

NEW

autobiz

BEV BAROMETER

OCTOBER 2025

Stock volumes vs demand index in Europe

Quarterly evolution

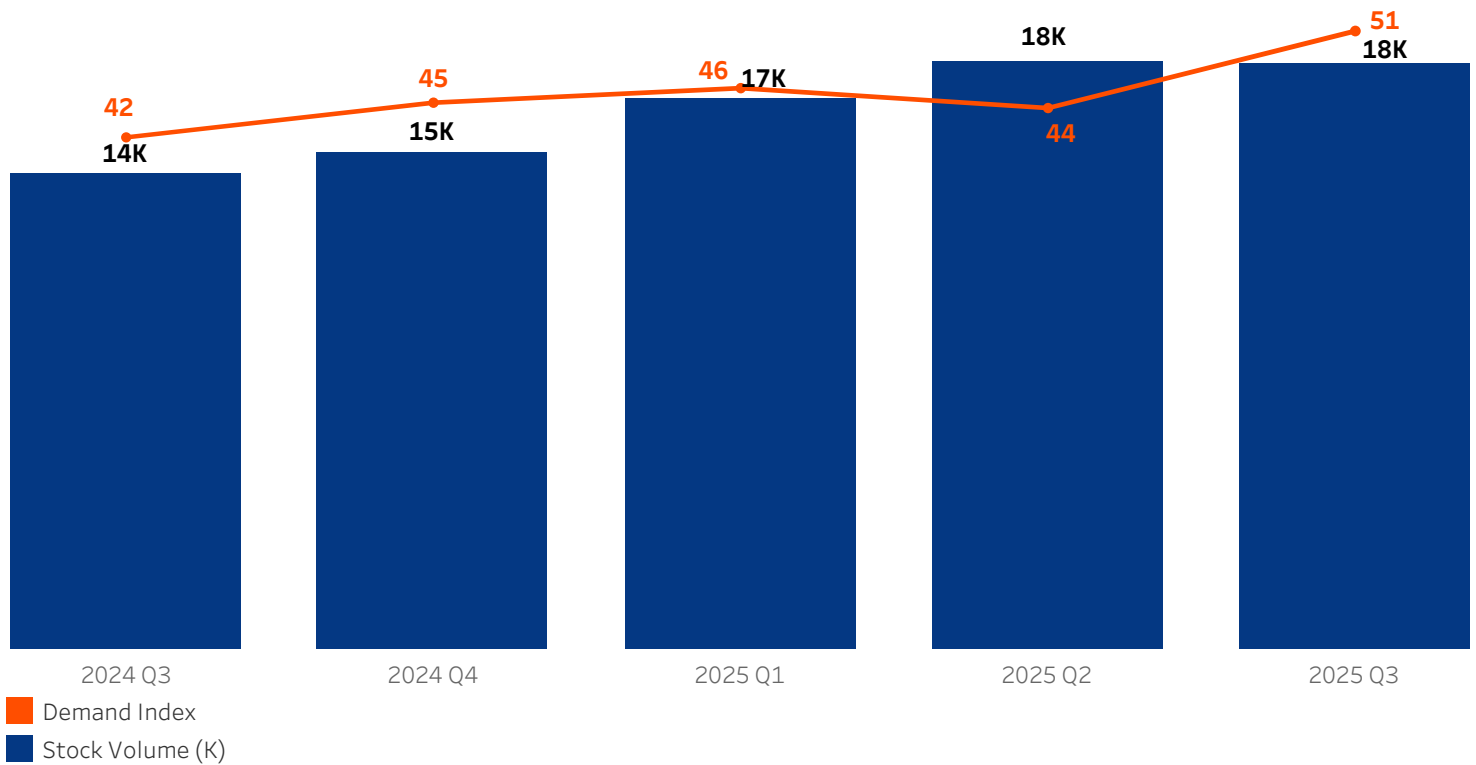


+23%

vs 2024 Q3 in stock volume

+21%

vs 2024 Q3 in demand index



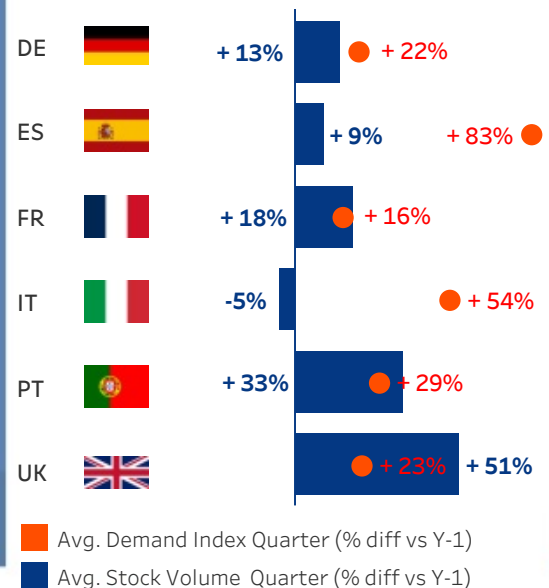
Source: autobiz, BEV only, online professional stock volume vs demand index, Age <8 YO

In Q3 2025, stock volumes rose by a notable **23% compared to Q3 2024**, while the **demand index** also showed positive momentum, albeit with more moderate growth. **Quarter-on-quarter**, stock levels remained **stable**, but the demand index recorded a **significant increase**.

