Europe’s Chinese car surge

How consumer search demand is shifting across five major European car markets

IMAGIN.studio ‘European Brand Pulse Report’

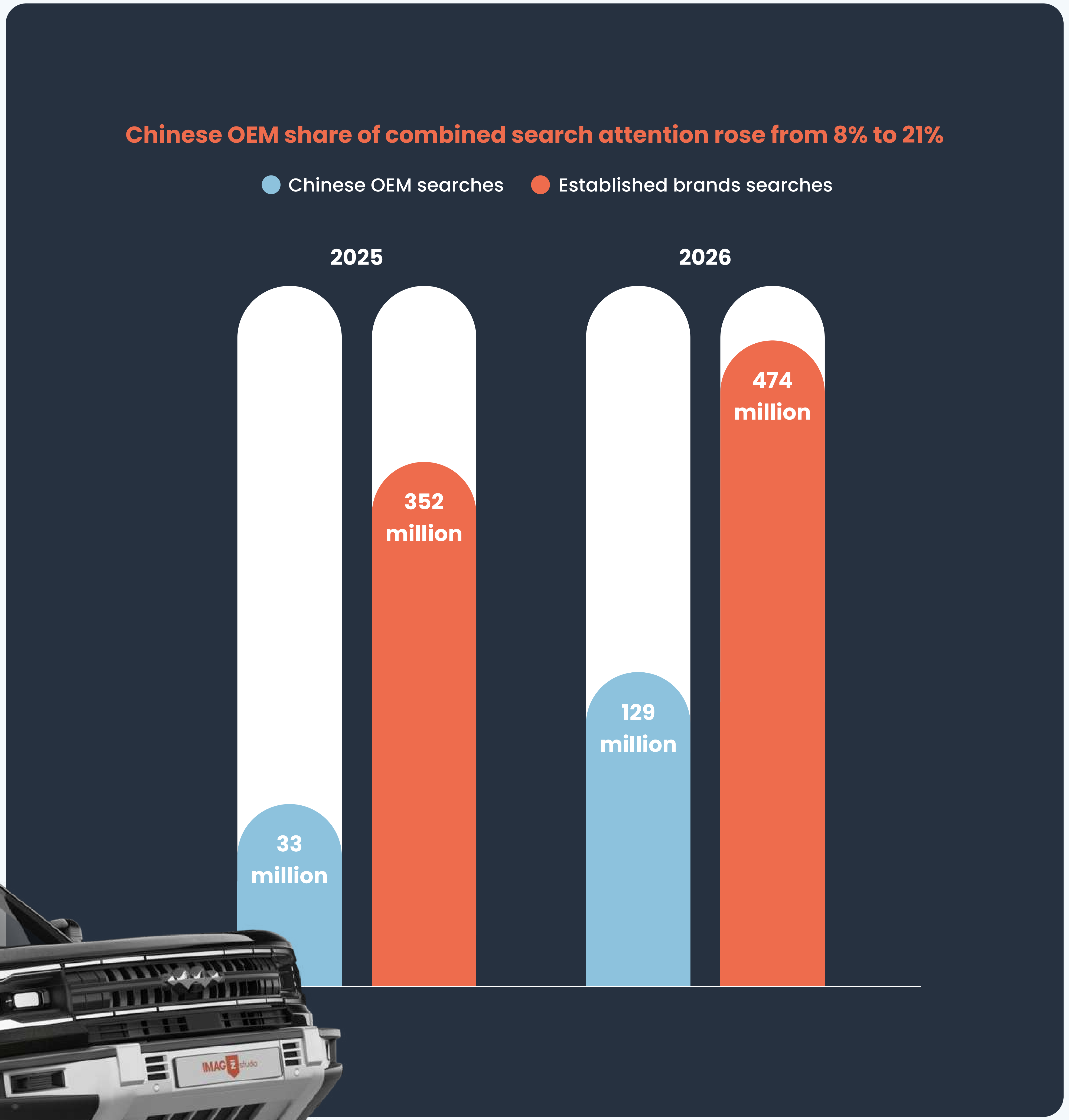
Based on search activity for 14 automotive brands across the UK, Germany, France, Italy and Spain in H1 2025 and H1 2026

