



# Individual brand analysis: **Leapmotor**

A report by **JATO Advisory**

November 2025



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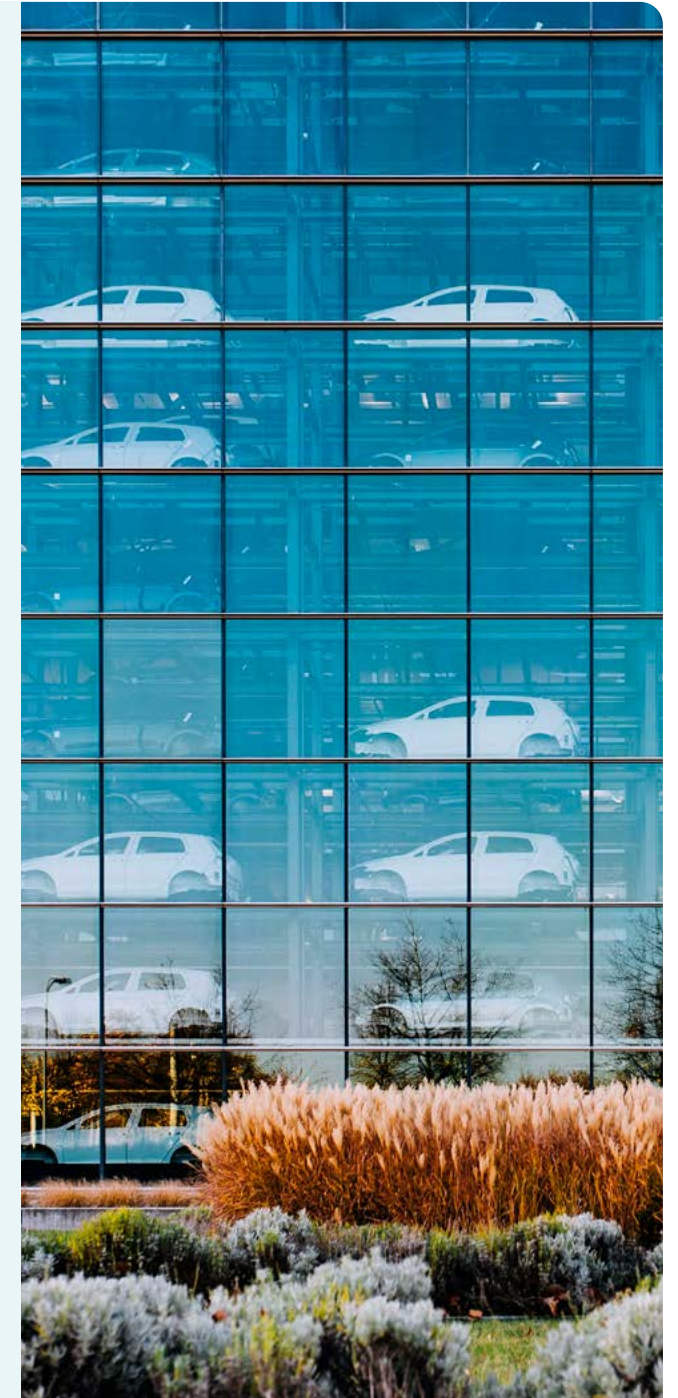
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# 01

## Introduction

**Leapmotor is a Chinese electric vehicle startup founded in 2015, known for its focus on smart, affordable EVs. With a strong presence in China's domestic market, the company has rapidly gained attention for its innovative technology and competitive pricing.**

In 2024, the company took a major step toward international expansion by forming a joint venture with Stellantis: Leapmotor International. Stellantis holds a 51% stake in the JV, which grants it exclusive rights to export, sell, and manufacture Leapmotor vehicles outside China.

This partnership enables Leapmotor to leverage Stellantis' global industrial and commercial footprint to enter Europe and other key markets, providing a unique competitive advantage over other Chinese brands thanks to direct access to established distribution networks, manufacturing capabilities, and regulatory expertise.





