



# autobiz

## EUROPEAN USED CAR MARKET BAROMETER

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European market disparities are deepening as demand strengthens and supply imbalance grows, signalling a shifting strategic landscape.

# KEY LEARNINGS

## Global observation

Market dispersion across countries remains significant. While demand is generally positive year-on-year, stock dynamics vary widely, from strong increases in some markets to stagnation or contraction in others.

This confirms that European averages can be misleading: market balance remains highly country-specific, depending on the gap between demand momentum and supply pressure.

## Country level observation

Switzerland stands out with the strongest stock growth, indicating increasing supply pressure despite sustained demand.

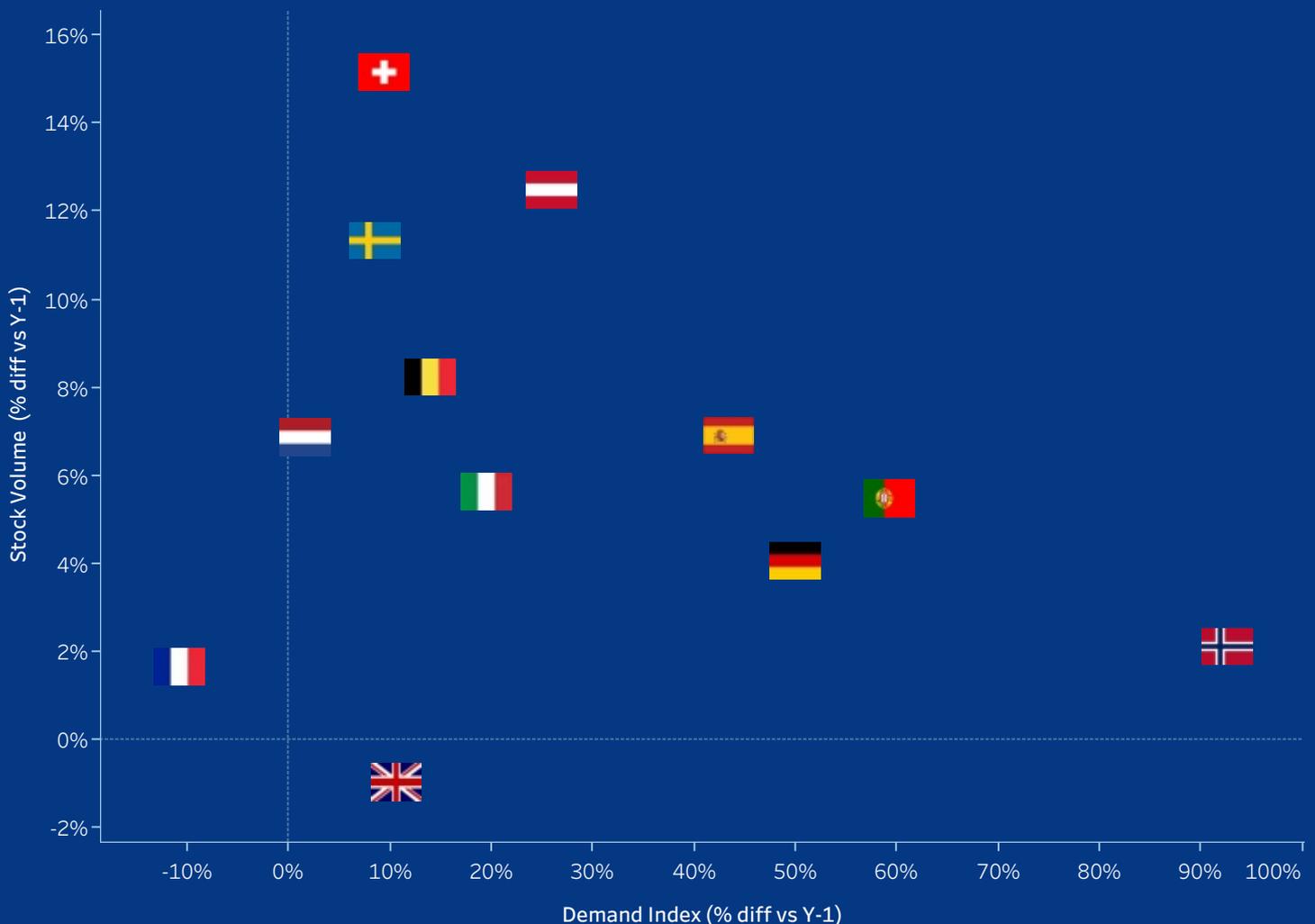
Austria and Sweden also show solid stock expansion combined with positive demand, suggesting an active but supply-sensitive environment.

Belgium, Italy and The Netherlands display balanced growth patterns, with demand and stock moving in parallel.

