



# THE 2035 FLEET OF THE NETHERLANDS

ANALYSIS & FUTURE VISION

# DEVELOPMENT OF PRIVATELY OWNED FLEET

The Dutch vehicle fleet has shown consistent growth from 2014 through 2024. In 2014, vehicle registrations were recorded at 7,932,000. Since then, the number of registrations has increased annually, with fluctuation percentages around 1%. Within the battery electric vehicle (BEV) segment, we observe a significant increase. In 2018, BEVs accounted for just 0.3% of the total fleet. From that year on, the number of BEVs has steadily increased, resulting in 444,348 battery vehicles, which is 4.9% of the total vehicle fleet. In figure 1.1, after 2024, we anticipate total fleet growth of 1% annually, with 35% of new registrations being BEVs in 2025, and this percentage is expected to increase by 5% each year.

FIGURE 1.1

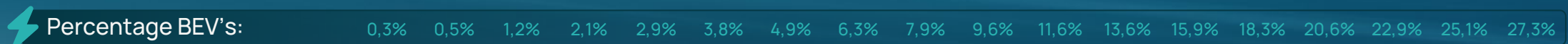
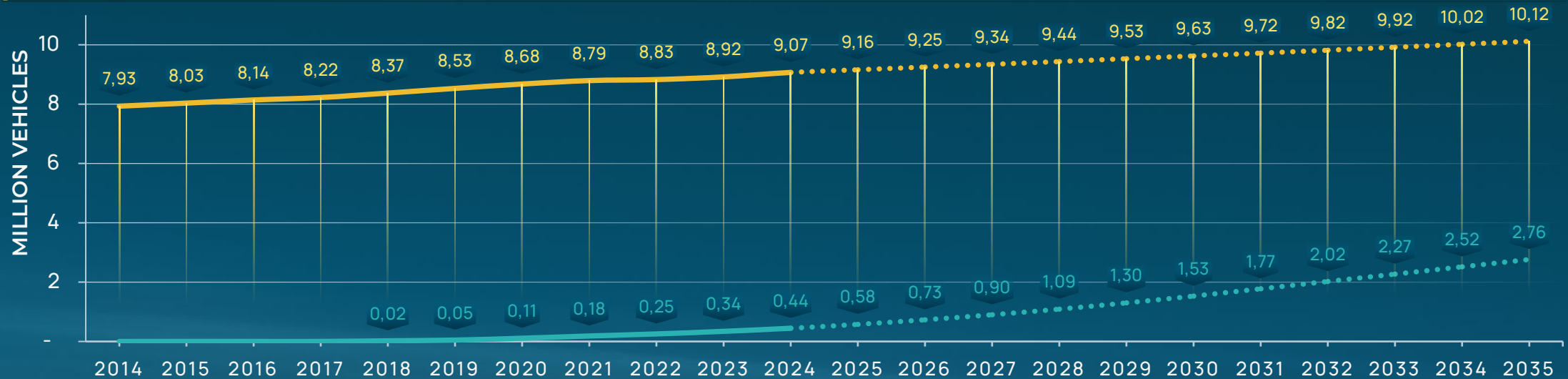
**expected development  
privately owned cars:**



Privately owned vehicles



BEV's



Source: CBS Statline; RDW, RAI-vereniging



# DEVELOPMENT OF COMMERCIAL VEHICLE FLEET

The commercial vehicle segment in the Netherlands also shows a positive trend between 2019 and 2024. The index value for commercial vehicles started in 2019 with a base number of 1,110,651 and has since grown steadily, with an increase to 1,218,693 in 2024, indicating an average rise of 1.5%. While the annual growth fluctuates, it remains around 1% to 2%, comparable to the trend in passenger cars. In 2024, there are 25,773 BEVs making up 2.1% of the total. In figure 2.1, we anticipate a total growth of 1% annually, with 10% of new registrations being BEVs in 2025, and this percentage is expected to increase by 5% each year.

