SINO DRIVE

MARKET RESEARCH PDF · 2025 LANDSCAPE

Chinese Auto Brands in Europe 2025

Complete B2B landscape report for European dealers, importers, distributors, fleet managers and automotive strategy teams.

SCOPE

Brand profiles, pricing anchors, dealer networks, tariffs and local factory plans.

COMMERCIAL LENS

Opportunities and risks for European B2B automotive operators.

SOURCE

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SinoDrive Editorial

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Note aux lecteurs francophones

Ce livrable est le rapport complet SinoDrive sur le paysage 2025 des marques automobiles chinoises en Europe. Il est rédigé en anglais pour rester exploitable par des équipes internationales, avec une lecture B2B orientée concessionnaires, importateurs, distributeurs et responsables flotte. Vous y trouverez les profils de marques, ordres de prix, réseaux dealers, effets des tarifs douaniers et opportunités commerciales prioritaires.

Executive Summary

The phrase "Chinese auto invasion" captures the direction of travel in Europe, but it obscures the way the market is actually developing. There is no single China strategy. Instead, Europe is seeing several Chinese plays unfold at once:

- Scale-and-value brands such as MG and BYD attacking the mass market with strong specifications and aggressive equipment-per-euro.
- Tech-premium challengers such as XPeng, NIO and Zeekr trying to win on software, range, charging speed and design.
- Distributor-led entrants such as Chery's Omoda and Jaecoo using a conventional importer-plus-dealer model that feels familiar to European retail groups.
- Partnership-led entrants such as Leapmotor using incumbent European infrastructure, in this case Stellantis, to compress time-to-market.

The important 2025 conclusion is that Chinese brands are no longer a future risk for Europe. They are already a structural part of the competitive field. What changed between the early hype cycle and the current reality is the difficulty level. Europe is tougher than it looked in 2022-2023 because three forces hit at once:

1. The EU imposed definitive anti-subsidy duties on China-built battery-electric vehicles.
2. BEV demand growth in Europe slowed and became more uneven country by country.
3. European, Korean and Japanese incumbents responded with better pricing, more entry EVs and broader hybrid offers.

That shift favors the Chinese groups that can localize, diversify powertrains and build real aftersales capacity. It hurts the brands that arrived with a narrow "cheap China-built EV" proposition and weak local execution.

Several headline facts define the landscape:

- MG remains the most commercially mature Chinese-owned passenger-car brand in Europe, with roughly 240,000 European sales in 2024 and one of the broadest market footprints.
- BYD is the clearest current growth story. In the EU-EVs 15-country EV panel, it more than doubled from 15,161 registrations in 2023 to 34,881 in 2024, while simultaneously expanding its retail network and European factory agenda.
- XPeng is the strongest tech-premium growth challenger on the numbers, rising from 2,080 to 7,330 EV registrations in the same panel.
- NIO remains strategically relevant but commercially subscale relative to its brand ambition.
- Chery has become one of the most dealer-relevant stories because Omoda and Jaecoo are entering Europe through familiar crossover segments, hybrids and distributor-friendly operating models.
- Leapmotor may prove disproportionately important because Stellantis gives it faster retail scaling than most Chinese newcomers can achieve alone.

The regulatory and commercial reality now rewards five capabilities:

- A credible dealer and service network.
- A lineup broad enough to survive shifts in EV demand.
- Financing and fleet support, not just attractive list prices.
- A tariff strategy, whether through local assembly, lower-duty exposure or more hybrid mix.
- Evidence that the OEM will stay in Europe long enough to support warranties, software, parts and residual values.

For SinoDrive subscribers, the key commercial takeaway is simple: Europe is not shutting out Chinese brands, but it is separating durable operators from launch-only stories. The best opportunities sit with brands that combine strong product economics with local operating discipline.

Methodology And Data Notes

This report combines four public-data buckets:

- Official company and brand sources for lineups, list-price anchors, footprint claims, network announcements and factory plans.
- Official EU and ACEA material for tariffs, trade flows, registration mix and emissions rules.
- Public European EV registration data from EU-EVs, using its comparable 15-country panel: Austria, Belgium, Switzerland, Germany, Denmark, Spain, Finland, France, Great Britain, Ireland, Italy, the Netherlands, Norway, Portugal and Sweden.
- Specialist industry reporting, mainly for factory plans, market-share context and distribution announcements that brands did not fully centralize on one corporate page.