## 02 | Market entry strategy

**After introducing its first model in France in 2023, Leapmotor has expanded its European operations by leveraging its joint venture with Stellantis.**

The initial rollout covered nine countries: France, Italy, Germany, the Netherlands, Spain, Portugal, Belgium, Greece, and Romania. Shortly after, the brand expanded its presence to Switzerland, Luxembourg, Malta, and the United Kingdom

This represents the fastest market entry in Europe ever achieved by a Chinese OEM.

The strategic expansion marks Leapmotor's first major international move, supported by Stellantis' extensive distribution and service network across the region.

### 2023

512 units

- France

### 2024

1,228 units

- Belgium
- Germany
- Italy
- Spain

### H1 2025

8,353 units

- Austria
- United Kingdom
- Netherlands
- Poland
- Romania
- Switzerland





## 03 | Brand positioning and value proposition

**Leapmotor positions itself in Europe as a smart and affordable electric mobility brand, targeting consumers looking for accessible NEV solutions.**

Its value proposition combines competitive pricing with advanced digital features, aimed at democratising electrified vehicle ownership.

Through its joint venture with Stellantis, Leapmotor benefits from a robust distribution and service network, reinforced its promise of reliability and customer proximity.

The brand's strategy focuses on offering modern, connected vehicles that meet European expectations for quality and innovation, while maintaining a distinctly Chinese edge in terms of design and technology.

## 04 | Dealer network strategy

**As of mid-2025, Leapmotor has established a dealer and service network of approximately 600 locations across 14 European countries, with plans to exceed 700 points of sale and service by the end of the year.**

This rapid expansion has been made possible largely through integration with the existing Stellantis dealer network. Leapmotor's European network also includes strategic partnerships with major distributors such as Gowan Auto in Ireland, Emil Frey Group in Central and Eastern Europe.





05

## European entity established or announced



### European legal entity

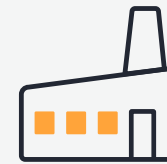
#### Leapmotor International B.V.

Taurusavenue 1  
2132LS Hoofddorp  
Netherlands



### Research & development

Leapmotor is leveraging the joint venture with Stellantis not only for market entry but also for R&D activities across Europe.



### Factories

Leapmotor has announced its intention to leverage the joint venture with Stellantis for local production activities across Europe.



