The Rise of Chinese Car Brands: Understanding Dutch Consumer Motivations and Country-of-Origin Effects

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The Rise of Chinese Car Brands: Understanding Dutch Consumer Motivations and Country-of-Origin Effects

by

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1. Introduction

In 2004, Italian car designer Giorgetto Giugiaro, known for designing cars such as the first Volkswagen Golf and Fiat Panda, as well as models for Japanese, South Korean, and Chinese automakers (Italdesign, n.d.), made a striking prediction: “It took Japan 40 years to become a great automotive nation. It took South Korea 20 years. I think it will take China as little as 10 to 15 years” (Ciferri, 2004).

Two decades later, his forecast has largely materialised, proven by the exponential growth of the Chinese car market in the past decades. Since 2008, China has been the world’s largest vehicle producer and, since 2009, the largest new vehicle market (Gong et al., 2013). Chinese car manufacturers have markedly improved their product offerings and have acquired a strong position within the domestic market (Xinhua Daily, 2025).

Until 2018, the presence of Chinese car brands in Europe remained limited, apart from a few attempts that generated a lot of media attention but few sales (Clark, 2007). Initially, Chinese brands targeted markets in the Global South, but in recent years they have also entered Europe (Baker & Hyvonen, 2011; Muñoz-Vieira, 2024). The arrival of Chinese carmakers coincided with a rapidly increasing demand for electric vehicles (EVs): by 2024, EVs accounted for 22.7% of all new passenger car registrations in Europe. This trend prompted Chinese brands to enter Europe with a strong focus on EVs (Muñoz-Vieira, 2024).

As a result, registrations of Chinese car brands have increased from less than 5,000 passenger cars in 2017 to over 357,000 cars in 2023 (Muñoz-Vieira, 2024). Chinese cars are particularly popular in countries where EVs are in high demand, like Norway and the Netherlands (Muñoz-Vieira, 2024). These countries form a relevant case study given that both EVs and Chinese cars are more popular than average there. The significance of the Dutch market is further emphasised by the fact that several Chinese car brands have established their European headquarters in the Netherlands.

Consumers’ decision to buy Chinese cars over European, Japanese, Korean, or American cars is likely to be influenced by a range of factors that typically influence car-purchasing decisions. Some examples of these factors are pricing, practicality, electric range, and psychological considerations such as brand image, aesthetic appeal, and retail experience (Hafner et al., 2017). Another factor, the country-of-origin (COO) effect, or how a product’s national origin affects consumer perceptions, has been studied extensively in marketing and international business research (Pharr, 2005; Lu et al., 2016). This factor is particularly interesting given that cars with China as a country of origin are a recent phenomenon in Europe.

Despite rising sales of Chinese automobile brands in the past decade (Muñoz-Vieira, 2025a), China's image has deteriorated in many Western countries over the same period. For instance, data from the Pew Research Center indicate that in 2024, 74% of the Dutch population had a negative opinion of China (Silver et al., 2024). This paradox raises important questions: to what extent does China’s image influence consumer behaviour, and how does this relate to the growing market share of Chinese brands? Existing quantitative research suggests that COO effects influence car purchase decisions (Johansson et al., 1985; Han, 1989; Fetscherin and Toncar, 2010).

However, such studies do not adequately explain the recent success of Chinese brands in the Netherlands, despite the increasingly negative perceptions of China. My thesis aims to address the remaining research gaps. Therefore, the central research question underlying this thesis is:

What motivates Dutch consumers to purchase Chinese car brands, and how do country-of-origin perceptions influence this decision-making process?

To answer the research question, I analyse the emergence and development of Chinese car brands in the Netherlands, focusing on the period from 2019 to the first half of 2025. Employing a combination of qualitative research methods, I identify the characteristics of Chinese car brands according to automotive experts, such as journalists and brand representatives. To ensure relevance and comparability, I selected and compared the seven best-selling Chinese brands of 2024. Although COO effects are a central focus in this thesis, the research scope was broadened to include the wider motivations of Dutch consumers purchasing Chinese cars. I made this decision to better reflect the complexity of consumer decision-making, limiting the risk of inflating the influence of COO.

My findings suggest that Chinese brands are growing market share thanks to solid, innovative products, and a focus on EVs, while success largely depends on integration into dealer, service, and leasing networks. China's COO can still pose barriers, but there are signs that COO perceptions are softening as people become more familiar with Chinese brands. My findings will contribute to a better understanding of how negative country perceptions influence consumer decision-making processes.

This thesis consists of five chapters. Chapter 2 provides the theoretical framework. I review existing literature on car purchase motivations and COO effects, with special attention to China's image. Chapter 3 uses secondary sources to outline the historical development of the Chinese automotive industry and applies content analysis to highlight how policy, industrial strategy, and technological innovation have enabled Chinese manufacturers to become competitive global carmakers. Chapter 4 examines the Dutch market in detail. This includes content analysis of 156 expert reviews (written and video) of the seven selected brands, supplemented by semi-structured interviews with two automotive journalists and three PR managers, and secondary source interviews with other journalists and brand representatives. Finally, Chapter 5 synthesises the main findings, answers the research question, and situates the study within the broader literature on COO effects. It also acknowledges methodological limitations and suggest avenues for future research.

Thematic coding was conducted manually to identify recurring themes, such as affordability, retail network, brand image, and perceived country of origin, and to detect patterns in language use, framing, and emotional tone. To ensure reliability, different data sources such as expert reviews, brand representatives, and market data are used. Market data includes official registration figures from the Dutch automotive association (RDC/RAI Vereniging) to determine brand performance.

2. Car purchase reasons and the role of COO effects

The European car market has changed dramatically in recent decades. Until the 1960s, it was dominated by European brands, but this began to change with the arrival of Japanese manufacturers, followed by Korean carmakers from the late 1970s onwards. The growing success of East Asian car manufacturers contributed to the decline or disappearance of several historically prominent European brands (Rawlinson & Wells, 1996).

More recently, the rise of EVs has once again transformed the automotive industry. While Tesla has become a leading EV manufacturer, Chinese brands have also been expanding rapidly (Muñoz-Vieira, 2024). Although the influence of COO effects on consumer behaviour has been widely studied (e.g., Johansson et al., 1985; Han, 1989; Fetscherin & Toncar, 2010), relatively little attention has been paid to the rise of Chinese car brands in European markets. This gap is striking given that China is the world's largest manufacturer and exporter of electric cars (Muñoz-Vieira, 2025a).

This chapter reviews two interrelated topics: the influences on consumers when choosing a car and how COO effects shape those decisions. The first section discusses functional and emotional-social concerns; the second addresses COO effects, with a focus on how China is perceived. These factors form the framework for Chapter 4, which investigates whether Chinese cars have distinctive qualities in these areas.

The concept of COO image refers to how consumers evaluate a country, which in turn shapes their evaluations of the quality, pricing, or desirability of products originating from that country (Roth & Romeo, 1992). In the case of China, its COO in high-income countries is often negative, which is underscored by data from the Pew Research Center (Silver et al., 2023). In the Netherlands, for instance, the proportion of individuals with a negative view of China rose from 34% in 2002 to 77% in 2023, a trend observed across all age groups (Silver et al., 2023). However, this image is more nuanced than those proportions suggest. While many Dutch respondents see China as a geopolitical threat, they also acknowledge its economic and technological strength (Silver et al., 2023).

A major limitation of existing research on car purchase motivations and COO is the heavy reliance on quantitative methods such as surveys and experiments (Milliken, 2001). While these can identify correlations or general trends, they often overlook the underlying reasons behind consumer decisions (Tjandra et al., 2015). Moreover, by isolating variables, they may ignore how consumers interpret COO cues in real-life situations (Samiee et al., 2005). This is particularly problematic when consumers are unaware of a product’s actual origin or do not actively consider COO information, a situation that can lead to biased results (Johansson et al., 1985). In response, Magnussen et al. (2011) argued that it is the perceived COO, rather than actual origin, that influences consumer evaluations. This is especially relevant for unfamiliar or new brands, such as many Chinese entrants in Europe.

To address these gaps, researchers have increasingly adopted qualitative research methods from the social sciences (Milliken, 2001; Sunderland & Denny, 2007). These allow for deeper insights into the symbolic, psychological, and cultural factors that influence consumer behaviour. In COO research, several scholars now advocate for the use of interviews, focus groups, and ethnographic approaches (Ger et al., 1999; Checchinato et al., 2013; Tjandra et al., 2015; Genç & Bayraktaroğlu, 2017). In line with this, my thesis adopts a

qualitative approach to explore how Dutch consumers and professionals within the automotive sector evaluate Chinese brands and their COO.

This chapter discusses purchase considerations, including affordability, brand image, and retail network, selected based on recurring themes in prior studies (e.g., Steg, 2005; Krupa et al., 2014; Hafner et al., 2017). They reflect both functional and emotional-social dimensions of car purchase reasons (Dittmar, 1992; Jensen, 1999; Steg, 2005). While functional factors, such as cost and practicality, remain central (Dittmar, 1992), recent studies highlight the growing importance of the symbolic factors influencing car-buying decisions (Steg, 2005).