Chinese car brands are becoming serious contenders in European search demand

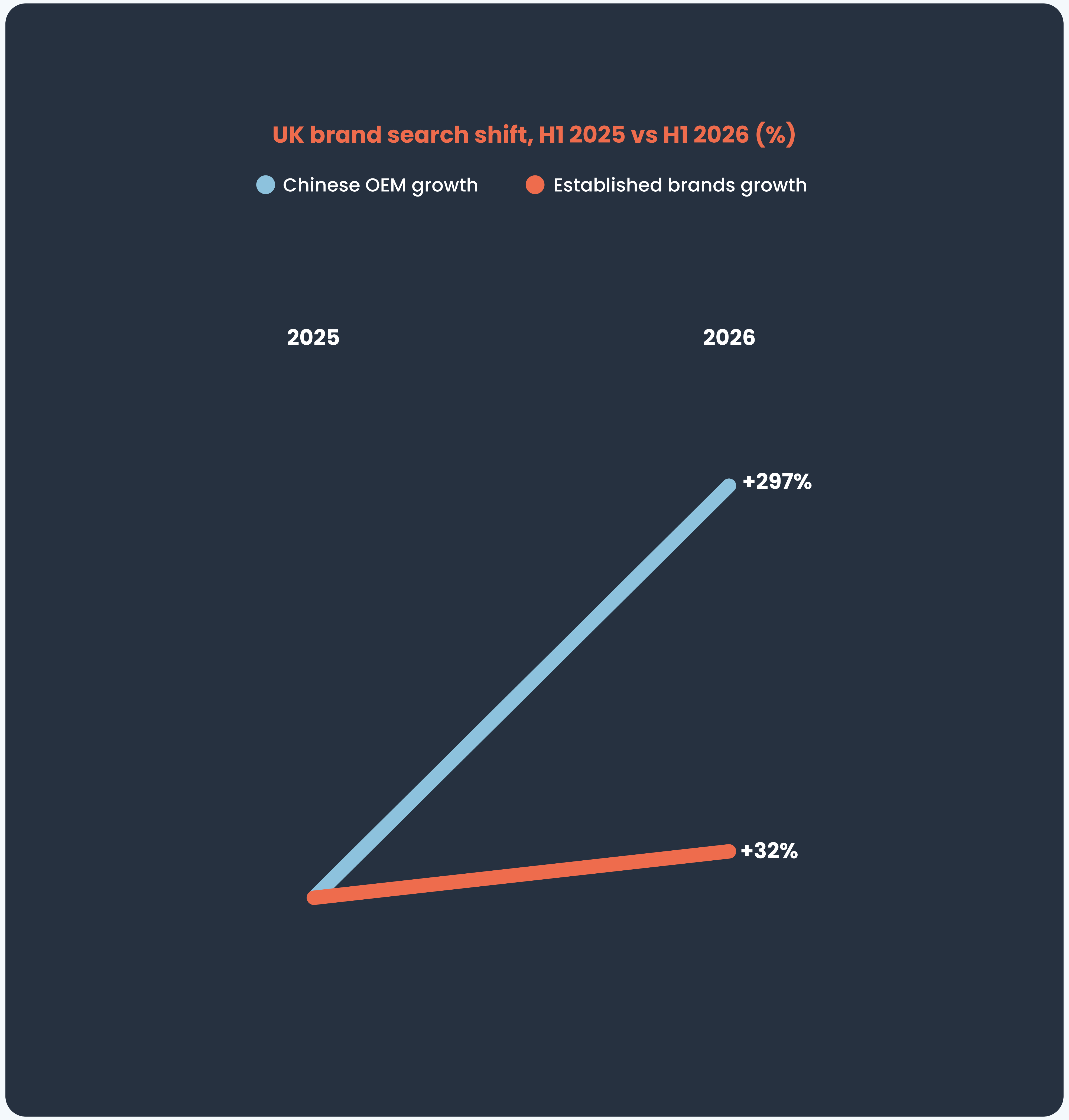
Across the UK, Germany, France, Italy and Spain, consumer interest in Chinese car brands has grown at a far faster rate than interest in some of Europe's most established manufacturers.

Between H1 2025 and H1 2026, searches for seven Chinese OEMs rose by close to 300% across IMAGIN.studio's European dataset. By comparison, searches for seven established brands rose by 35% over the same period. That marks a clear shift in online car buyer attention. The established names still dominate in absolute search volume, but Chinese OEMs are taking a much larger share of consideration than they were just twelve months ago.

