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Geographic skew in electric vehicle statistics

Identifying real world Plug-in vehicle numbers in Scotland

2026

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1 Definitions

ANPR	Automatic Number Plate Recognition
BEV	Battery Electric Vehicle
CCC	Climate Change Committee
CO2e	Carbon Dioxide equivalent
EV	Electric Vehicle
HEV	Hybrid Electric Vehicle
ICE	Internal Combustion Engine
LA	Local Authorities
LEZ	Low Emission Zones
Mts	Megatons (1,000,000 kg)
OZEV	Office of Zero Emission Vehicles
SMMT	Society of Motor Manufacturers & Traders
VETS	Vehicle Emission Trading Scheme
ZEV	Zero Emission Vehicle

2 Geographic skew in electric vehicle statistics

2.1 Context

In UK Department for Transport (DfT) published statistics, ‘Keepership’ refers to the registered keeper of the vehicle, which might not be the owner.

DfT notes:

- “Vehicles are allocated to a local authority according to the postcode of the registered keeper. This is the keeper's address for privately owned vehicles or the company's registered address for company owned vehicles. The address does not necessarily reflect where the vehicle is located. This is especially true for large fleets kept by companies involved with vehicle management, leasing or rentals.”
- “Significant changes in the number of vehicles from year to year can often occur when companies change their registered address.” (DfT VEH0142, April 2026)

The UK Driver Vehicle and Licensing Agency (DVLA) records and reports statistics on the keepership address, however the registered address provided to DVLA may not be where the vehicle is ultimately kept. In particular, company keepership is frequently registered at an address other than where the vehicle is used e.g. a finance brokers address, or company HQ.

This effect is particularly evident with newly manufactured vehicles, which are significantly more likely to be registered under company keepership than older vehicles. The rise in proportion of company keepership registrations as a result of new finance products in the car lease market has led to an increasing distortion in the reported geographic allocation of vehicles in recent years.

As the geographic registration of company keepership vehicles has become incrementally less reliable to determine accurate uptake of new vehicles by location of use, an exploration of the extent to which this could be distorting official statistics reported for Scotland’s vehicle keepership became necessary.

A method to recalibrate the effect of geographic skew in the reported location of vehicle registration has been developed to provide better insight into the prevalence of vehicle ownership by respective fuel types for both new vehicle sales and total vehicle stock in Scotland.

2.2 Aims and objectives

The intended outputs from this report:

- Provide a better means of determining real-world electric vehicle uptake in Scotland.
- Develop methodology that can be shared with key stakeholders who model emissions using national statistics including DfT, Devolved Governments and the Climate Change Committee.
- Demonstrate how this methodology impacts the total number of vehicles of all fuel types in Scotland.
- Consider the impact on the total carbon footprint for the car and van sectors in Scotland, and their respective emissions trajectories.

2.3 Company vehicle keepership

Table 1 – Percentage of new vehicles recorded as company cars in 2025:

Petrol	Diesel	Hybrid electric (petrol)	Hybrid electric (diesel)	Plug-in hybrid electric (petrol)	Plug-in hybrid electric (diesel)	Battery Electric Vehicle	All fuel types
56.59%	64.01%	55.61%	43.28%	72.97%	84.53%	78.10%	63.28%

(DfT statistics VEH1153a, vehicles registered for the first time, published April 2026)

Most newly registered vehicles in the UK (63.28%) were registered as company cars in 2025. The percentage of plug-in hybrid vehicles (PHEVs) and battery electric vehicles (BEVs) registered as company keepership is higher, at 72.97% and 78.10% respectively.

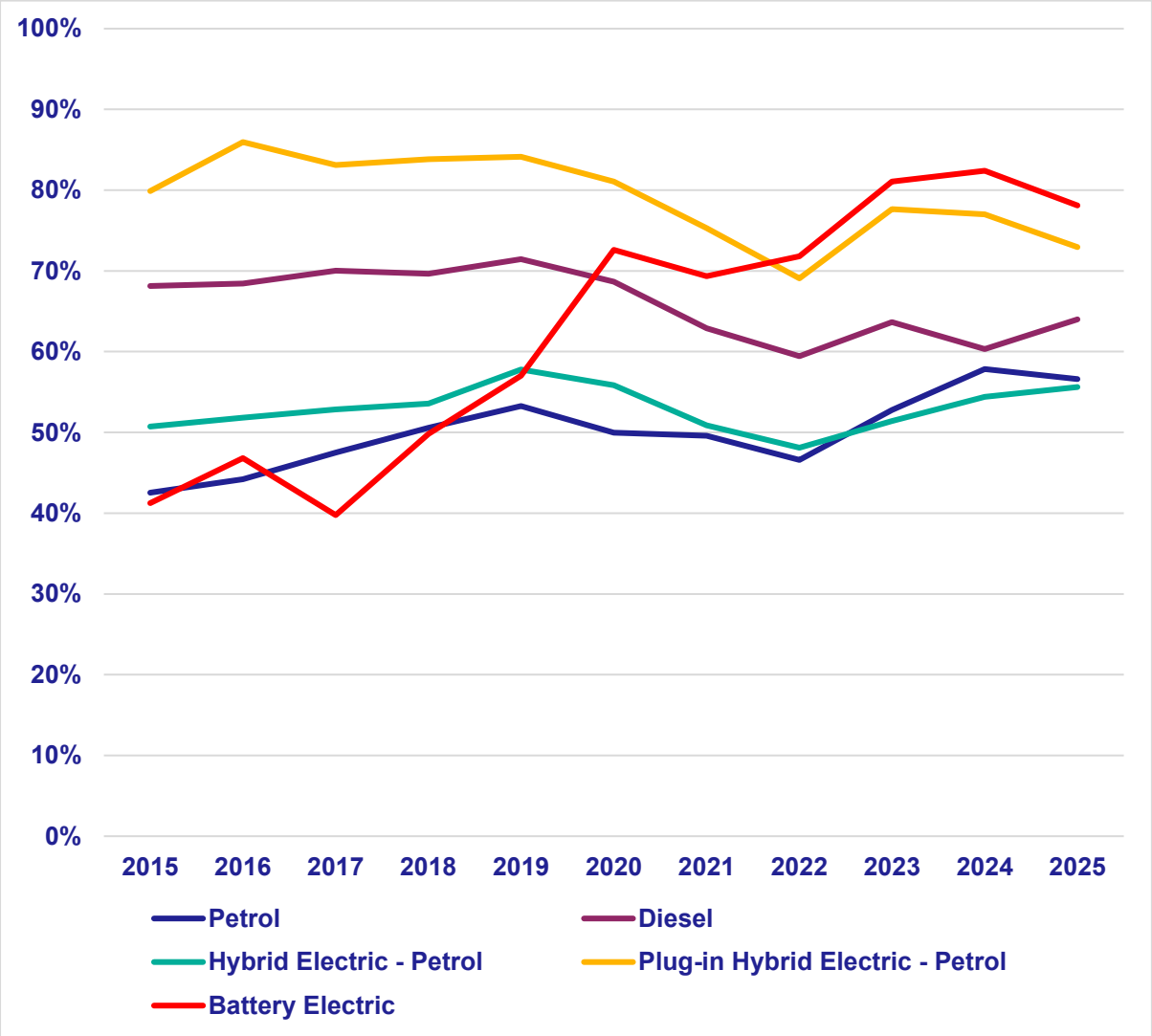
This is, in part due to the company car taxation system currently favouring both PHEV and BEV vehicles. It is also due to the relatively recent rise of individual lease products popular with plug-in vehicle drivers that register keepership with a company rather than that of the vehicle user even where this is used as a private vehicle.

There are also differences in the taxation system in Scotland that could lead to some businesses choosing to register a vehicle at an office or address in England to obtain tax advantages for the vehicle user.

PHEVs are particularly likely to be registered as company vehicles when compared to other fuel types. This high percentage of company vehicles is consistently between 70% and 85% each year for the past 10 years (yellow line).

The rate of company keepership for BEVs varies to a greater degree by age of vehicle, with older BEVs in the UK significantly more likely to be privately owned than newer BEVs (red line).

Graph 1 – Percentage of licenced company vehicles in total UK stock by year of first registration and fuel type



(DfT statistics VEH1153a, April 2026)

The percentages of company keepership for plug-in vehicles are substantially higher than that of even diesel cars (60% to 70%) which are traditionally adopted by businesses due to beneficial tax structures that this enabled.

2.4 Electric vehicle keepership in Scotland

In recent years, DfT statistics have reported Scotland as having a lower proportion of BEV new car registrations compared to the UK average.

According to DfT licenced vehicle data for Scotland, the percentage of BEVs first registered in 2025 and licenced at the end of 2025 was 14.2%, and 8.8% for PHEVs.

In contrast, the percentage of electric cars first registered over the same period across the UK was higher, with 23.4% for BEVs and 10.9% for PHEVs.

Table 2 – percentage of BEV registrations:

2025	Scotland	UK
New BEV car registrations	14.2%	23.4%
New PHEV car registrations	8.8%	10.9%
New BEV van registrations	4.8%	9.2%
New PHEV van registrations	2.3%	3.0%

The difference in these statistics for Scotland and UK is likely to be primarily due to geographical skews in the registration of the location of vehicle user rather than significant differences in relative uptake of electric vehicles.

Personal contract hire and Business contract hire has emerged in recent years as a popular means of ordering a new electric vehicle in the UK. With this financing model, the purchaser does not necessarily own the vehicle at any point, as the vehicle is leased from an intermediary who is ordinarily not the manufacturer. The vehicle is typically registered with DVLA at the brokers address rather than the address where the vehicle is kept.