Across major European markets, the **UK** posted the **strongest growth** in stock volumes, followed by **Portugal**, and **France**.

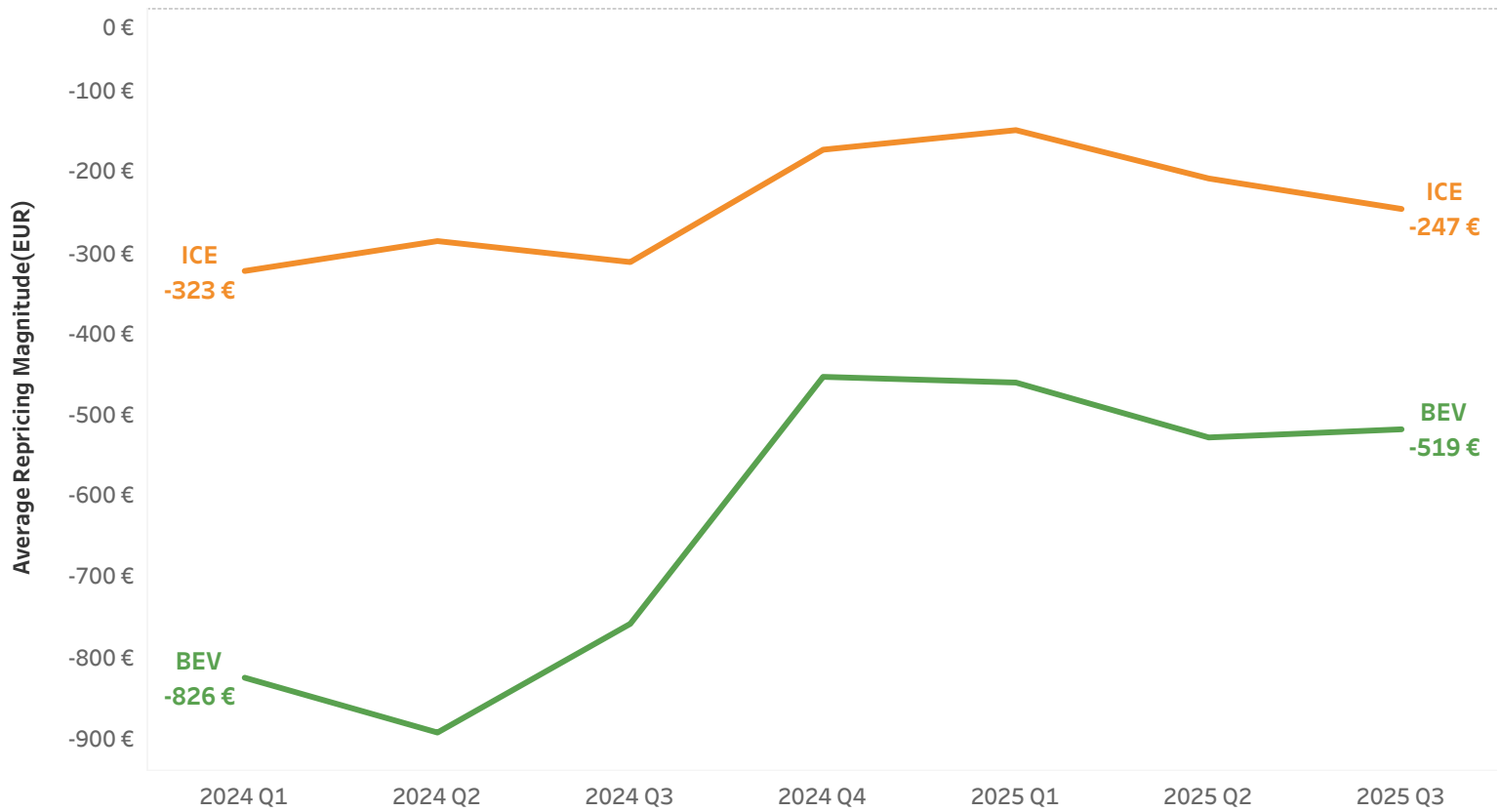
Although **overall stock availability** continued to rise, **with the exception of Italy**, demand dynamics evolved during the quarter: **Spain, Italy, and Portugal** all saw a **substantial increase in their demand index**.

