

Tesla decline slows as BEVs in Europe see highest quarterly registrations on record

22/04/25

- March delivered Europe's second-best month on record for BEV registrations
- Tesla led the BEV ranking by model despite a continued fall in volumes
- The Peugeot 208 led the overall model ranking in March, while the Dacia Sandero topped the Q1 ranking

The European new car market showed signs of improvement in March, with registrations of new passenger cars totalling 1,423,340 units, up by 3.2% compared to March 2024. These results helped to offset the declines recorded in January and February, allowing the first quarter to close with a total of 3,383,986 units registered – close to the 3,384,614 units registered in the same quarter last year.

The UK was the main driver of growth as the largest market during the month, with volumes up by 13%. Increases were also recorded in Italy and Spain, while Germany and France both experienced declines, with drops of 3.9% and 15% respectively.

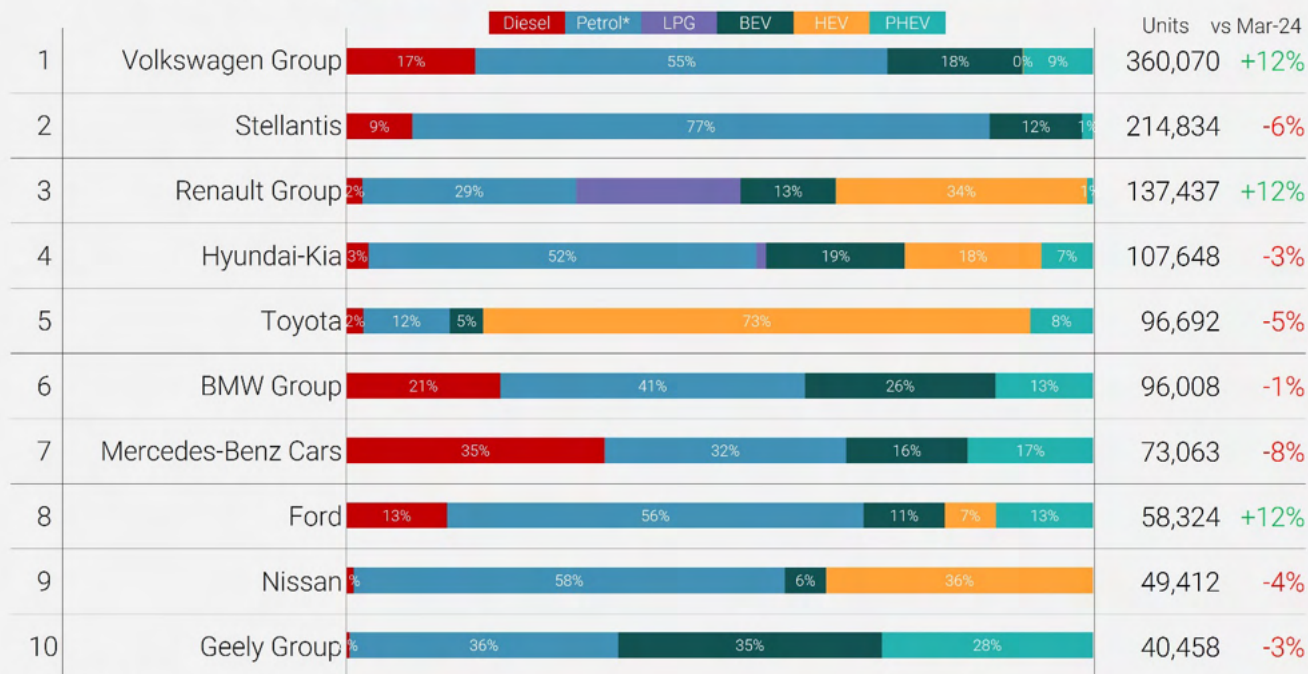
Felipe Munoz, Global Analyst at JATO Dynamics, commented: "March was a momentous month for BEV registrations in Europe, indicating that the positive response we are seeing to the continually broadening offer is finally having a real impact on the overall market."