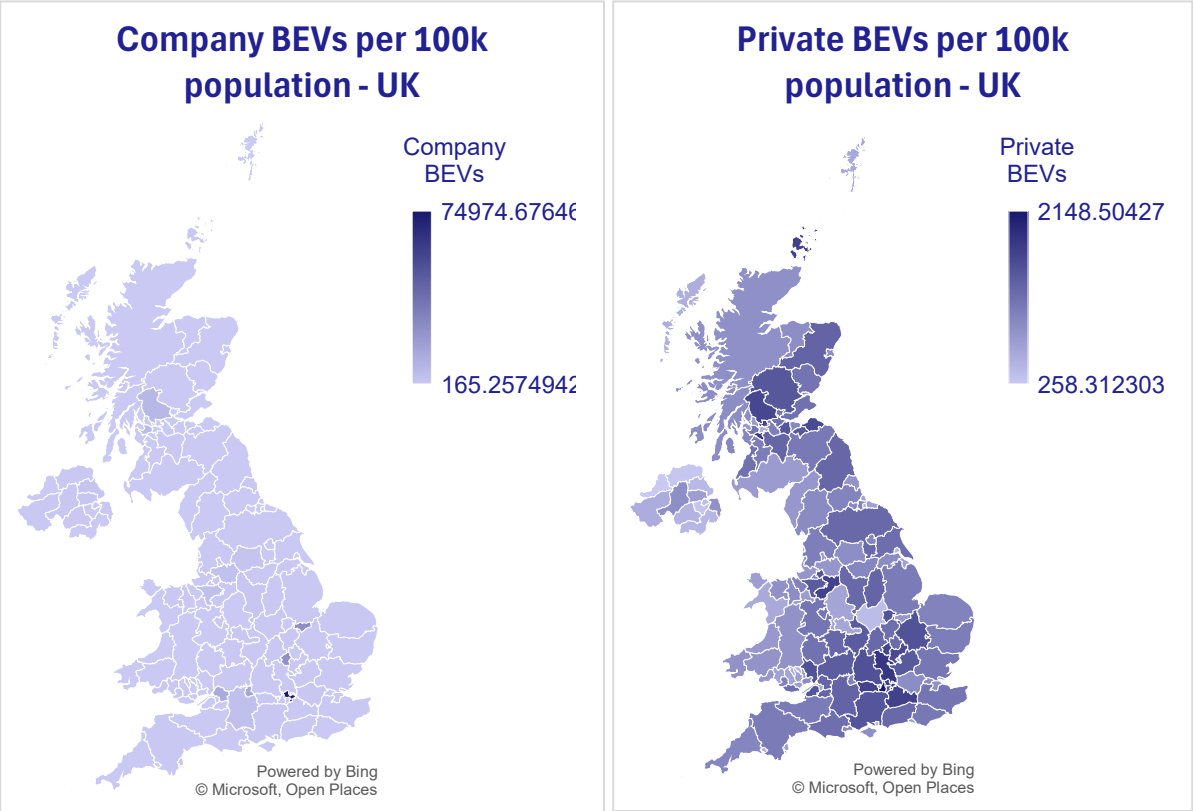
This means that the location of the first vehicle registration in DVLA records can increasingly reflect the address of the leasing company rather than that of the vehicle keeper.

Vehicle finance brokers are concentrated in half a dozen key locations in England, notably the North West, South West and South East of England, the result being that vehicles are disproportionately likely to be registered in these regions in England rather than other regions of England, or Scotland, Wales or Northern Ireland.

The degree of skew in the geographic allocation of vehicles has increased in recent years and has become significant because of the volume of new vehicles that are registered with company keepership status.

Company keepership encompassed over 63% of all cars first registered in 2025 and licenced in Dec 2025, and over 78% of battery electric cars. For vans, company keepership was 92% overall for vans, and 98% of all battery electric vans.

Graph 2 – BEV car geographic distribution in Scotland - private vs company:



The above heat maps of BEV car registrations contrast the much greater geographic variation by region in BEV uptake for company keepership versus that of private keepership.

The company keepership chart (left) disproportionately reflects the addresses of main vehicle brokers in Renfrewshire and Stirlingshire. Although these dealerships may appear dominant on a Scotland wide scale, the volumes of vehicles registered are low when placed beside the sales of major vehicle broker hubs in England.

Geographic records of BEV uptake can be seen to be skewed towards the headquarters of leasing agents, with the main agents based in key towns/cities such as Stockport, Windsor, Milton Keynes and Peterborough. Remarkably, there are more BEVs registered in Stockport than there are households. This is because the company headquarters of a major car leasing agent is based in Stockport, and leasing products offered for UK car orders can result the keeper being registered in Stockport.

The private keepership chart (right) is by contrast more evenly distributed geographically and provides a better indicator as to relative levels of BEV uptake in the four Nations.

2.5 Vehicle data sources

The primary source for vehicle data in the UK is the Department for Transport's vehicle statistics. VEH9901 for licenced road-using vehicles, and VEH1153a registration statistics are the key sources of data when seeking when vehicles are first registered and comparing to historical data. The two diverge because not every vehicle that is first registered remains licensed and active on UK roads.

However, there are discrepancies between the two databases. For example, for BEV cars VEH9901 licensing statistics shows the number of first registered in 2025 as 458,671 in the UK (as licenced at end Dec 2025), while VEH1153a registration statistics shows the number of BEV cars first registered in 2025 as being 473,225 in the UK.

The 3.2% difference (14,554 cars) is principally explained by the following:

1. Vehicles that are not licenced i.e. not paid VED due to being between owners or SORN.
2. Exported vehicles.
3. Write-offs.
4. Stolen vehicles.
5. The VEH9901 licensing road using vehicle database also excludes vehicles that do not have a keeper type, and those that cannot be allocated to a specific local authority due to the postcode being incomplete or invalid.

In addition, there will be vehicles imported to the UK that will serve to increase the total number of vehicles first registered and licenced in a particular year.

Whilst DfT vehicle registration statistics VEH1153a is a useful indicator for the total number of vehicles first registered each year, the total numbers of licenced vehicles on the road will become increasingly divergent over time due to vehicles being written off and exported etc. From a geographic allocation perspective, vehicles can also be sold on and move freely between areas within the UK. As a result, licensing data relating to vehicle location is likely to be more accurate with older vehicles due to the lower incidence of company keepership.

It is still possible however that even with older vehicles that some of these vehicles can be recorded with the DVLA (in other datasets) as registered in one country, region or town yet kept in another.

DfT's vehicle statistics VEH9901 provides a better indication of licenced road using vehicles, and this dataset is updated several times per year. For these reasons VEH9901 has been adopted in the geographic adjustment methodology described as the best indicator of the number of road using vehicles by fuel type.

3 Geographical adjustment

3.1 Methodology

The underlying principle in the adjustment methodology is that vehicles with company keepership are more likely than vehicles recorded with private keepership to be registered at a different address than that where the vehicle is kept creating a vehicle registration skew in official statistics.

It is assumed that vehicles with private keepership are reasonably normally distributed and that DVLA geographic data in licencing statistics held for private vehicle owners is a fair representation of real-world keepership. This premise is supported by the distribution of private keepership to relative population sizes, and correlation to areas of greater affordability of car ownership. As the sample size of cars with private keepership is both large and significant, by extrapolating the relative proportions of vehicles with private keepership by geographic distribution, a statistical representation of the total vehicle stock can be derived. This provides insight into which regions many cars registered under company keepership may actually be kept.

Geographic adjustment to the licenced vehicle database (VEH9901) published by DfT can be conducted by following a simple methodology:

- Segregate cars by private and company keepership totals by fuel type.
- Calculate the percentage of licenced private keepership vehicles from the totals for each Nation or region by quarter / year of first registration as a function of all private keepership vehicles for the respective quarter / year of first registration.
- Multiply by total sales for all keepership types for each fuel type for all Nation or region by quarter or year of first registration.
- Validate totals – these should equal the original for each fuel type for each quarter / year. The revised totals have now been geographically readjusted to reflect the distribution of vehicles of private keepership.
- Repeat for vans.

This method provides a means of statistical redistribution of vehicles. Whilst this is likely to be a better indicator of geographic allocation of vehicles than the current mix

of private and company keepership data, any extrapolation will a function of the accuracy of the private keepership data.

For vans, the percentage of private keepership data is lower than for cars, and so the confidence with any extrapolation should be considered lower than that of the car sector adjustment. It should be noted that this methodology may be less accurate for adjustment with Northern Ireland data given vehicles may also be leased or registered from locations in Ireland.