Important interpretation notes:

- The EU-EVs panel is an EV-registration view, not a full all-powertrain Europe total. For MG, Chery/Omoda/Jaecoo and other brands using hybrids or combustion cars, EV registrations understate total commercial scale.
- Prices are indicative anchor prices from public European-market sites or official launch materials. They vary by country, trim, VAT treatment, battery subscription structure and promotional timing.
- Dealer counts are often not audited Europe-wide totals. Some brands publish sales points, some publish showrooms, some publish dealer contracts and some publish nothing centralized at all. Where counts are not clearly disclosed, this report says so directly.
- The title refers to the 2025 competitive landscape, but because this report is being compiled after year-end data became available, it uses 2023-2024 sales history and checks current lineup and localization references through early April 2026.

Landscape At A Glance

Brand or group	Core Europe models	Price anchor	2023 EV reg.*	2024 EV reg.*	Country presence	Dealer / retail footprint	Factory or localization status
BYD	Dolphin Surf, Dolphin, Atto 3, Seal, Seal U, Sealion 7, Han, Tang, DM-i hybrids	Dolphin Surf from about GBP 18,650 in the UK; Dolphin from about EUR 28,990 in France	15,161	34,881	Over 20 European countries	Early-2024 public claim of 267 retail stores in 20 countries; Germany expansion plan from 27 to 120 points by end-2025	Hungary plant under construction; Turkey investment announced
NIO	ET5, ET5 Touring, ET7, EL6, EL8	ET5 from about EUR 47,500 in Germany, with BaaS reducing upfront body price	2,365	1,630	Core Nordics + Germany/Netherlands; 2025 distributor expansion into 7 more markets announced	Boutique direct-and-agency model; no large public dealer count	No confirmed Europe vehicle plant
XPeng	G6, G9, P7	G6 from GBP 39,990 in the UK; G9 from about EUR 59,600 in Germany	2,080	7,330	16 European markets by late 2024	More than 40 dealerships launched across Germany, the UK, France and Italy; Germany alone targeted 24 retail locations by end-2025	No Europe plant announced
Zeekr	001, X, 7X, 7GT	X from about EUR 37,990 in the Netherlands; 001 from about EUR 54,990	98	2,138	Selected West European and Nordic markets	Controlled-launch retail model; no consolidated Europe-wide count	No Europe plant announced

Brand or group	Core Europe models	Price anchor	2023 EV reg.*	2024 EV reg.*	Country presence	Dealer / retail footprint	Factory or localization status
Polestar	2, 3, 4	Polestar 2 from roughly GBP 39,900 in the UK	36,145	27,490	Around 27 European markets	Space-plus-service-partner model, broad geographic access but not a dense franchise network	Polestar 7 allocated to Volvo Cars' Kosice, Slovakia plant
MG / SAIC	MG3, ZS, HS, MG4 EV, MGS5 EV, Cyberster, hybrids and PHEVs	MG4 EV from about GBP 21,995 in the UK	99,408	63,197	Pan-European	Broadest retail reach of any Chinese-owned brand in Europe, but no single audited Europe count	SAIC has studied Europe production; no final site publicly confirmed
Chery / Omoda / Jaecoo	Omoda 5, Omoda E5, Jaecoo 7, SHS variants	Omoda E5 from about GBP 33,055; Jaecoo 7 from about GBP 29,435	negligible	1,243	Spain, UK, Italy, Poland, Hungary, Czech Republic, Greece and others	UK network passed 60 dealerships in 2024 and kept expanding; Europe footprint is distributor-led and dealer-friendly	Barcelona EBRO partnership gives Chery local assembly route
GWM / ORA / WEY	ORA 03, WEY 03, WEY 05	ORA 03 from about GBP 24,995	4,578	2,142	About 9 European markets	Thin retail footprint relative to leaders; relies on partners such as Hedin in several markets	No Europe passenger-car plant confirmed

Brand or group	Core Europe models	Price anchor	2023 EV reg.*	2024 EV reg.*	Country presence	Dealer / retail footprint	Factory or localization status
Leapmotor	T03, C10, later B10 rollout	T03 from EUR 18,900; C10 from EUR 36,400	0	771	Initial launch in 13 markets	200 sales points targeted by end-2024; more than 600 points reported by mid-2025	Poland plan paused; Spain discussed for future production
Dongfeng / Voyah / related importers	Dongfeng Box, Voyah Free, Voyah Dream	Dongfeng Box from about EUR 23,490 in Spain	low base	low base	Fragmented country-by-country importer presence	Small localized importer networks; no central Europe count	No meaningful Europe manufacturing commitment visible

* EU-EVs 15-country EV panel.