2.1 Functional concerns

Scholars frequently cite financial factors as a deciding factor in car purchases (Hafner et al., 2017; Ma et al., 2019). Along with purchase price, these also include depreciation rates (Yang et al., 2018), resale value, maintenance, insurance, taxation (Helveston et al., 2015; Gómez Vilchez et al., 2019), fuel economy and charging costs (Krupa et al., 2014), equipment levels (Sobiech-Grabka et al., 2022), and terms of lease or purchase (Taylor & Fujita, 2018). For consumers choosing an EV, financial considerations are similarly important (Graham-Rowe et al., 2012; Krupa et al., 2014; Helveston et al., 2015). Leasing rates are extra relevant for them, as leasing is more common in the EV market (Taylor & Fujita, 2018; VNA, 2025).

Practicality is another key concern. In the broad definition of Hafner et al. (2017), it includes size, interior space, safety, reliability, comfort, and technological features. In contrast, others more narrowly define practicality with terms such as number of seats, dimensions, and weight (Krupa et al., 2014; Ma et al., 2019; Sobiech-Grabka et al., 2022). This thesis adopts the latter definition, combined with Hafner et al.'s (2017) emphasis on interior space.

For EV consumers specifically, range and charging capabilities are important considerations (Helveston et al., 2015; Taylor & Fujita, 2018; Yang et al., 2018). Consumers often prioritise charging speeds over driving range (Ma et al., 2019). Other instrumental considerations, including safety, comfort, and reliability, were cited less frequently. Hafner et al. (2017) incorporated these concerns within their broader "practicality" category, while Gómez Vilchez et al. (2019) found safety to be a top concern in only one of six European countries studied and comfort in three. Performance, including acceleration and handling, are valued, but typically rank below cost and practicality (Krupa et al., 2014; Helveston et al., 2015; Yang et al., 2018).

2.2 Emotional-social concerns

Several studies found that retail experience and dealership proximity and reputation are found to influence purchase decisions (Krupa et al., 2014; Hafner et al., 2017; Taylor and Fujita, 2018).

Car ownership holds symbolic value for many consumers, often linked to social status, self-esteem, and visual appeal (Sirgy, 1982; Sirgy, 1985; Jensen, 1999; Steg, 2005; Graham-Rowe et al., 2012). Consumers also regard appearance as an important EV purchasing factor (Sobiech-Grabka et al., 2022). Hafner et al. (2017) found that all participants acknowledged

some aspect of image, including prestige, aesthetics, or influence on others, as relevant to their choice.

Brand image also influences purchasing behaviour. While only a minority of Hafner et al.'s (2017) participants explicitly cited brand image as important, most acknowledged the influence of image in some form, such as aesthetics or prestige. Gómez Vilchez et al. (2019) found brand to be a top concern in only one of six countries surveyed. However, this is likely due to the nature of quantitative surveys, where respondents may underreport non-rational considerations. In a study of Chinese consumers, Wang and Yang (2010) found that brand credibility, which is defined by perceived expertise, trustworthiness, and attractiveness, together with brand value strongly influence purchase intentions.

2.3 Country-of-origin effects

The concept of COO, which dates back to the 1960s (Schooler, 1965; Nagashima, 1970), is a widely researched topic (Pharr, 2005; Lu et al., 2016). It commonly refers to the location where a brand is manufactured, headquartered, or designed. COO provides consumers with a cognitive cue to assess product attributes such as quality (Steenkamp, 1990; Verlegh and Steenkamp, 1999; Diamantopoulos et al., 2020).

However, COO effects depend on several variables, including a consumer's age, gender, and income (Checchinato et al., 2013; Li, 2019), and may also vary based on their familiarity and involvement in a product category (Johansson et al., 1985). More specifically, Josiassen et al. (2008) found that COO image information plays a greater role when consumers are less familiar with a category and less involved in the decision.

Moreover, COO effects are category-specific. For example, Han and Terpstra (1988) found that American consumers associated German products with prestige but not economy. Similarly, Kaynak and Cavusgil (1983) reported that Canadians perceived Japanese electronics as high quality, unlike Japanese food. These associations depend on how a country is viewed in relation to specific product categories (Roth & Romeo, 1992).

Scholars further distinguish between perceptions of a country itself and perceptions of its products (Roth & Diamantopoulos, 2009). Some studies focus on attributes like innovation, design, prestige, or quality, while others centre on political or economic dimensions that offer a broader understanding of how a country is perceived, independent of specific product characteristics (Martin & Eroglu, 1993)

Psychological and sociocultural factors also affect country evaluations. For instance, researchers discovered that consumer ethnocentrism, cosmopolitanism, and animosity influence attitudes towards brands. Ethnocentric consumers may reject foreign products (Shimp & Sharma, 1987). Animosity, or hostility caused by political or economic tensions, may similarly lead consumers to avoid products from certain countries, regardless of product quality (Klein et al., 1998). In contrast, cosmopolitan consumers tend to evaluate foreign brands favourably (Yoon et al., 1996).

Firms use strategies to show or hide COO information. Foreign branding means they pick foreign-sounding names to artificially evoke associations from liked countries (Melnyk et al., 2012). With advertising companies guide COO perceptions. Hornikx et al. (2020) found that around 36% of the advertisements in their study had at least one COO indicator, including "Made in…" labels, company names with geographic references, native language usage,

national celebrities, flags, or iconic cultural images. However, researchers question the effectiveness of such strategies (Chao et al., 2005; Melnyk et al., 2012).

Determining a product's COO has become complex in the current globalised economy. Products often have multiple country affiliations: they are designed in one country, manufactured in another, and have global headquarters elsewhere (Al-Sulaiti & Baker, 1998). Whether manufacturing, assembly, brand or design origin matters most for consumers remains a topic of debate. For example, Han and Terpstra (1988) demonstrated that in the case of bi-national products, consumers attach more importance to a product's manufacturing origin than to the brand origin. Li et al. (2000) challenged these findings and suggests that consumers put more emphasis on country of design than production origin, since these markers have become less meaningful due to widespread outsourcing. For Chinese brands looking to gain traction in European markets, this complexity is particularly relevant.

COO and automobile sector

Numerous studies have examined how COO effects influence consumer evaluations and purchase intentions in the automotive sector. Given their significant costs and importance, COO cues may be less influential compared to low-involvement products (Urbonavičius et al., 2007). Nonetheless, evidence shows that country image still plays a role.

Chinen et al. (2014) found that U.S. consumers were more receptive to cars made in Japan, Germany, and the United States than to those from South Korea and China. Although they interpreted these outcomes as evidence of rational consumer behaviour, judging products based on their country of origin regardless of any objective qualities offered, is by definition subjective and a sign of underlying stereotypes. Helveston et al. (2015) reported that American buyers preferred domestic automobile brands, followed by Japanese, German, South Korean, and Chinese brands. Chinese consumers differed by favouring German brands, followed by Chinese, American, Japanese, and South Korean brands.

Similarly, Katsumata and Song (2015) demonstrated a direct link between COO and consumers' willingness to purchase, with different COO effects across automobiles from China, Japan, South Korea, and the U.S. Furthermore, Saridakis and Baltas (2016) showed that COO can influence the price premium consumers are willing to pay, with for instance positive COO effects for automobile brands originating from Germany, Japan, and the United States, while those from China and South Korea face more scepticism. Fetscherin and Toncar (2010) further showed that COO effects vary depending on whether a product's origin is based on the branding or manufacturing, with Chinese cars made in the U.S. receiving a more positive evaluation than U.S. cars made in China.

However, these different studies predate the expansion of Chinese brands in European markets and China's deteriorating image. Moreover, consumer evaluations are not only influenced by COO, but also by functional and other emotional-social concerns. Erdogan et al. (2021), for example, found that while Turkish consumers held unfavourable views of France, this did not translate to French brands like Peugeot. This suggests that COO is not always a decisive factor and can be outweighed by functional or other emotional-social concerns.

COO and China

Given that China has a negative image in many Western countries (Silver et al., 2023), it is important to examine how this perception influences the acceptance of Chinese products. Yang (2020) found that a favourable general perception of China among American consumers was associated with more positive evaluations of Chinese products, including higher perceived reliability, quality, and design, and stronger purchase intentions. In a South African context, Lee and Robb (2022) showed that while Korean products were seen as more technologically advanced than Chinese ones, the purchase likelihood for both were similar. They also found that cosmopolitan consumers, who are more world-minded, were more likely to intend to purchase Chinese goods, being less influenced by national stereotypes. Similarly, Xia and Xu (2023) reported that an improved national image of China led to higher sales of Chinese firms in export markets. Together, these studies suggest that while national stereotypes persist, there are wide differences among consumers and some consumers are more likely to give Chinese products the benefit of the doubt.

