



Trends Analysis in the Israeli Automotive Market

Q4/2025

PREFACE



Israel Vehicle Importers Association (I-via) publishes this quarterly overview to offer a comprehensive analysis of the Israeli market for new vehicles, highlighting relevant trends observed over the years.

It should be noted that the data presented in this document pertains to passenger cars and light commercial vehicles weighing up to 3.5 tons, falling within the N1+M1 categories (as classified by the EU), and imported solely by direct importers.

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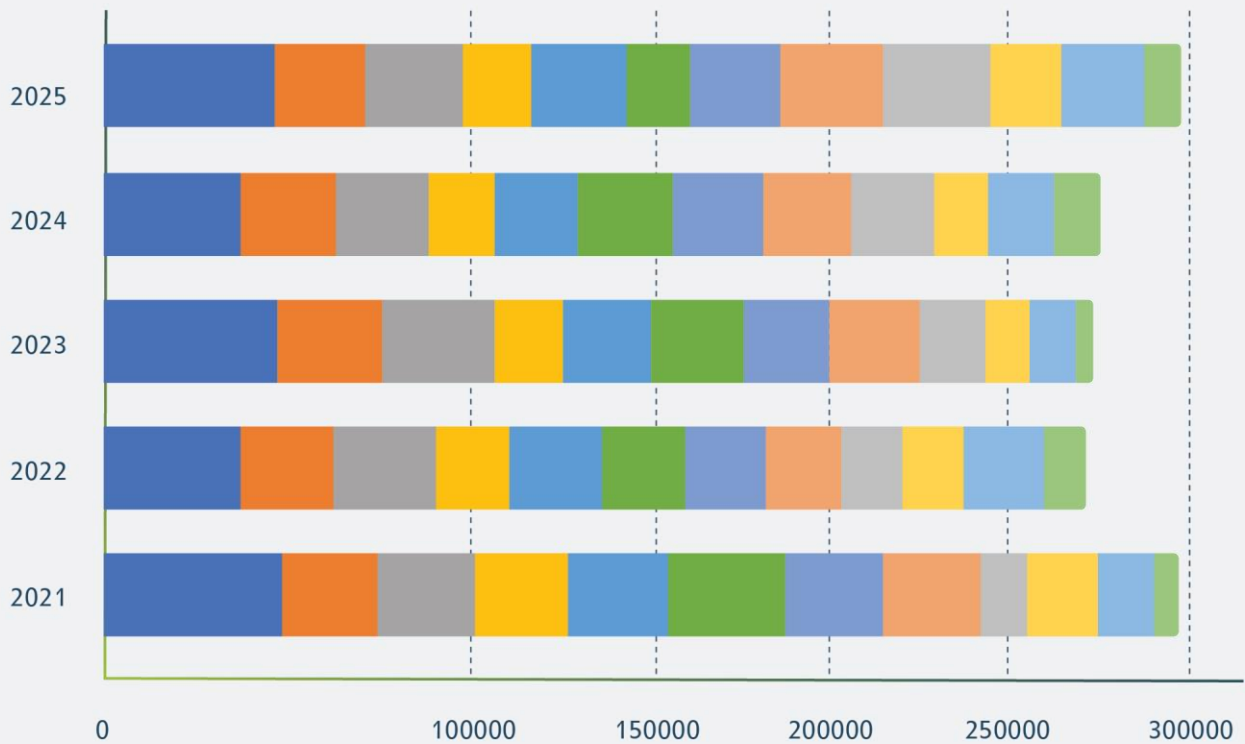
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The data analysis was performed in collaboration with Carzone Technologies Ltd.