The comparative table shows why broad statements about "Chinese brands" are analytically weak. MG, BYD, NIO, Chery and Leapmotor are all Chinese-linked Europe stories, but they differ radically in price position, distribution logic, tariff exposure and execution quality.

Market Snapshot: Scale Versus Trajectory

The fastest way to separate noise from substance is to look at scale and direction at the same time.

Brand or group	2023 EV registrations*	2024 EV registrations*	YoY direction	Commercial reading
MG	99,408	63,197	Down 36.4%	Still the largest Chinese-owned EV brand in the tracked panel, but the story has shifted from EV-only disruption to multi-powertrain volume management
BYD	15,161	34,881	Up 130.1%	Clear scale-up leader among direct Chinese challengers
Polestar	36,145	27,490	Down 23.9%	Still large, but in reset mode as lineup broadens beyond Polestar 2
XPeng	2,080	7,330	Up 252.4%	Fastest-growing tech-premium challenger from a meaningful base
GWM	4,578	2,142	Down 53.2%	Retrenchment and limited product-market fit so far
Zeekr	98	2,138	Up sharply from launch base	Small in volume, but building credibility
NIO	2,365	1,630	Down 31.1%	Important premium brand, weak retail throughput
ORA	1,634	1,201	Down 26.5%	Awareness has not translated into durable momentum
Omoda	not meaningful	1,243	New	Early-stage EV presence, with broader non-EV scale not reflected here
Leapmotor	0	771	New	2024 launch; real commercial test is 2025 onward
Voyah	69	415	Up 501.4%	Tiny but no longer invisible

* EU-EVs 15-country EV panel.

Three immediate conclusions follow:

1. BYD and XPeng are moving fast enough to matter beyond niche status.
2. MG is still strategically important, but Europe is forcing it into a more diversified powertrain mix.
3. A long tail of entrants is still proving whether it can move from launch publicity to repeatable dealer throughput.

Brand-By-Brand Profiles

BYD

BYD is now the most important direct Chinese passenger-car challenger in Europe. It combines vertical integration, broad model coverage and a visible willingness to localize production.

- **Models available in Europe:** Dolphin Surf, Dolphin, Atto 3, Seal, Seal U, Sealion 7, Han, Tang, plus a growing set of DM-i plug-in hybrids for Europe such as Seal U DM-i and other market-specific additions.
- **Pricing:** BYD has pushed into the entry band with the Dolphin Surf at around GBP 18,650 in the UK, while the Dolphin has been listed from about EUR 28,990 in France. Family EVs and SUVs mostly sit in the EUR 30,000-50,000 mainstream zone.
- **Sales:** 15,161 EV registrations in the EU-EVs panel in 2023, rising to 34,881 in 2024.
- **Countries of presence:** Early-2024 BYD communications referenced 20 European countries. Current rollout now covers most major West European and Nordic markets, with continued expansion into Central and Southern Europe.
- **Dealer count:** BYD publicly cited 267 retail stores in 20 countries by early 2024. In Germany, it later set a 2025 goal of expanding from 27 dealer locations to 120.
- **Factory plans:** BYD is building its first European passenger-car plant in Hungary and announced a major second European manufacturing investment in Turkey.

Why BYD matters: it is no longer competing only as a "cheap Chinese EV." It now has the breadth to attack Volkswagen, Peugeot, Skoda, Kia, Hyundai and Tesla in mainstream EVs while also moving into plug-in hybrid territory, where the tariff logic is more favorable.

NIO

NIO remains strategically important because it is the most explicit "premium Chinese ecosystem" bet in Europe, built around branding, experience-led retail and battery swap. The commercial challenge is that this has not yet translated into enough scale.