3. The development of the Chinese automobile industry

3.1 Mass production and the foundation of industrial policy (1978-1997)

Before 1978, China's passenger car production was limited, as cars were considered bourgeois luxury items in communist China. However, starting in the early 1950s, state-owned enterprises (SOEs) began mass-producing trucks, laying the foundation for the passenger car industry (Chu, 2011; Yuan & Brasó Broggi, 2023). In this period, the SOEs First Auto Works (FAW), Beijing Automobile Works (BAW), Shanghai Automobile (SAIC), Changan Automobile, and Dongfeng were established.

After China opened and reformed its economy under the leadership of Deng Xiaoping in 1978, demand for cars for official use increased. Due to the lack of domestic cars, imports and smuggling surged, with smuggling rising even further after import restrictions came into effect. These developments prompted the government to shift its stance on automobile production. It eased restrictions and began supporting joint ventures to achieve import substitution and acquire foreign technology (Chu, 2011).

Responding to these trends, the state granted permission to the establishment of joint ventures between major global automakers and domestic SOEs, such as Beijing Jeep (AMC and BAW, 1983), Tianjin-Daihatsu (1983), SAIC-Volkswagen (1984), and Guangzhou-Peugeot (1985). A milestone was reached in 1986, when industrial policy was included in the national Five-Year Plan. In 1988, the state established a strategy of supporting the three major automobile manufacturers FAW, Dongfeng, and SAIC, and the three minor firms, Beijing, Tianjin, and Guangzhou. Entry restrictions, high tariffs, and local protection helped these firms scale up production and maintain profitability (Chu, 2011).

However, not all attempts to increase the local content of cars, that is, the locally produced parts and components, were successful. While the Shanghai municipality actively supported Shanghai Volkswagen in raising domestic content, centrally managed SOEs like FAW and Dongfeng felt little pressure. The 1994 Automotive Industry Policy reiterated the promotion of joint ventures, entry restrictions, and technology transfers (Baker & Hyvonen, 2011; Chu, 2011).

3.2. Market liberalisation and the rise of indigenous carmakers (1997-2009)

As China prepared to join the World Trade Organization (WTO) in 2001, the central government grew increasingly dissatisfied with the limited technology transfer in existing joint ventures (Brandt and Thun, 2010). This prompted it to ease protectionism, and reduce tariffs while encouraging new foreign-invested enterprises, marking a departure from the "three majors, three minors" strategy. In return, foreign-invested enterprises had to bring advanced technology and establish local R&D centres. This led to capacity expansion, an intensification of competition, speeding up of technology transfers, and more regular car model updates (Chu, 2011).

Simultaneously, rising private consumption created a new, price-sensitive market, ideal for the appearance of indigenous automakers (Brandt & Thun, 2010). Chery and Geely, backed by local governments, entered the market even before receiving central approval. In 2001, the central government became more willing to grant production rights, and approved the entry of four domestic carmakers, recognising the potential of domestic automakers (Chu, 2011; Zhang, 2013a; Zhang, 2013b; Chen, 2014).

The 2004 Automotive Industry Development Policy emphasised indigenous R&D and domestic brands. Those brands often started with low-cost imitation models (Brandt and Thun, 2010). By offering affordable vehicles, they captured market share from JV brands. They also recruited personnel from major SOEs or cooperated with established foreign carmakers for the development of indigenously developed products (Chu, 2011). Despite the 2006 goal to have domestic brands exceed 50% of market share by 2010, these developments challenged the central state's joint venture-focused policy (Chu, 2011). Still, the new dynamic encouraged competition, driving down prices and improving product quality (Brandt & Thun, 2010).

3.3 The rise of the electric car and its success on the domestic market (2009-now)

China overtook the U.S. as the world's largest automobile market in 2009. Even though the automobile sector brought economic benefits and jobs, the rapid growth in car ownership had negative consequences such as urban congestion, air pollution, and an increasing dependence on foreign oil (Gong et al., 2013; Du et al., 2017; Du & Ouyang, 2017; Li et al., 2019; Li, 2020). The state saw the strategic value of the New Energy Vehicle (NEV), which includes hybrid, plug-in hybrid, and fully electric cars, providing China with an opportunity to environmental protection, industrial upgrading, reducing energy dependence, and technological leapfrogging (Wan et al., 2015). While Chinese automakers lagged behind international automakers with ICE cars, the NEV sector was still in its infancy globally, which offered China strategic chances.

The NEV strategy started with the 10th Five-Year Plan (2001), with programs like the "Three-Vertical and Three-Horizontal" R&D structure. The central and local governments, academic research organisations and private companies collectively began making large investments in R&D, pilots and demonstrations, and the commercialisation of NEVs. In this phase, public transportation was targeted. The 2009 "Ten Cities, Thousand Vehicles" program marked the start of national industrialisation and commercialisation efforts, characterised by

more pilots, increased government budgets for national policy and subsidies, and almost annually increased sales targets for NEVs (Wan et al., 2015).

By promoting both low-speed EVs, and electric buses on the opposite end the "Squeezed from Two Ends" strategy aimed to achieve broader convergence of NEV technologies, ultimately leading to regular-size NEV passenger cars. However, local protectionism, misuse of subsidies, insufficient consumer research, lack of charging infrastructure, and risk-averse behaviour of battery manufacturers undermined progress (Gong et al., 201; Wan et al., 2015; Wang et al., 2017; Li, 2020). In 2016, policy shifted towards nationwide promotion, stricter tech standards, and gradual subsidy reductions (Wu et al., 2021). The dual-credit system linked fuel economy and NEV quotas, stimulating firms to lower emissions and increase NEV output. In total fourteen categories were eligible for EV subsidies, from producers and suppliers of NEVs, technology for NEVs to battery packs and infrastructure, including charging networks and battery swap stations. Purchase tax exemptions, first implemented in 2014, further supported adoption (Wu et al., 2021).

This industrial policy evolution coincided with China's strategic global expansion. NEV exports, once focused on developing nations, increasingly targeted developed markets, supported by the Belt and Road Initiative (BRI) and "Made in China 2025" (Li, 2020). With the latter strategic plan, issued by the state in 2015, China began stimulating enterprises that move up the value chain and focus more on high-technology sectors such as EVs.

Chinese automakers hold a significant cost advantage over their international competitors, driven by economies of scale, substantial government incentives, lower labour costs, and domestic access to EV batteries and components, most of which are produced in China (World Economic Forum, 2024). Companies such as BYD, SAIC, Dongfeng, and Changan now manufacture or co-develop EVs for global brands including Toyota, Volkswagen, Nissan, and Mazda. By 2024, domestic brands had captured over 60% of China's car market, overtaking joint venture firms. Industrial policies at both national and regional levels made this transformation possible (Chu et al., 2011; Li, 2020), positioning China as the global leader in EVs.

4. Chinese car brands and their performance in the Dutch market

While Chinese car manufacturers have established a solid market position in their domestic market, the European market has a different context. This chapter examines how the seven selected brands are received in the Dutch market, focusing on perceived strengths and weaknesses, as well as the role of COO perceptions in consumer decision-making.

Since the European relaunch of MG in 2019, Chinese car brands have significantly strengthened their position in the European market. Between May 2024 and May 2025, their collective market share increased from 2.9% to 5.9% (Muñoz-Vieira, 2025a). The Netherlands contributed to this growth, with a rise from 3.4% to 5.4% in the same period (RAI Vereniging, 2025). Figure 1 illustrates this trend in Dutch passenger car registrations.

Chinese brands are especially gaining traction in the electrified segments. In April 2025, they accounted for 8.3% of all battery electric vehicles (BEVs) and nearly 10% of plug-in hybrid electric vehicles (PHEVs) sold in Europe. To circumvent new EU tariffs on BEVs made in China, several brands have expanded their European model range with hybrid and

PHEV models, which are currently not subject to the same tariff regime (Muñoz-Vieira, 2025b).

This recent momentum stands in sharp contrast with earlier, unsuccessful attempts to enter the European market. In 2005, for example, Dutch entrepreneur Peter Bijvelds imported the Landwind SUV from China, which drew attention for its remarkably low price, and became infamous for its poor crash test result (Van der Maar, 2021). For years, Chinese brands primarily focused on the Global South. Only in the past six years they have begun targeting European markets (Zhang, 2021).