Demand index & stock volume evolution vs Q3 2024



Repricing

Quarterly evolution

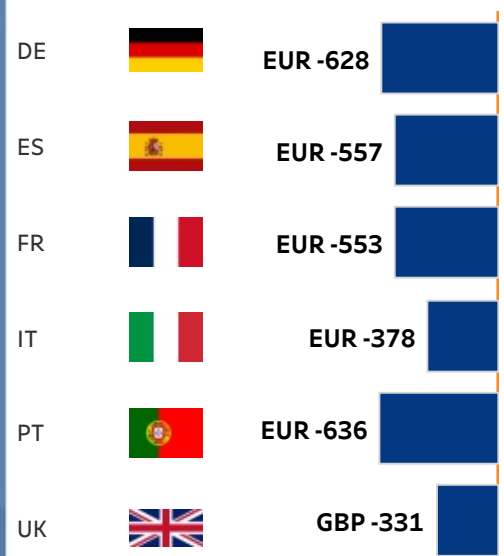


Source: autobiz, online professional stock volume, DE, ES, FR, IT, PT, UK, age <8 YO

At the **European level**, the **price gap** between BEVs and ICE vehicles continues to **narrow gradually**, although it remains **significant**.

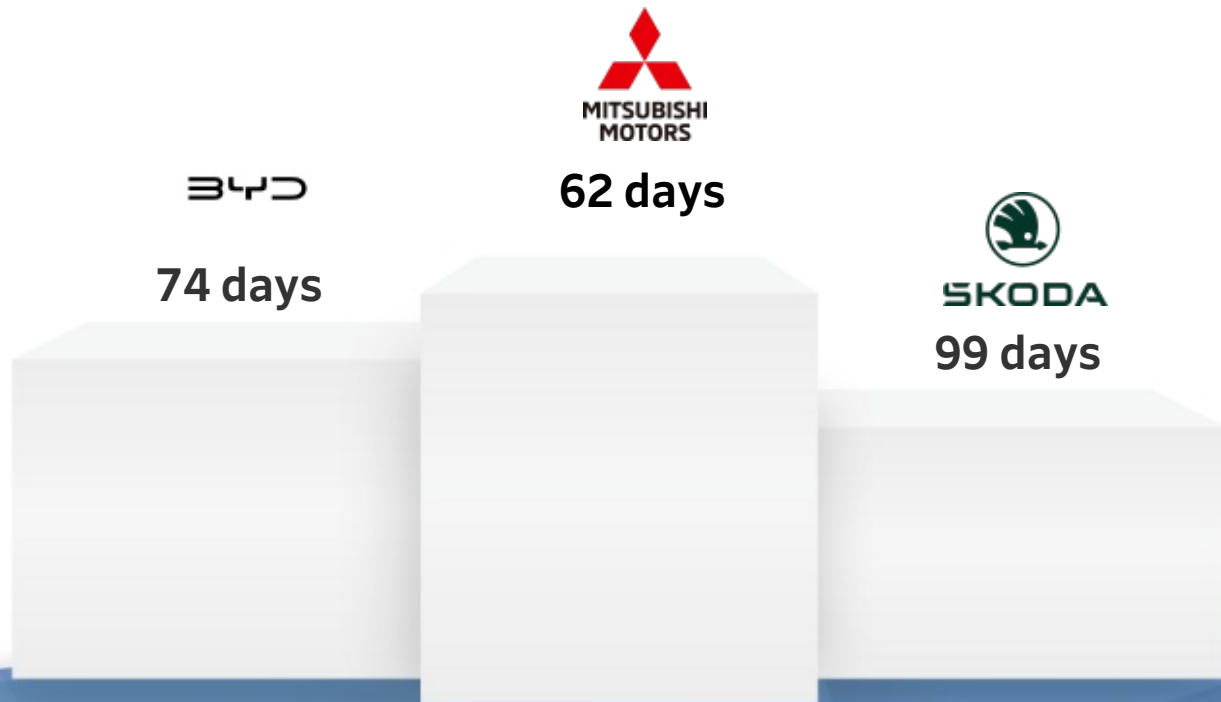
Across all markets, **average prices** are **still declining**, but at a **slower pace**, approaching a point of **stabilization**. The **sharpest decreases** were observed in **Portugal (-€636)** and **Germany (-€628)**. This trend highlights an **ongoing market correction**, likely driven by **high stock levels** and **intensifying competitive pressure**.

Repricing per country - BEV only



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

Stock turn Top 3 brands Q3 2025



Source: autobiz, average Europe, BEV only

In Q3 2025, **Mitsubishi** led the ranking with the fastest turnover, averaging just **62 days**. This could signal a potential brand advantage for players such as the Japanese automaker, which has long focused on hybrid and battery electric vehicles, backed by a well-established expertise in the field.

