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The Role of PHEVs in Transport Electrification

By **Victoria Barreto Vieira do Prado** and **Dr. Tom Moerenhout**

- Market trend data suggest that plug-in hybrid electric vehicles (PHEVs) can be a niche complement to battery electric vehicles (BEVs) in automakers' journey toward transport electrification, though competitiveness in the medium term will remain structurally shaped by China's dominance in battery supply chains and PHEV cost structures.
- PHEVs have the distinct advantage of lowering mineral demand three- to fourfold for every driver who switches to a PHEV rather than a BEV, increasing the number of electric drivers and as a result demand for supporting infrastructure, and preserving jobs and industrial manufacturing capacity in the short term.
- However, for the US and the EU, relying on PHEVs to preserve industrial employment risks delaying the deeper reforms and supply chain investments needed for long-term competitiveness, given that China's global dominance in both BEVs and PHEVs mostly stems from its low-cost, high-quality battery cell manufacturing, specifically using LFP chemistries.
- Policy choices over the next three to five years will determine whether PHEVs support a smooth domestic transition or inadvertently lock in higher emissions, higher costs, and continued dependence on foreign battery inputs.

As the United States and Europe navigate a difficult and uneven shift toward full battery electric vehicles (BEVs), the US and EU auto markets are under heavy pressure, lagging China's market in terms of supply chain and battery technology readiness. In the US, the Trump administration is rolling back Biden-era electric vehicle (EV) policies, and its newly imposed tariffs may increase BEV

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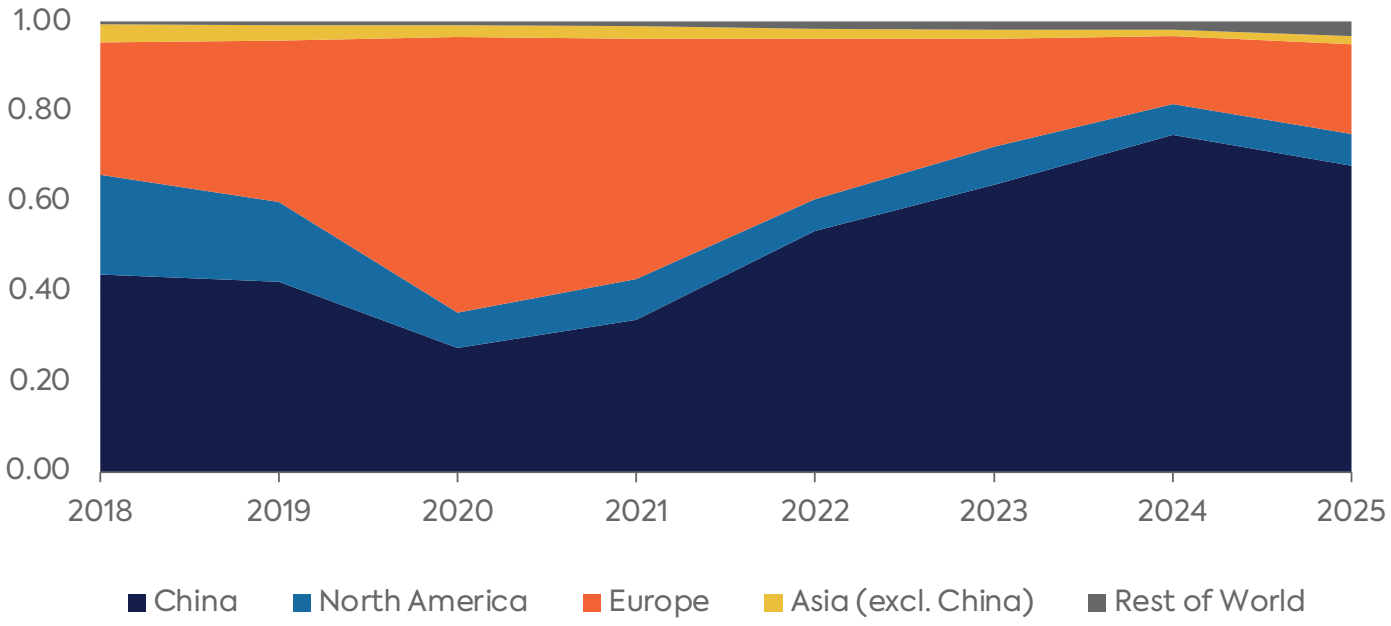
prices, potentially slowing the pace of transition to BEVs. In this context, US and EU policymakers and automakers are reassessing where plug-in hybrid vehicles (PHEVs) fit within their industrial and climate strategies. The idea that is that, given the US's and EU's less-developed minerals and battery sectors, range anxiety, and slowly developing charging infrastructure, PHEVs—with their smaller batteries relative to BEVs—can serve as a bridge technology that still offers carbon-reduction benefits.