3.2 Scotland results

Graph 3 – Total plug-in cars and vans in Scotland pre and post adjustment:

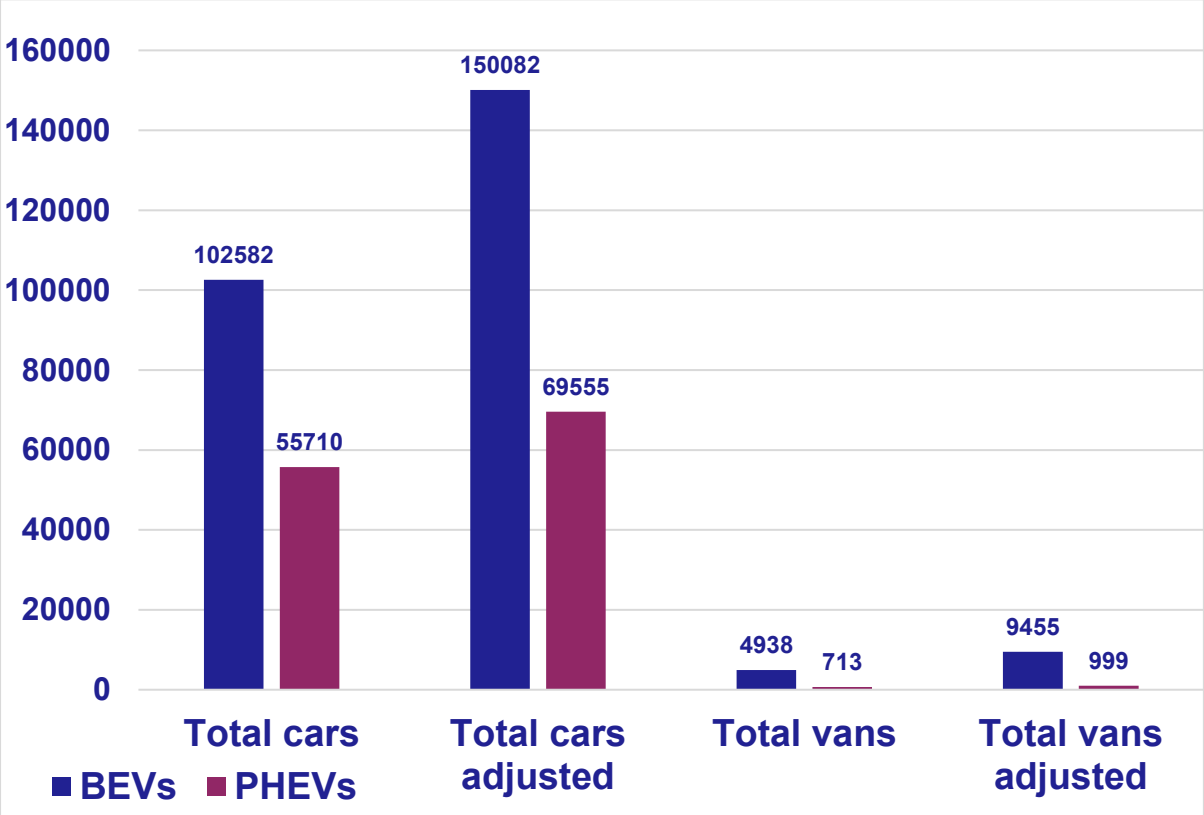


Table 3 – Total plug-in cars and vans in Scotland pre and post adjustment:

Fuel type	Total cars*	Total cars adjusted	% change cars	Total vans*	Total vans adjusted	% change vans
BEVs	102,582	150,082	+46%	4,938	9,455	+91%
PHEVs	55,710	69,555	+25%	713	999	+40%
Total Plug-in	158,292	219,637	+39%	5,651	10,454	+85%

(*based on DfT VEH9901 licenced road using vehicle statistics as of end Dec 2025)

The increase in total BEVs in the geographically adjusted statistics is significant, with 46% additional BEV cars in Scotland than recorded through traditional methods. There are 25% more PHEV cars. The overall change represents over 66,000 additional plug-in cars and vans in total, 40% more than in reported statistics.

3.3 Nation comparison

Graph 4 – Total BEVs per '000 in population by Nation:

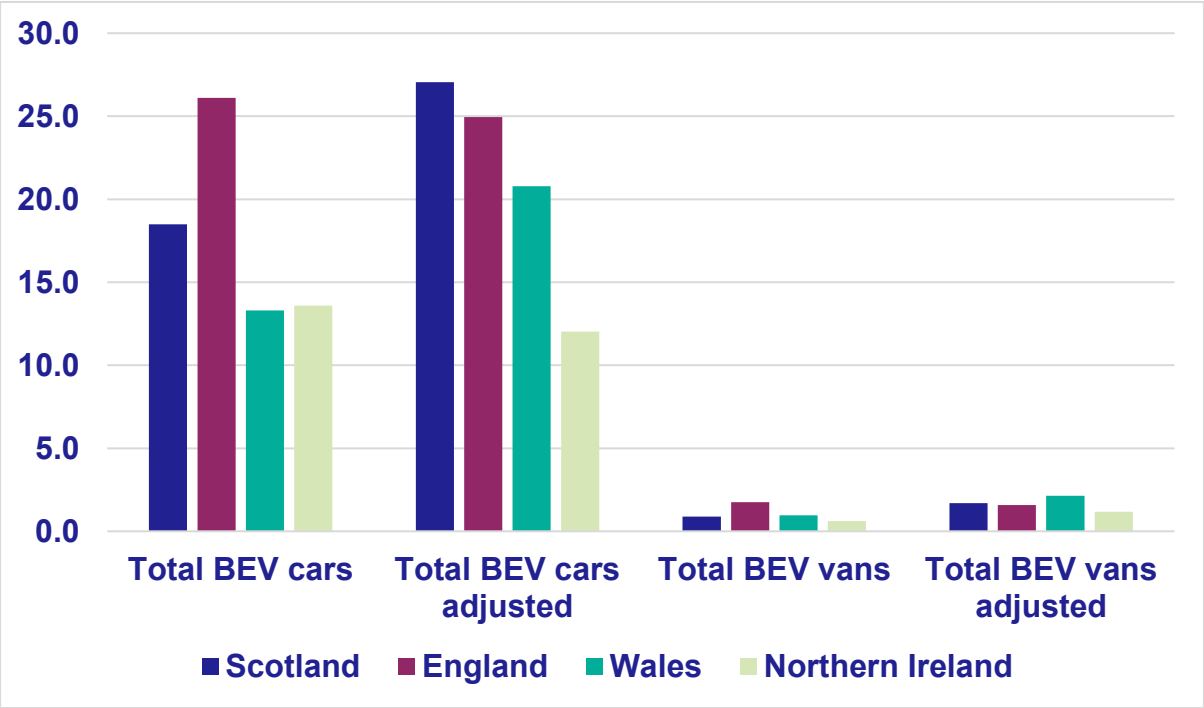


Table 4 – Summary of total cars and vans by Nation:

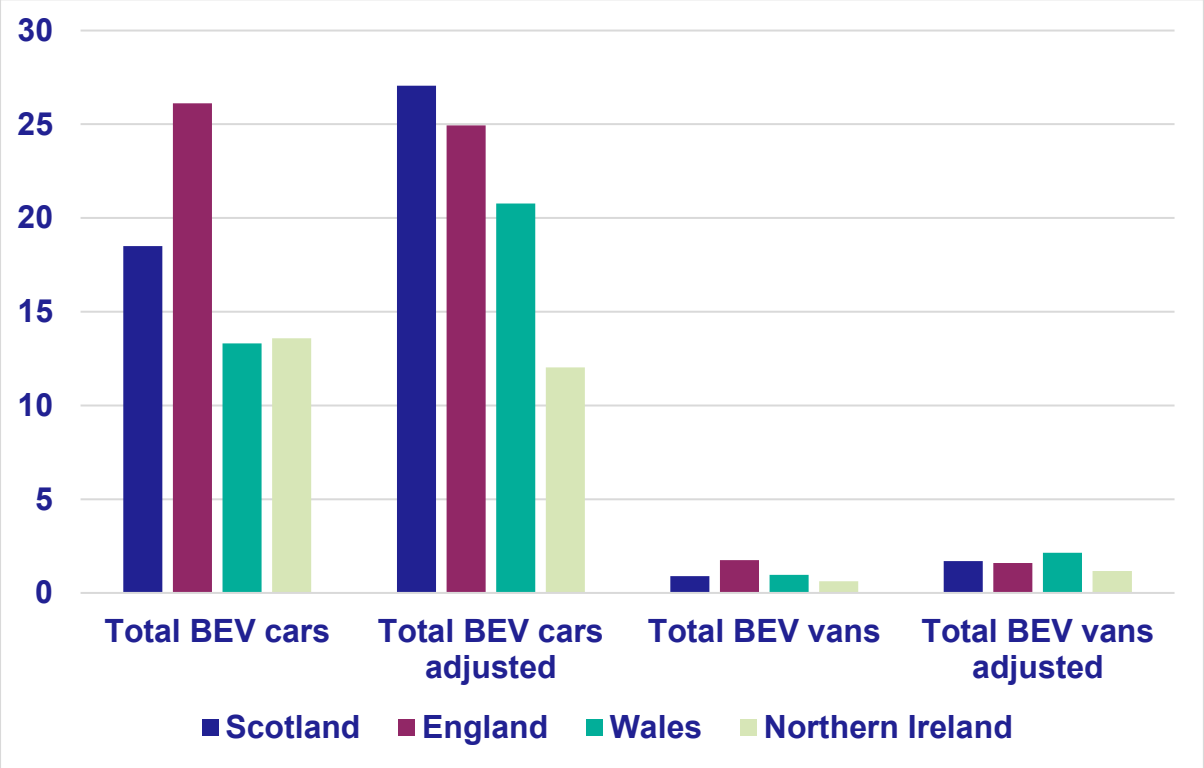
Nation	Population	Total BEV cars	Total BEV cars adjusted	Total BEV vans	Total BEV vans adjusted
Scotland	5,546,900	102,582	150,082	4,938	9,455
England	58,620,101	1,530,599	1,462,317	102,456	93,135
Wales	3,186,581	42,419	66,198	3,060	6,807
Northern Ireland	1,927,855	26,200	23,203	1,199	2,252

(DfT VEH9901 (end Dec 2025) and ONS statistics Population estimates for the UK, England, Wales, Scotland and Northern Ireland - Office for National Statistics)

Normalising vehicle prevalence by population size provides an insightful means of comparison of BEV uptake across the four Nations. Once adjusted for geographic skew, the figures show a much more consistent levels of BEV uptake in Scotland, England and Wales than the non-adjusted figures for both cars and vans.

Scotland and Wales in particular show a significant increase in BEVs per '000 people in the population using the adjusted method. The effect is less evident with Northern Ireland data, potentially due to a secondary statistical geographic skew taking place as a result of vehicle exchange and registration practices with Ireland.