- **Models available in Europe:** ET5, ET5 Touring, ET7, EL6 and EL8.
- **Pricing:** Germany launch materials put the ET5 at roughly EUR 47,500 gross list price, with the battery-as-a-service structure lowering the upfront vehicle-only entry point and shifting part of the cost into a subscription.
- **Sales:** 2,365 EV registrations in the EU-EVs panel in 2023 and 1,630 in 2024.
- **Countries of presence:** Core direct operating markets have centered on Norway, Germany, the Netherlands, Sweden and Denmark. In June 2025 NIO announced expansion into Austria, Belgium, the Czech Republic, Hungary, Luxembourg, Poland and Romania via distributor partnerships.
- **Dealer count:** NIO does not publish a conventional Europe-wide dealer total because it relies on NIO Houses, NIO Spaces, online ordering and agency-style formats rather than a dense franchise model.
- **Factory plans:** No confirmed European vehicle manufacturing commitment has been made public.

The commercial reading on NIO is mixed. The brand remains differentiated and premium, but the ownership proposition in Europe still asks customers to trust a relatively small installed base, novel battery economics and a limited service footprint. That is a harder sale in Europe than in China.

XPeng

XPeng is increasingly the cleanest example of a Chinese tech-premium brand whose product proposition travels well in Europe.

- **Models available in Europe:** G6, G9 and P7 are the core of its current push.
- **Pricing:** The G6 launched in the UK from GBP 39,990, directly targeting Tesla Model Y territory. The G9 has been positioned in Germany from around EUR 59,600.
- **Sales:** 2,080 EV registrations in 2023 and 7,330 in 2024 in the EU-EVs panel.
- **Countries of presence:** XPeng said it had entered 16 European markets by late 2024.
- **Dealer count:** XPeng's coordinated launch across Germany, the UK, France and Italy started with more than 40 dealerships. Germany alone was later targeted to reach 24 retail locations by the end of 2025.
- **Factory plans:** No European vehicle plant has been announced.

XPeng's strength is clarity. Customers and dealers can understand the pitch immediately: large-screen, high-spec, long-range electric vehicles with credible charging and ADAS positioning. It is less conceptually complicated than NIO, and that helps at the retail level.

Geely, Zeekr And Polestar

Geely should be analyzed as a system rather than a single brand. In Europe it can compete through explicitly Chinese names such as Zeekr, through more internationalized identities such as Polestar, and through the industrial infrastructure of Volvo Cars.

Zeekr

Zeekr is Geely's clearest direct premium-EV push from China into Europe.

- **Models available in Europe:** 001, X, 7X and 7GT are the current commercial spine.
- **Pricing:** The Zeekr X has been listed in the Netherlands from about EUR 37,990 and the 001 from about EUR 54,990.

- **Sales:** 98 EV registrations in 2023 and 2,138 in 2024 in the EU-EVs panel.
- **Countries of presence:** Zeekr has launched in selected Nordic and Western European markets including the Netherlands, Sweden, Norway, Denmark, Belgium, Germany and France, with Italy added during 2025.
- **Dealer count:** Zeekr is still in controlled-launch mode and does not publish a broad Europe-wide dealer total.
- **Factory plans:** No dedicated European Zeekr plant has been publicly confirmed.

Zeekr proves that Chinese brands are not limited to the low-price end of the market. The challenge is that premium buyers are less forgiving of software bugs, repair delays and residual-value uncertainty.

Polestar

Polestar is not normally perceived by consumers as a "Chinese brand," but a complete landscape review should include it because the Geely relationship materially shapes its capital base and industrial logic.

- **Models available in Europe:** Polestar 2, Polestar 3 and Polestar 4.
- **Pricing:** Polestar 2 has been marketed in the UK from roughly GBP 39,900.
- **Sales:** 36,145 EV registrations in 2023 and 27,490 in 2024 in the EU-EVs panel.
- **Countries of presence:** Around 27 European markets.
- **Dealer count:** Polestar uses Spaces, online ordering and partner-based service access rather than a traditional large-scale dealer model.
- **Factory plans:** Polestar 7 has been assigned to Volvo Cars' planned Kosice, Slovakia plant, which strengthens Geely's European localization story.