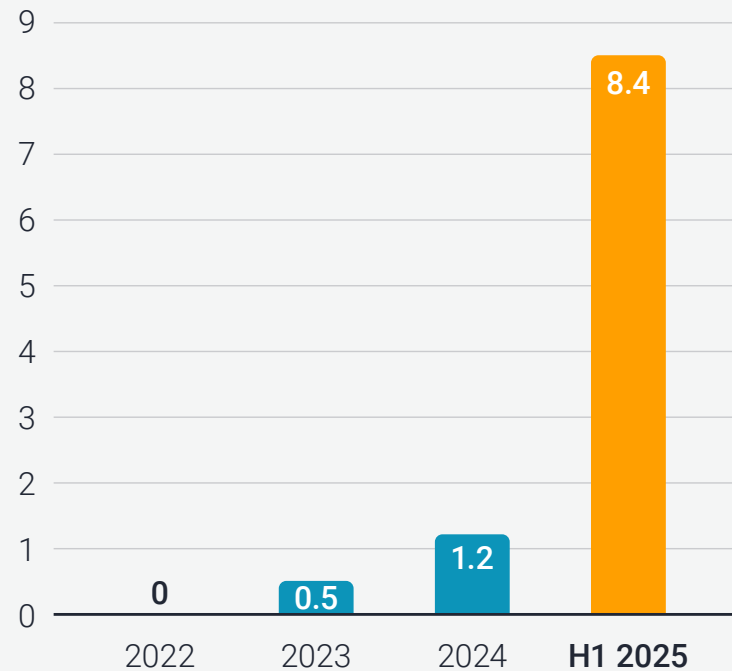


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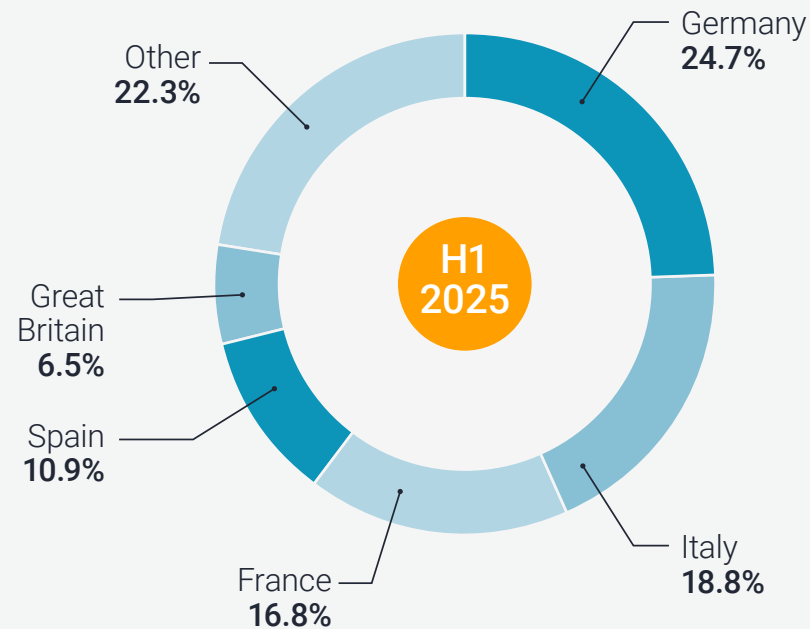
## Volume evolution in Europe

### Leapmotors volumes in Europe

(thousand units)



### Mix by country



**Thanks to the rapid expansion of its dealer network, Leapmotor is experiencing strong volume growth across European markets.**

The year 2025 will mark the brand's first full year of sales in the region, and it has already surpassed 8,000 registered units. Notably, Germany and France, traditionally challenging markets for Chinese OEMs, are among the top three countries by volume, underscoring the effectiveness of Leapmotor's European strategy and the strength of its partnership with Stellantis. Remarkably, the brand has already outperformed several historic marques within the Stellantis group, such as Lancia (despite its planned revival following the FCA-PSA merger in 2019), Maserati, and Abarth, in terms of 2025 registrations across the EU region.





# 07

## Product line-up and mixes - H1 2025

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Model	Segment	Body	Powertrain mix		Mix on brand line-up
			EREV	BEV	
T03	A	Hatchback		100%	70.7%
C10	D	SUV	43%	57%	29.3%
EU powertrain mix			12.6%	87.4%	

The brand's European line-up currently includes two models. The T03, an A-segment BEV, was introduced in France as early as 2023 (prior to the joint venture with Stellantis) and now accounts for approximately 70% of Leapmotor's volumes in Europe.

This strong performance is likely supported by Stellantis' existing customer base in the A-segment, built around models like the Fiat Panda and 500, as well as the lack of other affordable sub-3.7-meter offerings within the group. The second model, the C10, is a D-segment SUV available as both a BEV and, for the first time in Europe from a Chinese brand, as an EREV (Extended-Range Electric Vehicle).

This powertrain type, which is gaining traction in China, could offer Leapmotor a first-mover advantage over other Chinese OEMs in the European market.

Leapmotor recently unveiled three new models: the B10, a compact SUV positioned in the C-segment; the A10, a B-SUV; and the B05, a sporty electric hatchback aimed at younger urban buyers and designed to compete with the VW ID.3 and MG4.





