
Chinese brands and electric vehicles drive European new car registrations in November

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- Europe's new car market sees modest growth in November
- Registrations of BEVs rise 37% year-on-year, while market share increases to 23.5%
- Tesla's Model 3 was the most-registered BEV, recording an increase of 45% from last year

Europe's new passenger car market saw moderate growth in November 2025. According to JATO Dynamics' data, a total of 1,075,922 units were registered across Europe-28* in November 2025 – a year-on-year increase of 2.3%. The key drivers of growth were Austria (+20.5%), Spain (+12.8%) and Germany (2.5%), with Austria and Spain recording double-digit growth for the year-to-date with registrations increasing by 13.1% and 15%, respectively.

Demand for new vehicles was driven primarily by BEVs, with 252,336 units registered in November – a year-on-year increase of 37% and a rise of more than 27,000 units compared to October 2025 (224,351 units). November's figures for BEVs brought the powertrain's share of the overall market to 23.5%, a year-on-year increase of 5.9 percentage points.

PHEVs recorded the second-strongest growth by powertrain, with 113,019 units registered, up 35% year-on-year, meaning the segment now accounts for 10.5% of the overall market. Growth in the segment came primarily from Volkswagen (the Golf and the new Tayron), Audi (the new A5 and the PHEV version of the A3), BYD (Seal U) and Jaecoo (7).

The only powertrain that recorded a year-on-year decline was ICE vehicles. Registrations were down 20% compared to the corresponding period in 2024, but the powertrain still accounted for 30.6% of all registrations in November, with 329,064 units registered.

Daniele Ministeri, Senior Consultant at JATO Dynamics, said: "Even though EU CO₂ penalties are now being assessed over a three-year period, OEMs are continuing to prioritise BEVs because they are essential for lowering average fleet emissions and avoiding regulatory fines.

"Meanwhile, countries such as Italy have introduced new EV incentives, and EV charging infrastructure is continuously improving, albeit slowly. These factors are increasing the volume of BEV registrations. Despite ICE vehicles being the most-registered powertrain in November 2025, registrations are continuing to decline."

Newer Chinese brands drive growth

At a brand level, year-on-year growth in November was largely driven by Chinese OEMs, notably BYD, with 21,043 registrations, more than doubling its performance in November 2024. Leapmotor registered 6,022 units in November and 26,538 units for the year-to-date, reaching the volumes recorded by Stellantis-owned DS and surpassing Lancia, Maserati and Abarth within the wider Stellantis portfolio.

As well as Chinese brands, Cupra is growing in terms of registrations volumes – recording 25,536 units in November (up 26% year on year). Its parent company Volkswagen performed well in November as the most-registered BEV maker with 23,507 units, while Renault recorded 18,826 registrations – a year-on-year increase of 90%, due to the success of the Renault 5.

Large declines compared to November 2024 were recorded by Porsche (-29%), Jeep (-22%) and Land Rover (-20%).

Tesla Model 3 sales rise

Despite overall sales declining for Tesla, and registrations of its Model Y dropping by 39% year-on-year, the Model 3 was the most-registered BEV model in November, recording 11,437 units, a year-on-year increase of 45% mostly driven by growth in Norway – where 98% of vehicle registrations are BEVs – and Italy, largely as a result of incentives.

Other models that performed well include Skoda's Elroq (10,833 units), the Tesla Model Y (10,722 units), and the Renault 5 (10,549 units). Among the top ten BEVs, the only new entrant was the BYD Dolphin Surf, which ranked tenth with 5,890 registrations.

For full rankings and detailed analysis, please contact us.

Notes to Editors

*Europe-28: Austria, Belgium, Czechia, Croatia, Cyprus, Denmark, Estonia, France, Finland, Germany, Greece, Hungary, Ireland, Italy, Lithuania, Latvia, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Sweden, Spain, Switzerland, Slovakia, Slovenia, UK.

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