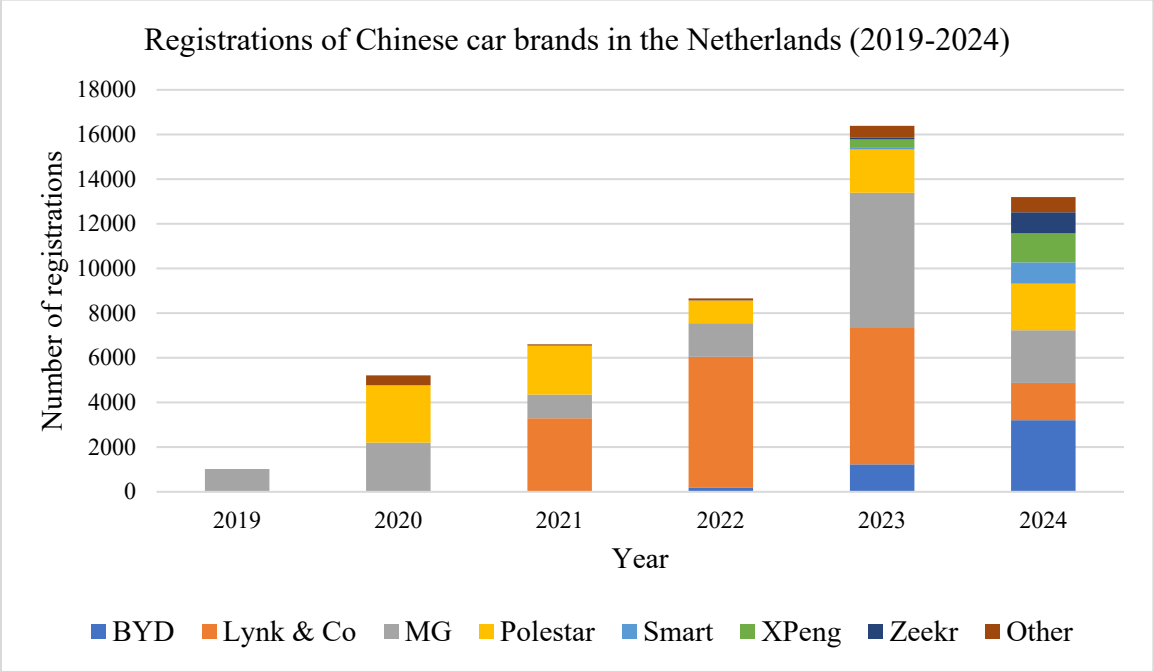
To understand how these brands are received in the Netherlands, this chapter relies on two qualitative research methods: First, a content analysis of 156 professional reviews, including both print and video media, was conducted to assess how journalists evaluate Chinese car brands. Second, semi-structured interviews with five industry experts provide additional context. These include two Dutch automotive journalists (from *AutoWeek* and *InstaAutovlog*) and three PR managers representing BYD, Nio, and XPeng. Their insights are supplemented with public statements from the European CEOs of Lynk & Co and Zeekr, MG's former PR manager, the Dutch country manager, the head of MG Motor Benelux, and MG's European Vice President. All interviewees gave consent to participate in this research and agreed to be identified by name and role in this thesis. The collected data was categorised based on key purchasing factors discussed in Chapter 2: affordability, practicality, technology and EV performance, retail experiences, and brand image/COO perceptions.

In an era of globalization, determining a car's COO has become increasingly complicated. For this study, a brand is categorised as "Chinese" if its parent company is headquartered in China and if design, production, or technological development occur there. Using these criteria, 21 brands have entered the Dutch market since 2019. However, this chapter focuses on the seven best-selling: BYD, Lynk & Co, MG, Nio, Polestar, XPeng, and Zeekr. Smart, a joint venture between Mercedes-Benz and Geely, was excluded, because until recently there was no Chinese production and ownership involvement.

By analysing the characteristics of these brands in the Netherlands, this chapter aims to better understand the factors contributing to their market success, and the role COO perceptions have in shaping consumer attitudes towards Chinese cars.

Figure 1

Registrations of Chinese car brands in the Netherlands (2019-2024)



Note. Registration data sources from RAI Vereniging (https://www.raivereniging.nl/actuele-verkoopcijfers/) and Open Data RDW (https://opendata.rdw.nl/Voertuigen/Open-Data-RDW-Gekentekende_voertuigen/m9d7-ebf2/about_data). The "Other" category includes Chinese car brands that did not exceed 500 passenger car registrations in any single year.

4.1 Company profile of seven Chinese car brands

This section introduces seven different Chinese brands. Each profile includes a brief history, information on whether it is a private or state-owned company, and the registrations of the brands in the Netherlands, Europe, and worldwide.

Table 1

Registrations in 2024 and ownership structures of Chinese car brands

Brand	BYD	Lynk & Co	MG	Nio	Polestar	XPeng	Zeekr
Ownership structure	Private	Private (Geely)	SOE (SAIC)	Private	Private (Geely)	Private	Private (Geely)
Global registrations	4,272,145	285,441	700,000	221,970	44,851	190,068	222,123
European registrations	50,265	5,975	243,390	2,404 (2023)	30,520	8,188	110 (2023)
Dutch registrations	3,207	1,671	2,355	263	2,087	1,293	951

Note. Vehicle registration figures are based on manufacturer press releases and media sources (see Appendix A for full list of sources).

BYD. Founded in 1995 as a battery producer, BYD entered the automobile industry after acquiring Qinchuan Auto. Since its inception, BYD Auto had the intention of making NEVs,

leveraging its in-house developed battery technology (Chu, 2011; Zhang, 2013). Initially the brand was known for reverse-engineering Japanese and French cars, the brand

In 2008, investor Warren Buffett saw the potential in BYD Auto and acquired a 10% stake (Chu, 2011; Zhang, 2013), citing it as "one day becoming the largest player in a global automobile market that was inevitably going electric" (BYD History, 2022). BYD now produces most components in-house, including batteries and microchips, and it ceased production of internal combustion engine vehicles in 2022. BYD overtook Tesla in 2023 as the world's largest EV manufacturer. It entered the Dutch market in 2022 and became the top-selling Chinese brand in 2024 (see Figure 1).

Lynk & Co. Lynk & Co is a sub-brand of Geely, one of the largest Chinese privately owned car manufacturers. Geely was founded by in 1993, yet the central government still followed its "three majors and three minors" joint venture policy and refused production rights (Chu, 2011; Zhang, 2013b). After building a car factory under the guise of motorcycle production, Geely finally acquired a license after purchasing Deyang Prison Automobile Factory in 1998. Geely initially focused on reverse-engineering Japanese cars, but quickly expanded, acquiring international carmakers such as Volvo Cars in 2009 (Zhang, 2013b). Geely's automobile brands collectively sold over 3.3 million cars in 2024.

A sub-brand of Geely, Lynk & Co was launched in 2016 to bridge the gap between Geely and Volvo. The brand entered the Dutch market in 2021 with a PHEV model and recently added its first BEV. While initially successful, as Figure 1 shows, registrations declined in 2024.

MG. SAIC Motor (Shanghai Automotive Industry Corporation), a major SOE, originated in 1951 as a municipal bus repair and manufacturing plant (Teng, 2020). Through several consolidations, it evolved into a major SOE, eventually manufacturing its first passenger car in 1958. Following the bankruptcy of the British MG Rover Group, the Chinese SOE Nanjing Automobile Corporation (NAC) acquired the MG brand in 2005. In 2007, NAC merged into SAIC, placing MG under SAIC's control (Teng, 2020).

MG re-entered the Dutch market in 2019 and has experienced fluctuating registrations. Following EU tariffs on Chinese BEVs in 2024, MG diversified its offerings by adding two hybrid line-up to maintain competitiveness.

Nio. Nio was founded in 2014 and began production in 2018 through a partnership with the state-owned automaker JAC (Breevoort, 2021a). Nio initially focused on the premium EV market, incorporating self-developed technologies such as a battery-swap infrastructure and in-car artificial intelligence systems. Despite these innovations and a growing product portfolio, Nio has faced difficulties gaining traction in the Dutch market. In 2024, it sold only 263 units, indicating that its higher price point and novel technologies have yet to resonate with a broader consumer base.

Polestar. Polestar was spun off from Volvo Cars in 2017 and is a BEV brand jointly owned by Volvo Cars and Geely (Yantakosol, 2024). Initially only produced in China, Polestar currently also makes cars in the U.S. and South Korea (Polestar, 2023). Despite these global affiliations, Polestar's sales are primarily concentrated in Europe.

Polestar debuted in the Dutch market in 2020, and 2,087 cars on the Dutch market in 2024.

XPeng. XPeng was founded in 2014 by a tech entrepreneur with a background in software development (Breevoort, 2021b). It began mass-producing EVs in 2018 using Haima as a contract manufacturer. To gain independence and secure its own production license, XPeng acquired the small-volume automaker Foday (Fudi) in 2020. It entered the Dutch market in 2023 and registered 1,293 units in 2024.

Zeekr. Launched in 2021, Zeekr is Geely's most upmarket fully domestic EV brand, positioned above Lynk & Co. The brand entered the Dutch market in 2023, and had a registered 951 cars in 2024.

4.2 Affordability

Table 2

Average purchase price of cars from Chinese brands registered in the Netherlands in 2024

Brand	BYD	Lynk & Co	MG	Nio	Polestar	XPeng	Zeekr
Average price	€ 40,933	€ 45,055	€ 34,367	€ 84,386	€ 59,308	€ 60,903	€ 57,200

Note. The information was obtained from kenteken.tv. The average purchase price of all passenger cars registered in the Netherlands in 2024 was € 48,118.

BYD. BYD vehicles are seen as offering strong value for money (media review). While its products do not significantly undercut entry-level prices of established competitors, they are often praised for their rich equipment levels and favourable price-performance ratio. According to Dutch PR manager Fons Nijkrake, a major selling point is the generous standard equipment, eliminating the need to configure expensive options: "You no longer have to go through endless price lists," he notes (personal communication, 26 July 2023).

