

SinoDrive free download

Chinese Auto Brands in Europe

Quick Reference Card 2025

A boardroom-ready snapshot of the Chinese car brands shaping Europe's 2025 market: who is here, what they sell, how far their networks reach, and which regulatory dates change the economics.

CHINESE BRAND MARKET SHARE

5.1%

of Europe's new-car market in H1 2025

YOY GROWTH

+91%

Chinese-brand registrations vs. H1 2024

BATTERY-ELECTRIC MIX

13.6%

EU new-car market share for BEVs in 2024

Top-selling models to know

- **BYD Seal U / Seal U DM-i**
Top-selling Chinese family SUV; among Europe's leading PHEVs in 2025.
- **XPENG G6**
Main growth driver for XPENG's 2025 European ramp-up.
- **Leapmotor T03 & C10**
Affordable city-car + SUV pairing powering Stellantis-backed rollout.

Key regulatory dates

4 Jul 2024 Provisional BEV duties start

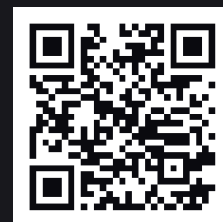
29 Oct 2024 Definitive duties confirmed

1 Jan 2025 2025 CO2 phase begins

17 Jun 2025 2025-2027 averaging approved
Duties apply to China-built BEVs; hybrids and PHEVs avoid the extra anti-subsidy layer.

Tariff bands on China-built BEVs

- BYD: 17.0%
- Geely: 18.8%
- SAIC: 35.3%
- Other cooperating OEMs: 20.7%
- Non-cooperating OEMs: 35.3%



Scan for the full SinoDrive report and weekly intelligence.

Chinese Auto Brands in Europe

Quick Reference Card 2025 | Page 2

Brand	Core models in Europe	Price anchor	Dealers / points	HQ
BYD	Dolphin Surf, Dolphin, Atto 3, Seal U, Sealion 7	GBP 18.7k to EUR 50k+	267+ retail stores	China
NIO	ET5, ET5 Touring, ET7, EL6, EL8	EUR 47.5k+ (BaaS lowers upfront)	n/d; direct & agency format	China
XPENG	G6, G9, P7	GBP 40.0k to EUR 59.6k	40+ launch dealers	China
ZEEKR	X, 001, 7X, 7GT	EUR 38.0k to EUR 55.0k+	n/d; controlled launch	China
MG (SAIC)	MG3, ZS, HS, MG4 EV, MGS5 EV, Cyberster	GBP 22.0k to GBP 55.0k	Pan-European; total n/d	China

Continued on next page

Chinese Auto Brands in Europe

Quick Reference Card 2025 | Page 3

Brand	Core models in Europe	Price anchor	Dealers / points	HQ
OMODA / JAECOO	Omoda 5, Omoda E5, Jaecoo 7, SHS variants	GBP 29.4k to GBP 33.1k+	60+ UK sites; EU expanding	China
GWM / ORA / WEY	ORA 03, WEY 03, WEY 05	GBP 25.0k to GBP 40.0k	Partner-led; total n/d	China
Leapmotor	T03, C10, B10 pipeline	EUR 18.9k to EUR 36.4k	600+ sales & service points	China
Dongfeng / Voyah	Box, Free, Dream	EUR 23.5k+	Importer-led; total n/d	China

Notes

Dealer figures are public footprint references, not apples-to-apples audited franchise totals. Pricing is shown as entry anchors pulled from major European markets and may vary by country, trim, tax treatment, and promotional timing.

Source stack

- SinoDrive internal market-research memo, checked through April 2026.
- European Commission duty decision (29 Oct 2024) and EUR-Lex Regulation (EU) 2025/1214.
- JATO / ACEA reporting for H1 2025 market share and 2024 EU powertrain mix.
- Brand and partner announcements from BYD, XPENG, Leapmotor/Stellantis, and OMODA&JAECOO.