This theory appears intuitive, but whether it maps with the projected global competitiveness and relevance of PHEVs remains an open question. This commentary analyzes current market and technology trends to better understand the future of PHEVs in an increasingly electrified transportation market. These trends indicate that PHEVs are unlikely to serve as a durable path for the US and Europe to achieve global EV competitiveness. Instead, their value lies primarily in serving as a transitional complement within domestic markets, provided policymakers address real-world emissions gaps, cost barriers, and supply-chain vulnerabilities that extend from China's dominance. In other words, PHEVs can play a role in specific market segments and extend the utilization of the industrial base and therefore jobs in the short-term, but it can't do so beyond this since both BEV and PHEV competitiveness is built on battery competitiveness now concentrated with Chinese players.

The Current State of PHEVs

Global EV sales reveal an evolving dynamic between BEVs and PHEVs. In the early years of market growth, up to 2018, PHEVs were a popular entry point for consumers transitioning away from internal combustion engine vehicles (ICEVs), representing about 40 percent of total EV sales. As technology advanced and battery prices fell, BEVs surged to nearly 70 percent of total EV sales between 2018 and 2024, supported by policy incentives and growing consumer confidence in charging infrastructure.[1] Since 2024, PHEVs have grown only modestly, accounting for roughly one-third of global sales versus two-thirds for BEVs through mid-2025 (Figure 1).[2] In 2024, there were around two BEV models for every PHEV model available in China, Europe, and the United States. Globally, the ratio was over three to one.[3]

Figure 1: PHEVs' share of total EV sales (%)



Source: Rho Motion, "BCA Datafile August 2025," August 2025.

Much of this dynamic has been shaped by China, which has looked at transport electrification as a way to compensate for its competitive disadvantage in ICE markets. Chinese demand today accounts for 67 percent of global PHEV sales and 56 percent of BEV sales.[4] This is largely explained by China's early investments in battery manufacturing and supply chains, which cemented its global leadership in EVs. China currently maintains the broadest support for PHEVs of any country in the world through a combination of incentives, including a 10 percent vehicle purchase tax exemption to production-side credits.[5] Europe, whose PHEV market is mostly geared towards high profit margin premium models, represents around 20 percent of global PHEV market share.[6] The US follows in third place, at around 7 percent, with the few supportive federal policies that had been in place being rolled back over the past year, though PHEV support persists via California's Zero-emission Vehicle Regulation.[7]

PHEVs have also benefited from broader technological advancements in the EV industry, which is building next-generation batteries with higher energy densities and longer ranges.[8] The size of PHEV battery packs has increased from an average of 13 kilowatt hour (kWh) in 2018 to 23 kWh by 2025, and thus allowed for longer electric-powered ranges. However, because PHEVs must accommodate both a battery pack and an ICE, they require two parallel and therefore complex

propulsion systems that make their average price per kWh higher than that of BEVs, by roughly three times in 2024.[9] In 2024, affordable PHEV options were limited in Europe and the United States, with only one model priced below $40,000 in Europe and four in the United States, while China stood out with nearly 40 models under $25,000.[10] Conversely, in China, PHEV prices have consistently dropped as a result of the country's competitiveness in batteries: the sales-weighted average for medium-sized PHEVs in 2024 was 10 percent lower than conventional models in the same category, causing PHEV sales in the sector to more than double.

A key appeal of PHEVs lies in their ability to handle longer trips even when charging infrastructure is insufficient or congested. In China, this advantage has been reinforced by steady improvements in range: between 2020 and 2025, the electric-only range of PHEVs grew by more than 20 percent, reaching nearly 100 kilometers. By contrast, ranges in Europe and the United States have plateaued at around 65 kilometers.[11]

Another distinct advantage of PHEVs is their lower mineral intensity. In 2025, European BEVs had an average pack size of about 70 kWh, compared with 19 kWh for PHEVs, in the passenger and light duty vehicle segment. In the US, it was 94 kWh compared with 19 kWh.[12] US and European BEV and PHEV batteries also include a heavy makeup of nickel-cobalt-manganese (NCM) battery cells, which use more and more expensive critical minerals compared with LFP batteries. This means that, all else being equal, European and US PHEVs use three to four times less critical minerals than BEVs. In a context of critical mineral supply constraints and chokepoints,[13] they may therefore enable more drivers to shift to electric cars more quickly, with a spillover effect on demand for supporting infrastructure, particularly charging infrastructure. This can certainly be a boost to electrifying the transport sector, if drivers primarily use their batteries (see below). But a broader shift to PHEVs does not necessarily mean global competitiveness (see below also).