For SinoDrive subscribers, Polestar is strategically useful because it demonstrates how Chinese ownership can be partially abstracted away from the consumer through Scandinavian design, local engineering credibility and European production.

MG / SAIC

MG is the most commercially mature Chinese-owned passenger-car brand in Europe. It already behaves more like an established challenger than an entrant.

- **Models available in Europe:** MG3, MG3 Hybrid+, ZS, ZS Hybrid+, HS, HS Hybrid+, HS Plug-in Hybrid, MG4 EV, MGS5 EV and Cyberster.
- **Pricing:** In the UK, MG4 EV has been marketed from about GBP 21,995, the MGS5 EV from about GBP 28,495 and Cyberster from about GBP 54,995.
- **Sales:** 99,408 EV registrations in 2023 and 63,197 in 2024 in the EU-EVs panel. On an all-powertrain basis, MG said European sales were about 240,000 units in 2024, after roughly 200,000 in 2023.
- **Countries of presence:** Effectively pan-European.
- **Dealer count:** MG has one of the deepest retail networks of any Chinese-owned brand in Europe, though the company does not centrally publish one audited continent-wide total.
- **Factory plans:** SAIC has repeatedly studied European manufacturing to reduce tariff exposure, but no final plant site had been publicly confirmed by early April 2026.

MG's importance is that it has already solved several problems newer entrants still face: broad market access, retail familiarity, aftersales presence and brand recognition. Its 2024 EV decline does not mean the brand is failing. It means Europe pushed MG toward a more hybrid-heavy and tariff-resilient mix.

Chery / Omoda / Jaecoo

Chery is becoming one of the most dealer-relevant Chinese groups in Europe because its market entry strategy looks familiar to local distributors and dealer groups.

- **Models available in Europe:** Omoda 5, Omoda E5, Jaecoo 7 and electrified SHS variants, with additional SUV models planned.
- **Pricing:** Omoda E5 has been listed from roughly GBP 33,055 in the UK. Jaecoo 7 has been advertised from about GBP 29,435, with electrified trims above that.
- **Sales:** Omoda registered 1,243 EVs in the EU-EVs panel in 2024 from a negligible 2023 base. More important, Reuters reported Chery sold more than 47,000 vehicles in Europe in the first seven months of 2024, showing that the commercial story is far larger than the EV-only view.
- **Countries of presence:** Spain, the UK, Italy, Poland, Hungary, the Czech Republic, Greece and other selected markets.
- **Dealer count:** Omoda and Jaecoo passed 60 UK dealerships in 2024 and continued expanding rapidly; Europe-wide coverage is being built through national importers and dealer groups.
- **Factory plans:** Chery's tie-up with EBRO in Barcelona is the most meaningful localization step among the newer mainstream entrants.

Chery is attractive to dealers because it does not require them to bet everything on a premium-tech or pure-BEV narrative. It offers mainstream SUV formats, broad equipment and a more conventional route to market.

Great Wall / ORA / WEY

Great Wall's European passenger-car push has so far generated less traction than the early media attention suggested.

- **Models available in Europe:** ORA 03, WEY 03 and WEY 05.
- **Pricing:** ORA 03 has been marketed in the UK from around GBP 24,995. WEY 03 has been positioned from around GBP 39,995.

- **Sales:** GWM recorded 4,578 EV registrations in 2023 and 2,142 in 2024 in the EU-EVs panel. ORA as a sub-brand fell from 1,634 to 1,201.
- **Countries of presence:** GWM Europe has described its operations across about nine European markets.
- **Dealer count:** Public Europe-wide counts are not clearly centralized. Distribution relies heavily on partners, but the footprint remains visibly thinner than BYD, MG or the Stellantis-backed Leapmotor rollout.
- **Factory plans:** No confirmed European passenger-car plant has been announced.

The issue for GWM is positioning. ORA won attention for design but not enough durable demand. WEY adds plug-in hybrid breadth, yet the sub-brand architecture is not intuitive for buyers. Europe rewards clarity, and GWM has not delivered enough of it.

Leapmotor

Leapmotor could become one of the most consequential Chinese players in Europe because it has something many rivals lack: a ready-made European operating machine through Stellantis.

