NEW

autobiz

BEV BAROMETER

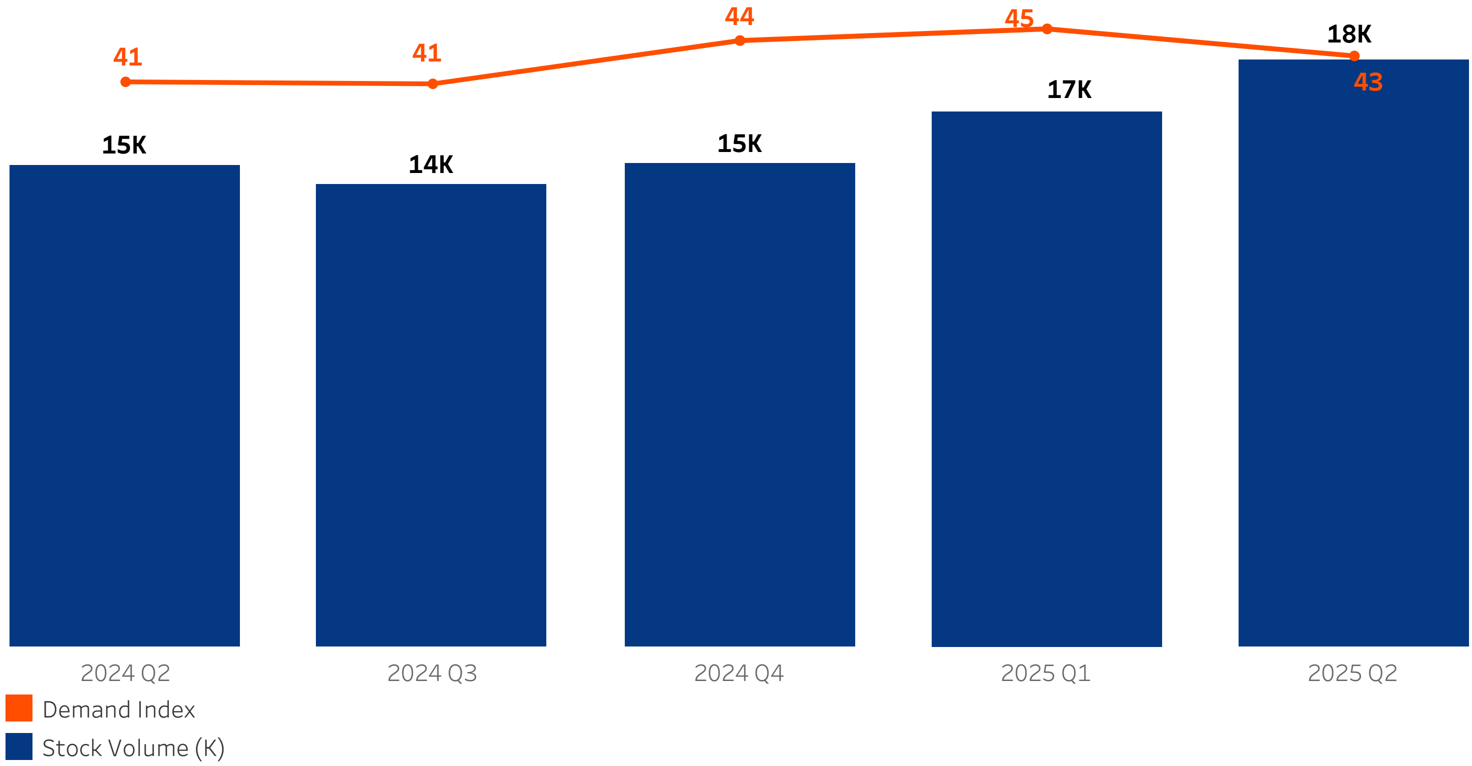
JULY 2025

Quarterly evolution

Stock volumes vs demand index in Europe*

+22%
vs 2024 Q2 in stock volume

+5%
vs 2024 Q2 in demand index

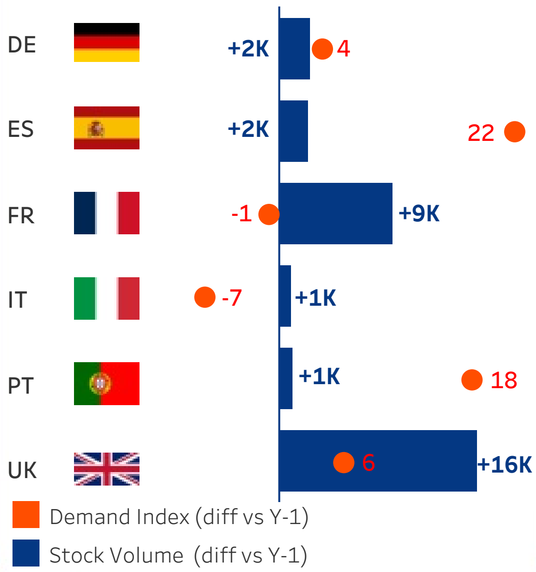


Source: autobiz, BEV only, online professional stock volume vs demand index, Age <8 YO

In Q2 2025, stock volumes increased by an overall +22% compared to Q1 2024, while the demand index showed a more modest improvement.
Among the major European markets, the UK recorded the highest growth in stock volumes, followed by France.