Market Trends and Strategic Shifts in the PHEV Landscape

As with BEVs, China leads the global PHEV market, bolstered by favorable policy, consumer enthusiasm for Range-Extended Electric Vehicles (REEVs), and ongoing government incentive programs.[14] Chinese PHEV sales are expected to reach around 8 million units by 2030 in the base scenario and 9.3 million units in the upside case, compared with 1.6 to 1.7 million in Europe and 1.2 to 1.4 million in the US.[15] While this suggests growth potential for Western markets, it also reflects China's enduring grip on PHEV markets and models.

China's dominance in the sector raises the question of whether a strategic refocus on PHEVs could allow Western automakers to compete globally, rather than solely within domestic

markets. Given that PHEV competitiveness is tightly linked to battery manufacturing capabilities, countries applying tariffs to shield domestic BEV and battery industries may find themselves at a disadvantage in exporting PHEVs. Under such conditions, PHEVs could support national transition goals but are unlikely to generate new global leaders in transport electrification.

Domestic appetite remains notable, however. In the US, BEVs and PHEVs accounted for 8 percent and 2 percent of new passenger car sales in 2024, respectively—and these shares are expected to grow to 26 percent and 17 percent by 2034.[16] This suggests PHEVs will continue to have a role in the transition, even as global markets favor full electrification. Despite the expiration of federal incentives in the US in 2025, analysts still project steady, albeit slower, growth in broader EV uptake, suggesting that consumer interest is proving more stable than policy.[17] Still, in a global context, the trend is toward full battery electrification, with PHEVs increasingly acting as a transitional technology whose relevance narrows as infrastructure, costs, and regulations evolve in favor of BEVs. In China, 2024 BEV and PHEV sales stood at 26 percent and 19 percent, respectively, with PHEVs expected to peak near 30 percent in 2032 before declining to 18 percent by 2040 as BEVs reach 80 percent. Europe follows a similar path: BEV and PHEV shares were 14 percent and 6 percent in 2024, and projected to reach 67 percent and 8 percent by 2034, consistent with Europe's policy focus on full electrification.[18] In 2025, PHEV sales climbed by almost 60 percent year on year, which analysts say reflects temporary policy and registration effects rather than a structural shift away from BEVs.[19]

Battery demand further illustrates the growing divide between BEVs and PHEVs. In 2024, BEVs accounted for 148 gigawatt hours (GWh) of battery demand in Europe and 112 GWh in the United States, compared with just 17 GWh and 6 GWh from PHEVs. The battery share in the US for PHEVs was mostly NCM chemistries, comprising more than 99 percent of battery share in 2025.[20] This contrasts with China, where lithium-ion phosphate (LFP) technology—used in 61 percent of PHEV batteries and projected to reach 76 percent by 2030[21]—has driven down costs and reinforced China's structural advantage in PHEV battery pricing. These lower costs cascade into final vehicle prices, further strengthening China's competitiveness.

Challenges to PHEVs as a Complement

Automakers and suppliers are increasingly pressing for PHEVs to be recognized as part of Europe's decarbonization pathway. The German Association of the Automotive Industry (VDA) has recommended maintaining PHEVs beyond 2035 and easing regulatory adjustments, arguing that hybrids can help preserve industrial capacity and employment across the automotive value chain.[22] Similarly, the European Automobile Manufacturers' Association (ACEA) and the European

Association of Automotive Suppliers (CLEPA) have stressed a technology-neutral approach, noting that high electricity prices, trade tariffs, and uneven charging infrastructure require flexibility in compliance pathways.[23]

This lobbying reflects not only industrial and job-protection motives—the European automotive sector employs over 13 million people[24] and PHEV manufacturing may preserve existing supplier ecosystems—but also changing market dynamics: forecasted PHEV sales are rising for most years, and imports from China surged from 31,000 in 2024 to 46,000 in the first half of 2025, largely driven by BYD and Chery New Energy, which are taking advantage of PHEVs not being included in the EU's additional duties.[25]