- **Models available in Europe:** T03 and C10 are the current core, with B10 and other additions building the pipeline.
- **Pricing:** T03 launched from EUR 18,900 in mainland Europe and from GBP 15,995 in the UK. C10 has been positioned from EUR 36,400 and around GBP 36,500 in the UK.
- **Sales:** 771 EV registrations in the EU-EVs panel in 2024 after effectively starting from zero in 2023.
- **Countries of presence:** Leapmotor International launched initially in 13 European markets and then broadened further during 2025.
- **Dealer count:** Stellantis targeted 200 sales points by end-2024. By June 2025 Leapmotor International said it had exceeded 600 sales

and service points in Europe.

- **Factory plans:** European assembly plans remain fluid. Polish T03 assembly was paused, while Spain has been discussed as a possible future base for later programs.

For dealers, Leapmotor is one of the easiest China stories to underwrite because the operating risk is partly transferred to an incumbent partner. For European incumbents, it is a direct threat in the affordable EV segment.

Dongfeng, Voyah And Other Low-Volume Entrants

Dongfeng's European story is fragmented rather than centrally orchestrated. The group appears through Dongfeng-badged low-cost EVs, premium Voyah products and related importer-led channels in selected markets.

- **Models available in Europe:** Dongfeng Box, Voyah Free and Voyah Dream are the most visible offers.
- **Pricing:** Dongfeng Box has been marketed in Spain from about EUR 23,490.
- **Sales:** Voyah rose from 69 EV registrations in 2023 to 415 in 2024 in the EU-EVs panel. DFSK-related vehicles also remain low-volume. These are still fringe numbers by European passenger-car standards.
- **Countries of presence:** Presence is selective and importer-led rather than part of one integrated Europe strategy.
- **Dealer count:** Small country-specific importer networks; no meaningful centralized Europe total.
- **Factory plans:** No visible European passenger-car manufacturing commitment at scale.

Dongfeng matters less as a near-term continent-wide scale threat and more as evidence that the Chinese field will stay crowded. That creates white space for some dealers, but it also increases brand-survival risk.

EU Regulatory Landscape

European regulation now shapes Chinese strategy almost as much as product quality does.

1. Anti-subsidy tariffs changed the economics of China-built BEVs

The European Commission's anti-subsidy investigation into battery-electric vehicles imported from China resulted in definitive additional duties on top of the EU's standard 10% car import tariff. The headline rates were:

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

That decision matters for two reasons. First, it sharply narrows the margin for a pure China-built BEV price war. Second, it creates a strategic premium for hybrid mix, CKD or SKD assembly, and local production.

2. The tariff scope is narrow enough to change product strategy

The measures target BEVs, not every powertrain. That is one reason why MG, Chery, Jaecoo and BYD have all increased emphasis on hybrids or plug-in hybrids in Europe. In commercial terms, Europe did not just tax Chinese EVs. It indirectly encouraged more complex portfolio planning.

3. CO2 regulation still keeps the long-term door open

Despite the tariff headwind, EU fleet-emissions rules continue to push the market toward low-emission vehicles. The key structural step for passenger cars in 2025 is the 15% CO2 reduction target versus the 2021 baseline for the 2025-2029 period. That preserves long-term demand for EVs and PHEVs even if short-term adoption is volatile.

4. Europe temporarily softened near-term compliance pressure

In 2025, the EU adopted a flexibility amendment allowing passenger-car and van manufacturers to average compliance over 2025-2027 rather than face a harder one-year cliff in 2025 alone. This matters because it gives European incumbents more breathing room and slightly reduces the immediate urgency that might otherwise have benefited pure-EV challengers.

5. Local manufacturing is no longer optional theater

A European plant now does three jobs at once:

- It mitigates tariff risk.
- It improves political optics.
- It shortens logistics and lead times.

That makes BYD's Hungary and Turkey agenda, Chery's Barcelona partnership and the wider Geely localization story strategically more significant than they would have looked two years ago.

Market Share And Growth Trends

The macro trend is still positive for Chinese brands, but it is no longer a simple BEV-export growth story.