Graph 5 – Total BEVs per '000 in population by Nation:



BEV keepership registrations in published statistics suggest that England records by far the highest uptake per head of population, and Scotland / Wales far lower.

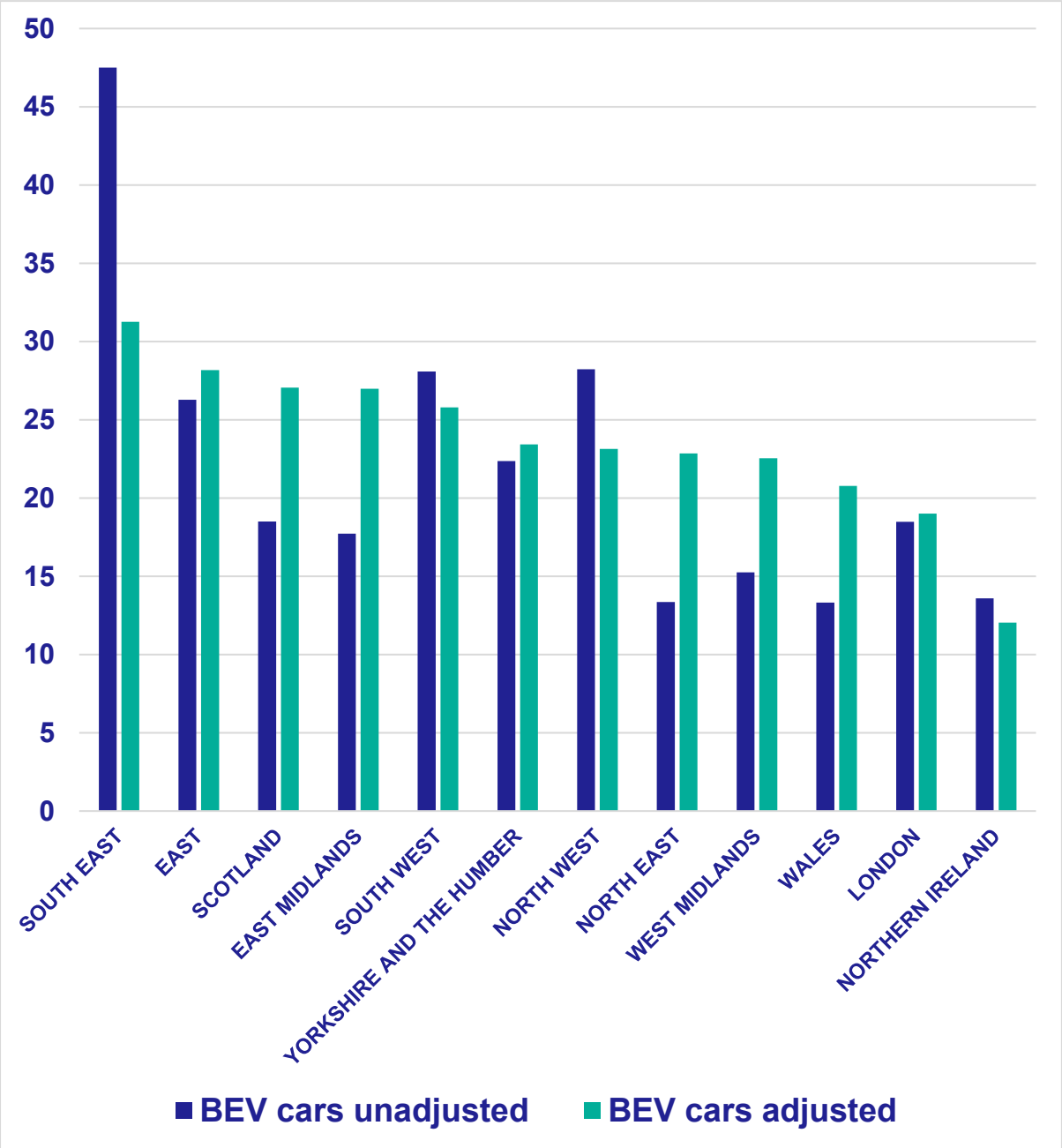
This is principally due however to the propensity for major leasing providers and company HQs to be based in England, resulting in a significantly different geographic allocation of keepership by company and private keepership data.

Following geographic adjustment however, the total number of electric cars first registered to Scotland in 2025 is revealed to be the highest per head of population of the four Nations at the end of 2025.

Whilst the reduction in total BEVs per head of population is not significant in England, the increase in BEVs per head of population is far more pronounced in Scotland and Wales.

Electric vans show a significant increase in total licenced vehicles per '000 in population in Scotland, Wales and Northern Ireland following the adjustment.

Graph 6 – Total BEV cars per '000 in population by Nation and region:

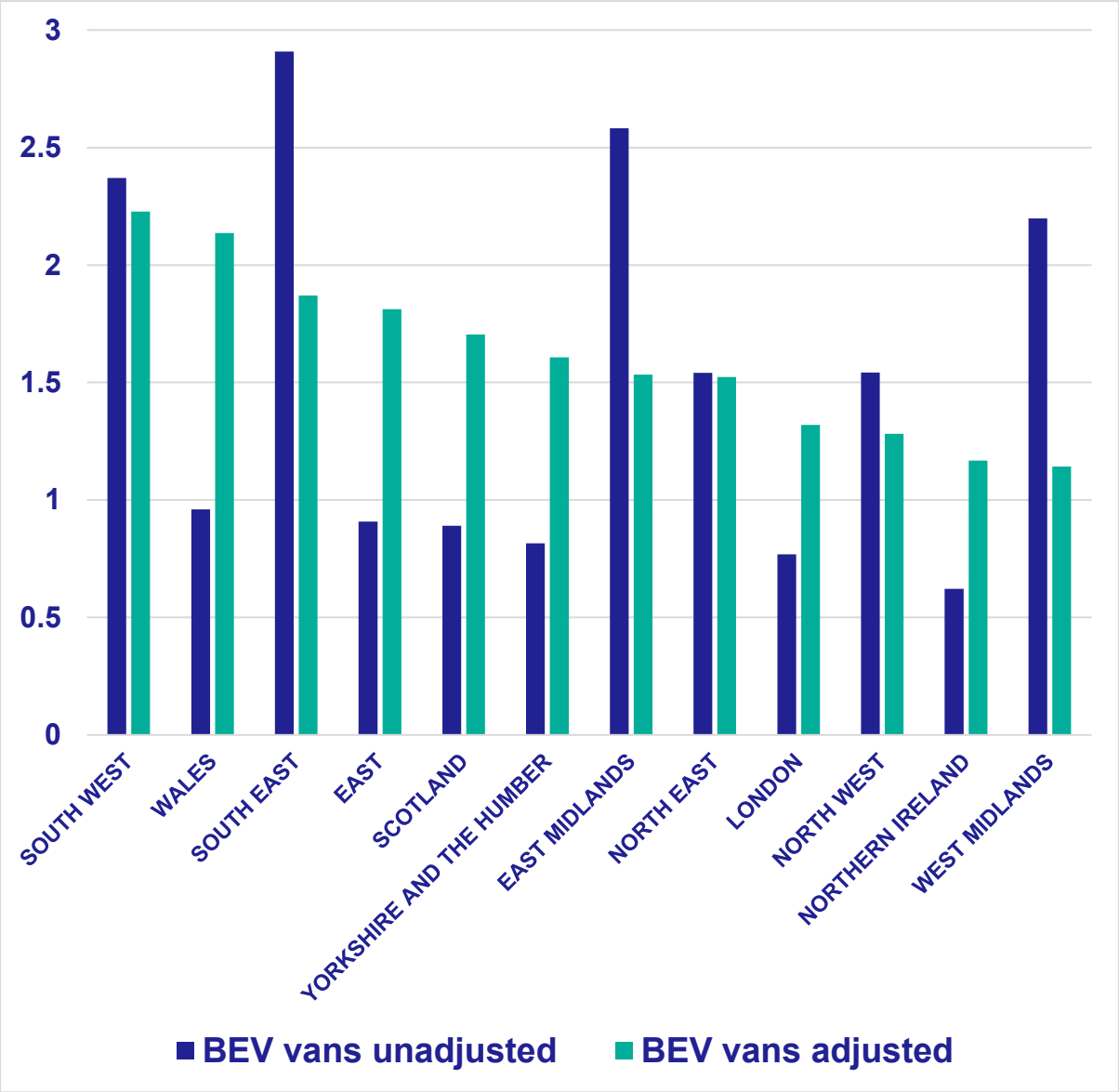


The geographic adjustment provides greater consistency of BEV uptake across regions than by traditional reporting methods.

The South East, South West and North West of England regions show the highest uptake of BEV cars relative to population size prior to adjustment.

South East, East and Scotland show the highest uptake of BEV cars after adjustment. Wales, the North East, and East Midlands also show significant increases in BEV car totals after adjustment.

Graph 7 – Total BEV vans per '000 in population by Nation and region:



A similar picture is presented for vans, with Wales, Scotland, Yorkshire, East of England and Northern Ireland broadly doubling the number of BEV vans in the geographic redistributed data.

There are significant reductions in East Midlands, West Midlands, and the South East.

As noted in the above, the confidence in the accuracy of statistical redistribution for vans is lower due to lower proportions of privately owned vehicles. Vans can also to a greater extent be allocated at depots, so the distribution of larger fleet operators will be a modifying factor that has not been considered within this adjustment.