Market projections show that the absolute number of PHEVs sold will indeed increase in the medium-term (albeit slower than BEVs). The purpose of this increase, however, is not dictated by the data but instead will be determined by policy. PHEVs can function either as a detour that slows full electrification or as a limited but useful boost to electric driving, lower mineral demand, and scaling domestic battery and charging ecosystems. Different actors hold different preferences: some automakers see PHEVs as a way to preserve existing supply chains and employment, while regulators focused on long-term decarbonization increasingly worry about real-world emissions and lock-in risks. If the strategic goal is full electrification—an assumption that cannot be made for the US under the Trump administration—then the following challenges will need to be addressed for PHEVs to make a meaningful contribution.

Challenge 1: Pricing uncertainty

PHEV pricing shows no consistent pattern across global markets, reflecting differing policy priorities and manufacturer strategies. While the general expectation is that PHEVs will cost less than BEVs due to their smaller batteries, they have become increasingly expensive relative to ICEVs—by over 30 percent for midsize cars and 50 percent for SUVs since 2022—partly because fixed battery system costs are spread over fewer cells and their pack designs are complex and as such add costs.[26] In Europe, PHEVs remain the most expensive option across all vehicle categories, with only one of roughly 130 models priced below $40,000, compared with more than 40 BEVs and 155 ICEVs under the same threshold. [27] In the United States, prices vary by segment: PHEVs are cheaper than BEVs in some SUV categories but considerably more expensive in others. In China, PHEV prices fell in 2024 while those in Germany rose, reflecting the influence of larger battery packs and domestic supply chain dynamics.[28] The result is a fragmented pricing landscape in which PHEVs occupy multiple strategic roles—premium compliance vehicles in some markets, affordable entry-level hybrids in others—creating uncertainty for both automakers and consumers about the long-term position of these vehicles in the electrification transition.

Challenge 2: Uncertainty over REEVs

REEVs—a type of PHEV that uses an ICE to recharge the battery when depleted—previously emerged as a way to appease consumer range anxiety concerns, illustrating both the flexibility and uncertainty facing the electrification of transport. In China, REEVs doubled their market share in 2024 from 5 percent to 12 percent before BEVs gained ground.[29] This temporary surge was viewed as evidence of REEVs' potential as a transition technology when supported by strong policy incentives—such as China's vehicle trade-in schemes—and appealing OEM offerings from manufacturers like Li Auto and BYD. Outside China, however, REEVs remain niche, with only 2,515 registrations in the first half of 2025,[30] though the United Kingdom and a few European markets have seen some uptake. Automaker strategies reflect these divergent signals: while groups like Volkswagen and Stellantis have reaffirmed their commitment to fully electric production, others continue to see hybrid and range-extended technologies as useful bridge options, particularly in regions where charging networks remain uneven. Yet it is unclear whether broader REEV adoption would meaningfully accelerate electrification or lower emissions, as these vehicles still rely on combustion engines for part of their range and may replicate some of the behavioral challenges observed with PHEVs.

Challenge 3: Emissions concerns

PHEVs are often promoted as a lower-emission alternative to ICEVs, but real-world data has shown that they can emit nearly five times the official stated emissions and about the same as ICEVs, mostly due to usage patterns and the amount of time users are running on electricity versus fuel combustion. The mismatch between expected and actual emissions has accelerated efforts—mostly in Europe—to phase out PHEV subsidies, with the UK going as far as banning PHEV and hybrid EV sales by 2040.[31] Remaining incentives are now conditional (based on electric range or corporate fleet use) and are being phased out in favor of zero-emission BEVs.[32] As governments tighten climate targets, many automakers are accelerating their transition towards fully electric vehicles over hybrids. In the EU, stricter fleet-wide CO2 emission limits are pushing manufacturers to increase BEV sales to avoid financial penalties. This regulatory shift may gradually become hostile to PHEVs, particularly as questions continue to surface in Europe about their real-word emission performance.[33] For PHEVs to play a bigger part in transport decarbonization pathways in Europe and beyond, this element is a key area to address. Indeed, countries outside of Europe that are working on reducing their carbon footprint in transport may favor BEVs if they lack evidence that PHEVs have contributed to emissions reduction in advanced economies like the US and EU.