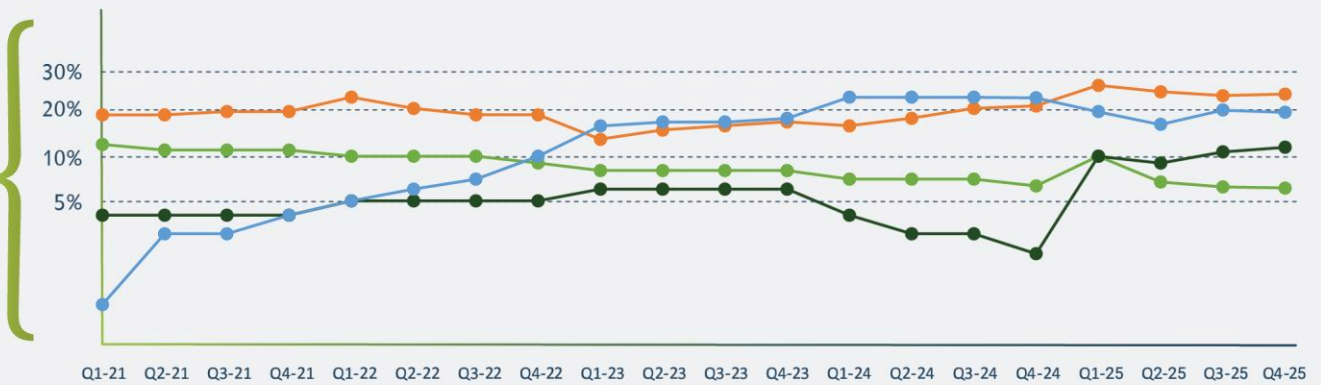
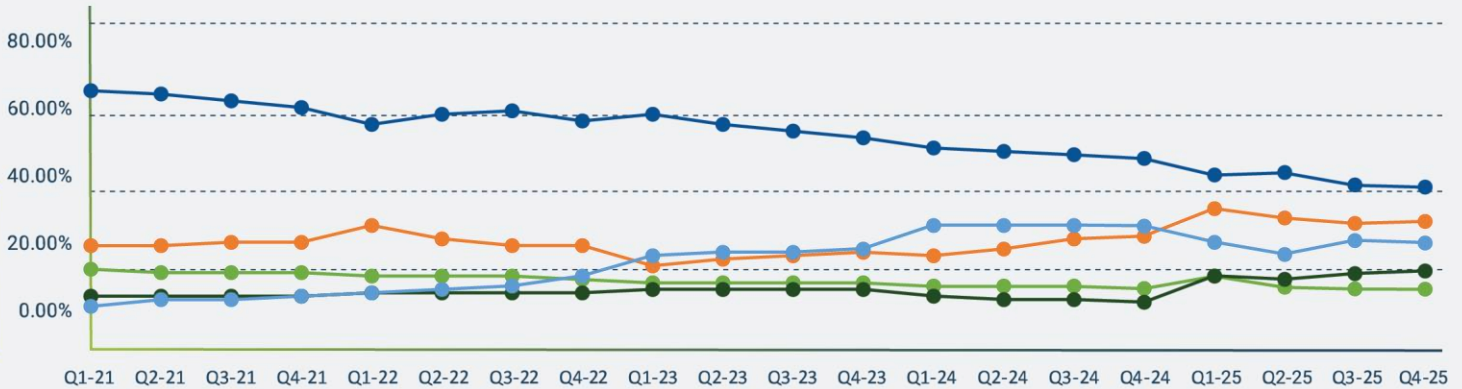
REGISTRATION DATA



REGISTRATIONS BY ENGINE TYPE



● Petrol ● hybrid ● Diesel ● phev ● Electric



It should be noted that the data presented in the graph in relation to each quarter in given year, are cumulative data from the beginning of that year.

Q4 2025 further confirms the ongoing transformation of Israel's powertrain mix, with continued weakening of petrol-powered vehicles and sustained growth in electrified powertrains.

Petrol-powered vehicles accounted for **36.4%** of total registrations in Q4 2025, down from **37.0%** in Q3 2025 and markedly lower than **44.9%** in Q4 2024 and **51.0%** in Q4 2023, indicating a continued erosion of petrol's market share.

Hybrid vehicles reached **26.2%** of new registrations, slightly above **25.6%** in Q3 2025 and significantly higher than **21.8%** in Q4 2024 and **17.0%** in Q4 2023, further strengthening their position in the market.

