AAADATA

Press Release
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Car Registration Market – September 2025

Fleet operators accelerate their energy transition as the French car market grows in September

After an upturn in August, the French new car market remained steady in September, supported by one additional working day and a small gain of +1%.

- Fleets continue their shift to electric vehicles but dropped by -7% overall across all powertrains, while private registrations rose by +7%.
- The share of electric cars reached 22%, driven by persistent fleet support and a renewed interest among private buyers, even before the launch of electric leasing on September 30.
- The used car market also regained momentum, up +5%.

FOCUS: Fleet operators' favorite electrified models by segment

After July and August suffered from one fewer working day, September's extra day provided another positive monthly balance. New car registrations rose by +1% despite the fleet slowdown. Electric vehicles confirmed their renewed momentum in September, accounting for nearly one in four registrations. The energy transition of fleets is accelerating for passenger cars but remains slower for commercial vehicles.

Fleets: The new engine of market electrification

Long lagging in electrification, fleets have clearly accelerated their energy transition since the beginning of the year, driven by regulatory measures. By the end of August, electric car registrations for fleets (long-term rentals, companies, and government) had surged by 47% compared to the same period in 2024. Their share now exceeds 21%, three points higher than the overall market. Hybrid growth is less spectacular, but when combining all types (HEV, MHEV, PHEV, and EREV), hybrids account for 53% of fleet registrations — a total of 74% electrified cars — with diesel (8%, down 46%) and petrol (17%, down 45%) making up the rest.

Electric vehicles reach a historic high

Unlike in recent months, electric cars are no longer driven only by fleets. Among private buyers, EVs reached 23% of sales, stable year-on-year. The total electric share rose to 22% of new car registrations in September — a record level, well above the 18% average since the start of the year — largely driven by the Tesla Model Y, far ahead of other EVs.

Hybrid powertrains, still dominant, rose +13% and accounted for more than half of all registrations. Standard hybrids (HEV) grew by +5%, plug-in hybrids (PHEV) continued to fall (-10%), mild hybrids (MHEV) jumped +31%, and range-extended EVs (EREV) rose +14%, thanks to the success of Nissan's Qashqai and X-Trail.

Conversely, internal combustion engines (including LPG) now account for only 3% of new registrations. Petrol (-25%) and diesel (-22%) continue to lose ground.

The used car market boosted by electric and older models

After a summer slowdown, the used car market regained momentum in September, with 456,514 transactions (+5%), driven by two distinct trends:
- a steady rise in cars over 10 years old (+11%), compensating for the lack of recent used vehicles after five years of new-car market decline;
- and a surge of nearly +44% in used electric vehicles, whose share reached 4% for the month, versus 3% on average since the start of the year.

All hybrid types (HEV, MHEV, PHEV, EREV) continued to gain ground, representing 12% of used car transactions in September.

More than 80% of used EVs are sold by professionals, who benefit from this trend. Across all powertrains, however, transactions between private individuals grew the most (+18%), while professional-to-private sales dropped by -1%.

Focus: Fleet operators' favorite electrified models by segment

TYPE	MODEL	SEGMENT	REGISTRATIONS
ELECTRIC	Renault Scenic	C-SUV	4,823
	Tesla Model Y	D-SUV	4,561
	Renault 5	B	2,955
HYBRID (HEV)	Renault Symbioz	C-SUV	8,300
	Renault Clio	B	5,818
	Toyota Yaris Cross	B-SUV	5,397
MILD HYBRID (MHEV)	Peugeot 3008	C-SUV	9,339
	Peugeot 2008	B-SUV	7,005
	Peugeot 308	C	5,952

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