3.4 Regional distribution within Scotland

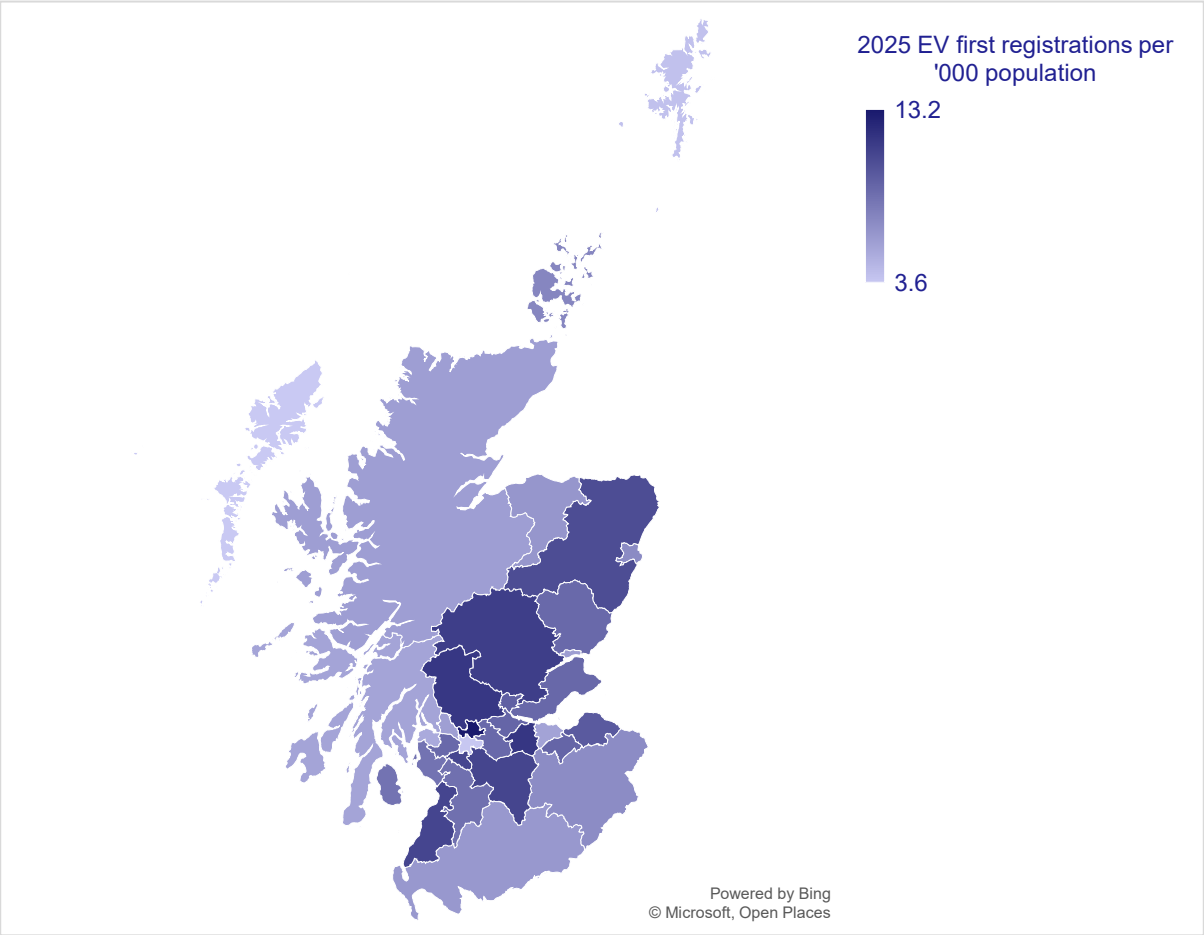
Official statistics of BEV cars report elevated levels of sales in Renfrewshire and Stirling, reflecting the locations of popular vehicle franchises in these regions.

An adjustment at regional level, again based on the distribution pattern of privately owned vehicles, reveals an uplift in BEV cars in the remaining regions in Scotland.

The data has been further normalised per 1,000 people in the population to account for variation in population size.

The Scottish regions with highest relative EV uptake in 2025 to population size were East Dunbartonshire and West Lothian. The island regions of Shetlands Isles and Na h-Eileanan Siar were lowest for EV uptake in 2025, potentially related to historic challenges with electric grid infrastructure. Glasgow recorded a low level of EV uptake in 2025 relative to population size although also had one of the lowest levels of non-EVs uptake in 2025 relative to population.

Graph 8 – 2025 BEV uptake by region per '000 in population - adjusted for geographic skew



3.5 Total vehicles

The redistribution effect is most pronounced with BEV and PHEV cars; however, this is also evident with other fuel types, meaning that petrol / diesel car totals can also be under-reported in the licencing data.

Table 5 – Total vehicles pre and post adjustment by Nation and region:

Nation / Region	Total DfT data	Total – adjusted	% of original
Scotland	2,619,212	2,768,919	105.72%
North East	1,231,302	1,297,042	105.34%
East Midlands	2,560,870	2,662,517	103.97%
West Midlands	2,991,096	3,094,612	103.46%
Wales	1,658,580	1,709,997	103.10%
East	3,553,322	3,607,296	101.52%
London	2,630,663	2,658,203	101.05%
Yorkshire and The Humber	2,714,473	2,741,102	100.98%
North West	3,719,855	3,669,095	98.64%
South West	3,308,327	3,251,354	98.28%
Northern Ireland	1,057,895	1,036,309	97.96%
South East	5,739,579	5,288,730	92.14%

For Scotland, this represents 5.72% more total cars of all fuel types than previously reported, an additional 149,707 cars. The uplift in percentage terms is the highest of all Nations / regions in the UK, and as a consequence the increased accuracy from using geographically adjustment to revise national statistics could be of significant relevance for other means of assessing economic and transport related activity.

Table 6 – Total cars and vans pre and post adjustment by fuel type:

DfT VEH9901 data Scotland	BATTERY ELECTRIC	DIESEL	HYBRID ELECTRIC	OTHER FUELS	PETROL	PLUG-IN HYBRID ELECTRIC	TOTAL
Cars	102,582	742,170	232,410	2,156	1,484,184	55,710	2,619,212
Adjusted cars	150,082	751,199	257,923	2,202	1,537,959	69,555	2,768,919
Difference	47,500	9,029	25,513	46	53,775	13,845	149,707
Vans	4,938	353,910	1,043	162	9,017	713	369,783
Adjusted vans	9,455	403,408	1,281	168	9,483	999	424,793
Difference	4,517	49,498	238	6	466	286	55,010

By fuel type, over 53,000 of the additional cars in the adjusted statistics are petrol; 25,000 hybrid; and 9,000 diesel cars.

With vans, there is an even greater uplift in percentage terms, with 14.9% more vans, indicating over 55,000 additional diesel vans in Scotland. As previously noted, the confidence in the use of this technique is lower with van data than with car data.

3.6 Plug-in vehicle prevalence in Scotland

Published DfT statistics have been released for up to end December 2025. SMMT have released data showing new car registrations for each month up to December 2025. Although the exact proportion of these in Scotland is currently unknown, a proportion of new BEV and PHEVs will be vehicles for use in Scotland.

From the geographically adjusted data in 2025, 8.8% of newly licenced BEVs cars in the UK and 8.0% of newly licensed BEV vans in the UK are likely to have been registered in Scotland.

Table 7 – Total BEV and PHEV vehicles in Scotland:

Body Type	BEV geographical adjustment Dec 2025	PHEV geographical adjustment Dec 2025	All plug-in vehicles geographical adjustment Dec 2025
Buses and coaches*	989	0	989
Cars**	150,082	69,555	219,637
HGVs*	46	0	46
Light goods vehicles**	9,455	999	10,454
Motorcycles*	630	0	630
Other vehicles*	35	659	694
Total	**161,237**	**71,213**	**232,450**

(*VEH1103, **VEH9901 adjusted)

Traditional means of interpreting BEV uptake suggest total prevalence in the Scottish car fleet (as of Dec 2025) at 3.9%. Correcting for geographic skew increases this to 5.4%, or 1 in 18.5 cars. For all Plug-in cars, this represents 7.9%, or 1 in 12.6 cars.

Table 8 – Percentage of BEV and PHEV cars and vans post adjustment:

Body Type	BEV geographical adjustment Dec 2025	PHEV geographical adjustment Dec 2025	All plug-in vehicles geographical adjustment Dec 2025
Cars	5.42%	2.51%	7.93%
Vans	2.22%	0.24%	2.46%

3.7 Average annual km

Due to the greater geographical area of Scotland, it has been historically reported that vehicles travel further on average in Scotland than the GB average.

In 2024, cars in Scotland travelled on average 13,787 km, and vans 26,080 km based on data published by Transport Scotland. These distances are significantly greater than the GB 2024 averages of 12,586 km for cars and 20,264 km for vans.