Registration mix inside the wider European market

ACEA data for 2024 shows that battery-electric cars represented 13.6% of EU passenger-car registrations, down slightly from 14.6% in 2023. Hybrids rose strongly to 30.9%, while petrol and diesel continued to lose share. That mix change is critical. It means Europe is still electrifying, but not through BEVs alone.

Chinese brand share is rising even in a harder market

JATO-based industry reporting showed Chinese brands reaching 4.5% of the European passenger-car market in the first quarter of 2025, up from 2.5% a year earlier. In May 2025, their share reportedly hit 5.9% of European registrations, versus 2.9% in May 2024. Those numbers are a reminder that Chinese brand gains continued even after tariffs were announced.

The China-Europe trade lane is already material

ACEA's China-EU trade fact sheet underscored the scale of the flow before tariffs bit. In 2023, the EU imported 438,034 battery-electric cars from China, worth EUR 9.7 billion. That does not mean every car was from a Chinese-owned brand, but it confirms how deeply Europe had already become linked to Chinese EV production.

The commercial winners are changing

The market now favors:

- Brands with multi-powertrain flexibility.
- Brands with distribution density and service support.
- Brands willing to localize assembly or at least localize operations.

It is less friendly to:

- Small-volume boutique brands with limited service footprints.
- Entrants that rely only on low ex-factory BEV cost.
- Brands that cannot reassure customers on resale values and spare parts.

Key Opportunities For European Dealers And Distributors

Chinese brands create real commercial openings for dealer groups, national sales companies and independent distributors, but only if partner selection is disciplined.

The most attractive opportunities are:

- **White-space territory development.** Several Chinese OEMs still need serious local partners in under-covered markets. Dealer groups with strong regional dominance can secure favorable territory rights, especially outside the biggest capitals.
- **Multi-powertrain retailing.** Brands that offer EVs plus hybrids or PHEVs reduce transition risk for the retailer. MG, Chery and BYD are better positioned here than narrow BEV-only entrants.
- **Fleet and B2B channels.** Richly equipped Chinese products can perform strongly on monthly leasing cost and specification-per-euro, especially against European OEMs that still protect margin with options lists.
- **Aftersales and service specialization.** Some brands with appealing products still lack robust local repair infrastructure. Well-run dealer groups can turn that gap into a service-led advantage.
- **Assembly or industrial partnerships.** Europe-based groups that can assist with homologation, labor, logistics or semi-knocked-down operations may find higher-value roles than conventional retail alone.

The main risks are equally important:

- Tariff exposure if the model plan remains too dependent on China-built BEVs.
- Residual-value volatility.
- Weak spare-parts logistics.

- Software and warranty complexity.
- Brand attrition if a smaller entrant fails to scale.

The strongest dealer strategy is selective alignment, not blanket enthusiasm. A Chinese OEM relationship only makes sense if the brand has both product strength and a credible medium-term commitment to the market.

Competitive Positioning Versus European, Korean And Japanese Brands

Chinese brands are not competing on a single dimension. Their strengths and weaknesses vary by segment.

Against European mass-market brands

Chinese challengers usually offer:

- More standard equipment.
- Stronger battery-cost economics.
- Faster refresh cycles.
- Cleaner digital interfaces and cabin technology in some cases.

European incumbents still retain:

- Better fleet relationships.
- Wider service and repair coverage.
- Higher brand trust.
- More resilient residual-value management.

Against Korean brands

Hyundai and Kia remain the strongest non-European benchmark for Chinese OEMs in mainstream electrification. Chinese brands can often beat them on visible specification or price, but still lag on consistency of dealer execution and long-term buyer confidence.

Against Japanese brands

Chinese OEMs generally look fresher in pure EV product cadence and screen-led user experience. Japanese brands remain stronger in hybrid trust, conservative reliability perception and used-car confidence.

Against Tesla and German premium

This is where the tech-premium Chinese brands have focused.

- **XPeng** is positioned closest to Tesla-plus: large screens, ADAS messaging, strong charging and good interior value.
- **NIO** emphasizes experience, battery swap and premium ambience.
- **Zeekr** aims at design-led premium EV buyers.

The missing pieces versus Tesla and German premium remain:

- Charging ecosystem advantage.
- Full-service confidence.
- Prestige.
- Residual-value depth.
- Installed-base trust.