While overall stock availability trended upward, **demand evolved more unevenly**: France and Italy experienced a decline in their demand index, whereas countries like Spain showed a significant increase.

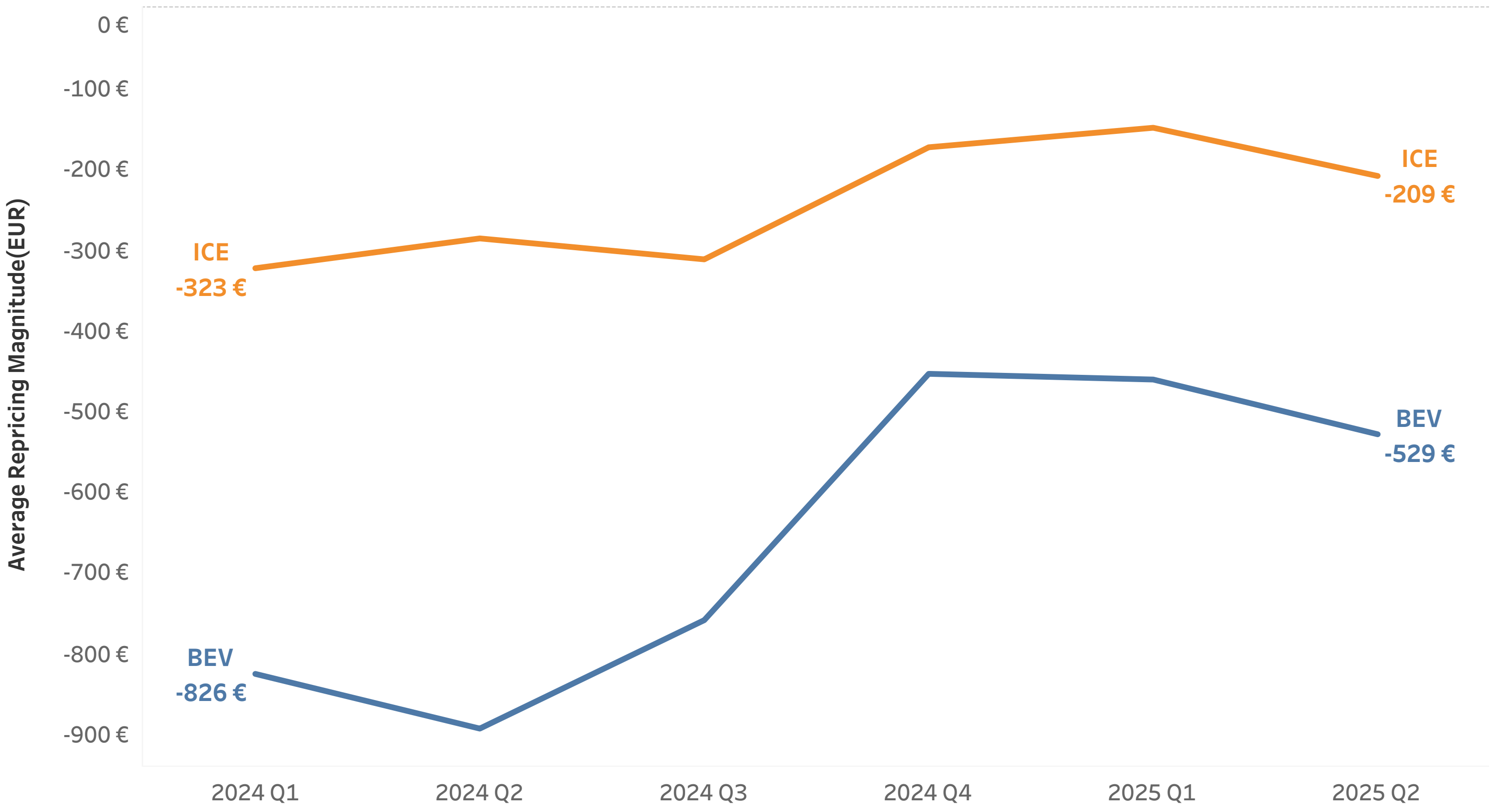
Demand index & stock volume evolution vs Q1 2024



*Definitions of demand index, stock volume, repricing, stock turn and depreciation are available p.5

Quarterly evolution

Repricing*



Source: autobiz, online professional stock volume, DE, ES, FR, IT, PT, UK, age <8 YO

At the European level, the price gap between BEVs and ICE vehicles is gradually narrowing, though it remains substantial.

Across all markets, prices continue to decline, with the steepest drops recorded in France (-€562) and Germany (-€726). This trend underscores the ongoing price correction, likely driven by stock saturation and heightened competitive pressure.