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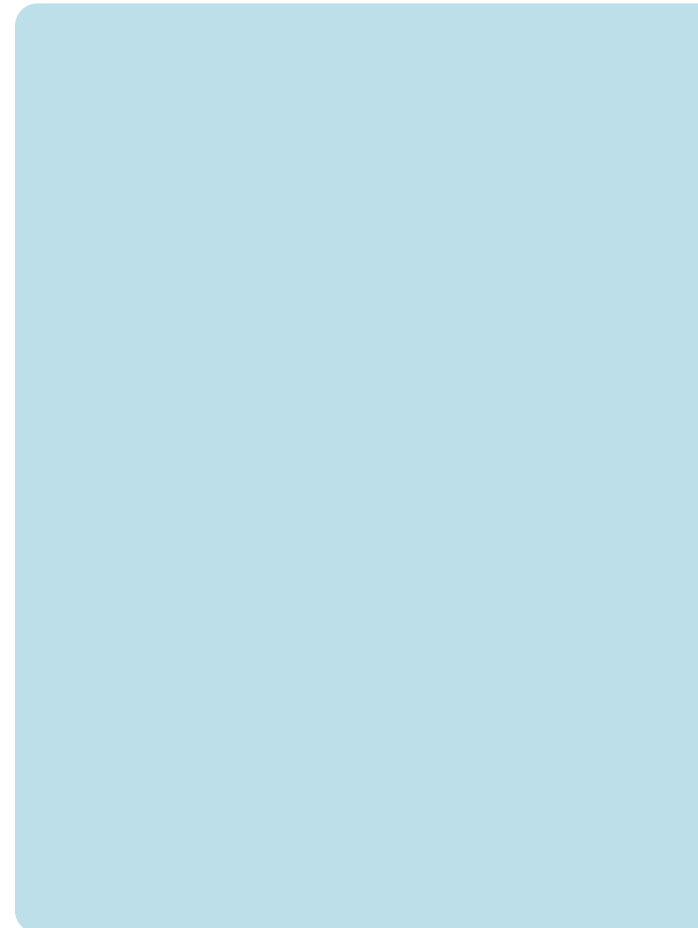
**Leapmotor's price positioning in Europe is aligned with that of the Dacia Spring (produced by Renault in collaboration with Dongfeng), offering one of the most competitively priced vehicles on the market.**

Despite its affordability, the T03 is significantly richer in terms of features and equipment, comparable to B-segment models like the Citroën C3 and even surpassing the more expensive A-segment Fiat 500.

While it remains below the BYD Dolphin Surf in terms of overall equipment, Leapmotor's offering is still more competitive from a pricing standpoint.

Looking more closely at its features, the T03 distinguishes itself in infotainment, particularly thanks to its 10.1" touchscreen, well above the average for both A- and B-segment vehicles.

However, it lags behind in connectivity, lacking telematics functions and remote features such as air conditioning control.