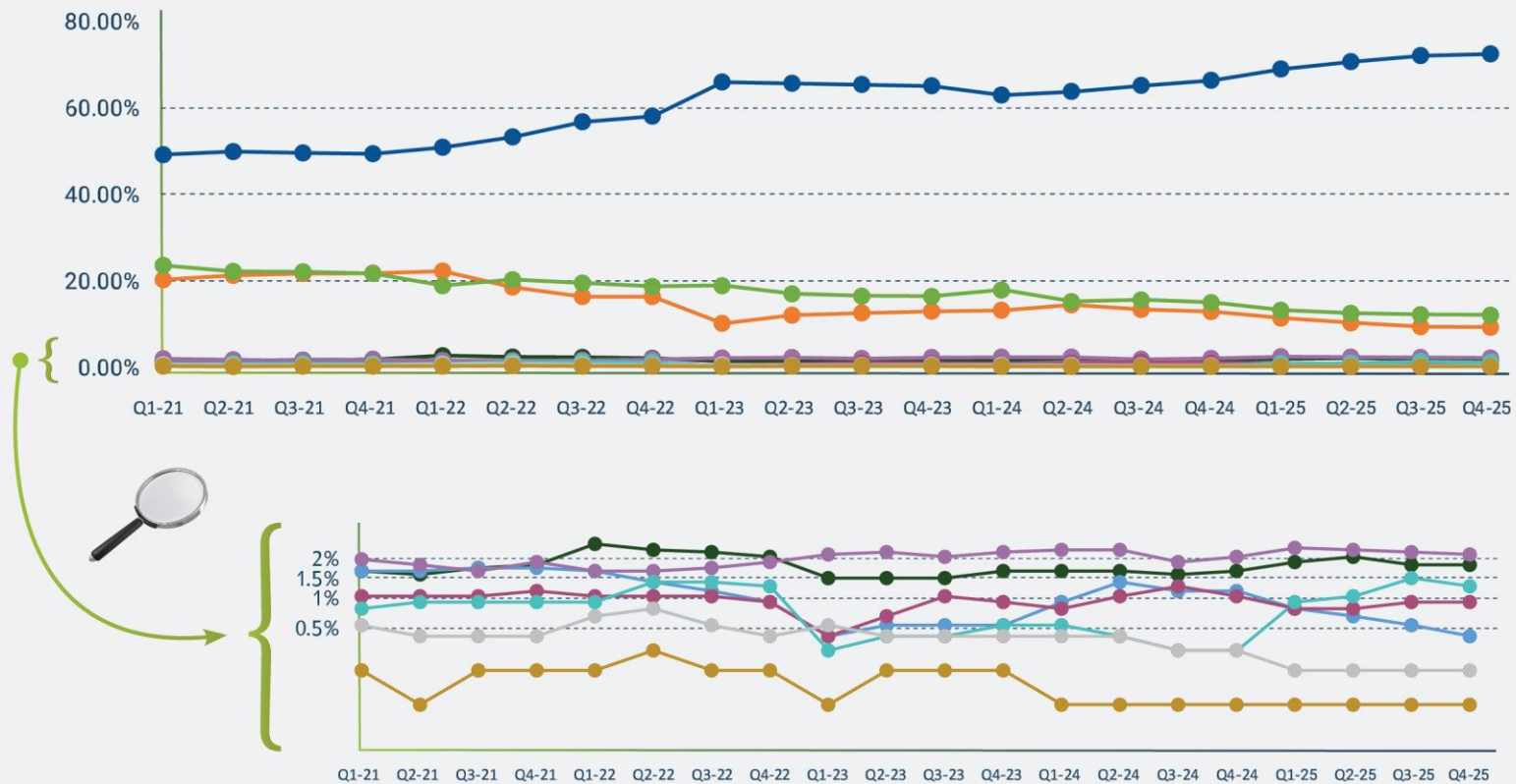
Battery electric vehicles (BEVs) accounted for **19.8%** of registrations, marginally below **20.5%** in Q3 2025 and lower than **24.8%** in Q4 2024, but above **18.0%** in Q4 2023, pointing to stabilization following the peak levels seen in 2024

Plug-in hybrid vehicles (PHEVs) increased their share to **11.5%**, up from **10.7%** in Q3 2025 and well above **2.2%** in Q4 2024 and **6.0%** in Q4 2023, continuing their steady expansion.

