliance with the Worldwide Harmonised Light Vehicle Test Procedure (WLTP). The stated electric vehicle range is for the purposes of comparison amongst vehicles tested under the same technical procedures only. The real range for your vehicle will vary according to a number of different factors.

5 Local Government

As important as federal and state government policies are, local councils will also need to adapt as the EV transition picks up speed. In fact, local officials often have jurisdiction over some of the most important policy levers for EV uptake. From public charging to development applications, road access to community engagement, councils will need to be proactive in addressing the individual needs of their communities and their unique pathway to electrification.

With over 500 LGAs in Australia, there is no one-size-fits-all EV strategy at the local government level. Some of the most pressing EV priorities will largely depend on the location and demographics of a given council:

Inner City	Outer Suburbs	Regional & Rural
Kerbside charging for residents without parking	Fast-charging at shopping precincts, commercial centres	Multi-bay fast-chargers between regional centres
Council-hosted public charging at community facilities/venues	Carpark charging at train stations, commuter hubs	Pull-through bays on key highway and freight routes
Destination charging at local activity centres	EV-ready planning laws, for new builds and land releases	Co-locating destination chargers at tourist attractions
Retrofitting high-rise and strata developments	Improved access for electric trucks to/from freight precincts	Maximising 'linger-and-spend' dollars in regional towns

The EV Council has published a dedicated resource pack for local governments, outlining 8 priority areas where most local councils will need to focus their efforts in the critical years before 2030. It also includes pro-forma guidance documents and checklists to help simplify common charging and planning requirements. To access the resource pack and get more information about shaping the EVC's advocacy at the local government level, visit the EVC website.

EVC Policy Asks

		State	Federal
Light vehicles:	1. Retain Electric Car Discount until 2035		✓
	2. Set EV targets and a date for ban on ICE vehicle registrations	✓	✓
	3. GST-exemption for car and truck EVs		✓
	4. Energy bill credit for car and truck EVs	✓	
Commercial vehicles:	1. Provide financial incentives to reduce capital costs of fleet purchase of electric van/trucks	✓	✓
	2. Provide operational benefits (e.g. registration discounts, toll discounts)	✓	
	3. Improve access (e.g. curfew exemptions, as-of-right access, 24/7 operations)	✓	
Market and Industry development:	1. Establish local battery manufacturing and recycling	✓	✓
	2. Support local EV manufacturing and supply chain development	✓	✓
	3. Expand funding for critical minerals industry development	✓	✓
	4. Funding for EV-related skills training programs	✓	✓
	5. EV Awareness Campaign	✓	✓
Energy and Infrastructure	1. Charging Roadmap for Australia underpinned by a data-driven dashboard to support investment decisions		✓
	2. A mechanism to achieve improved coordination between charging solution providers and network operators (including network visibility, tariff reform, transparent facilities access agreements, connection timeline targets, Service & Installation Rules)	✓	✓
	3. Nationally harmonised right to charge legislation and financial incentives for renters to install EV charging	✓	✓
	4. An incentive for V2G such a rebate for purchase of a bidirectional inverter	✓	✓
	5. Cost-sharing model for heavy vehicle public charging infrastructure	✓	✓

7 Appendices

Appendix A - Glossary

Term	Explanation
AC Charging	When an EV is connected to an AC charger, the onboard charger of the vehicle converts the AC electricity from the power grid into DC electricity, which is then used to charge the vehicle battery. AC charging is typically slower compared to DC charging and is often used for overnight home charging or at workplaces where vehicles are parked for extended periods.
BEVs (Battery Electric Vehicles)	Vehicles that are powered exclusively by electricity stored in onboard batteries and use electric motors for propulsion.
DC Charging	DC charging involves supplying direct current directly to a vehicle's battery without the need for conversion by the onboard charger. This allows for much faster charging times ideal for use at public charging stations along highways or in settings where rapid charging is necessary. With current technologies offering power levels from around 50 kW to over 350 kW, DC chargers are significantly more powerful than AC chargers.
Destination Charging	EV charging stations located at destinations like hotels, shopping centres, or tourist hotspots, usually providing slower charging over a longer period.
DNSP (Distribution Network Service Provider)	DNSPs are the entities responsible for operating and maintaining the electricity distribution network, which includes the poles, wires, meters, and infrastructure that deliver electricity from the high voltage transmission network to end users, including residential homes, businesses, and EV charging stations.
EVs (Electric Vehicles)	Electric Vehicles (EVs) specifically refer to vehicles that use electric motors for propulsion and can be recharged from an external power source. This includes Battery Electric Vehicles (BEVs), which operate solely on electric power stored in batteries, and Plug-in Hybrid Electric Vehicles (PHEVs), which can run on electric power and switch to an internal combustion engine when needed. Unlike conventional hybrid vehicles, EVs can be externally charged, allowing for extended electric-only driving capabilities.
EVSE (Electric Vehicle Supply Equipment)	Equipment required to supply electric energy for recharging electric vehi-cles, commonly referred to as EV chargers. This typically refers to Mode 3 & Mode 4 charging.
Fast and Ultra-Fast Charging	Refers to higher power charging technologies that can recharge EV batteries much faster than standard charging options. Fast chargers are typically rated between 24 kW and 99 kW, while ultra-fast chargers exceed 100 kW.
FBT (Fringe Benefit Tax)	FBT is a tax paid by employers on certain benefits provided to their employees, including vehicles. Since 2022, EVs that meet certain criteria have been exempt of FBT which has made them more affordable under novated leasing/salary sacrifice arrangements.
GVM (Gross Vehicle Mass)	The maximum a vehicle can weigh when fully loaded, as specified by the manufacturer.