FIGURE 2.1

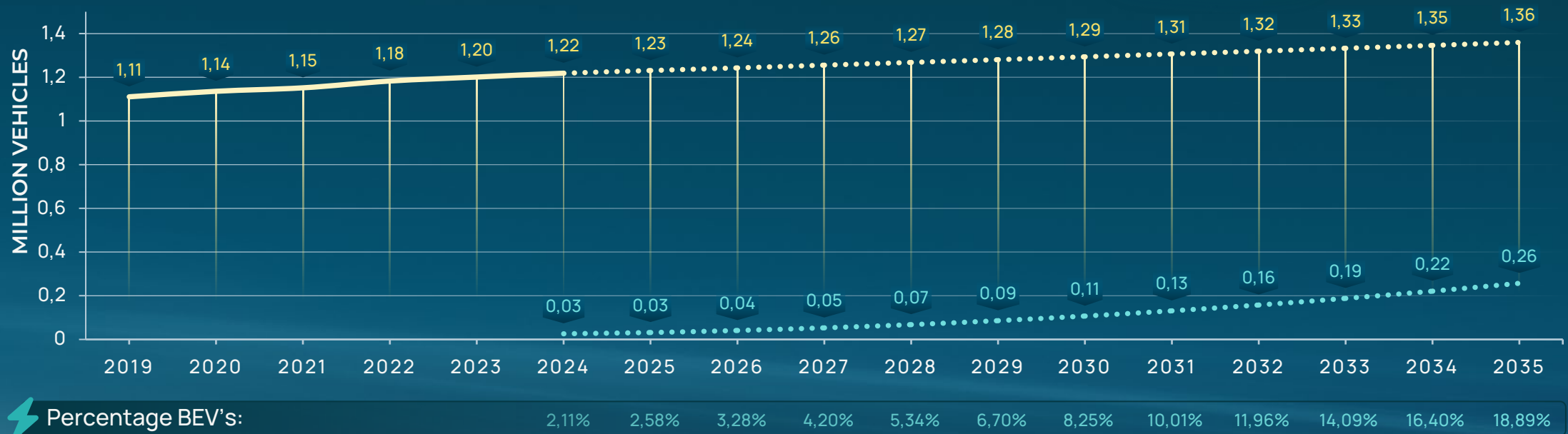
## Expected vehicle fleet development commercial vehicles:



Commercial vehicles



BEV's



Percentage BEV's: 2,11% 2,58% 3,28% 4,20% 5,34% 6,70% 8,25% 10,01% 11,96% 14,09% 16,40% 18,89%

Source: CBS Statline; RDW, RAI-vereniging

# THE VEHICLE FLEET IN THE NETHERLANDS: 2024 versus 2035

Between 2024 and 2035, a significant shift is expected in the composition of the Dutch vehicle fleet, with an increase in battery-electric vehicles. In 2024, 4.9% of passenger cars were BEVs, while in the commercial vehicle category, this segment made up 2.1%. According to the analysis by Blue River, the share of BEVs in the passenger car segment is expected to increase to 27.3%, while in commercial vehicles, an increase to 18.9% is anticipated.

## CONCLUSION

While the data indicates a significant shift towards the electrification of the fleet, it is expected that in 2035, 73% of passenger cars will have a combustion engine. In the commercial vehicle segment, this will be more than 80%.

The fleet will continue to grow but will still largely consist of vehicles with combustion engines: The absolute number will be only 14% less than in 2024.

FIGURE 3,1

### 2024: The current fleet

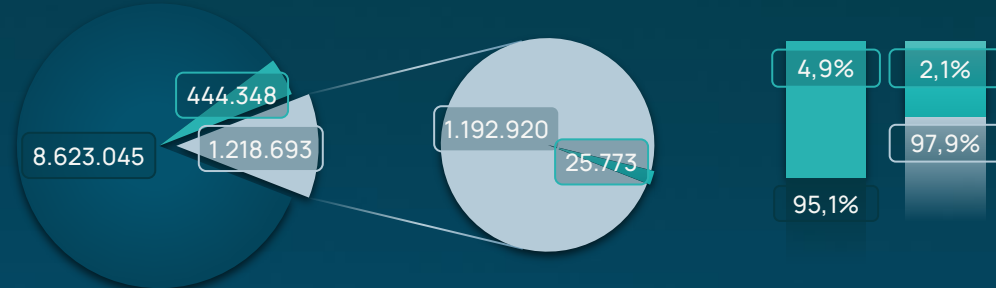
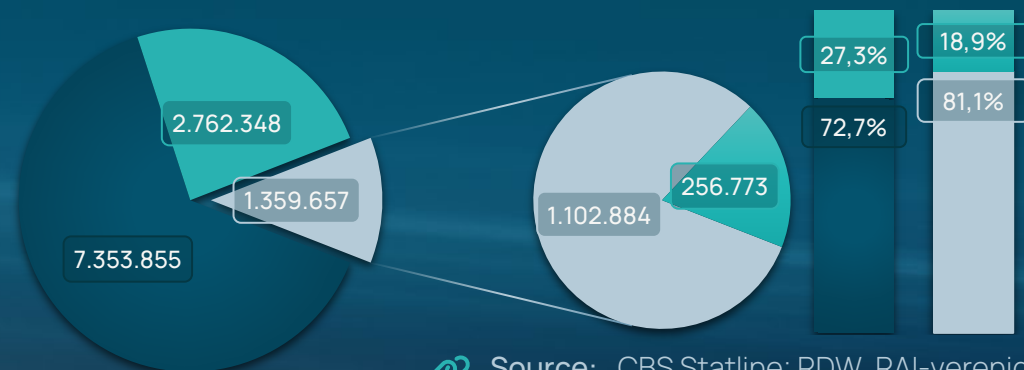


FIGURE 3,2

### 2035: From our analysis



Source: CBS Statline; RDW, RAI-vereniging