New car registrations Europe-28						
	March			Q1		
	2024	2025	Δ	2024	2025	Δ
Total	1,379,865	1,423,340	+3.2%	3,383,986	3,384,614	0.0%
BEV	196,059	240,891	+23%	447,278	570,943	+28%
	14%	17%	+2.7p	13%	17%	+3.7p
PHEV	99,722	119,494	+20%	252,679	268,344	+6.2%
	7.2%	8.4%	+1.2p	7.5%	7.9%	+0.5p
SUV	729,113	809,987	+11%	1,777,573	1,881,407	+5.8%
	53%	57%	+4.1p	53%	56%	+3.1p
Chinese brands	33,630	74,210	+121%	80,460	153,646	+91%
	2.4%	5.2%	+2.8p	2.4%	4.5%	+2.1p
Chinese-owned Western brands	43,813	40,532	-7.5%	104,474	95,214	-7.5%
	3.2%	2.9%	-0.3p	3.1%	2.8%	-0.3p

Estimations for Poland

Source: JATO

Top 10 most-registered car makers in Europe-28 March 2025

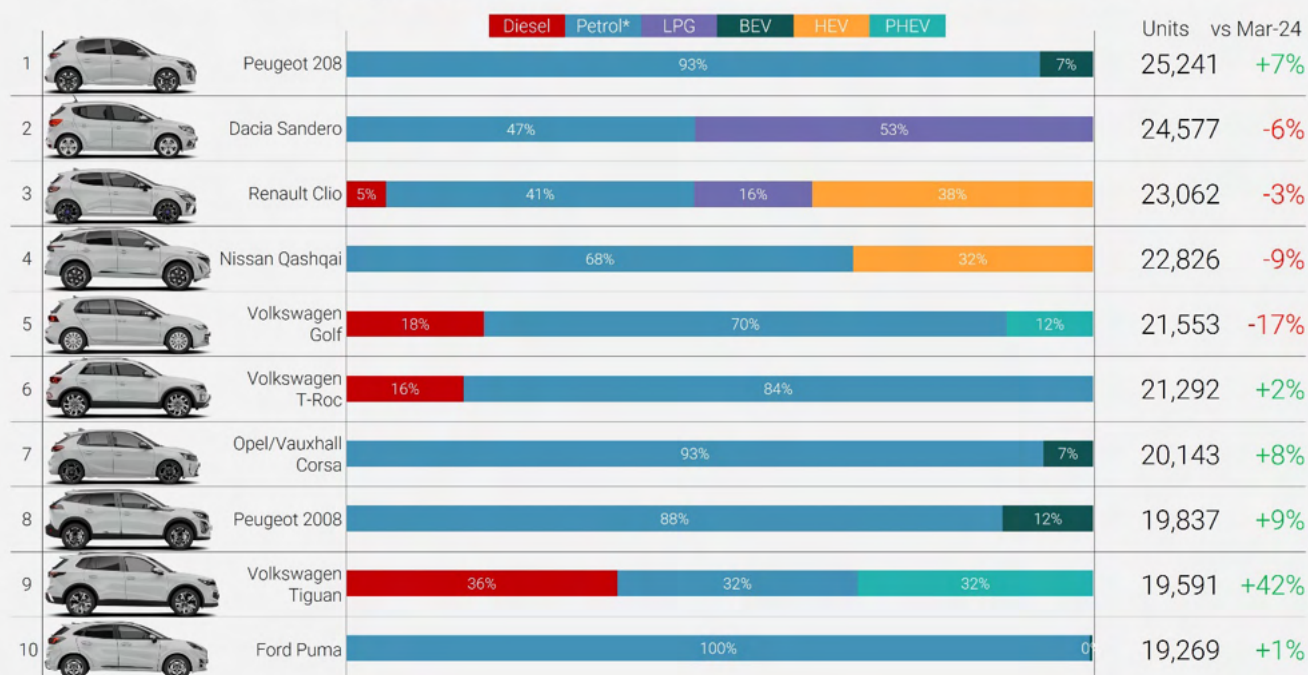


*includes MHEV

Source: JATO

JATO Dynamics data for 28 markets across the region shows that a total of 240,891 battery electric vehicles (BEVs) were registered in March. This marks the second highest result on record for this powertrain, behind December 2022 when registrations reached 275,108 units.

