

## How does data support OEMs to navigate the challenging used BEV market?



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The European **Battery Electric Vehicle (BEV)** market is currently undergoing a period of adjustment. While some governments have introduced measures to promote adoption, the gradual reduction of incentives—particularly in Germany and Spain—combined with technological expectations that are not yet fully met, is slowing down the electrification momentum.

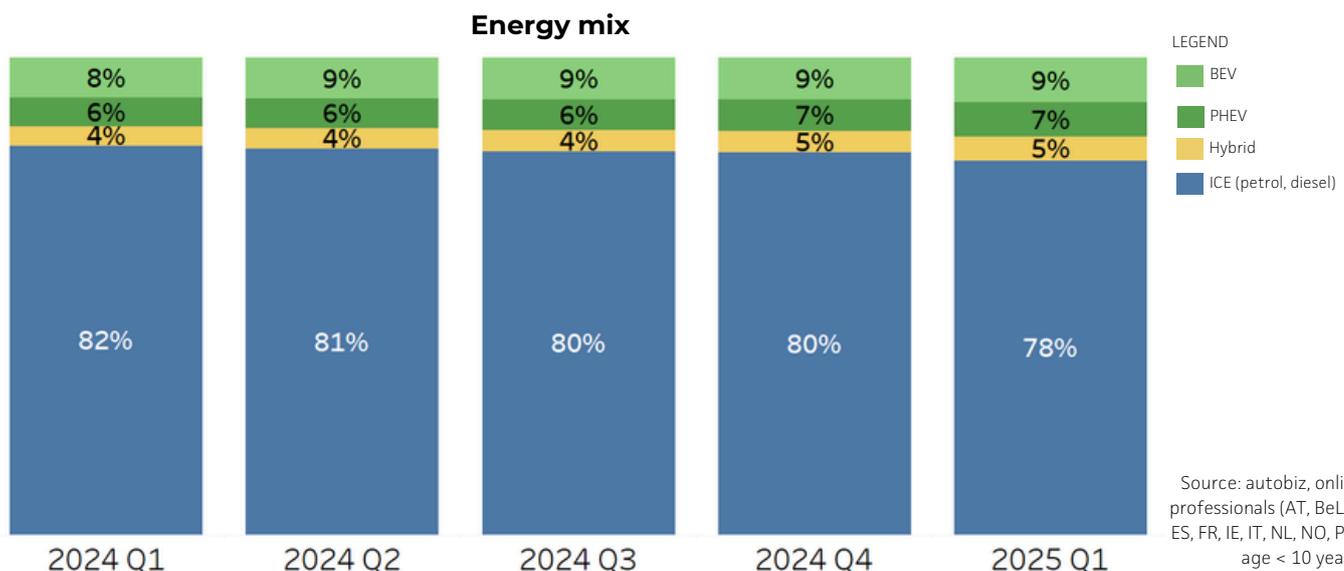
This situation is reflected by the number of days in stock, with BEVs remaining online an average of **25 days longer than internal combustion engine (ICE) vehicles**, which still account for **78%\* of the available online stock**.

### 3 steps to better understand the dynamics of the used BEV market

#### A European analysis framework for local adaptation

To fully understand the BEV market, it is essential to analyse both national and European dynamics. While the energy mix appears stable at the **pan-European level**, a country-by-country analysis reveals significant disparities, highlighting the specific challenges faced by national subsidiaries.

**In February 2025**, France recorded a **+2.5-percentage point increase in the BEV mix** (new and used vehicles) compared to February 2024, versus only **+0.4 percentage point in Germany over the same period** for BEVs under 10 years old. At the same time, and as expected, we are seeing strong growth in Nordic countries such as Denmark, and stable but low electrified markets like Italy.



These disparities highlight the importance of conducting a **market-by-market benchmark** to adjust objectives and commercial strategies based on local maturity, the level of charging infrastructure, existing fiscal incentives, and the regulatory framework specific to each country.

\*Source: autobiz, online stocks for professionals (AT, BeLux, CH, DE, DK, ES, FR, IE, IT, NL, NO, PL, PT, SE, UK) - age < 10 years old

### Compare the performance of your used BEVs

Once the promising markets have been identified, it is crucial to assess the manufacturer's **position in contrast to the competitors in each country**, to pinpoint the segments where it performs well and those where adjustments are needed.

The analysis of KPIs such as **volumes, average prices, or age of the listing** helps to identify performance gaps within the same competitive landscape. For example, we observe that mainstream BEVs stay in stock longer than their premium counterparts (or newcomers). Even within the same brand's grouping, significant differences can be seen between competitors, with up to a **73-day difference among premium brands**.

### Assess the network's performance

An **effective BEV strategy relies on strict monitoring of the brand's local network**, as well as the implementation of preventive actions upon acquisition. For example, setting up bonuses for achieving targets based on monthly-tracked KPIs can help to improve the management of the Used Car business per dealership.

### Average days online per brand grouping - BEV market only

Brands grouping	2024 Q1	2025 Q1
<b>Mainstream</b> <b>Volkswagen, Ford, Renault...</b> Vehicles that are designed for the average consumer and are widely available in the market.	<b>130 days</b>	<b>136 days</b>
<b>Premium</b> <b>Audi, BMW, Jaguar...</b> These cars cater to consumers looking for a more refined experience in terms of quality, comfort, and design.	<b>116 days</b>	<b>115 days</b>
<b>Newcomers</b> <b>BYD, MG, NIO, Polestar...</b> Brands or models that are relatively new to the market, often entering it with innovative designs, new technologies, or alternative approaches to vehicle production.	<b>112 days</b>	<b>111 days</b>

Source: autobiz, online stocks for professionals (AT, BeLux, CH, DE, DK, ES, FR, IE, IT, NL, NO, PL, PT, SE, UK) - BEV < 10 years old

## Implement alternative sales strategies

Given the higher rotation rates for BEVs compared to internal combustion engine vehicles, it becomes relevant to explore alternative sales strategies. This approach helps to **reduce storage costs** while also addressing the specific challenges of reselling used BEVs. Indeed, to tackle current challenges, manufacturers can reassign certain models to markets with higher demand or sell some BEVs to local professionals, who are sometimes more effective than franchised networks in selling this type of vehicle.

## How to anticipate in such an uncertain landscape?

To effectively manage the BEV market, manufacturers can combine innovation, network monitoring, and adaptation to regulations.

Exploring alternatives such as e-fuels, which offer other alternative solutions to meet market expectations, as well as improving range and charging times for BEVs, will ensure sustainable growth in a changing regulatory environment.



**Want to know more?**

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