Conclusion

The United States and Europe still face a narrow window in which PHEVs can play a constructive role in marrying automaker competitiveness with decarbonization by sustaining consumer engagement in electrification, supporting segments where charging access remains uneven, and preserving parts of the existing automotive supply base during a difficult transition. Yet these benefits do not alter the structural reality that China's dominance in PHEV-relevant supply chains (particularly LFP and low-cost pack integration) limits the extent to which hybrids can meaningfully strengthen Western global competitiveness in an increasingly electrified market. In global markets, the long-term signals are clear: BEVs continue to gain ground as infrastructure expands, costs fall, and regulatory frameworks tighten around real-world emissions.

If PHEVs are to function as complements rather than detours, policy design will be decisive. The US and EU Governments could take the following steps:

- Close the gap between laboratory and real-world emissions, including through usage-based monitoring and conditional incentives tied to minimum electric-driving shares. Without this, PHEVs risk locking in higher emissions while absorbing fiscal resources that could accelerate full electrification.
- Make remaining PHEV incentives time- and performance-limited and carefully targeted to focus on segments where they provide genuine utility (e.g., larger vehicles in the US market).
- Link PHEV policy explicitly to industrial strategy, ensuring it reinforces, rather than distracts from, investment in domestic battery manufacturing, critical minerals processing, and charging infrastructure. Strengthening these foundations will do far more for long-term competitiveness than extending the hybrid cycle.
- Create regulatory clarity through multi-year rules on fleet emissions, charging standards, and battery chemistries to reduce automaker uncertainty and curb repeated strategic pivots that ultimately slow electrification and global competitiveness.

Together, these measures can allow PHEVs to serve the narrow but highly useful purpose of supporting the electrification transition by easing short-term market pressures while keeping long-term industrial competitiveness at the center of policy..

About the Authors

Victoria Prado is a Research Associate at Columbia University's Center on Global Energy Policy, where she integrates the Trade and Clean Energy Transition initiative and conducts research on the geopolitics of critical minerals in Latin America. She was the first hire at a successful climate startup in Brazil, where she supported investor rounds, led the business intelligence team, and gained hands-on experience with carbon markets in emerging economies. Victoria also worked at the Rockefeller Foundation, advancing projects to expand energy access, accelerate coal phase-out in Southeast Asia, and deploy clean energy storage solutions in sub-Saharan Africa. Her work lies at the intersection of climate policy, sustainable development, and global energy systems, with a regional focus on Latin America. She holds a Master of Science in Sustainability Management from Columbia University and has experience in advising major players in Brazil's oil, gas, and mining sectors on long-term sustainability strategy.

Dr. Tom Moerenhout is a Professor at Columbia University's School of International and Public Affairs and leads the Critical Materials Initiative at Columbia's Center on Global Energy Policy. His work extends to roles as Senior Advisor at the World Bank Energy and Extractives Group, Executive Director at the Geneva Platform for Resilient Value Chains, and Senior Associate at the International Institute for Sustainable Development and Intergovernmental Forum on Mining, Minerals and Metals. He has served as Visiting Professor at NYU, Sciences Po Paris, and the Geneva Graduate Institute.

Tom specializes in the intersection of geopolitics and industrial policy, particularly as they relate to energy, critical minerals, and battery supply chains. His work focuses on integrating the interests and influence of multiple actors across complex political economies to improve supply chain security and resilience. Tom has published extensively on sustainable development and energy policy reforms, specifically on energy subsidies, critical materials, and the economic development of resource-rich countries.

He has advised and consulted for various stakeholders, including the White House, Departments of Energy and State, USTR, and policymakers in several other countries, including the EU, Canada, India, Indonesia, Nigeria, DRC, Egypt, Iraq, Chile, and Brazil. His collaborative efforts span organizations such as the OECD, IEA, World Bank, UNCTAD, UNEP, OPEC, IRENA, and several philanthropic foundations.

Tom holds two master's degrees and obtained his PhD at the Graduate Institute of International and Development Studies in Geneva. This academic background includes fellowships at LSE and the

Oxford Institute for Energy Studies. He was also a Fulbright and Albert Gallatin Fellow, and a Swiss National Science Foundation Scholar.

In his downtime, Tom enjoys reading & writing, culinary experiences, football, skiing, and chess.

Notes

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battery demand, and technology trends. Rho Motion is an intelligence firm specializing in EV and battery markets whose granular, model-level forecasting is widely used by industry and policymakers. As with all proprietary market intelligence forecasters, not all of its underlying assumptions and methods are publicly disclosed, and long-term projections involve inherent uncertainty, particularly in markets without a clear policy direction, like the United States.

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