Top 10 most-registered new cars in Europe-28 March 2025



*includes MHEV. Car images by IMAGIN.studio

Source: JATO

Top 25 most-registered BEV brands March and Q1 2025 Europe-28

March vs Mar-24				Q1 vs Q1-24			
1	Tesla	27,828	-30%	Volkswagen	65,679	+157%	
2	Volkswagen	25,544	+118%	Tesla	53,237	-38%	
3	BMW	19,307	+14%	BMW	46,557	+21%	
4	Audi	15,972	+70%	Audi	34,739	+51%	
5	Renault	13,575	+69%	Renault	31,880	+89%	
6	Skoda	12,281	+164%	Kia	28,950	+59%	
7	Mercedes	11,876	-1%	Mercedes	28,375	+6%	
8	Kia	11,285	+51%	Skoda	26,578	+93%	
9	Peugeot	9,329	-8%	Peugeot	24,397	+8%	
10	Volvo	8,947	-38%	Volvo	22,810	-30%	
11	Hyundai	8,555	+19%	Hyundai	21,286	+28%	
12	BYD	8,458	+189%	Cupra	18,878	+179%	
13	Cupra	7,182	+117%	BYD	17,729	+133%	
14	Ford	6,345	+157%	Citroen	16,367	+161%	
15	Opel/Vauxhall	5,937	+1%	Mini	14,448	+545%	
16	Citroen	5,890	+128%	Opel/Vauxhall	13,612	+23%	
17	Mini	5,163	+1052%	Ford	13,103	+160%	
18	Polestar	4,693	+107%	Dacia	11,315	+46%	
19	MG	4,656	-36%	MG	10,163	-47%	
20	Porsche	4,120	+503%	Toyota	10,106	+27%	
21	Toyota	3,753	-6%	Porsche	9,929	+389%	
22	Dacia	3,362	+107%	Polestar	9,662	+106%	
23	Fiat	3,085	-38%	Nissan	7,431	-9%	
24	Nissan	2,796	-26%	Fiat	6,825	-44%	
25	Xpeng	1,412	+211%	Xpeng	3,377	+226%	

Last month, BEVs accounted for 16.9% of total registrations, marking an increase of 2.7 percentage points in market share compared to March 2024, as volumes rose by 23% year on year. In terms of units registered, this was the strongest quarter for BEVs on record.

Tesla decline slows

Despite the momentum behind BEV uptake in Europe, Tesla – the world’s largest BEV maker by sales volume in 2024 – recorded a 30% drop in registrations. This was the most significant decline among the 30 most registered brands, surpassed only by Mitsubishi in 33rd position (-43%), Lancia in 41st position (-73%), Jaguar (-82%), Smart (-65%), Maserati (-39%) and Abarth (-75%).

Despite the negative trend, the 30% drop experienced in March was less severe than

those recorded in January (-47%) and February (-44%). “As the brand continues to deal with a host of PR issues in addition to the changeover of the Model Y, Tesla is now relying on the Model 3 to offset its losses”, Munoz added. The midsize sedan recorded an increase of 1.1% to reach 12,500 units, topping the BEV ranking alongside the Model Y.

While the Model Y (-49%) and Model 3 (-14%) both recorded notable declines between January and March, they were still able to outpace all other electric cars in Europe. The Volkswagen ID.4 followed in third position thanks to an outstanding 115% increase in registrations but remained 2,000 units short of the Model 3.

“Despite the controversy surrounding the brand’s CEO and the limited availability of the new Model Y, Tesla continues to perform well as the most popular EV brand in Europe. Its success, amid these challenges, provides an indication of what European consumers are looking for in an EV”, Munoz continued.