REGISTRATIONS BY SEGMENT TYPE



- Crossover/suv
- Sedan
- Hatchback
- Pickup
- Estate
- LAV (Lifestyle Activity Vehicle)
- Van
- MPV (Multi-Purpose Vehicle)
- Coupe
- Convertible



It should be noted that the data presented in the graph in relation to each quarter in given year, are cumulative data from the beginning of that year.

Q4 2025 reflects a continued concentration of the Israeli passenger car market around Crossover and SUV models, alongside relatively lower shares for traditional passenger car segments.

Crossover/SUV vehicles accounted for **72.4%** of total registrations in Q4 2025, slightly higher than **72.0%** in Q3 2025 and above the levels recorded in Q4 2024 (**66.3%**) and Q4 2023 (**65.0%**). The segment continues to represent the largest share of the market.

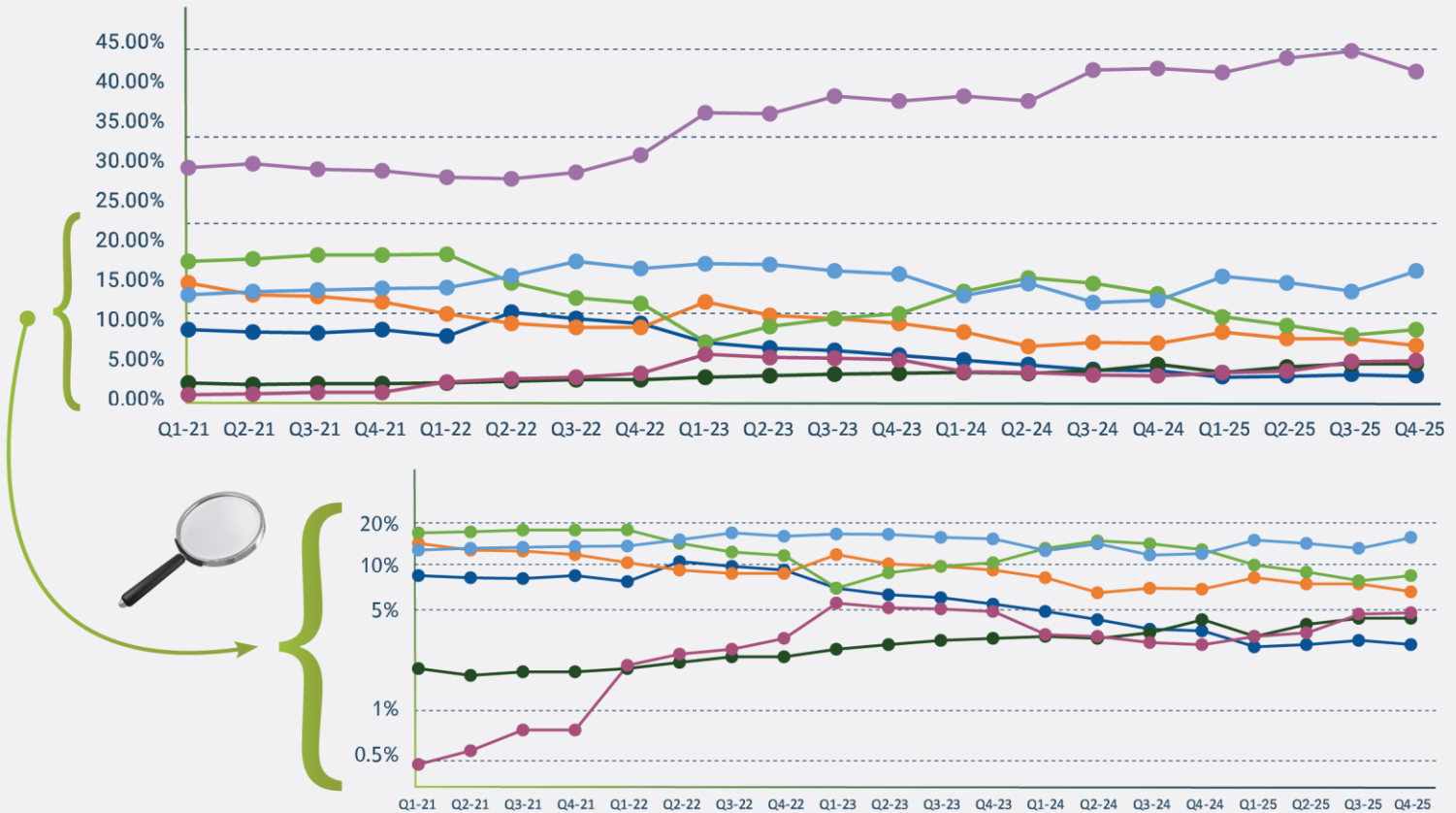
Sedan vehicles represented **9.2%** of new registrations, broadly in line with **9.3%** in the previous quarter, and below **12.8%** in Q4 2024 and **12.9%** in Q4 2023. The segment maintains a more limited share compared to earlier periods.