08

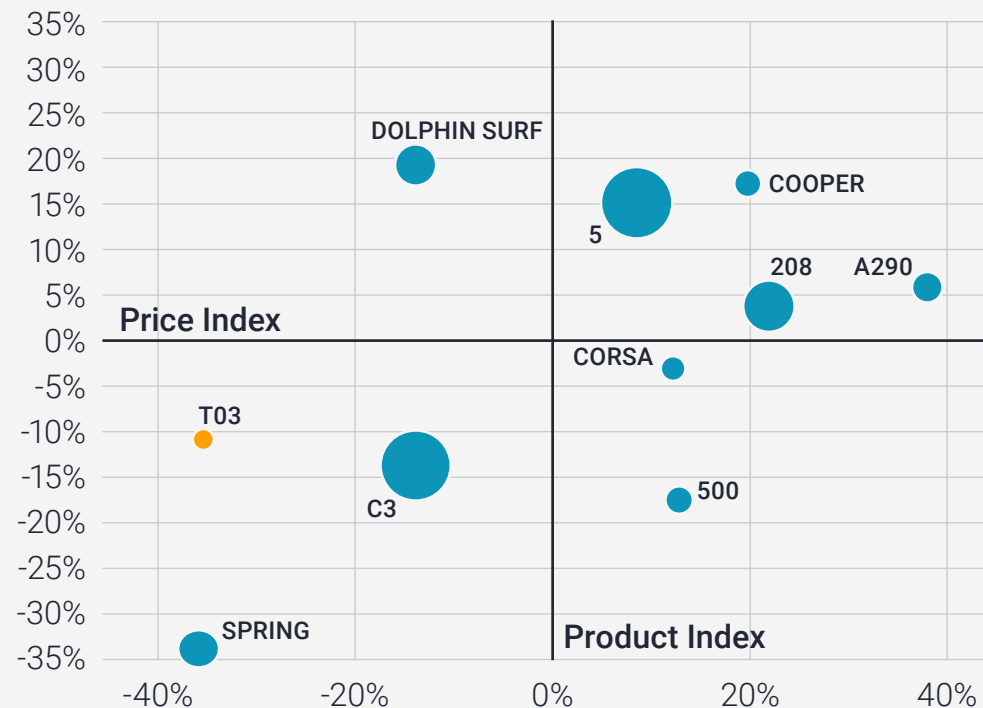
## Product positioning analysis

Leapmotor's pricing in Europe is aligned with the Dacia Spring, making the T03 one of the most affordable options on the market.

Despite its low price, it offers equipment comparable to B-segment models like the Citroën C3 and even surpasses the A-segment Fiat 500, though it remains below the BYD Dolphin Surf. The T03 stands out for its 10.1" touchscreen, well above segment averages, but lacks advanced connectivity features such as telematics and remote controls.

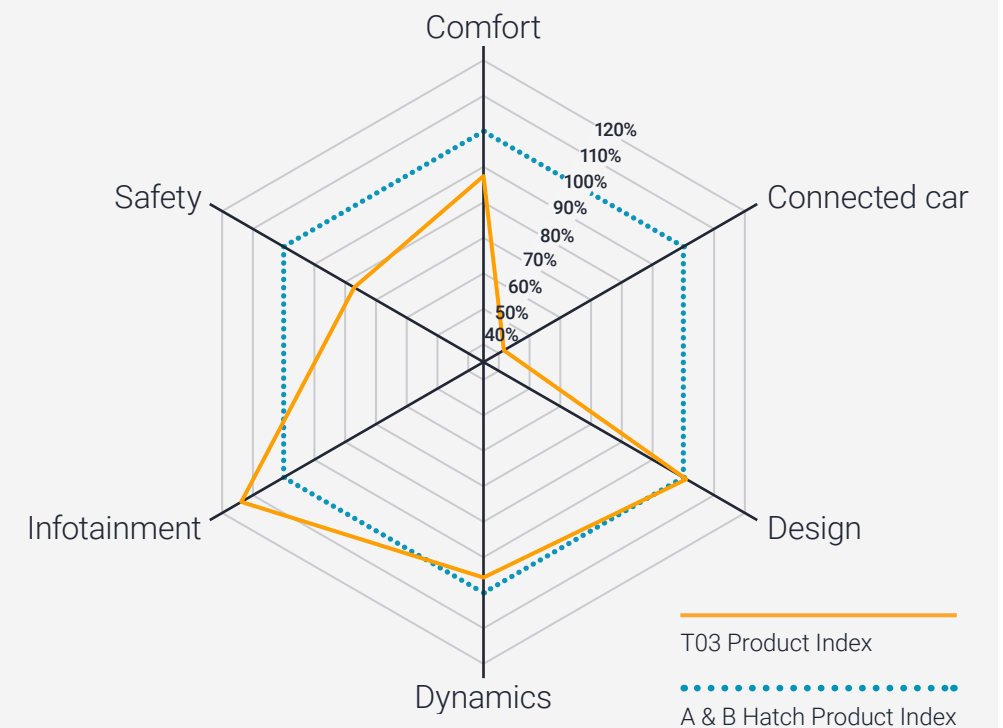
### T03 positioning vs. A & B-hatch top 10

French market – June 2025 (list prices)