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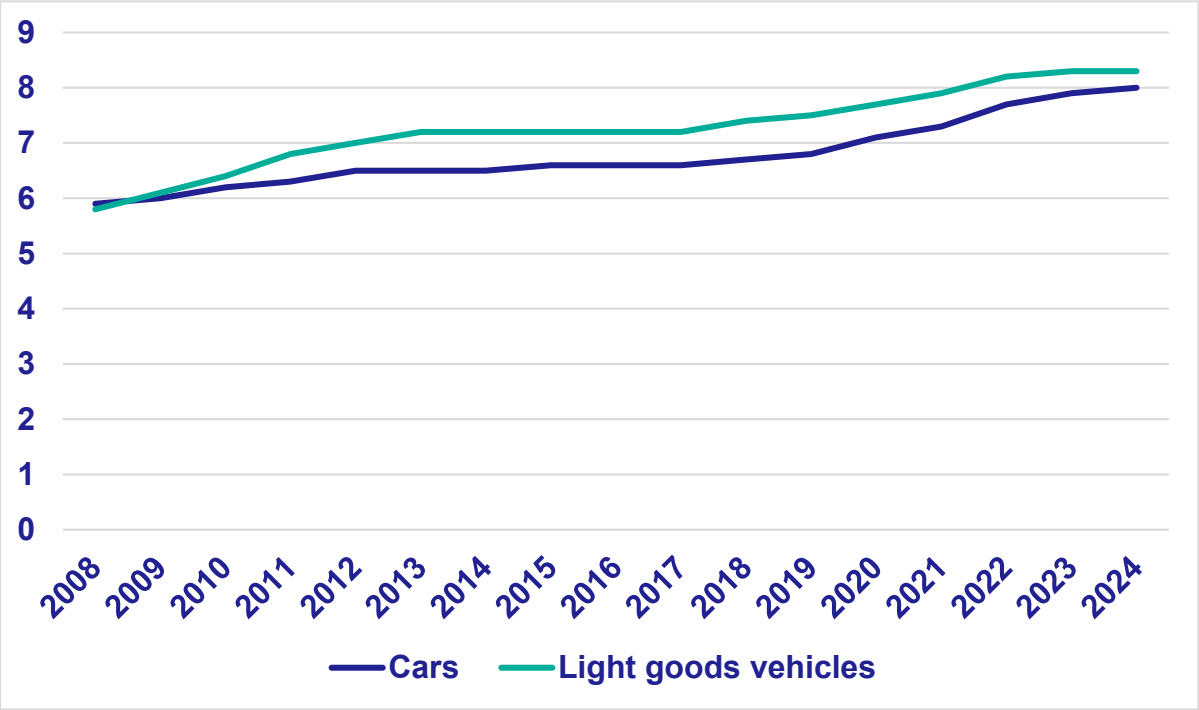
Road traffic estimates in Great Britain, 2025: Traffic in Great Britain by vehicle type - GOV.UK

The additional total vehicles identified in this report (see section 3.4) could in part account for the large disparity in the average annual mileage of vehicles in Scotland vs GB datasets average. Using the geographically adjusted total figures brings the average annual car km closer to the GB average with 13,042 km for cars and 22,703 km for vans.

The average additional annual mileage for cars and vans in Scotland would reduce to 3.6% and 12.0% for cars and vans respectively by using the geographically adjusted vehicle totals for each sector. Whilst still above the GB annual average, the reduced discrepancy supports the hypothesis that there are a greater number of road using vehicles in Scotland than currently recognised in DVLA statistics.

3.8 Average age of vehicles

Graph 9 – Mean age of licenced cars and vans in Scotland:



(Scottish Transport Statistics 2025, published March 2026)

Scottish Transport Statistics 2025 | Transport Scotland

The average age of cars and vans has been increasing in Scotland steadily over the past 15 years.

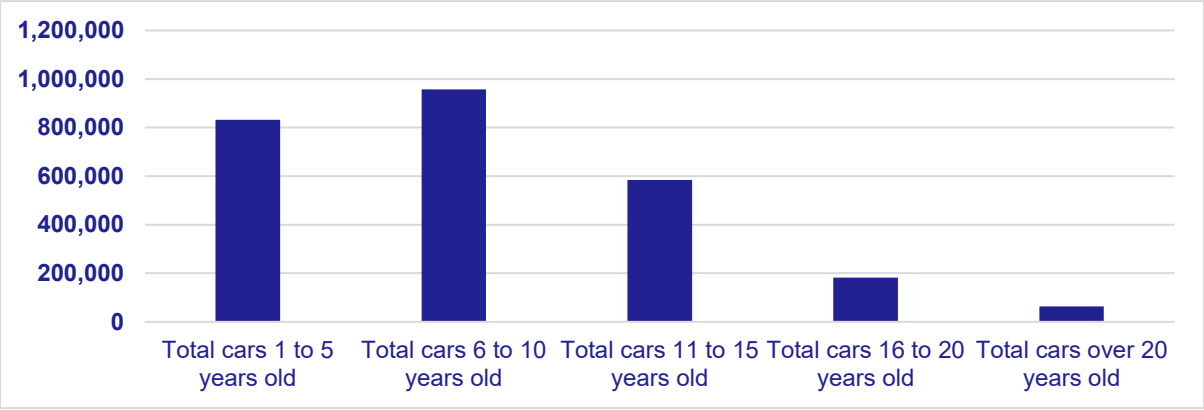
Mean age cars in Scotland at end of 2025 is 8.2 years, and the median age of cars in Scotland at end of 2025 is 7 years. (DfT statistics, VEH9901).

The growth in the total number of licenced road using cars (2.23 million in 2008 vs 2.61 million in 2025) has occurred despite reductions in annual car sales over the past 10 years and could be attributed primarily to an increase in the useful economically viable lifespan of cars and vans. Although the median age is 7 years, this does not mean that all vehicles are scrapped at 14 years old.

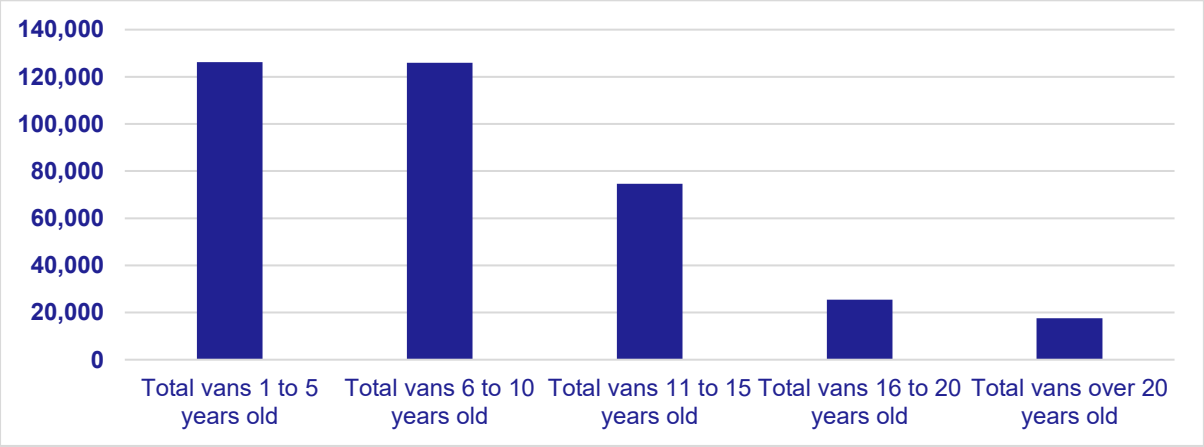
From UK wide data, the age where the number of licenced cars drops below 50% of the that originally first registered in a given year is 16.6 years. For vans this is 14.6 years. (DfT statistics, VEH0124).

As car sales volumes have fluctuated significantly in the last 15 years, this has had the effect of skewing statistics on average age of vehicles.

Graph 10 – Cars in Scotland by vehicle age:



Graph 11 – Vans in Scotland by vehicle age:



Graph 12 – Car average age across the UK:

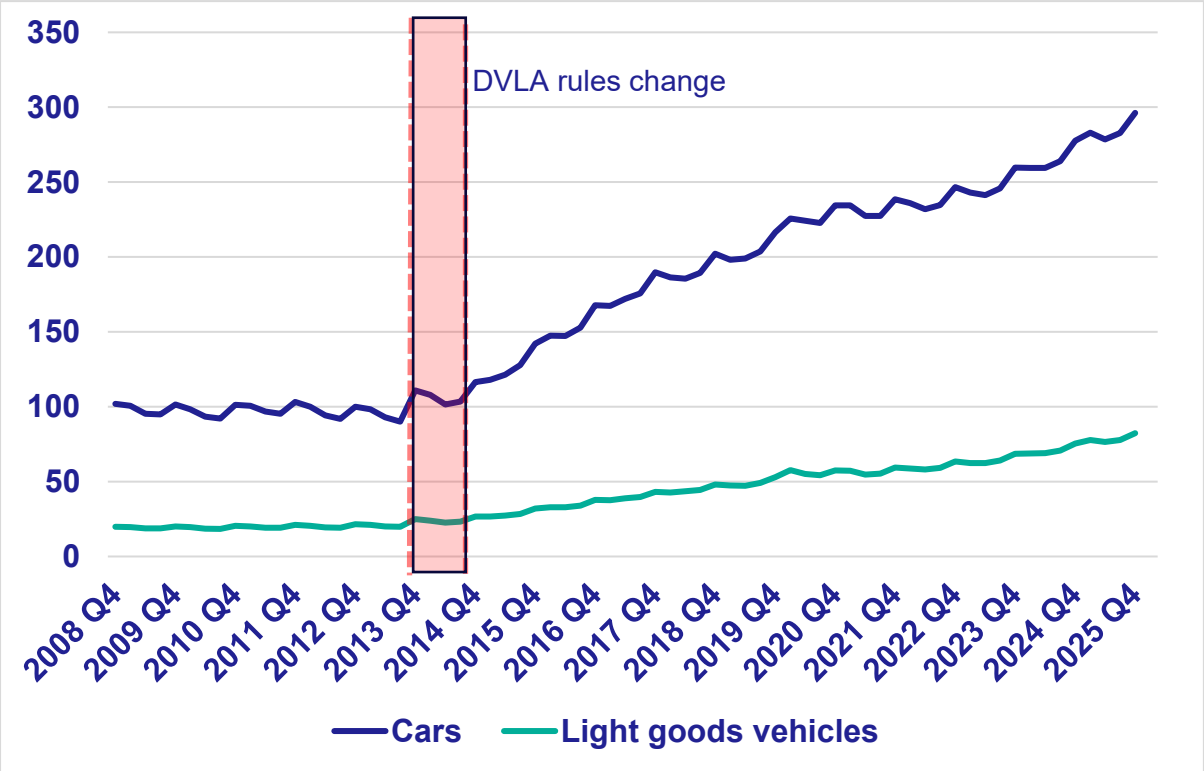
Average age at end Q4 2025 (years)	East	East Midlands	London	North East	North West	Northern Ireland	Scotland	South East	South West	Wales	West Midlands	Yorkshire and Humber	Grand Total
Mean age	10.31	10.42	9.97	9.22	9.19	9.83	8.17	9.62	10.8	10.19	10.29	9.59	9.81
Median age	8.94	9.26	8.33	8.35	8.13	9.09	7.05	8.2	9.53	9.16	9.09	8.65	8.6

Scotland in DfT statistics has the lowest average car age of all Nations in the UK, both in terms of median and mean ages. This is despite the significant increase in average age over the past 15 years and the more recent trend for newer vehicles to be under-reported in total licencing statistics through geographic skew.