Lynk & Co. Lynk & Co's first product offers a rich standard equipment and is priced below comparable models, including those from Volvo, on which it is based (media review). Lynk & Co's subscription-based model, in which people pay for the use of the car and not for ownership, initially offered a fixed monthly price that undercut private lease alternatives. Journalist Jan Lemkes credit the car's early success to this affordability and flexibility (personal communication, 15 May 2023). However, since its introduction, the monthly rate has increased from €499 to €679, reducing the brand's pricing advantage (Michel, 2024).

Nicolas López Appelgren, CEO of Lynk & Co Europe, emphasises that the good value proposition is one of the core values of the brand, particularly in the business-to-business (B2B) market, which accounts for around 70% of its car sales in the Netherlands (Collewijn, 2025d). In response to a notable decline in private subscriptions, the brand is increasingly targeting B2B channels through company lease offerings (Collewijn, 2025d; Wilman, 2025).

MG. Affordability is arguably MG's core competence in the Dutch market. As Table 2 illustrates, with an average sales price of €34,367 the MG brand is well below the Dutch national average. Automotive journalists frequently cite this affordability, alongside generous equipment levels, as a major reason for the brand's appeal (media review).

Former PR Manager Mike Belinfante underscored affordability repeatedly in a public interview, stressing its importance especially for private buyers (BNR Nieuwsradio, 2021).

This is echoed by European Vice President Aiden He, who stated that SAIC's objective has always been to make EVs “affordable and accessible to everyone” (Schenk, 2024). Ralf van Meer, CEO of MG in the Netherlands, reinforced this view by stressing that MG appeals to consumers using rational purchase criteria, with price being the main consideration (Collewijn, 2025c). Journalists Jan Lemkes (personal communication, 15 May 2023) and Irwin Versteegh (personal communication, 9 October 2023) concur that both MG and BYD have succeeded in making EVs accessible to a wider demographic.

Affordability is especially relevant to private drivers. Belinfante notes that MG’s price advantage is stronger in the private market than through company leasing (BNR Nieuwsradio, 2021). In 2020, 70% of MG buyers were private customers, 20% paid in cash, and only 10% acquired the car via business lease, significantly lower than the market average for lease sales. Over time, MG's products have improved in overall quality. While earlier cars were chosen mainly for their low cost, more recent models offer much the same qualities as competitors, but at a still competitive price (Kroone, 2024b).

Nio. Nio occupies a markedly different segment of the market, because as Table 2 shows, its average list price of over €84,000, positioning the brand firmly into the premium territory. However, the pricing reflects high levels of standard equipment and the presence of advanced features that are often lacking in similarly priced German rivals (media review). Many Nio customers do not purchase the car outright. Instead, they use the brand’s Battery-as-a-Service (BaaS) model, which separates ownership of the car from the battery. Through a monthly subscription, consumers gain access to battery upgrades and Nio’s battery-swap infrastructure. As a result, customers pay less for the car than the price including battery (Van Wijngaarden, 2024).

Polestar. Polestar positions itself at the premium segment, with average prices exceeding the national average by over €11,000. Its pricing is considered appropriate for the segment, quality, design, and technology on offer (media review). However, Lemkes notes that the brand's relatively recent origin means it must rely on design and innovation, rather than reputation, to justify its pricing (personal communication, 15 May 2023).

XPeng. Although XPeng is by no means a budget brand, it undercuts established competitors by offering comparatively well-equipped vehicles at a competitive price (media review). In 2024, the brand’s average transaction price was €60,903 (see Table 2), positioning it somewhere between mainstream and premium brands. However, Jasper Koek, XPeng’s PR manager, sees the brand as a rival to generalist brands such as Volkswagen and Skoda. Due to the limited number of trim levels, there is no need for costly optional extras, simplifying the selection process for customers (personal communication, 31 July 2023). XPeng is focused on the fleet and lease markets, where list price plays a smaller role in the final monthly cost.

Zeekr. Zeekr cars are priced above the market average, but journalists agree that they justify their pricing with a rich standard equipment, striking designs, and quality materials that often surpass European mainstream competitors (media review).

Chinese brands are generally characterised by their value for money. While brands such as MG and BYD are more focused on price-conscious buyers, other brands, including Nio, XPeng, and Zeekr, have more premium positionings in terms of price. However, the higher prices of these brands are offset by their generous standard equipment. The limited

availability of optional extras means that the customer, despite the higher base price, often pays less than for comparable non-Chinese competitors.

4.3 Practicality

BYD. Automotive journalists frequently describe the interior space of BYD's vehicles as average to above average (media review). Like many Chinese brands, BYD appears to prioritise rear seat legroom, sometimes at the expense of boot capacity.

Lynk & Co. Lynk & Co cars offer spacious interiors and seats adapted to taller Europeans, making them practical alternatives to Volvo cars, but at a more affordable price tag (media review).

MG. MG products also offer value for money when it comes to interior space. For a lower price, consumers often get a larger car with more interior space than similarly priced European alternatives (media review). Ralf van Meer, the Dutch CEO of MG, cites practicality, along with the competitive price, as one of the main reasons why consumers choose an MG (Collewijn, 2025c). In general, the seats are adapted to European body types, but journalists have nevertheless criticised the seating comfort of some models (media review). Ivo Kroone (2025) notes that while the seats are adequate, cost savings can be seen through compromises in the adjustability of the steering wheel and seat belt.

Nio. The practicality of Nio products varies by model. The cheapest sedan model has less interior space than average, while the brand's larger SUV models offer above-average passenger comfort, especially in the rear (media review). Like many Chinese automakers, Nio prioritises space for rear passengers over luggage capacity.

Polestar. Polestar models offer varying levels of functionality, with recent designs emphasizing rear legroom at the slight expense of luggage space. Journalists consistently praise the ergonomics and comfort of the seats, especially for taller drivers, which they attribute to development work by Volvo engineers in Sweden (media review).

XPeng. XPeng's sedan model reportedly offers average passenger and cargo space, while the much more popular SUV models perform better in this regard (media review). Auto reviewers note that the SUVs offer above-average interior space.

Zeekr. Zeekr's offerings also have different practicality levels depending on the model. One model is regarded as having below-average space relative to price, while another is praised for offering above-average interior dimensions and comfort. Like Polestar and Nio, Zeekr tends to emphasise rear legroom and premium interior design (media review).

Practical aspects, such as interior space, seating comfort and loading capacity, are an important consideration for Dutch consumers buying a new car. For Chinese brands, the emphasis on maximum rear legroom reflects the preferences of the domestic market (Li, 2010). The quality of the seating position varies, with the Geely brands scoring particularly well here due to their relation with Volvo.

4.4 Technology and EV capabilities

BYD. BYD is the largest producer of electric vehicles and second-largest battery manufacturer in the world. BYD is known for its vertically integrated supply chain and its in-house developed lithium iron phosphate (LFP) batteries. These batteries are praised for their safety, long lifespan, and absence of cobalt (Yu, 2022). Despite these strengths, automotive

journalists have noted a shortcoming: BYD's fast-charging speeds are generally below par, which is surprising given its reputation as a leader in battery technology (Kleijwegt, 2025). Combined with average energy consumption, the technical advantage lies more in battery durability than in charging or consumption performance.

Lynk & Co. Lynk & Co offers both PHEV and BEV products. The BEV has adequate levels of efficiency and charging speed, without standing out (media review).

MG. There are big differences in EV performance between MG models. Some of the latest BEV models offer competitive charging performance, while others lag behind (media review). The brand's PHEV models are generally praised for their long electric range.

Nio. Nio is not a leader in standard EV metrics such as energy efficiency, range, or charging speed (media review). However, according to Nio's Dutch PR manager Mark Heiligers, the brand sets itself apart with its Battery-as-a-Service (BaaS) model and battery swap system, which allows drivers to swap depleted batteries for fully charged ones in under six minutes (personal communication, 27 June 2023). This battery swap system is currently operational in ten locations in the Netherlands and sixty across Europe. While this infrastructure offers flexibility, some journalists remain sceptical, as similar concepts have failed before and some manufacturers now offer EVs with very fast charging times, which reduces the added value of the battery swap system in countries with dense fast-charging networks (media review).

In addition, Nio is known for its digital technology. Automotive journalist Irwin Versteegh notes that Nio has mirrored Tesla's digitalization approach faster than most European competitors, which is reflected in, for example, its integrated laser radar (LiDAR) and voice assistant Nomi (personal communication, 9 October 2023).

Polestar. Polestar products offer solid EV performance, with competitive values in EV metrics such as range, charging speeds, and energy consumption, without excelling (media review).

XPeng. XPeng differentiates itself by using an 800V battery architecture, which enables faster charging times than 400V architecture typically used by the competition (J. Koek, personal communication, 31 July 2023; media review). As a result of recent updates, XPeng's SUV models are now the fastest charging electric cars on the European market. Due to their technological capabilities and low energy consumption, XPeng products outperformed established competitors, ranging from Ford to Porsche products, in comparative tests conducted by Dutch automotive news outlets (media review).