Repricing per country - BEV only

Source: autobiz, online professional stock volume, Age <8 YO

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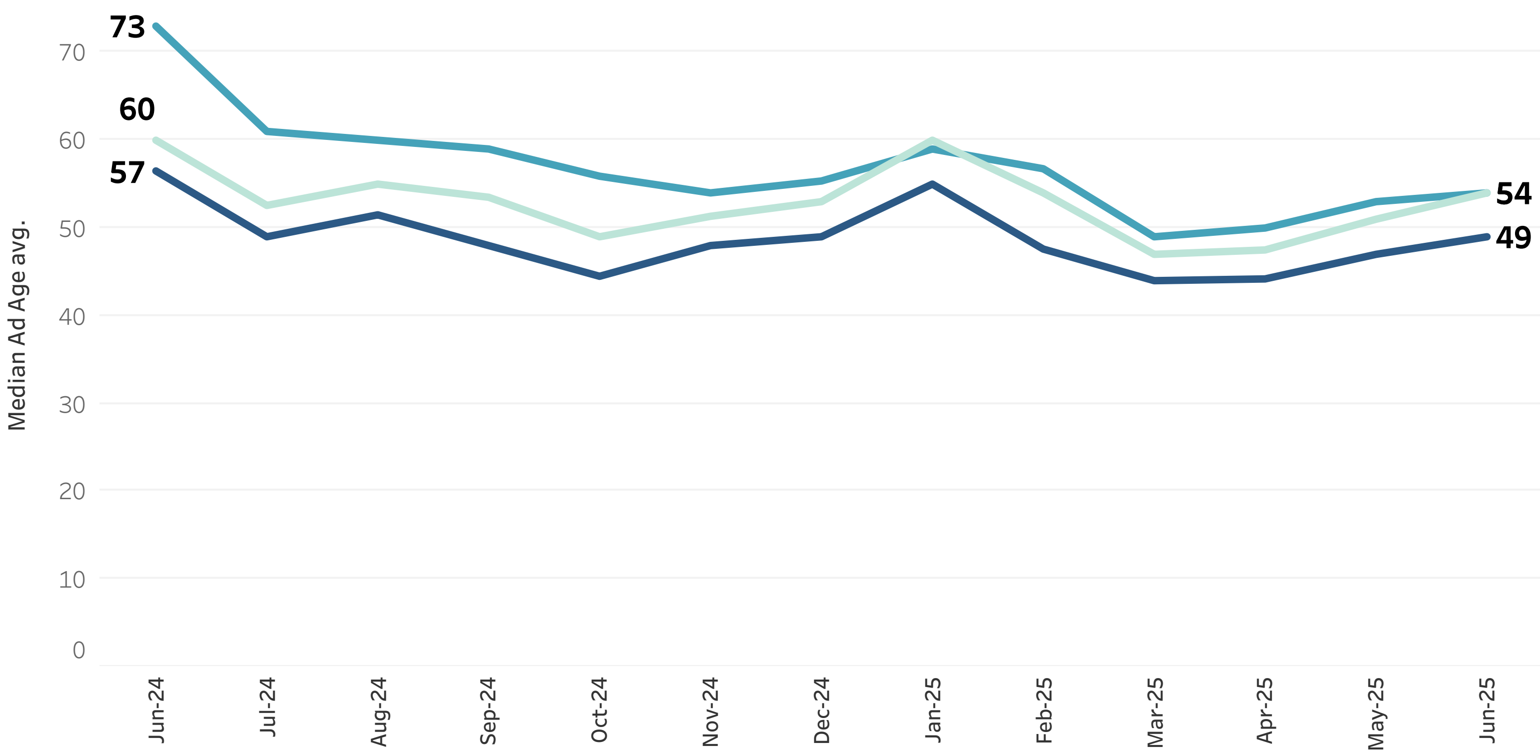
Focus

Brands grouping rotation*

Since June 2024, the overall trend has shown improvement across all segments — mainstream, newcomers, and premium brands.
For **newcomer brands**, the average age of older vehicles has improved about nearly 19 months, highlighting the growing significance of the **new Chinese players** in the automotive market.
While **mainstream and premium brands** have also seen positive developments, the changes have been **less pronounced** compared to those observed amongst newcomers.



Source: autobiz, average ads age, online professional stock volume, Age <8 YO

Brands grouping
Mainstream
Premium
Newcomers

*Definitions of Mainstream, newcomers and premium brands are available p.5

KPIs definition

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 autotibz 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 display..

Stock turn

Stock turn refers to the number of times vehicle inventory is sold and replenished over a specific period, reflecting how efficiently a dealer or brand moves cars off the lot.

Depreciation

Depreciation refers to the **loss of a vehicle's value over time**, primarily due to age, mileage, and market demand.

Mainstream

A mass-market car manufacturer offering **affordable** and **widely available** vehicles for everyday consumers.
Examples: Toyota, Renault, Volkswagen

Newcomers

A **recent market entrant**, often BEV-focused and tech-driven, challenging traditional players with **innovative models** and **direct-to-consumer strategies**.
Examples: Tesla, BYD, NIO

Premium

A brand known for offering **high-end vehicles** with a focus on **design, performance, comfort**, and **advanced technology** — positioned above mainstream brands in terms of price and brand perception.
Examples: BMW, Audi, Mercedes

Contact us

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