But the headline hides a more complex picture. Europe is not moving in one direction at one speed. In some markets, Chinese brands are growing from a low base. In others, they are already taking a large share of total search attention.



The Confidence Gap
The question is no longer whether consumers are curious about Chinese car brands. It's obvious they are. The bigger issue is how quickly that curiosity becomes confidence, comparison and purchase intent.



The UK is Europe's strongest Chinese brand-interest market

Searches for BYD, Jaecoo, Omoda, Xpeng, Chery, Geely and Zeekr rose nearly fourfold between H1 2025 and H1 2026. That is a near fourfold increase in just twelve months.

Established brands still attract far higher total search volumes, but their growth was much slower, rising by 32% over the same period. This makes the UK the clearest example of a market where Chinese brands are moving from curiosity to serious consideration. Their share of combined search attention among the 14 tracked brands rose from 9% to 22%.

- Chinese OEM growth: +297%
- Chinese OEM share of combined searches: 22%

The Familiarity Issue
The UK does not have a Chinese brand awareness problem anymore. It has a familiarity and conversion problem. Buyers are searching, but many still need clearer information on brand trust, specification, pricing, range, charging and ownership cost.

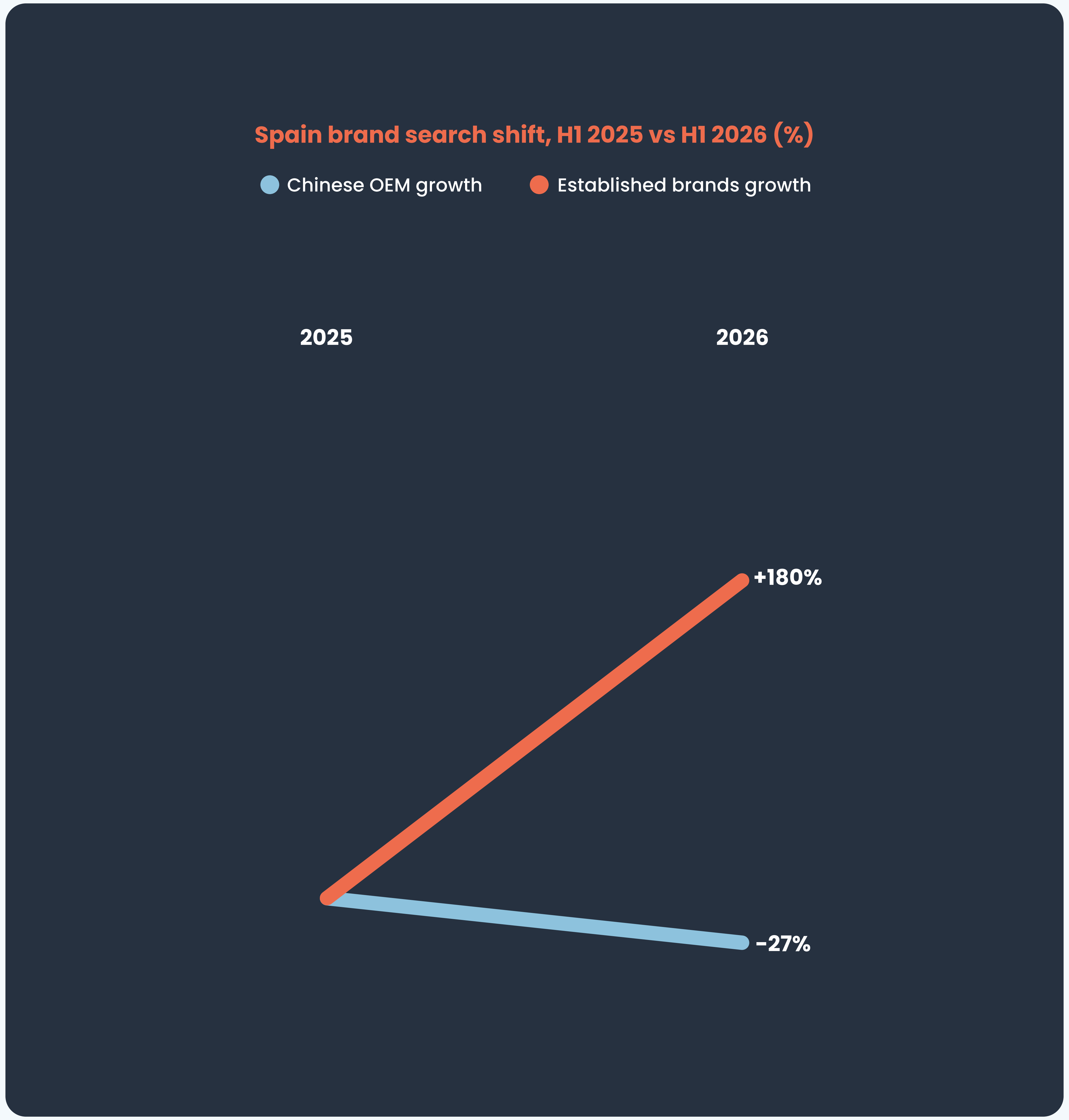
Spain is shifting attention toward Chinese brands