Term	Explanation
Heavy Vehicles	Includes larger transport vehicles like trucks, buses and some vans that are generally greater than 4.5 tonnes gross vehicle mass (with some exceptions, such as light box 3.5-4.5 tonne trucks).
HV (High Voltage)	In most contexts, high voltage is defined as any voltage exceeding 1,000 volts AC or 1,500 volts DC.
Light Vehicles	Typically refers to passenger vehicles including cars, small vans, and utes that are generally below 4.5 tonnes gross vehicle mass.
LV (Low Voltage)	Low voltage is defined as any voltage from 50 to 1,000 volts alternating current (AC) or from 120 to 1,500 volts direct current (DC).
PHEVs (Plug-in Hybrid Electric Vehicles)	Vehicles that combine an internal combustion engine with an electric propulsion system. These vehicles can be charged externally to run on electricity before switching to fuel.
V2G (Vehicle-to-Grid)	Technology that enables energy to be pushed back to the power grid from the battery of an electric vehicle.
V2X (Vehicle-to-Anything)	Technology that enables an electric vehicle to supply electricity from its battery to external loads, e.g. the grid (V2G), a building/home (V2B/H), or external loads (V2L) via bidirectional charging. It encompasses V2G, V2H, V2B, and V2L.
New Vehicle Efficiency Standard	The New Vehicle Efficiency Standard sets an average tailpipe carbon emissions target for all new vehicles sold in a single year by each car maker. These companies are able to sell vehicles both above and below the target; what is important is the average carbon emissions across all vehicles sold. The target is reduced each year, encouraging car makers to continue importing more efficient, low and zero emission models into Australia. Car makers that beat the target earn credits. These credits can be saved for future years or sold to other car makers. Car makers that miss the target can choose to pay a penalty, purchase credits from other carmakers or try to make up the deficit in future years – since there is a rolling window to save credits and debits. In effect, the standard sets up a trading scheme between car makers and encourages competition for the most efficient vehicles. This will save consumers money, reduce Australia's reliance on foreign oil, and increase the use of Australian-made energy. Until 1 January 2025, Australia was one of the few developed economies that did not have this type of standard (together with Russia).
Facilities Access Agreement	A contract between a DNSP and a charge point operator (CPO) for the CPO to use the DNSPs assets, such as a powerpole.
Service Installation Rules	A document defining how electrical connections may be made to the distribution network in a certain state/territory.
Time-of-Use tariff	Requiring a digital smart meter, these kinds of tariffs have different prices for different times of day. Typically they feature; low prices for off-peak periods and high prices for peak-periods.

Appendix B - Targets

Below is an overview of key targets related to the EV transition across the country:

Jurisdiction	Federal	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Net Zero Commitment	2050 2030 (-45%)	2045 2040 (-90-95%) 2030 (-65-75%)	2050 2030 (-50%) 2035 (-70%)	2050	2050 2035 (-75%) 2030 (-30%)	2050 2030 (-60%)	Achieved	2045	2050
Renewable Energy Target	82% by 2030	100% by 2020 (achieved)	12 GW renewable energy generation by 2030 16 GWh of long-duration storage by 2030	50% by 2030	N/A (The QLD Government has committed to repealing the renewable energy target)	100% net renewable by 2027	200% by 2040 (150% by 2030)	65% by 2030 (95% by 2035)	N/A
EV Sales Target	N/A	80-90% of new car sales by 2030 (100% from 2035)	52% of new car sales by 2031	N/A	50% passenger vehicle sales by 2030; 100% by 2036	100% by 2040 (via COP Declaration)	N/A	50% of new light vehicle sales by 2030	N/A
Government Fleet Target	'Low Emission Vehicles' to be 75% of new passenger vehicles by 2025	100% electric fleet by 2040 (in line with net zero ACT Gov)	100% passenger EVs by 2030 (50% by 2026)	200 government EVs by 2030	-10% tailpipe emissions by 2030	N/A	100% by 2030	100% by 2035 link	50% of eligible vehicles purchases from FY2025-26
Electric/Zero Emissions Bus (ZEB) Target	N/A	100% ZEB fleet by 2040	100% ZEB fleet by 2035 (Greater Sydney); 2040 (Outer Metro); 2047 (Regional NSW)	N/A	All new buses added to SEQ fleet ZEBs by 2025; 100% ZEB state-wide by 2030	100% ZEB fleet by 2050	N/A	All new orders to be ZEB by July 2025;	100% ZEB purchases from 2025