### T03 Product index vs. A & B-hatch top 10

French market – June 2025





# 09

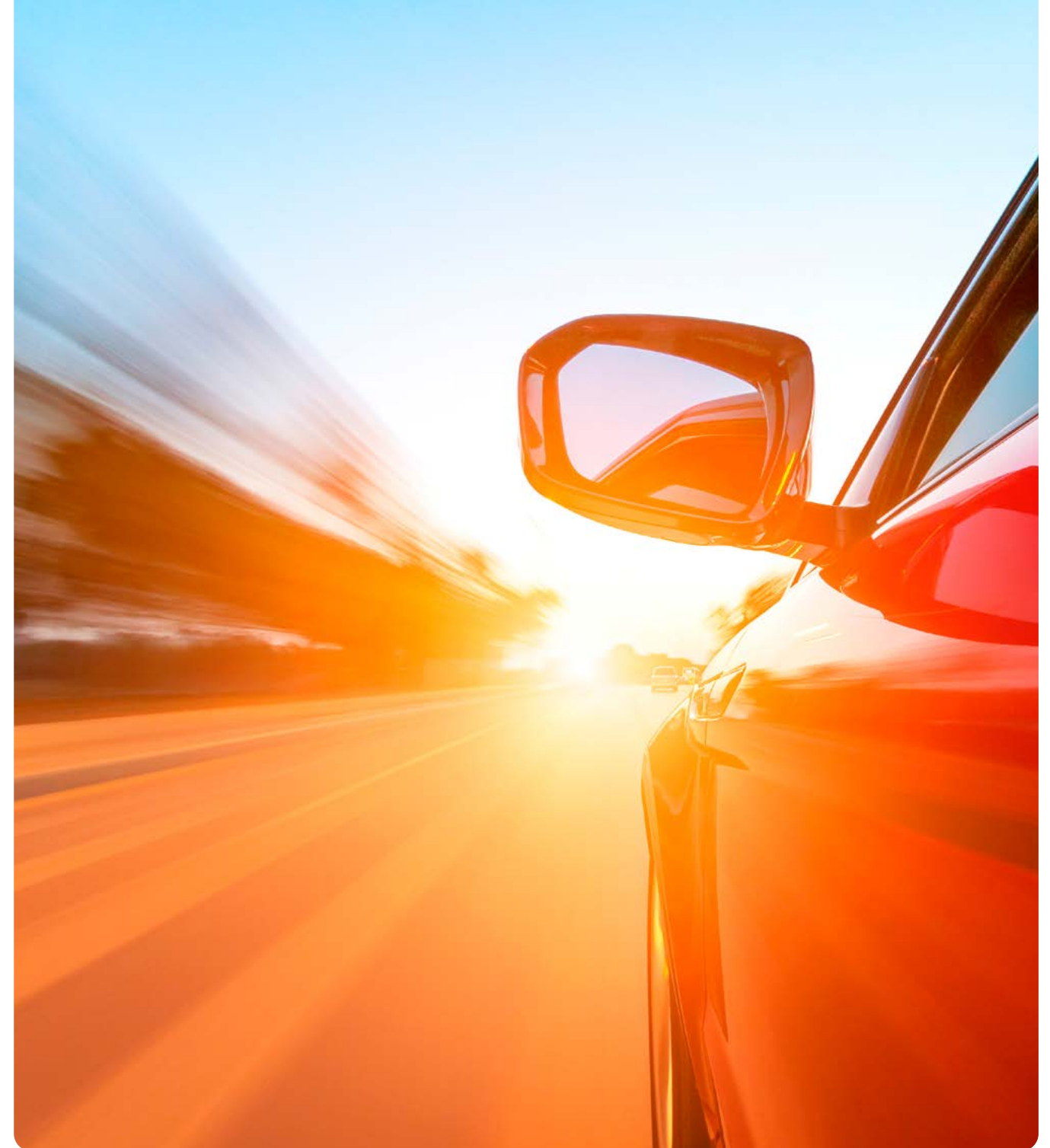
## Conclusion

**Leapmotor's entry into the European market represents a significant milestone for Chinese OEMs, combining affordability, innovation, and strategic execution.**

Through its joint venture with Stellantis, the brand has rapidly built a strong presence across key European countries, supported by an extensive dealer network and a clear value proposition.

With a product offering that challenges traditional segments and a pricing strategy that undercuts competitors while delivering superior content, Leapmotor is positioning itself as a serious contender in the European NEV landscape.

Its early success in traditionally resistant markets like France and Germany, along with its ability to outperform legacy brands within the Stellantis group, signals a shift in consumer preferences and highlights the growing competitiveness of Chinese electric mobility solutions in Europe.





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Call **+44 (0)20 8423 7100**

Email **enquiries@jato.com**

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