autobiz

# EUROPEAN USED CAR MARKET BAROMETER

**November 2025**

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

# KEY LEARNINGS

## Global observation

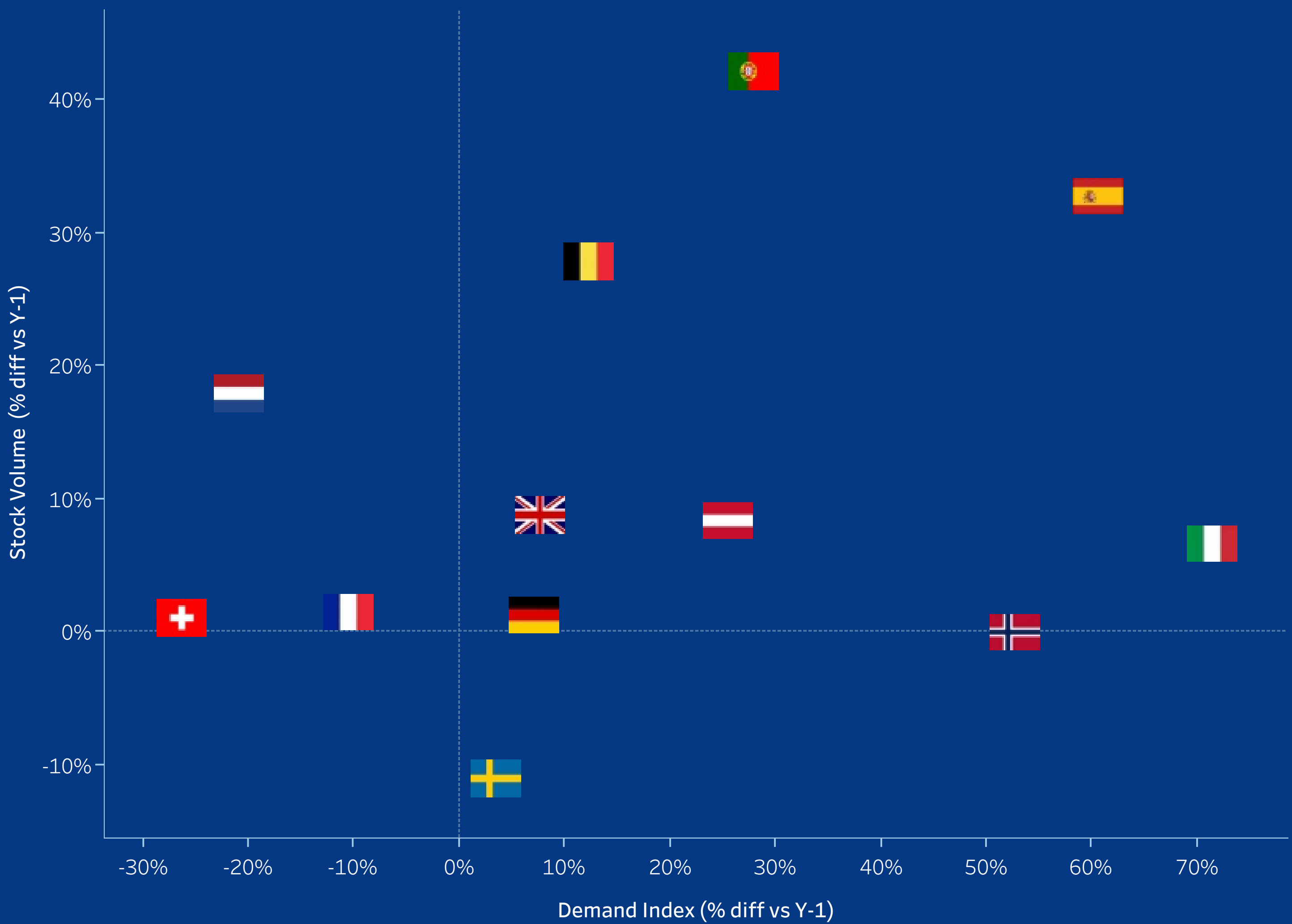
Compared to our Q3 edition, the disparities between countries still tend to widen while overall demand keeps rising.
Thus, 9 countries have experienced a notable increase in demand (up from 8 in our previous edition).

A similar trend apears on the supply side: stock levels are rising in 10 out the 12 countries analysed, compared with only 6 in Q2 2025.

## Country level observation

**France and Switzerland** both experience declining demand while stock levels hold steady.
**Belgium, Spain and Portugal** show strong momentum, with demand and stock rising together.
**Austria, Germany, and the UK** continue to display steady, well-balanced growth across both metrics.
**Norway and Italy** see demand climbing but stock remaining limited or declining, signalling tightening supply conditions.
**Sweden** maintains stable demand, but shrinking stock levels are creating increasing supply pressure.
**Switzerland** shows weakness on both fronts, suggesting a stagnant market.
**The Netherlands** record rising stock volumes while demand continues to fall.

**Austria, Belgium, Switzerland, France, the Netherlands, Sweden and the UK** are all showing positive year-on-year repricing trends, although they still display an overall month-to-month decline.



# EUROPE OVERVIEW

## Top 12 markets

| | Stock volume % M vs Y-1 | Stock volume M | Demand % M vs Y-1 | Demand M | Repricing M vs Y-1 | Repricing M |
|---|---|---|---|---|---|---|
| AT | 8% | 77K | 25% | 23 | 324 | 150 EUR |
| BE | 28% | 94K | 12% | 32 | 162 | -300 EUR |
| CH | 1% | 95K | -26% | 31 | 942 | -200 CHF |
| DE | 1% | 704K | 7% | 24 | -2 | -300 EUR |
| ES | 33% | 209K | 61% | 24 | -106 | -400 EUR |
| FR | 2% | 440K | -11% | 26 | 87 | -400 EUR |
| IT | 7% | 257K | 71% | 14 | -136 | -400 EUR |
| NL | 18% | 207K | -21% | 12 | 299 | 50 EUR |
| NO | 0% | 20K | 53% | 8 | -9,181 | -12,150 NOK |
| PT | 42% | 46K | 28% | 18 | -184 | -300 EUR |
| SE | -11% | 46K | 3% | 7 | 1,165 | -1,950 SEK |
| UK | 9% | 409K | 8% | 18 | 96 | -350 GBP |

# KPIs

## 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

Google Trends

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 displayed.

# autobiz

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