Net Zero Commitment: The target year by which the jurisdiction aims to achieve net-zero greenhouse gas emissions.

Renewable Energy Target: The percentage of energy the jurisdiction aims to generate from renewable sources by a specified year.

EV Sales Target: The expected percentage of electric vehicles in new car sales by a specified year.

Electric/Zero Emissions Bus Target: Plans or targets related to transitioning public bus fleets to electric or zero-emission vehicles.

Appendix C – Electric Vehicle Sales

The following sales figures are for light passenger vehicles only.

Year	BEV Sales	PHEV Sales	Total EV Sales	EV Market Share
2011	49	0	49	0.00%
2012	173	80	253	0.02%
2013	191	102	293	0.02%
2014	371	951	1,322	0.12%
2015	759	1,012	1,771	0.15%
2016	668	701	1,369	0.12%
2017	1,208	1,076	2,284	0.19%
2018	1,053	1,163	2,216	0.21%
2019	5,292	1,402	6,694	0.65%
2020	5,215	1,685	6,900	0.78%
2021	17,293	3,372	20,665	1.95%
2022	33,416	5,937	39,353	3.81%
2023	87,217	11,219	98,436	8.45%
2024	90,847	22,900	113,747	9.60%
2025 (Jan-Jun)	47,145	25,613	72,758	12.10%

Sources: EVC Vehicles Sales Report, AAA EV Index, VFACTS

Appendix D – Electric Vehicle Models

Please note that figures on model availability across vehicle segments are based on industry submissions and desktop research. The EVC gratefully acknowledges the contributions of zecar in compiling the below list.

Electric cars

PHEV BEV

Brand	Model
Abarth	500e
Alfa Romeo	Junior
Alfa Romeo	Tonale
Audi	A5
Audi	e-tron GT
Audi	Q4 e-tron
Audi	Q5
Audi	Q6 e-tron
Audi	Q8
Audi	Q8 e-tron
BMW	i4
BMW	i5
BMW	i7
BMW	iX
BMW	iX1
BMW	iX2
BMW	M5 Sedan
BMW	M5 Touring
BMW	X3 30e xDrive
BMW	X5
BMW	XM
BYD	DOLPHIN
BYD	ATTO 3
BYD	SEAL
BYD	SEALION 6
BYD	SEALION 7
Cadillac	Lyriq
Chery	E5 Urban
Chery	E5 Ultimate
CUPRA	Leon
CUPRA	Formentor
CUPRA	Terramar
CUPRA	Tavascan
Deepal	S07*
Deepal	E07
Fiat	500e
Ford	Mustang Mach-E
Ford	Escape
Geely	EX5
Genesis	G80 Electrified
Genesis	GV60
Genesis	GV70 Electrified
GWM	Ora
Haval	H6 GT
Hyundai	Inster
Hyundai	Ioniq 5
Hyundai	Ioniq 6
Hyundai	Ioniq 9
Hyundai	Kona Electric
Jaguar	I-Pace
Jaguar	F-Pace
Jeep	Avenger
Jeep	Compass 4xe
Jeep	Grand Cherokee
Kia	EV3
Kia	EV5
Kia	EV6
Kia	EV9
Kia	Niro EV
Kia	Niro PHEV
Kia	Sorento
Land Rover	Defender
Land Rover	Range Rover
Land Rover	Range Rover Evoque
Land Rover	Range Rover Sport
Land Rover	Range Rover Velar
LDV	MIFA 9
Leapmotor	C10
Leapmotor	C10 (PHEV)
Lexus	NX 450h+ (AWD)
Lexus	RZ 450e
Lexus	UX 300e
Lotus	Eletre
Lotus	Emeya
Maserati	GranTurismo Folgore
Mazda	CX-60
Mazda	CX-80
Mercedes-Benz	EQA
Mercedes-Benz	EQB
Mercedes-Benz	EQE
Mercedes-Benz	EQS
Mercedes-Benz	G-Class
Mercedes-AMG	GLC
Mercedes-Benz	GLA
Mercedes-Benz	C-Class
Mercedes-AMG	E-Class
MG	Cyberster
MG	MG4
MG	IM5
MG	MGS5 EV
MG	ZS EV
MG	HS
Mini	Aceman
Mini	Cooper
Mini	Countryman
MINI	Cooper

