EV Attractiveness Index 2025 – International comparison

MARKETS COMPARED:
Infrastructure, price, and electricity costs

	Price[1]	**Electricity costs**[1]	**Charging infrastructure** density[2]
1. CHINA	27,478 €	1.01 € per 100 km	0.19
2. US	62,260 €	2.89 € per 100 km	0.01
3. GERMANY	44,445 €	6.60 € per 100 km	0.20
4. FRANCE	42,990 €	4.34 € per 100 km	0.05

Market attractiveness
Index value: Germany 2024 = 100

1. CHINA
133.5 Points

2. US
114.4 Points

3. GERMANY
108.4 Points

4. FRANCE
94.6 Points

China's strong appeal is primarily due to favorable conditions in terms of financial purchasing criteria and charging-related factors.

BRANDS IN FOCUS:
Brand trust and preferences of buyers

Trust in the respective OEMs across different countries[3]

	German OEMs	American OEMs	Chinese OEMs
1. CHINA	⌀ 76%	⌀ 72%	⌀ 68%
2. US	⌀ 68%	⌀ 58%	⌀ 34%
3. GERMANY	⌀ 65%	⌀ 44%	⌀ 27%
4. FRANCE	⌀ 74%	⌀ 62%	⌀ 45%

Top 3 brands by overall attractiveness in each country

	2.	1.	3.
1. CHINA	GAC 150.0	BYD 155.9	Geely 147.2
2. US	Porsche 122.8	Tesla 128.6	BMW 115.8
3. GERMANY	Audi 118.2	VW 122.1	Mercedes-Benz 117.9
4. FRANCE	Peugeot 106.8	Renault 112.3	Porsche 103.3

Domestic brands are the most attractive, and German brands lead in trust across all markets.

Handelsblatt RESEARCH INSTITUTE

1 Average of the vehicle offerings considered; 2 Number of fast-charging points per km²;
3 Share of surveyed drivers who tend to trust the quality of individual OEMs
Source: Handelsblatt Research Institute / BearingPoint

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