The relatively low average vehicle age could also be a result of harsher weather conditions causing increased corrosion and limiting vehicle lifespan in Scotland.

3.9 SORN

Graph 13 – Total SORN cars and vans in Scotland ('000) – registered but unlicenced where the owner has informed DVLA that the vehicle is not in use:



Prior to 2014 the total SORN cars in Scotland was steady at ~100,000 vehicles per year, then the following changes occurred:

- DVLA introduced continuous SORN in Q4 2013 for administrative savings, meaning annual registrations became no longer necessary.
- Continuous insurance enforcement made it an offence to keep a vehicle uninsured unless SORN declared. SORN became the only legal alternative.
- Vehicle Excise Duty (VED) changes proposed increasing costs for older cars. SORN became a means for some vehicles owners to avoid paying increased VED.
- 2014 removal of the requirement to display tax disc. Detecting an untaxed vehicle without SORN became reliant on ANPR detection systems, yet low cost false or modified number plates could readily overcome these.
- Introduction of the London ULEZ, Clean Air Zones in England and Low Emissions Zones in Scotland - ANPR regulated emissions zones that charged or fined non-compliant older vehicles for entry.

- Growth in multi-car households, classic cars, seasonal use cars, restoration projects using SORN to reduce tax and insurance liabilities.

By the end of 2025, there were **more than double** the number of SORN cars, and **more than triple** the SORN Vans / HGVs than was the case in 2014.

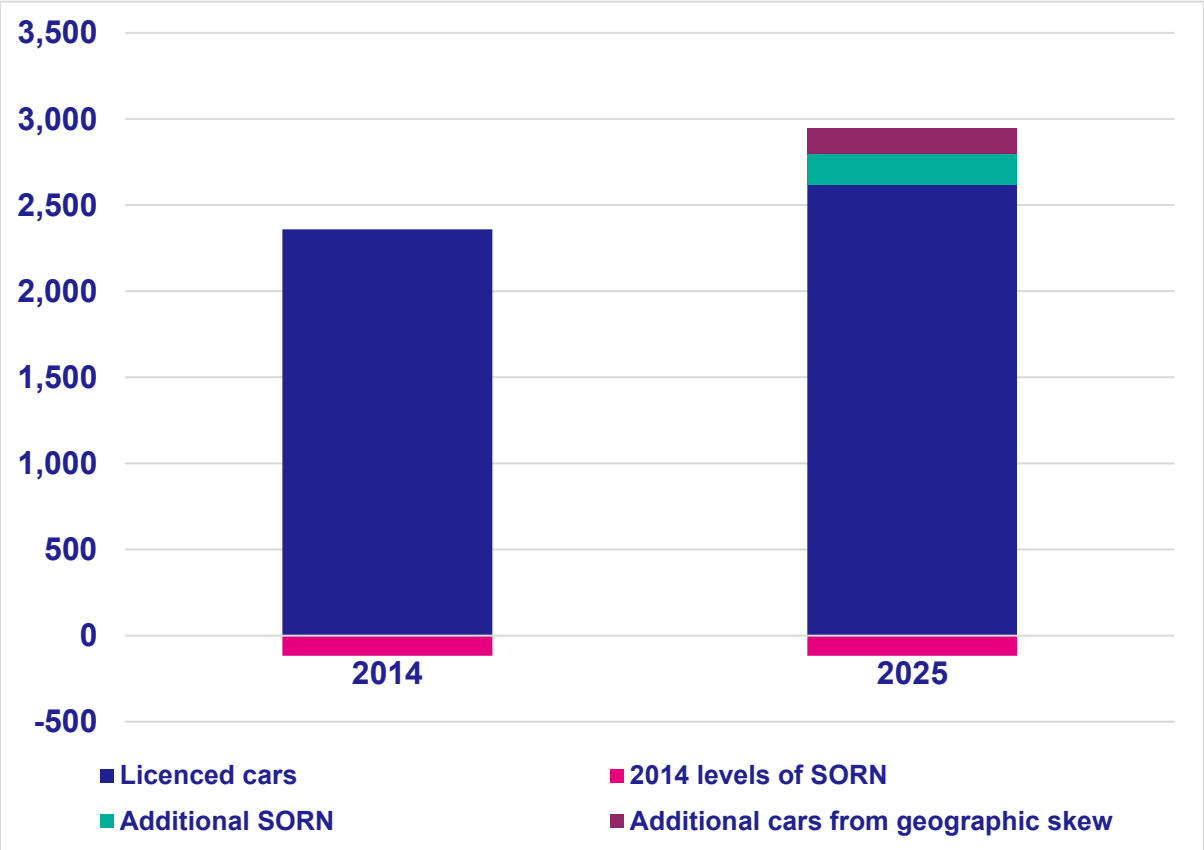
Why does this matter if these are merely older vehicles kept off-road?

SORN declaration, when combined with number plates that cause ANPR cameras to misread, could potentially provide the owner with tax free, insurance free, ANPR enforcement-free motoring unless apprehended by another form of enforcement. This could result in more cars and vans in use on the roads than we currently recognise through official stats, a shadow fleet responsible for greater emissions.

Among the oldest vehicles, those with indefinite SORN are also not incentivised to be taken to the scrapyard meaning non-runners can be left to rust. Such vehicles are not being recycled, and materials not recovered.

In 2013, the ratio of SORN cars to licenced cars was 1:25. By 2025 this had reduced to 1:9. This is a very significant shift which may have fallen beneath the policy radar.

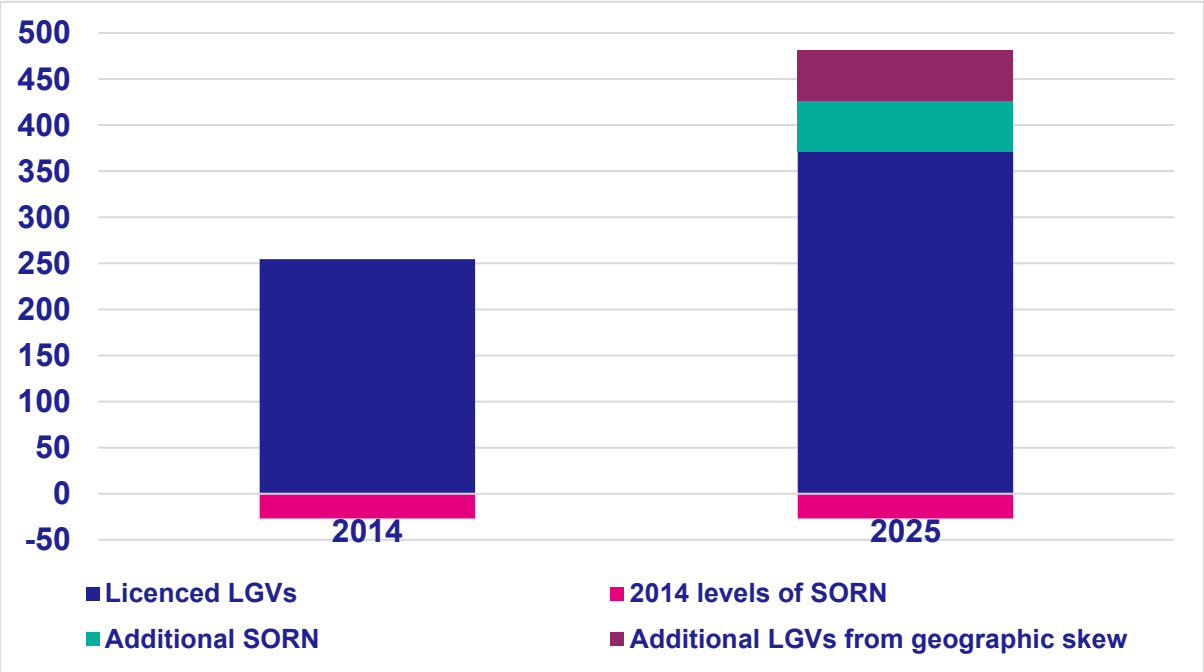
Graph 14 – Total cars in Scotland – licenced and unlicenced ('000):



The total number of licenced cars in Scotland has increased by over 263,000 (11.1%) since 2014. The unlicenced car total increased by 179,800 since 2014 (116,400 vs 296,200 SORN declared), a remarkable 154.4% increase.

If the rise in SORN declarations is primarily driven by unlicenced, yet road using cars, then the total road using cars – including the effect of geographic skew in licenced car totals – could be up to 589,800 additional cars (an increase of 25%).

Graph 15 – Total vans in Scotland – licenced and unlicenced ('000):



The total number of licenced vans in Scotland has increased by 116,300 (over 45%) since 2014. The unlicenced van total has also increased by 55,600 since 2014 (26,700 vs 82,300 SORN declared), a 208% increase.

If again the rise in SORN declarations is primarily driven by unlicenced, yet road-using vans, then the total road using vans – including the effect of geographic skew in licenced vans – could be up to 226,900 additional vans (an increase of 89%).