Following closely, **BYD** recorded an average turnover of **74 days**, underscoring the increasing interest in Chinese brands entering the European market. This trend signals the arrival of new and serious competitors in the BEV segment.

Skoda completed the top three with an average turnover of **99 days**, supported by the strong performance of its new 2025 model.

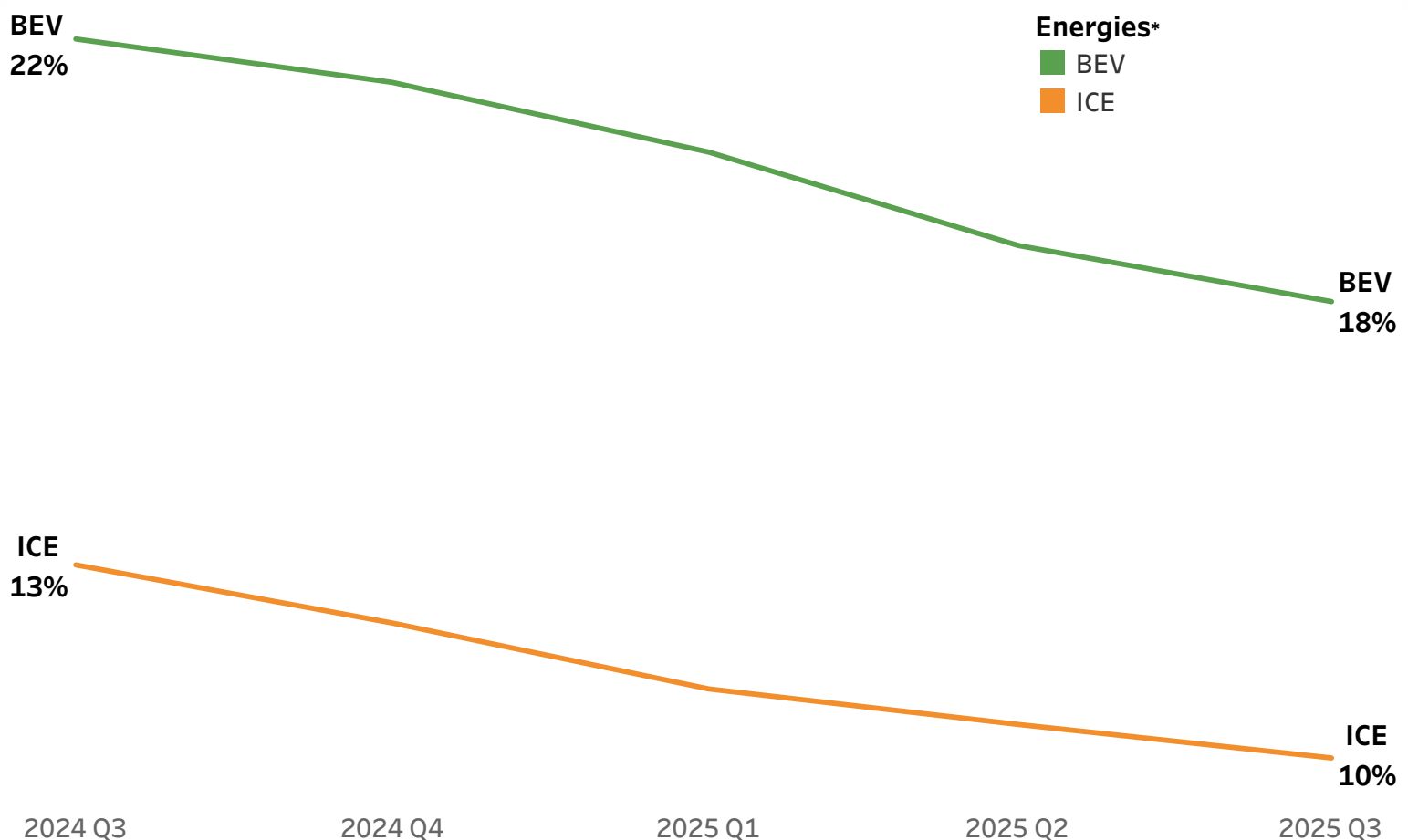
Focus

BEV vs ICE depreciation



During the third quarter of 2025, the depreciation trend continued to show a slight improvement. BEVs recorded an average depreciation of 18%, compared to 10% for ICE vehicles. the depreciation gap has narrowed slightly compared to previous quarters and remains significantly lower than in the same period last year.

This indicates that price adjustments are still underway across the market.



Source: autobiz, online professional stock volume, Age <8 YO
 *Other energies are not included in this graph (PHEV, MHEV, HEV, others)



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 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.

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

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