Zeekr. Journalists see Zeekr as a technology-oriented (semi)premium brand. The brand offers EVs with above-average charging speeds for both home and fast chargers and the electric range offered is good (media review).

A common denominator among Chinese automakers is their focus on technology and rapid product development (BOVAG, 2025a). As Jan Lemkes notes, innovation is a characteristic of Chinese electric car brands (personal communication, 15 May 2023). With heavy investment in EV development and pressure from fierce competition in the local market, Chinese automakers are generally progressive in their EV capabilities and other technologies.

However, some limitations remain. Driver assistance systems are often poorly calibrated for the European market, causing many drivers to turn them off. Yet, as journalist

Ivo Kroone (2024a) points out, Chinese manufacturers often address such issues quickly with software updates. This flexibility in upgrading products, including faster rollouts of upgrades than traditional automakers, is a competitive advantage. According to Jasper Koek (personal communication, 31 July 2023) this is because unlike traditional European carmakers that are burdened by combustion engine platforms, Chinese brands have entered the EV segment at a time when software and battery technology determine competitive edge. According to him, European companies are now responding to innovations introduced by new Chinese electric car brands.

4.5 Retail experience

This section examines how the seven brands studied have approached distribution, customer support and retail strategy.

BYD. BYD operates with a traditional dealership model and works with Louwman, a large car distributor that has decades of experience in import and distribution as a Dutch importer of Toyota and Suzuki, and this involvement gives BYD stability and market legitimacy (Kuijpers, 2023a). Dutch PR manager Fons Nijkrake (personal communication, 26 July 2023) and journalist Irwin Versteegh (personal communication, 9 October 2023) both emphasise the importance of this partnership and state that it gives BYD an advantage over other Chinese brands with less reliable networks.

Lynk & Co. Lynk & Co initially sold cars exclusively online via a subscription model, supported by brand "hubs" in major cities for test drives and car pick-ups (Veldhuis, 2020). Cars are serviced at Volvo dealerships. By the end of 2024, the brand's sales model was revised because of declining registrations caused by higher subscription prices (Kuijpers, 2023b) and to increase credibility and visibility. The company switched to a hybrid model in partnership with nine selected Volvo dealerships that will handle traditional sales, with further expansion planned. This also solved logistical problems with parts supply that the brand initially faced (Collewijn 2025d; Wilman, 2025).

The brand initially focused on car-sharing and flexible use, anticipating that 70% of customers would use a subscription. In reality, over 90% opted for a subscription, but with that market reaching saturation, CEO Nicolas López Appelgren made a shift to more conventional ownership and leasing models. As leasing accounts for around 70% of all new car sales in the Netherlands, Lynk & Co started active negotiations with leasing companies to broaden its appeal and distribution (Wilman, 2025).

MG. MG's distribution strategy varies by market. In the Netherlands, instead of working with a national importer, MG works directly with Van Mossel, one of the country's largest dealer holdings (Wijman, 2020). The brand currently operates nine brand stores and twelve service locations, with further plans for expansion. To increase visibility, MG had a pop-up store at the Westfield Mall of the Netherlands in Leidschendam until early 2024, displaying EVs (MG Motor, 2024; see Appendix, Figure A1).

According to MG Country Manager Jurgen Helmink, Van Mossel was chosen because of its strong reputation and extensive, reliable infrastructure (Bronkhorst, 2023). Journalist Irwin Versteegh sees this partnership as a significant advantage and states that a strong, local service and dealer network is an important prerequisite for Chinese brands to achieve success in Europe (personal communication, 9 October 2023).

Nio. Nio uses a direct sales retail model that differs significantly from a traditional dealer network model. Nio sells its cars directly to consumers and invests heavily in brand experience, such as with the Nio House in Rotterdam (M. Heiligers; personal communication, 27 June 2023; see Figure 2). In addition to a showroom, this is also a multifunctional space with a lounge, café, art gallery and with the possibility of an event location and meeting room. Nio also offers products through Nio Life, a platform for designer stores, and Nio Life, its own lifestyle brand. The idea is that people feel connected to the brand even if they do not own a car, which makes them familiar with the brand, an emotional bond and loyalty with the brand.

Figure 2

Interior of Nio House Rotterdam, combining showroom with café and co-working space in an urban environment (photo by the author, August 2024).

Polestar. Polestar uses an online direct-sales model complemented by five "Polestar Spaces" across the Netherlands. These showrooms offer test drives but do not function as traditional dealerships. The visibility of Polestar products is also increased by the fact that the brand, like MG and XPeng in the past, has a pop-up store with EVs in the largest shopping centre in the Netherlands (Polestar, 2024; see Appendix, Figure A2). After-sales servicing is handled by Volvo's established dealer network, which is considered a strength (Kouwenhoven, 2020). However, the relatively short two-year warranty has drawn criticism. In response to unexceptional sales and criticisms of its retail model, Polestar has begun

experimenting with traditional dealer partnerships in Belgium, indicating a more traditional sales approach in the future (Quartier, 2024).

XPeng. Emil Frey, a major pan-European distributor, is managing XPeng's retail operations as an agent in the Netherlands (Van Buiten, 2022; Jasper Koek, personal communication, 31 July 2023). This partnership with a trusted party takes away the concerns that consumers usually have about newcomers to the market. Koek adds that XPeng also works with major leasing companies such as ALD and Athlon, making the brand accessible to business drivers.

Zeekr. Zeekr operates with a direct sales model. It has a flagship retail space in central Amsterdam (Tameling 2023; see Appendix, Figure A3), highlighting its focus on urban areas. Service is handled by a single facility and a collaboration with LKQ Fource, a network of independent garages. According to Zeekr Europe CEO Spiros Fotinos, the brand prioritises warm, customer-focused service (Tameling, 2023). However, journalist Bart Kuijpers criticises Zeekr's decision not to use Volvo's proven retail network, as this could limit the brand's market reach (Kuijpers, 2023b). Plans to move to an agency model are currently in development.

Although Chinese car manufacturers have improved their products significantly, their retail infrastructure remains a challenge in the European market. As Pieter Gabriëls, an automotive strategy advisor, observes, Chinese OEMs have focused heavily on product quality while underestimating the importance of distribution networks (Kuijpers, 2024). Initially, as automotive consultant Stijn de Groen points out, Chinese brands followed Tesla's direct-to-consumer sales model (BOVAG, 2025a). However, to become a serious consideration for fleet managers, automotive experts argue it is critical to have a solid dealer network with good aftersales (Kuijpers, 2024; Collewijn, 2025a). Thanks to the high adaptability of Chinese brands, many improvements have already been made to the retail model, according to De Groen (BOVAG, 2025a). In recent years Chinese brands have started outsourcing to local partners, and increasingly adopt a dealer retail model, even though logistical challenges remain (BOVAG, 2025a).

4.6 Brand image and COO

BYD. BYD enjoys status as the world's third largest automobile brand, and has ample financial reserves, reassuring Dutch consumers who decide to purchase a new car from this relatively new and unknown brand (Collewijn, 2025a). BYD is also leveraging its scale in a nationwide advertising campaign, highlighting that it is the world's largest manufacturer of EVs and PHEVs (see Figure 3). The brand name itself, "Build Your Dreams", does not explicitly refer to its Chinese origins.

Fetscherin et al. (2015) investigated the influence of the type of brand name on the acceptance of Chinese brands and showed that Chinese companies are viewed differently by American consumers based on the length of the character string and the semantic similarity to English. Shorter, English-language names are easy for Americans to pronounce and have a positive influence on brand preferences. This shows that the type of brand name of Chinese brands influences the perception of these brands. The acronym BYD is easy to pronounce, which can positively influence brand preference. Dutch BYD representative Ruitenbeek argues that many consumers are initially surprised to learn the brand is Chinese, often

expressing unexpected admiration after experiencing the cars in person. This reaction highlights the persistence of stereotypes about Chinese cars, while also illustrating BYD's growing success in transforming scepticism into consumer trust (Collewijn, 2025b).

According to PR manager Fons Nijkrake, BYD positions itself as a global brand, which is positioned above MG in Europe in terms of quality and refinement (personal communication, 26 July 2023). He compares BYD's trajectory to the earlier success stories of Toyota and Hyundai, brands that were initially met with scepticism because of their country of origin, yet gradually gained consumer trust. Nijkrake also highlights BYD's growing number of international partnerships, including battery supply agreements with European-American conglomerate Stellantis and Korean carmaker KGM, as well as upcoming production facilities in Hungary and Turkey. These moves could strengthen BYD's credibility as a technologically advanced, global manufacturer, rather than a brand that is specifically focused on China.

As mentioned in the literature review, there is research suggesting that in the case of bi-national products, the origin of production prevails for consumers (Han & Terpstra, 1988; Fetscherin & Toncar, 2010), but research by Li et al. (2000) suggests that consumers are more concerned with country of design than country of assembly. This suggests that factories on European soil and local development centres can contribute to positive consumer evaluations for the brand.

