



Paul Kirby

Helping the Commercial Vehicle users of the UK **go zero emission**



The Landscape

The drivers of change



**2035 Ban Petrol and Diesel
only / ZEV Mandate update**

**Government Support,
guidance and targets**

**CSR – Corporate Social
Responsibility.
The cascade – ESG**



COMING SOON

NOW!

What is our response?

- Fight
- Flight
- Freeze
- Figure it out?

60+

Fully electric LCVs
currently available
with more than 100
model derivatives.



COMING SOON



The Great Transition: UK Electric Van Market Momentum (2025–2026)

PLUMMETING DIESEL

The Diesel "Death Spiral" Accelerates:

Diesel registrations fell by **29.6%** in late 2025 as businesses pivot to cleaner alternatives.



Market Share Shift (Feb 2025 vs. Feb 2026)



VW and Maxus Lead Compliance

- Some manufacturers are already meeting the **16%-24%** ZEV targets without using regulatory flexibilities.

THE REGULATORY ENGINE & INDUSTRY ADAPTATIONS

ZEV Mandate: Forcing Function to 2026



ZEV Mandate Forces 24% Target for 2026: Manufacturers must significantly increase BEV mixes or face credit deficits and potential fines.



Payload Derogations Empower Category B Drivers: Rules now allow standard license holders to drive zero-emission vans up to 4,250kg.



The Infrastructure Bottleneck: Industry calls grow for a dedicated HGV and coach infrastructure strategy to support heavy-duty ZEVs.

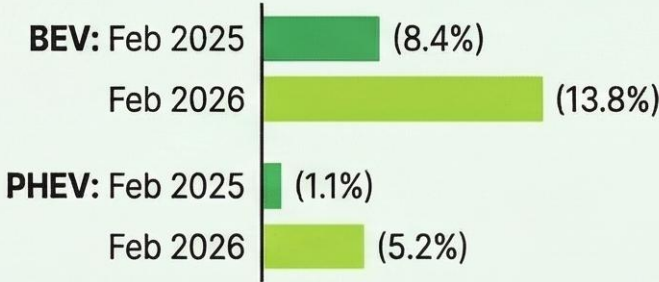
SURGING BEV

RECORD BREAKING: BEV Market Share Hits 13.75%

February 2026 marked a new record high for electric van market share.



Market Share Shift (Feb 2025 vs. Feb 2026)



FUTURE growth

SMMT

- Van Market Growth expected at 1.9% in 26 and a further 0.6% 2027
- LCV BEV market is expected to grow 51.5%, pushing market share to 13.1% (from 8.8% in '25)
- LCV BEV market share is expected to climb to 20.6%, with 48.4% volume growth

My Opinion

- Less market growth
- Greater EV Growth with new entrants driving change
- Establishment getting a bloody nose



44

Fully electric HGVs
currently available

Perceived Challenges

- 
- A background image showing a clenched fist smashing through a grey, textured wall, with debris flying outwards, symbolizing overcoming challenges.
- Payload
 - Range
 - Charging
 - Power
 - Driving styles
 - Cost
 - Energy cost
 - Myths –
 - Batteries
 - Carbon
 - Lifetime
 - Recyclability

Innovation

SOLAR

- Power mitigation
- Free to deploy
- Carbon reduction
- Energy independance

BATTERY

- Depot charge issue
- Productivity
- Cost
- Flexible deployment

The biggest challenge – Home going Fleets



Quiklog

Vehicle Manufacturer Road map

- **Ford** – The king of vans trying to make sure the electric future still says *Transit* on the front.
- **VW** – Clever engineering and strong branding, but leaning heavily on Ford to help carry the electric load.
- **Maxus** – The disruptor that's already inside the gates and quietly winning fleet business.
- **Mercedes** – Premium vans for premium fleets — technology-led and unapologetically expensive.
- **Stellantis** – The quiet giant of electric vans, supplying half the electric market under five different badges.
- **Renault / Nissan** – The early pioneers now rebooting their strategy around next-generation EV platforms.
- **Farizon** – A clean-sheet electric van built to shake up the European establishment.
- **BYD** – The global EV juggernaut that hasn't fully arrived in vans yet... but almost certainly will.
- **Toyota** – The reliability champion cautiously following the market rather than trying to lead it.
- **MAN** – A truck giant dipping a toe into vans while keeping its eyes on heavier transport.
- **Iveco** – A logistics heavyweight entering the electric van market through smart partnerships.
- **Kia** – The wildcard — bringing bold new PBV platforms designed from day one for electric fleets.
- **Chery** – Another new large and strong Chinese brand with big aspirations and new products

Conclusion and Key Messages

- “Brand” is losing strength
- Momentum is there
- Vehicles are available
- Challenge of charging is overcomeable
- Innovation is happening
- Ecosystem is growing in strength
- NOT optional

Take Action



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