Spain is one of the most advanced markets in the dataset for Chinese OEM search share.

Searches for Chinese car brands rose by 180% between H1 2025 and H1 2026. Over the same period, searches for the seven established brands fell by 27%.
That makes Spain different from most other European markets in the dataset. This is not only Chinese brands growing within a larger pool of demand. It is a shift in where buyer attention is going.
Chinese OEMs accounted for 11% of combined search attention in H1 2025. By H1 2026, that share had nearly tripled to 32%.

Chinese OEM growth: +180%
Established brand growth: -27%

Attention Is Shifting
Spain is not simply adding Chinese brands to the consideration list. It is redirecting attention toward them. For OEMs and retailers, that means Chinese brand content cannot sit behind established brand messaging. It needs its own trust story.



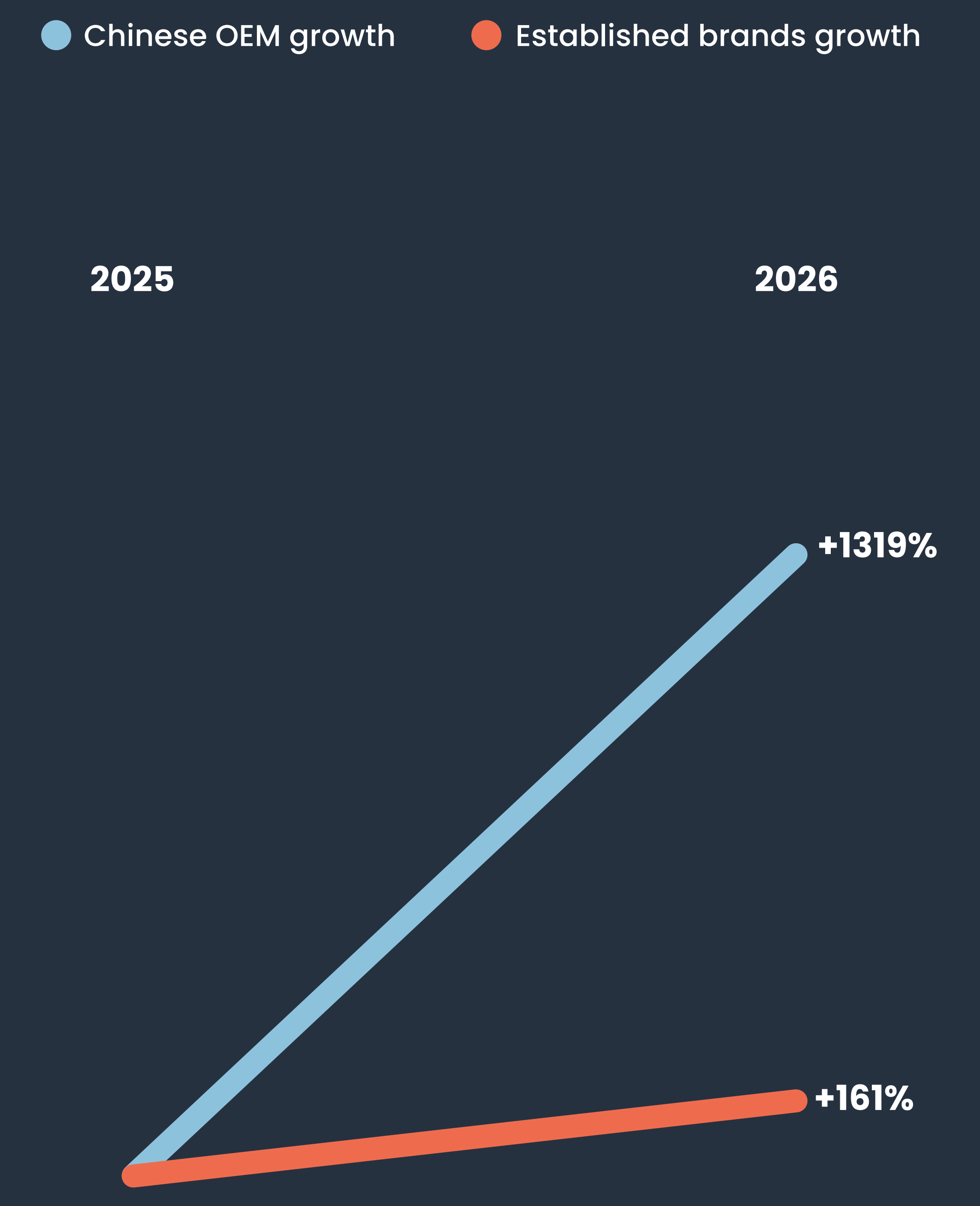
Germany's market is warming up to Chinese brands