Hatchbacks accounted for **12.0%** of the market in Q4 2025, similar to **12.1%** in Q3 2025, and lower than **14.9%** in Q4 2024 and **16.3%** in Q4 2023. The segment remains present in the market with a lower share than in previous years.

REGISTRATIONS BY CATEGORY



● Car-A ● Car-B ● Car-C ● Luxury-SUV-3
● SUV-B ● SUV-C ● SUV-D



It should be noted that the data presented in the graph in relation to each quarter in given year, are cumulative data from the beginning of that year.

In Q4 2025, the distribution of new vehicle registrations by category continued to be led by SUV models, with the C-segment maintaining a clear majority of the market.

The **SUV-C** vehicles accounted for **41.1%** of total registrations in Q4 2025, slightly below **43.7%** in Q3 2025 but broadly in line with **41.5%** in Q4 2024 and above **37.4%** in Q4 2023. The category continues to represent the largest share of the market.

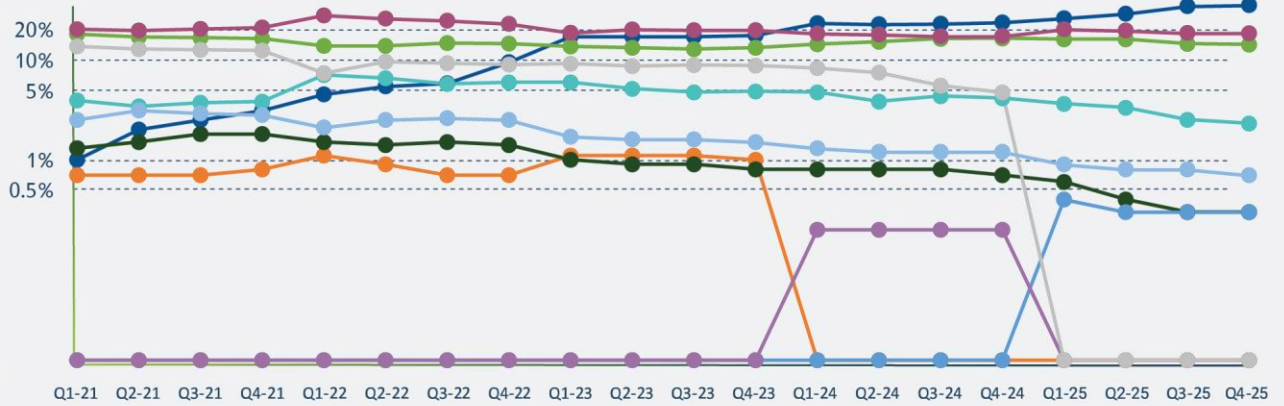
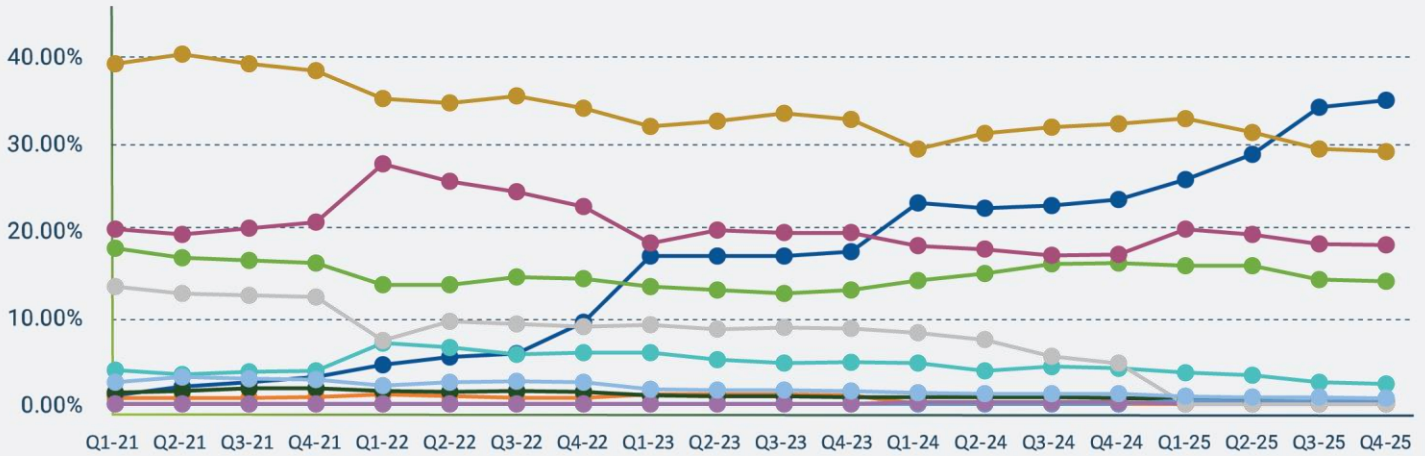
SUV-B models reached **16.0%** of new registrations, up from **13.4%** in Q3 2025 and higher than **12.3%** in Q4 2024 and **15.6%** in Q4 2023. The category maintains a stable and relatively consistent presence within the SUV segment.

Car-C vehicles represented **8.6%** of registrations in Q4 2025, above **7.9%** in Q3 2025 but below **13.1%** in Q4 2024 and **10.6%** in Q4 2023. The category continues to account for a smaller share of total registrations compared to SUV categories.

REGISTRATIONS BY COUNTRY OF ORIGIN



● China ● India ● Japan ● Mexico ● Morocco ● South Africa
● South Korea ● Thailand ● Turkey ● North America ● Europe



It should be noted that the data presented in the graph in relation to each quarter in given year, are cumulative data from the beginning of that year.

In Q4 2025, the distribution of new vehicle registrations by country of origin continued to evolve, with Chinese-manufactured vehicles accounting for the largest share of the market.

China accounted for **34.9%** of total registrations in Q4 2025, slightly above **34.1%** in Q3 2025 and significantly higher than **23.5%** in Q4 2024 and **17.5%** in Q4 2023. This marks the highest share recorded for vehicles manufactured in China to date.

Europe represented **29.0%** of new registrations, broadly stable compared to **29.3%** in Q3 2025 but below **32.2%** in Q4 2024 and **32.7%** in Q4 2023. The region continues to account for a substantial portion of total registrations.

South Korea accounted for **18.3%** of registrations in Q4 2025, nearly unchanged from **18.4%** in the previous quarter and slightly above **17.2%** in Q4 2024, while remaining below **19.7%** in Q4 2023. The share remains within a relatively stable range over the observed period.