PHEV BEV

Brand	Model
Mitsubishi	Eclipse Cross
Mitsubishi	Outlander
Peugeot	e-308
Peugeot	e-2008
Peugeot	508
Peugeot	408 Fastback GT
Peugeot	308
Polestar	2
Polestar	3
Polestar	4
Porsche	Cayenne
Porsche	Macan
Porsche	Panamera

Brand	Model
Porsche	Panamera Tourismo
Porsche	Taycan
Porsche	Taycan Cross Turisomo
Renault	Megane E-Tech
Rolls Royce	Spectre
Skoda	Elroq
Skoda	Enyaq
Skoda	Kodiaq
Smart	#1
Smart	#3
Subaru	Solterra
Tesla	Model 3

Brand	Model
Tesla	Model Y
Toyota	bZ4X
Volkswagen	ID. 4
Volkswagen	ID. 5
VOLKSWAGEN	ID. Buzz
Volvo	EX30
Volvo	EX40
Volvo	EX90
Volvo	XC60
Volvo	XC90
Xpeng	G6
Zeekr	009
Zeekr	X

Utes		Vans		Rigid Trucks		Prime Movers	
							
BYD	SHARK 6	Farizon	SV	Farizon	H9E	Mercedes	eActros 300
Ford (AUSEV)	F-150 Lightning	Ford	e-Transit	Foton	T5	Sitrak	TX
Ford (AUSEV)	F-150 Lightning	Ford	Transit Custom	Foton	eAuman D	Volvo	FM Electric
Ford	Ranger	Ford	e-Transit Custom	Foton	eAuman	Volvo	FMX Electric
IVECO	eDaily (cab-chassi)	IVECO	eDaily	Fuso	eCanter 515	Volvo	FH Electric
GWM	Cannon Alpha PHEV	LDV	eDeliver 7	Fuso	eCanter 615		
LDV	eT60	LDV	eDeliver 9	Fuso	eCanter 818		
LDV	eDeliver 9 (cab-chassis)	Mercedes	EQV	Fuso	eCanter 918		
		Mercedes	eVito	Hyundai	Mighty		
		Peugeot	E-Expert	Isuzu	NPR 75-200 EV*		
		Peugeot	e-Partner	IVECO	eDaily		
		Renault	Kangoo E-Tech	JAC	N55		
		Volkswagen	ID.Buzz Cargo	JAC	N75		
				JAC	N90		
				LDV	eDeliver 9		
				Mercedes	eActros 300		
				Mercedes	eEconic		
				Sitrak	TX		
				Volvo	FL Electric		
				Volvo	FE Electric		
				Volvo	FM Electric		
				Volvo	FMX Electric		

Electric buses

Make	Model	Segment	Range (km)*	Seats (approx.)
Bus & Coach International	Citirider EV	City Bus	350km	45
Bus & Coach International	Classmaster EV	Charter Bus/Coach	450km	57
Bus & Coach International	Fleetmaster EV	Charter Bus/Coach	420km	53
BusTech	ZDI-450	City Bus	325km	45
BYD	B70	City Bus (Small)	200km	18
BYD	BC18B2	City Bus	250km	Not available
BYD	BC12B1	City Bus	400km	Not available
Challenger	Electric Low Floor	City Bus	400km	41
Custom Denning	Element	City Bus	500km	45
Foton	Electric City Bus (BJ6123EVCA)	City Bus	300km	42
King Long	EVolution Complete	Charter Bus/Coach	350km	51
King Long	EVolution	City Bus	300km	43
Nexport	ZE-B 125	City Bus	<600km	46
Nexport	ZE-B 106	City Bus	<350km	36
Nexport	ZE-B 86	City Bus	<350km	28
Nexport	ZE-B 75	City Bus (Small)	180km	22
Nexport	ZE-C125	Charter Bus/Coach	<600km	57
Scania	K-Series	City Bus	400km	41
Volgren	Optimus	City Bus	>250km	47
Volvo	BZL Electric	City Bus	300km	Not available
Yutong	D7E	Minibus	200km	24-28
Yutong	E12	City Bus	320km	65
Yutong	C12E	Charter Bus/Coach	500km	57
Yutong	EZ7	Minibus	300km	12
Zero Ebus	Volt GT E-Series	Charter Bus/Coach	600km	57

*Subject to operating conditions

Please note that model availability across vehicle segments are based on industry submissions and desktop research. The Electric Vehicle Council gratefully acknowledges the support of the Bus Industry Confederation in verifying the above list.

State of Electric Vehicles

2025

ELECTRIC VEHICLE COUNCIL