Segment-by-segment view

- BYD versus Volkswagen, Skoda, Peugeot, Kia, Hyundai and Tesla in mainstream EVs and increasingly Toyota/Hyundai in the hybrid transition space.
- MG versus Dacia, Renault, Toyota, Hyundai and Kia in value-led hatchback and crossover segments.
- XPeng versus Tesla, high-spec Hyundai/Kia EVs and entry German premium.
- NIO and Zeekr versus Tesla and German premium in upper-mid EV segments.
- Chery/Omoda/Jaecoo versus Nissan, Renault, Hyundai, Kia and Toyota in crossover-heavy retail channels.
- Leapmotor versus Dacia Spring, Citroen e-C3, Fiat Grande Panda EV and other affordable EV programs.

Strategic Conclusions

Chinese brands are no longer testing Europe from the margins. They are building parallel routes into the market:

- Direct large-scale entry, led by BYD.
- Mature challenger positioning, led by MG.
- Premium-tech credibility plays, led by XPeng and Zeekr.
- Distributor-led crossover scale, led by Chery's Omoda and Jaecoo.
- Partnership-led rapid rollout, led by Leapmotor through Stellantis.

The likely winners in Europe are the brands that combine:

- Real network depth.
- Tariff-resilient industrial strategy.
- Lineup breadth.
- Financing and fleet competence.
- Patience to localize.

On that basis, BYD, MG, XPeng, Chery/Omoda/Jaecoo and Leapmotor sit at the center of the 2025 commercial story, each for different reasons. Geely's broader ecosystem is strategically powerful because it can operate through both clearly Chinese and partially Europeanized identities. NIO, GWM/ORA and Dongfeng-linked brands remain relevant, but more as selective or speculative stories than as continent-wide scale plays.

The practical implication for SinoDrive subscribers is clear. Europe has not closed the door on Chinese auto brands. It has raised the operating standard. The groups that meet that higher standard can still build durable positions, and the dealers who choose partners carefully can profit from that growth. The ones that rely only on launch buzz or simple export-price arithmetic will struggle.

Source Appendix

The report was built from public sources checked through early April 2026. The most important source families are below.

Regulation, trade and market structure

- European Commission material on definitive countervailing duties for battery-electric vehicles imported from China.
- ACEA 2024 passenger-car registration releases and ACEA China-EU automotive trade fact sheet.
- EU law and Council documentation on the 2025-2027 CO2 compliance flexibility amendment.
- JATO-reported 2025 European market-share analysis carried by Electrive and Reuters.

Brand and company sources

- BYD Europe and BYD national-market sites for lineup and price anchors; BYD corporate and Reuters coverage for Hungary and Turkey factory plans and Germany dealer rollout.
- NIO Europe and NIO Germany launch materials for lineup, BaaS structure and 2025 Central/Eastern Europe expansion.
- XPeng Europe and XPeng UK/Germany launch materials for lineup, pricing and dealer rollout.
- Zeekr Europe and country-market materials for lineup and pricing; brand launch releases for Italy and other market entries.
- Polestar market sites and corporate releases for lineup and the Kosice plant assignment.
- MG Motor Europe and MG country sites for lineup and pricing; company and media reporting for 2024 European sales.
- Omoda, Jaecoo and Chery corporate releases for lineup, dealer network and Barcelona localization.

- GWM, ORA and WEY European materials for model mix and country footprint.
- Leapmotor International and Stellantis materials for launch countries, sales-point rollout and factory planning context.
- Dongfeng and Voyah importer materials for local-market pricing and presence.

Registration data

- EU-EVs 2023 and 2024 brand-registration tables covering Austria, Belgium, Switzerland, Germany, Denmark, Spain, Finland, France, Great Britain, Ireland, Italy, the Netherlands, Norway, Portugal and Sweden.

Recommended Follow-Up Work For SinoDrive's Paid Version

- Build country-by-country maps for dealer and service footprints of the top eight brands.
- Add named distributor and dealer-group partner lists by market.
- Add a tariff-sensitivity model by brand, powertrain and factory origin.
- Add residual-value and leasing benchmarks versus European incumbents.
- Add a 2025-to-2027 scenario section on how EU CO_2 flexibility changes competitive timing.