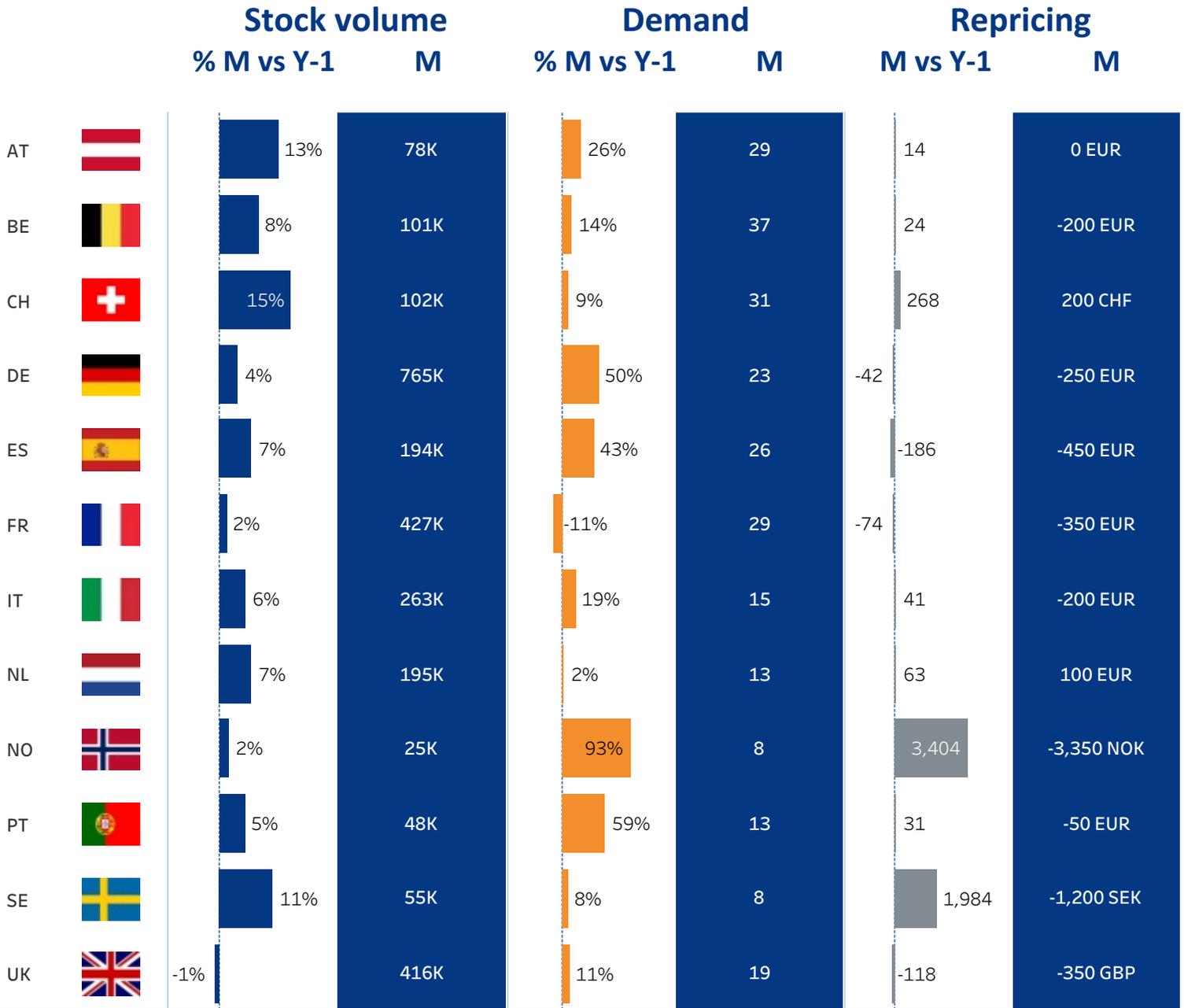
France shows modest stock growth despite limited momentum, reflecting a relatively contained market.

The UK remains an outlier, with declining demand despite moderate stock increases, pointing to short-term imbalance.

Germany and Portugal show healthy demand levels but more moderate stock growth, limiting immediate supply pressure.



# EUROPE OVERVIEW



Germany, Spain and Portugal show strong demand growth, significantly outpacing stock evolution, suggesting tightening supply conditions. Norway stands out with exceptional demand momentum (+93% YoY) combined with limited stock growth, reinforcing supply constraints. Switzerland and Austria display stronger stock increases, indicating rising supply pressure.

On the repricing side, markets such as Spain, France and the UK continue to show negative pricing adjustments, reflecting competitive pressure and the need to stimulate demand.

Conversely, Switzerland and the Netherlands display more stable or slightly positive repricing trends, suggesting better market balance.

Nordic markets (Norway, Sweden) show higher repricing volatility, confirming that demand surges do not automatically translate into pricing power.

## Definition & scope

### Stock Volume



Volume of deduplicated ads observed online with age **≤96 months** and mileage **≤200,000 km** within professional dealer stock.

### Demand Index



Average Google trends on fuel type key words (100 being the maximum of research made in one day since 8 years on one of the energy key words).

### Repricing Index



Delta between all new or updated ad price and autobiz market valuation on a weekly basis. autobiz's valuation being based on the previous week market observation, this KPIs indicated the pricing trends of the new pricing each week - local currency is displayed.

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