This is not unique to Scotland. UK SORN total for all vehicle types has increased from 2.5 million in 2014 to over 7 million in 2025. 4 million of these are SORN cars, and 1.2 million SORN vans. The relative growth in the totals of SORN vehicles since 2013 is even greater for commercial vehicles (Vans, HGVs) than for cars.

A national scrappage scheme could help to address these issues, increasing number of ZEV cars and vans, whilst reducing the rate of aging of the vehicle fleet to improve fleet turnover (reducing non-ZEVs) and improve material recovery (circular economy).

3.10 EV infrastructure

There are likely to be substantially more BEVs in Scotland than recognised in official statistical publications due to geographic skew. As these datasets also have a lag time for reporting data, the combination of these effects results in a significant under-reporting of BEV uptake.

Up to end December 2025, official DfT data suggests BEV cars make up 3.9% of total cars in Scotland. Recalibrating this for geographic skew that up to end Dec 2025 this is over 5.4%, or over 161,000 BEV cars.

This has implications for increased demand for publicly available EV charging infrastructure than some charge point networks may be currently forecasting.

Better insight into geographic skews in published EV statistics could help inform commercial investment decisions on EV infrastructure, leading to accelerated infrastructure provision and better utilisation of rapid and ultra rapid charging points in Scotland that are installed in the right places.

The geographic skew methodology could be extended to regional levels within Scotland to provide a more granular view of hot spots of EV uptake. Coupled with origin-and-destination studies this could help to identify future demand for EV charging.

3.11 CO2e emissions

An increased total number of road using vehicles in Scotland, both through geographic skew allocation and increases in unlicenced vehicles could represent greater total CO2e emissions than previously understood. The number of cars and vans that would need to transition to zero emission technology would also be greater than previously recognised by around 200k.

The effect on total CO2e emissions is a function of the methodology used to calculate this though. Using a ‘top down’ approach of fleet numbers x average annual km x average CO2e emissions per km by fuel type, will not necessarily yield a difference in total CO2e emissions where the average annual distance travelled per vehicle is reduced by the relative increase in total vehicles or CO2 conversion factors.

As noted in the above, the reported average car and van annual mileages for Scotland is considered to be signficantly higher than the UK average, and this itself could be in part due to the DVLA statistics under-recording the total vehicle numbers in Scotland.

4 Summary

4.1 Key findings

This report examines the growing distortion in official vehicle registration statistics caused by geographic skew, primarily due to company keepership practices and the rise of personal contract hire lease purchases. Vehicles registered under company addresses - often highly concentrated in specific towns in England - do not accurately reflect where these vehicles are used, leading to significant under-reporting of electric vehicle uptake in Scotland.

Key findings include:

- **Scotland has up to 46% more licenced battery electric cars and up to 91% more licenced battery electric vans than official statistics currently recognise due to the way in which many new vehicles are registered.** The consistent combination of enabling policy and investment to promote adoption of EVs in Scotland since 2011 may have had greater impact than previously recognised. There may be over 66,000 additional plug-in vehicles, including plug-in hybrids in Scotland.

- **Scotland's total number of cars and vans are greater**: There is likely to be a greater number of total vehicles of all fuel types in Scotland than previously understood. An additional 150,000 licenced cars and 55,000 licenced vans may be registered outwith Scotland yet kept in Scotland. A further 180,000 cars and 55,000 vans are additional unlicenced SORN declarations yet a proportion of these may be road using.

- **Scotland's total tailpipe emissions may be higher than official data suggests.** Due to the under-reported total number of vehicles on the roads, calculation of total CO2e emissions may change depending on methodology adopted.

- **Company keepership rates affect geographic allocation**: Over 63% of all cars and 78% of BEVs registered in 2025 were recorded as company vehicles. Company vehicles are more likely to be registered at a different address to the keeper than private vehicles, and the high rates of company keepership in turn influence geographic allocation statistics.

- **Better real-world data can support energy and climate policies**: Car and van emissions currently contribute over 18% of all Scotland's annual territorial emissions. Improving the quality of data on vehicle uptake through geographic adjustment is relevant to a range of stakeholders that enable electric vehicle investment including the charge point industry and energy distribution.

- **Economic policy implications**: Misallocated transport data affects carbon reduction targets, transport planning, and could mask wider patterns of tax optimization linked to vehicle registration practices.

4.2 Conclusion

The accuracy of official vehicle statistics for geographic location of vehicles by Nation or region has declined in recent years due to an incremental shift in vehicle purchase behaviour. This is partly a function of the taxation system, driving uptake of plug-in cars through incentivised business ownership, and also by the increasing adoption of popular leasing products that greatly reduce the initial capital outlay on new vehicle purchases. These have led to both an increase in the proportion of new vehicles recorded with DVLA under company keepership, and the reduced reliability of vehicle location data, resulting in geographic registration skew in official statistics.

Applying geographic adjustment techniques based on private keepership distribution patterns can provide better insight into the real-world vehicle locations of use.

This adjustment significantly alters the understanding of overall electric vehicle uptake by geographic dispersion. This reveals EV car prevalence in Scotland to be up to 46% greater than previously recognised, reinforcing the need for:

- **Enhanced data transparency** from DVLA and DfT
- **Adoption of adjustment methodologies** in national and devolved policy modelling from government bodies and relevant stakeholders
- **Further exploration** of the total number of vehicles in the Scottish car and van fleet.
- **Further exploration** of the implications of the aging vehicle fleet and increased prevalence of unlicenced SORN vehicles in Scotland.
- **Further exploration** of CO_2e emission impacts
- **Further exploration** of the economic consequences of vehicles registered outside their primary nation of use.

This approach should be considered for integration into future reporting frameworks to ensure robust evidence for policy decisions and carbon reduction strategies.

5 Annex

Licenced car totals (DfT stats VEH9901, end December 2025)

Nation / region	BATTERY ELECTRIC	DIESEL	HYBRID ELECTRIC (COMBINED)	OTHER FUEL TYPES	PETROL	PHEV	TOTAL
East	172848	1015751	278569	2143	1983619	100392	3553322
East Midlands	89727	889151	187033	1530	1340782	52647	2560870
London	167957	372752	309158	1687	1683839	95270	2630663
North East	36854	421123	92765	842	662962	16756	1231302
North West	218371	1104784	314931	2435	1962865	116469	3719855
Northern Ireland	26200	537850	70893	590	408457	13905	1057895
Scotland	102582	742170	232410	2156	1484184	55710	2619212
South East	458119	1361092	529861	3534	3186008	200965	5739579
South West	165414	1010042	234610	2509	1822706	73046	3308327
Wales	42419	602660	111140	1868	878904	21589	1658580
West Midlands	94419	950236	232089	3919	1655982	54451	2991096
Yorkshire & H	126890	910895	226358	1838	1379812	68680	2714473

Geographically adjusted totals

Nation / region	BATTERY ELECTRIC	DIESEL	HYBRID ELECTRIC (COMBINED)	OTHER FUEL TYPES	PETROL	PHEV	TOTAL
East	185346	1017346	300984	2136	2003941	97542	3607296
East Midlands	136624	889728	204528	1540	1362881	67215	2662517
London	172682	368214	311092	1685	1688379	116152	2658203
North East	63086	426254	102092	856	678562	26192	1297042
North West	179032	1100771	321901	2459	1976635	88297	3669095
Northern Ireland	23203	540092	62650	597	397536	12231	1036309
Scotland	150082	751199	257923	2202	1537959	69555	2768919
South East	301370	1342174	443106	3355	3045771	152952	5288730
South West	151870	1005141	220797	2530	1802385	68630	3251354
Wales	66198	605489	117048	1895	888886	30482	1709997
West Midlands	139446	954630	247867	3950	1678182	70537	3094612
Yorkshire & H	132860	917467	229830	1846	1389004	70095	2741102

Licenced van totals (DfT stats VEH9901, end December 2025)

Nation / region	BATTERY ELECTRIC	DIESEL	HYBRID ELECTRIC (COMBINED)	OTHER FUEL TYPES	PETROL	PHEV	TOTAL
East	5970	456694	1019	462	19029	2183	485357
East Midlands	13074	369765	731	247	14381	1001	399199
London	6986	187542	597	424	9826	946	206321
North East	4256	178005	328	106	3410	411	186516
North West	11934	477139	1888	257	11730	1502	504450
Northern Ireland	1199	149603	459	28	1760	134	153183
Scotland	4938	353910	1043	162	9017	713	369783
South East	28047	768698	2892	692	29167	2925	832421
South West	13958	562584	1347	481	21620	1831	601821
Wales	3060	264645	634	163	6798	466	275766
West Midlands	13601	387904	746	270	12122	709	415352
Yorkshire & H	4630	351590	1141	262	9999	922	368544

Geographically adjusted totals

Nation / region	BATTERY ELECTRIC	DIESEL	HYBRID ELECTRIC (COMBINED)	OTHER FUEL TYPES	PETROL	PHEV	TOTAL
East	11916	450247	1028	433	19602	2165	485390
East Midlands	7762	363007	746	264	11749	855	384383
London	11994	188759	732	400	9532	1223	212639
North East	4205	172493	552	84	3608	475	181416
North West	9921	460772	1273	251	11291	1231	484738
Northern Ireland	2252	185324	1507	28	2030	180	191320
Scotland	9455	403408	1281	168	9483	999	424793
South East	18031	638501	1870	710	29371	2386	690869
South West	13121	576380	1221	523	22320	1469	615034
Wales	6807	315552	658	170	7322	617	331126
West Midlands	7066	380179	720	275	12776	957	401973
Yorkshire & H	9119	373457	1237	248	9777	1187	395026

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