Germany is one of the most important tests for Chinese car brands in Europe.

Searches for Chinese OEMs rose more than tenfold between H1 2025 and H1 2026.
Established brands also grew strongly, with searches for Skoda, Audi, BMW, Mercedes, Volkswagen, Volvo and Renault rising by 161% over the same period.
That makes the German market especially interesting. Chinese brands are not growing because established brands are losing attention. They are growing much faster even as familiar names also gain ground.

Chinese OEM growth: +1,319%
Chinese OEM share of combined searches: 2.3% to 11.1%

Germany brand search shift, H1 2025 vs H1 2026 (%)



Germany's High Bar
Germany is the credibility test. Chinese brands are making inroads in a market where buyers have high expectations and strong attachment to established manufacturers. Digital presentation has to meet that standard from the first search.

France is opening up to new automotive challengers

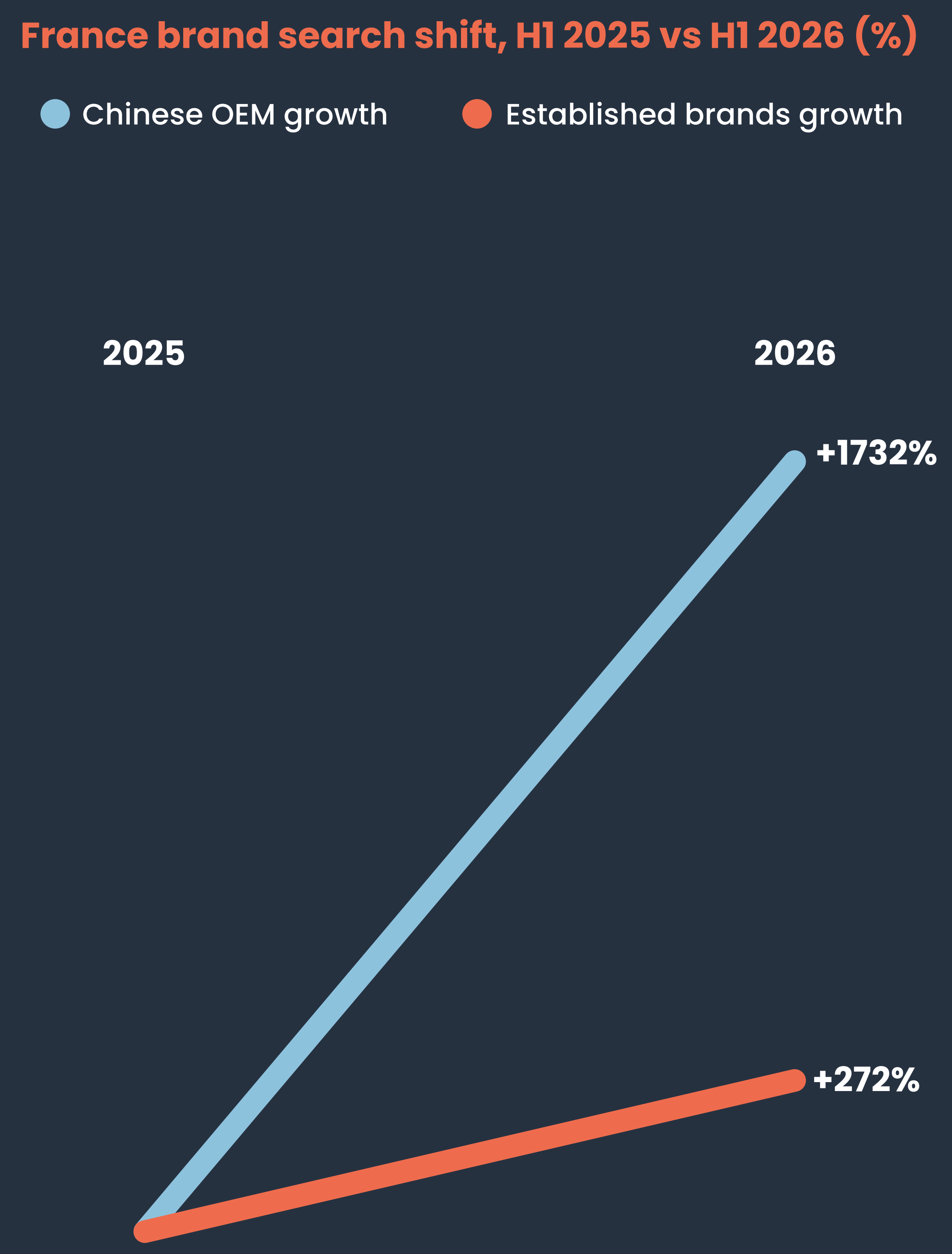
France shows the fastest Chinese OEM search growth rate in the dataset.