The Peugeot 208 takes the leadership

In March, the Dacia Sandero lost its title as Europe’s most registered new car to its rival from Stellantis, the Peugeot 208. Despite the change in leadership, the Sandero continued to lead over the quarter, with the 208 following in second place. Among the top ten, the Volkswagen Tiguan saw a 42% increase in registrations, while the Peugeot 208 and Opel/Vauxhall

Top 25 most-registered BEV models March and Q1 2025 Europe-28

March vs Mar-24				Q1 vs Q1-24			
1	Tesla Model Y	15,164	-43%	Tesla Model Y	29,770	-49%	
2	Tesla Model 3	12,500	+1%	Tesla Model 3	23,044	-14%	
3	Volkswagen ID.4	7,675	+57%	Volkswagen ID.4	21,025	+115%	
4	Volkswagen ID.7	7,438	+986%	Volkswagen ID.7	18,770	+873%	
5	Kia EV3	7,173	New	Kia EV3	18,484	New	
6	Renault 5	6,996	New	Volkswagen ID.3	17,223	+104%	
7	Skoda Enyaq	6,865	+92%	Skoda Enyaq	17,197	+58%	
8	Volkswagen ID.3	6,384	+62%	Renault 5	16,948	New	
9	BMW iX1	6,126	+24%	BMW iX1	14,397	+34%	
10	Audi Q6 e-tron	5,701	New	Citroen C3	12,381	New	
11	Audi Q4 e-tron	5,251	+20%	Audi Q6 e-tron	12,311	New	
12	BMW i4	5,194	+1%	BMW i4	12,160	-2%	
13	Skoda Elroq	4,580	New	Volvo EX30	11,720	-14%	
14	Mercedes EQA	4,547	+4%	Audi Q4 e-tron	11,667	+13%	
15	Renault Scenic	4,492	New	Dacia Spring	11,351	+46%	
16	Volvo EX30	4,253	-45%	Cupra Born	11,045	+64%	
17	Citroen C3	4,244	New	Mercedes EQA	10,790	+20%	
18	Mercedes EQB	3,912	+21%	Renault Scenic	9,793	New	
19	Ford Explorer EV	3,903	New	Toyota bZ4X	9,447	+24%	
20	Cupra Born	3,891	+18%	Mercedes EQB	8,466	+23%	
21	Toyota bZ4X	3,444	-11%	Ford Explorer EV	8,234	New	
22	Dacia Spring	3,398	+107%	Hyundai Kona	8,050	-8%	
23	Porsche Macan	3,304	New	Porsche Macan	8,016	New	
24	Cupra Tavascan	3,291	New	Cupra Tavascan	7,832	New	
25	Volvo EX40	3,176	-38%	Volvo EX40	7,001	-51%	

registered nearly 9,800 units of the MG3, which is also powered by a hybrid engine. Renault followed closely with 9,330 units of the new Symbioz, while Fiat/Abarth recorded 8,000 units of the 600. The Volkswagen ID.7 emerged as the fourth most-registered electric vehicle in March, with 7,438 units, closely followed by the Kia EV3 at 7,173 units. BYD recorded 7,144 registrations, with over 6,500 of those being plug-in hybrids. Jaecoo registered 7,000 units of the Jaecoo 7 – despite it not being available as an electric or plug-in hybrid. Interestingly, the same number of units was registered for the Renault 5, which ranked as the eighth most popular electric car for the month.

Corsa also performed well. Notably, these vehicles failed to make the top 10 in March 2024, when positions were held by the Tesla Model Y, Citroen C3 and Toyota Yaris.

Other standout performers included the MG ZS, the success of which was driven by the launch of its new generation – now available exclusively as a full hybrid, rather than an electric model. Munoz commented: “The initial success of the MG ZS is an example of how Chinese manufacturers are adjusting their strategies in response to EU tariffs on Chinese electric vehicles.”

Other models that also recorded impressive growth include the Peugeot 3008 (+60%), the Seat/Cupra Leon (+28%), the Jeep Avenger (+56%), the Skoda Kodiaq (+34%) and the Suzuki Swift (+54%).

Among the latest market entries, MG

About JATO

JATO Dynamics, founded in 1984, now has representation in over 51 countries around the world. We provide precision under pressure, providing the world's most timely, accurate and up-to-date automotive information on vehicle specifications, pricing, sales and registrations for over 30 years. We offer more than just data, as we've watched the world change, and consumer mindsets alter with it we have been able to offer insights that help inform the industry. We're able to react to short-term market movements, plan for long-term developments and ultimately to meet the needs of our clients.

Visit JATO at www.jato.com for more information.