Press release

Paris, November 1 , 2025

The French cars registrations – October 2025

The new car market grew again in October thanks to the acceleration of electric cars.

- **The French new car market recorded its third consecutive month of growth and gained 3 % in October.**
- **Boosted by government subsidies, electric car registrations jumped by 63 %. % and achieve a record market share of 24 %.**
- **Fleets remain the main driver of the market's conversion to electric, but purchase incentives for individuals are beginning to have an effect.**
- **The used car market is also continuing its electrification but slowed down in October with a decline of 1 %.**
- **FOCU S : mass-market models are democratizing the recent electric used car market.**

The jump of 63% of new electric car registrations in October propelled the market into positive territory: it gained 3 % overall, despite a further decline in fleets. On the other hand, the used car market lost momentum over the month, despite a strong increase in electric vehicles , driven by the arrival on the second-hand market of widely available and more affordable models .

AAA Data, the augmented data expert, recorded 139,514 new passenger car registrations in the past month, representing an increase of 3 %, with the same number of working days as in October 2024. Sales to individuals (51 % of the market (e) earn 6 %, those to the fleets (30 % of the market (e) decrease by 6 %.

" Registrations of electric vehicles to private individuals accelerated sharply during the month and showed the first significant effects of the new purchase incentives. " » , notes **Marie-Laure Nivot, Head of automotive market analysis at AAA Data** . *The outlook for the coming months is becoming more favorable, as the CCFA observes a 17% increase. % of new car orders in September. The supply of electric models is increasingly matching demand and their gradual arrival at used car dealerships is contributing to the decrease in average second-hand prices. »*

Individuals and fleets are rushing towards electric vehicles

While the growth of electric vehicles in recent months has relied solely on fleets, private individuals are joining the movement in October, thanks to more favorable purchase incentives (« Coup de pouce Véhicules Particuliers Électriques » replacing the bonus since July 1st , supplemented since October 1st by a bonus conditional on European production criteria) and the opening of social leasing on September 30th.

The scheme will concern 50 000 cars, deliveries of which are already visible in registration figures and will continue in the coming months. Compared to October 2024, registrations of electric cars by private individuals are 75% higher ; a progression that exceeds that of the fleets (+) 66 %). After reaching a record market share of 22 % in September, electric cars performed even better in October at 24 %.

Among the brands with the highest electric vehicle sales volumes, several are showing significant increases in this type of engine. The brands Renault, Skoda, Audi, Hyundai, Mercedes, and Ford have more than doubled their electric vehicle sales , Peugeot (+ 86 %), Mini (+ 93 %), Cupra (+ 41 %). Overall, these strong increases more than compensate for the decline in petrol models (- 27 %) and diesel (- 34 %). Hybrids, which are the majority, are up 4% overall, but with differences depending on the level of hybridization . : + 25% for *mild hybrid* (MHEV) and more 29% for electric vehicles with range extender (EREV), for most of the Nissan Qashqai and X-Trail.

This market growth is concentrated on three segments : B-segment sedans (led by the Renault Clio), B-SUVs (led by the Peugeot 2008) and D-SUVs (led by the Tesla Model Y).

<u>The original version is also becoming electrified.</u>

From one month to the next, the used car market fluctuates around equilibrium. After a gain of 5 % in September, it fell by 1 % in October and totals 483,743 transactions, still hampered by the shortage of recent models less than 5 years old (- 8 %). On the other hand, those over 10 years old, which weigh 50 % of the market , continue to grow (+ 5 % over the month) , just like electric motors : + 34% for electric vehicles , + 23 % for hybrids (HEV), + 24 % for *mild hybrid* (MHEV), + 11 % for plug-in hybrids (PHEVs) and above 18% for electric vehicles with range extender (EREV).

<u>Focus : mass -market models are democratizing the recent electric vehicle</u>

While most used car transactions take place between private individuals, the situation is reversed for electric vehicles. Most often recent models acquired through long-term leases, over 80% of them are resold by professionals. To analyze the effects of increased new car sales volumes on the used car market, AAA Data examined the price trends of electric vehicles offered by professionals*.

The first observation: with the average price of electric vehicles less than three years old stabilizing just under €33,000, the depreciation compared to new vehicles, around 15%, is now similar for both electric and internal combustion engine vehicles (considering the bonus and penalty tax). However, electric vehicles have lower mileage (14,284 km on average, compared to 21,281 km for internal combustion engine vehicles), confirming that their use is still primarily secondary and urban.

Furthermore, the most popular models are becoming increasingly affordable on the used market. Significant disparities remain, both in terms of price level and depreciation, linked to equipment levels and mileage. For example, the very recent Renault 5 and Citroën ë-C3 can appear more expensive on the used market than their new list price*. Conversely, models that have been on the market longer, such as the Peugeot e-208, Tesla Model Y, and to a lesser extent the Volkswagen ID.3, show greater depreciation.

Read the full barometer at: www.avere-france.org/wp-content/uploads/2025/10/Etude_AVERE_Mobilians_T3-2025.pdf

* The new cars price corresponds to the weighted average new price, calculated based on private registration volumes and the list prices of new cars, excluding bonus-malus, options, and negotiations. This price with bonus/penalty is calculated based on the same criteria, but includes the minimum bonus amount (€3,100 for individuals) as well as the estimated environmental penalty according to eligibility rules. The bonus amount used is the one applied to all eligible individuals.

The price of used cars is the average price from professional listings. It is weighed by the volume of registrations with a listed price and may include used cars with options. The analysis focuses on used cars less than three years old (with one exception).

Press Contact:
aaadata@rumeurpublique.fr
Léo Chompré – 06 14 35 41 74
Arthur Barbier - 07 71 80 76 69
Manuella Andrianjafimihanta – 06 22 08 64 51

About AAA DATA:
AAA DATA, a long-established and leading player in value-added data, detects and identifies consumer behaviors, needs, and trends to anticipate future uses and offer its clients customized solutions. Thanks to its data repository and expertise, AAA DATA has developed innovative solutions and anticipated future needs across a wide variety of consumer sectors. aaa-data.fr