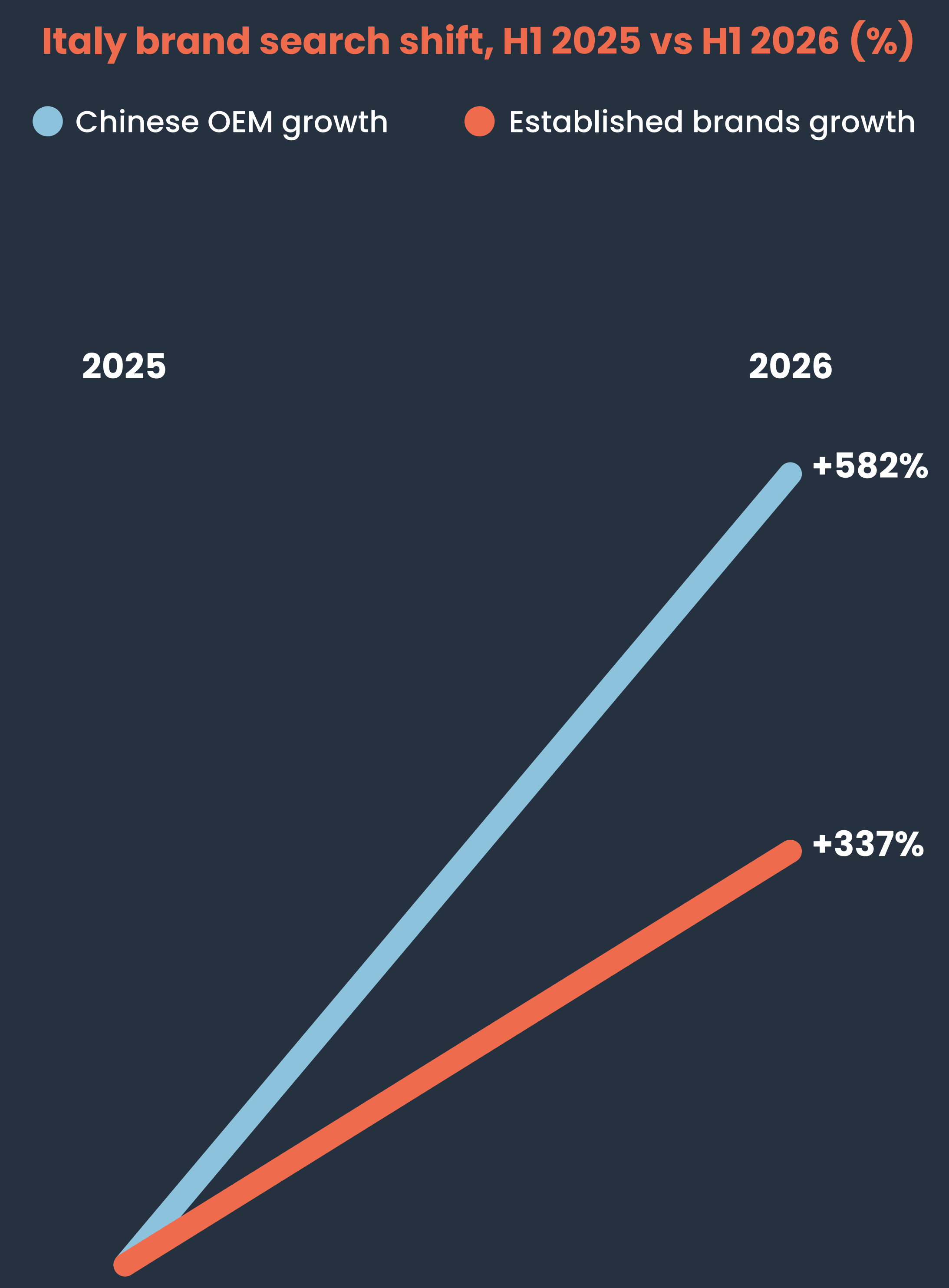
Searches for BYD, Jaecoo, Omoda, Xpeng, Chery, Geely and Zeekr rose by 1,732% between H1 2025 and H1 2026. Established brands also grew strongly, with searches for Skoda, Audi, BMW, Mercedes, Volkswagen, Volvo and Renault rising by 273% over the same period.