Lynk & Co. The brand name Lynk & Co is semantically relevant to English, which may make the brand more memorable to Dutch consumers than with a Chinese name. Despite its Volvo-based engineering and contemporary design, Lynk & Co has struggled to establish a clear brand identity. According to Jan Lemkes, the brand lacks emotional resonance and is often chosen for practical rather than aspirational reasons (personal communication, 15 May 2023). While Volvo's legacy and Swedish engineering lends credibility, internal competition within the Geely Group, particularly from Zeekr, Polestar, and Smart, has complicated Lynk & Co's market position (Kuijpers, 2024).

This lack of distinctiveness has prompted media outlet Automotive to question Lynk & Co's future prospects (Kuijpers, 2024). Journalist Irwin Versteegh adds that the brand's engineering credentials are reinforced by Volvo's know-how (personal communication, 9 October 2023). Moreover, lower prices compared to the previously mentioned brands, combined with a large existing customer base with an average age ten years younger than the average Volvo buyer, are brand strengths (Collewijn, 2025d).

Figure 3

BYD advertisement at a bus stop in Leiden (11 October 2024), promoting its technical specifications and position as the world's largest EV manufacturer. Photo by the author.

MG. MG's Dutch website promotes its British heritage, referencing "100 years of classic British design," "London Eye headlights," and "European interior styling" (MG Motor, n.d.). Yet, the brand's Chinese ownership by SAIC is downplayed, mentioned only briefly on the company's "About" page. Figure 4 shows modern MG models on display by Van Mossel at the British Autojumble in Waalwijk (June 2025), an event dedicated to British automotive heritage (British Autojumble, n.d.). The presence of modern MG products also illustrates how MG is using its British heritage to appeal to Western consumers, even while offering cars produced exclusively in China.

Public narratives from MG executives reflect a tension in the use of its heritage: former PR manager Mike Belinfante (BNR Nieuwsradio, 2021) directly labels MG as a Chinese brand, while European VP Aiden He emphasises its "global" identity and British

legacy (Schenk, 2024). Journalists like Lemkes (personal communication, 15 May 2023) and Versteegh (personal communication, 9 October 2023) confirm that while the MG name helps with brand recall, most consumers are aware of its Chinese ownership. Versteegh even suggests that MG's British associations may be a liability due to doubts about reliability, although he concedes the current models are the best MG has ever produced.

Both journalists agree that MG occupies the budget end of the market, competing primarily on affordability, which is seen as an effective strategy for newcomer brands, and similar to the earlier rise of Korean automakers like Kia and Hyundai (J. Lemkes, personal communication, 15 May 2023). According to Ralf van Meer, MG still lacks strong brand recall and desirability and aims to strengthen its profile by highlighting rational attributes such as value and practicality (Collewijn, 2025c).

Figure 4

New MG cars manufactured in China, presented by Van Mossel, at the British Autojumble Waalwijk, June 2025. Photo by the author.

Nio. Nio is derived from the Greek word for new. The brand name is short and easy to pronounce, making it potentially more memorable (Fetscherin et al., 2015). While headquartered and manufactured in China, Nio describes itself as a global high-tech brand. It has a design studio in Munich, chassis development in Oxford, and is listed on the stock exchanges of Singapore and New York. Despite this, the brand does not shy away from its Chinese roots: according to Heiligers "we are not ashamed to be Chinese," while acknowledging that negative perceptions remain, particularly in corporate environments (personal communication, 27 June 2023).

Nio attempts to counteract country-of-origin bias through transparency and technology leadership (M. Heiligers, personal communication, 27 June 2023). It emphasises transparency on data use, software and business ethics, and highlights innovations such as the Nomi AI assistant and Power Swap Stations. Auto publications recognise Nio's strong brand potential, with dealership managers ranking it among the top five most promising newcomers (Kuijpers, 2023a). However, ongoing financial losses and an unfamiliar brand concept make increasing consumer trust in the brand a challenge.

Polestar. Although Geely owns a majority stake in Polestar and until recently all of its products were made in China, the brand is strongly associated with Swedish design and Volvo engineering (media review). This may have allowed Polestar to largely escape the country-of-origin biases that other Chinese-origin brands have. This is illustrated by an anecdote that Nio's PR manager Mark Heiligers shared: in one case, Nio vehicles were denied access to a company parking garage due to data security concerns, simply because of their Chinese origins (personal communication, 27 June 2023). In contrast, Polestar cars were allowed in without issue. This underscores the double standards that some Chinese brands face, indicating that Polestar may benefit from its bi-national country-of-origin. The Polestar name is in English, which may make it more memorable to consumers.

Polestar aims to distinguish itself as a younger, more dynamic alternative to Volvo for tech-savvy consumers. Yet its long-term differentiation remains a topic of debate. Journalists such as Bart Kuijpers question whether Polestar can sustain a unique identity within the increasingly crowded Geely portfolio, particularly given model overlap and its limited traction outside the European market (Kuijpers, 2024).

XPeng. XPeng self-identifies as a "technology company focused on future mobility" rather than a traditional automaker. This is reflected in its product development strategy, which emphasises software innovation and autonomous driving capabilities. In advertising campaigns, XPeng also highlights partnerships with Porsche and Audi, sharing software and platforms with these legacy automakers (Automotive Online, 2025).

XPeng openly embraces its Chinese identity, with interior elements featuring Chinese characters and the brand name itself being unmistakably Chinese. However, compared to its Chinese name (小鹏 Xiǎopéng), it is still a shortened name for reasons of pronounceability. This openness about country of origin can polarise buyers, but Jasper Koek suggests that only a vocal minority expresses concerns about origins and do not significantly affect purchasing behaviour (personal communication, 31 July 2023). XPeng also emphasises its compliance with EU data regulations, with customer data stored on European servers, further addressing potential trust issues. Koek adds that the inclusion of XPeng in lease portfolios and the positive press coverage indicate growing confidence in the brand.

Zeekr. Zeekr places minimal emphasis on its Chinese origins and positions itself as a Swedish premium brand targeting young, highly educated consumers in cities. The brand name is an abbreviation of several English words and is short and easy to pronounce, which could help consumers memorise the brand. CEO Spiros Fotinos positions the brand as a high-quality, progressive and reliable alternative to European premium brands such as BMW and Porsche (Tameling, 2023). While some automotive journalists consider this ambition overly optimistic given Zeekr's limited brand awareness, others, such as Roy Kleijwegt (2023), place

Zeekr in the top three of most promising Chinese brands, alongside BYD and MG. Despite these positive signals, Zeekr's success will depend on brand positioning and consumer awareness, especially given the internal competition with other Geely brands.

A recent pan-European survey commissioned by Zeekr (2025) provides deeper insight into the evolving role of China's COO on European consumers and suggests an improving sentiment towards Chinese brands. The results suggest that European consumers were 38% more open to buying Chinese EVs than a year prior, while 17% were not. Meanwhile, 53% of EV drivers are open to buying Chinese EVs. Of the 8,000 respondents, nearly half say Chinese EVs offer value for money, while 40% find that premium Chinese EVs are as good as those from competitors, appreciating their advanced technology, quality, and safety. While many consumers continue to consider COO, attitudes are softening, especially among younger consumers, those already driving EVs, and in the Nordics and United Kingdom (Zeekr Europe, 2025).

As Versteegh notes, most consumers instead focus on features, EV range, and price. Nevertheless, ethnocentric attitudes and geopolitical biases do persist (personal communication, 9 October 2023). Journalist Lemkes cautions that lingering anti-China sentiment may hinder long-term brand acceptance (personal communication, 15 May 2023). Still, he and others anticipate that, given their rapid pace of innovation, Chinese brands will eventually secure a similar market position to Japanese and Korean brands, aligning with predictions from scholars (Baker & Hyvonen, 2011). However, for this to happen, manufacturers and local importers must make significant investments in marketing to make brands visible, generate sales and build a reputation, because according to automotive experts, good products alone are insufficient for gaining a substantial market share (Collewijn, 2025a).

5. Conclusion and discussion

This thesis examined what persuades Dutch consumers to purchase Chinese cars and how COO perceptions influence that process. Based on expert interviews and a media review, I found that Chinese carmakers have rapidly become leaders in the EV industry, aided by industrial policy. In the Netherlands, they have gained share through affordable, well-equipped products and partnerships with local service, dealer, and leasing networks. While some Dutch consumers remain cautious due to China's COO, attitudes are softening, echoing initial scepticism towards Japanese and Korean brands.

In Chapter 3 I demonstrated how the Chinese government directed the domestic automobile industry, for instance, through joint ventures and market entry regulations, and later through liberalisations and EV policies. With subsidies, incentives, and the strategic cooperation between governments, universities, and industry, Chinese brands created the current EV sector. This industry is characterised by vertically integrated supply chains and rapid scaling, allowing Chinese brands to leapfrog legacy automakers.

In Chapter 4 I showed that the appeal of Chinese brands lies in their affordability and strong EV capabilities. While MG targets price-conscious consumers, brands like BYD, Lynk & Co, XPeng, and Zeekr offer practical and advanced products that are still affordable. They differentiate themselves from established rivals through in-house battery innovations, fast-charging capabilities, software integration, and features such as Nio's battery-swapping stations.