Chinese brands are still smaller in absolute volume, but the speed of growth shows that awareness is building quickly in one of Europe's more brand-loyal car markets.

Chinese OEM growth: +1,732%
Chinese OEM share of combined searches: 1.9% to 8.8%

France's Fast Start
France is the breakout market. Chinese brands are still starting from a low base, but buyer curiosity is rising at pace. The next challenge is turning unfamiliar names into credible options.





Italy's market is booming, but Chinese brands are growing faster

Italy shows strong growth across the whole automotive search market, but Chinese OEMs are growing at a faster rate.

Searches for Chinese car brands rose by 582% between H1 2025 and H1 2026. Searches for the seven established brands also grew strongly, rising by 337% over the same period.
That makes Italy a growth market rather than a displacement market. Established brands are not losing search demand. But Chinese OEMs are expanding from a low base at a faster pace, which suggests awareness is building quickly.

Chinese OEM growth: +582%
Established brand growth: +337%

Making Unfamiliar Feel Credible
Italy is the early-stage case. Awareness is rising fast, but Chinese OEMs still account for a small share of total search attention. Digital presentation has to do more than show the vehicle. It must make unfamiliar brands feel credible, comparable and easy to understand.

Martijn Versteegen,
CEO at IMAGIN.studio:

"Chinese car brands are moving from niche curiosity to serious consideration across Europe. The speed of change is striking. In every major market we analysed, searches for Chinese OEMs grew faster than searches for some of the most established manufacturers.

But the story is not the same everywhere. In the UK, Chinese brands are already generating very large search volumes. In Spain, they are taking a much bigger share of total attention.

In Germany and France, they are still smaller in absolute terms, but growing from a low base at pace. Italy shows a market where everyone is growing, but Chinese OEMs are growing faster.

That creates a new challenge for the industry. When someone compares a BYD, Omoda or Geely against a Volkswagen, BMW or Renault, they do not have decades of familiarity to lean on. Every image, specification, trim detail and visual cue has to do more work.

Interest alone does not guarantee adoption. Buyers may be curious, but they still need confidence in what they are choosing. As more new brands enter the European market, the winners will be the brands, retailers and marketplaces that make comparison simple, clear and credible.

Digital presentation is now central to that process. Helping consumers visualise models, understand specifications and compare unfamiliar brands against familiar ones will be critical in turning rising search interest into real-world sales."

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