Despite these successes, challenges remain. My analysis reveals that brands often have struggled with inadequate dealer and service networks. Experimentations with direct sales or subscriptions have not always met consumer expectations or were unsustainable. Most brands have therefore adopted more traditional retail models. Experts therefore assume that continued growth is only possible with investments in marketing, brand-building, and integration into lease portfolios (Kuijpers, 2024).

As my thesis reveals, China's COO image is mixed, and its impact on consumer decisions is similarly dependent on context. Some brands, such as BYD and XPeng, seem to embrace their Chinese identity, while brands like Polestar and Zeekr may soften COO effects by emphasising Swedish or global connections. This contrast underlines findings by Magnussen et al. (2011), who discovered that perceived COO, rather than actual COO influences consumer behaviour. The anecdote that Nio drivers, unlike Polestar drivers, were not allowed to park in a garage is illustrative of these double standards.

While COO bias can be a barrier, it does not fully determine consumer behaviour. As journalist Jan Lemkes observes, many Chinese brands are now competitive, and their rise mirrors the earlier shifts in consumer perception of Japanese and Korean carmakers (personal communication, 15 May 2023). Over time, as Dutch consumers become more familiar with these products, the brand image, product quality, and prior experiences may outweigh national stereotypes of Chinese car brands.

My thesis contributes to existing literature on car purchase motivations and COO effects in several ways. The findings confirm the observations from Hafner et al. (2017) and Ma et al. (2019) that the primary purchase motivators of consumers are functional concerns, such as affordability and EV specifications, and emotional-social concerns such as brand

image and retail experience. The added value of this thesis lies in the inclusion of the COO perceptions of China into image concerns.

Existing studies have examined the COO effects of consumer car purchases (e.g., Fetscherin & Toncar, 2010; Chinen et al., 2014), but the studies that have included China date from a time when consumers were still unfamiliar with Chinese car brands. This thesis resolves this issue by offering updated insights. Qualitative methods, including expert interviews were chosen instead of surveys, as they allow for a deeper understanding of the motivations and sentiments behind COO perceptions. My findings suggest that the automotive industry can influence those perceptions, while the influence of COO may weaken as consumers become more familiar with Chinese brands.

For Chinese brands, this analysis reveals that competitive products alone are not enough. Brands must invest in brand-building, distribution and service networks, and leasing partnerships to succeed in European markets. As of April 2025, the European market share of Chinese brands was nearly 5%. Industry experts (BOVAG, 2025a) predict this share could rise to 10% by 2030. This indicates strong confidence in continued growth.

Journalists and automotive experts provided in-depth market knowledge for my thesis. While this approach yielded new insights, it may not fully reflect the perceptions of Dutch car consumers. Future studies could enhance generalisability by including consumer interviews of survey data. Another limitation is the scope. Since I included only seven of the most successful Chinese brands, brands that failed to gain traction, such as Aiways and Seres, were left out. The inclusion of these brands can provide additional insights into the causes of failure. Finally, rapid market and geopolitical developments, with growth of existing Chinese brands, a rise of new entrants, and protectionist tariffs, may partially outdate the conclusions of my thesis.

Future studies should incorporate consumer perspectives through interviews or surveys to better understand how Dutch consumers evaluate Chinese cars and to what extent COO matters in practice. Quantitative methods could complement these findings by measuring the scale of COO influences. Including failed Chinese brands would help understand why some brands fail where others succeed. Finally, comparative research across multiple European markets, where EV adoption and COO bias vary, could provide a fuller picture of consumer behaviour across different contexts.

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Appendix

Appendix A

Vehicle registration and delivery figures for 2024. Global data is based on publicly reported manufacturer sources. European and Dutch registration figures are drawn from industry and media reports. Sources (retrieved July 2025):

Global deliveries:

BYD: *France24* – https://www.france24.com/en/live-news/20250102-sales-surge-in-2024-for-chinese-ev-giant-byd

Lynk & Co: *Lynk & Co Newsroom* – https://newsroom.lynkco.com/2025/lynkco-honors-exceptional-global-achievements-in-2024

MG: *Autoworld Journal* – https://www.autoworldjournal.com/mg-delivers-700000-cars-globally/

Nio: *Nio IR* – https://ir.nio.com/news-releases/news-release-details/nio-inc-provides-december-fourth-quarter-and-full-year-2024/

Polestar: *Polestar Media* – https://media.polestar.com/us/en/media/pressreleases/686798

XPeng: *XPeng IR* – https://ir.xiaopeng.com/news-releases/news-release-details/xpeng-reports-fourth-quarter-and-fiscal-year-2024-unaudited

Zeekr: *Zeekr IR* – https://ir.zeekrgroup.com/2024-12-31-ZEEKR-Announces-December-and-Full-Year-2024-Delivery-Update

European registrations:

Carscoops – https://www.carscoops.com/2025/02/dacia-sandero-tops-europes-2024-best-sellers-list-as-byd-beats-alfa-romeo-and-subaru/

Dutch registrations:

RAI Vereniging – https://www.raivereniging.nl/actueel/nieuws/nieuwverkoop-personenautos-in-2024-op-de-valreep-gestegen/

Table A1

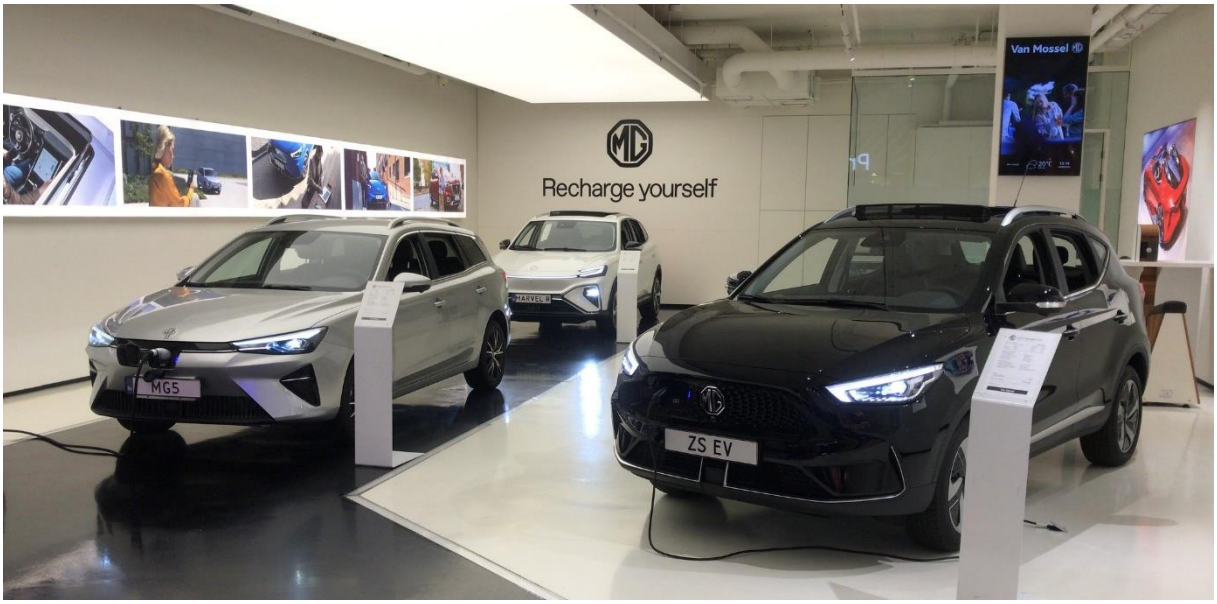
Annual registrations of Chinese car brands in the Netherlands (2019-2024)

Brand	2019	2020	2021	2022	2023	2024
BYD	–	–	–	200	1,230	3,207
Lynk & Co	–	–	3,297	5,847	6,109	1,671
MG	1,019	2,206	1,054	1,504	6,051	2,355
Polestar	–	2,566	2,192	1,010	1,936	2,087
Smart	–	–	–	–	110	957
XPeng	–	–	8	11	340	1,293
Zeekr	–	–	–	–	95	951
Other	–	443	51	88	519	675
Total	**1,019**	**5,215**	**6,602**	**8,660**	**16,390**	**13,196**

Note. Registration data sources from RAI Vereniging (https://www.raivereniging.nl/actuele-verkoopcijfers/) and Open Data RDW (https://opendata.rdw.nl/Voertuigen/Open-Data-RDW-Gekentekende_voertuigen/m9d7-ebf2/about_data). The "Other" category includes Chinese car brands that did not exceed 500 passenger car registrations in any single year.

Figure A1

MG pop-up store in Westfield Mall of the Netherlands (Leidschendam), showing a temporary promotional EV display



Note. Photograph by the author, August 2023.

Figure A2

Polestar space in Westfield Mall of the Netherlands (Leidschendam), showing a more premium aesthetic compared to the MG pop-up store next door.

Note. Photograph by the author, August 2023.

Figure A3

Zeekr Center in the centre of Amsterdam: an urban showroom with experience centre.

Note. Photograph by the author, August 2024.