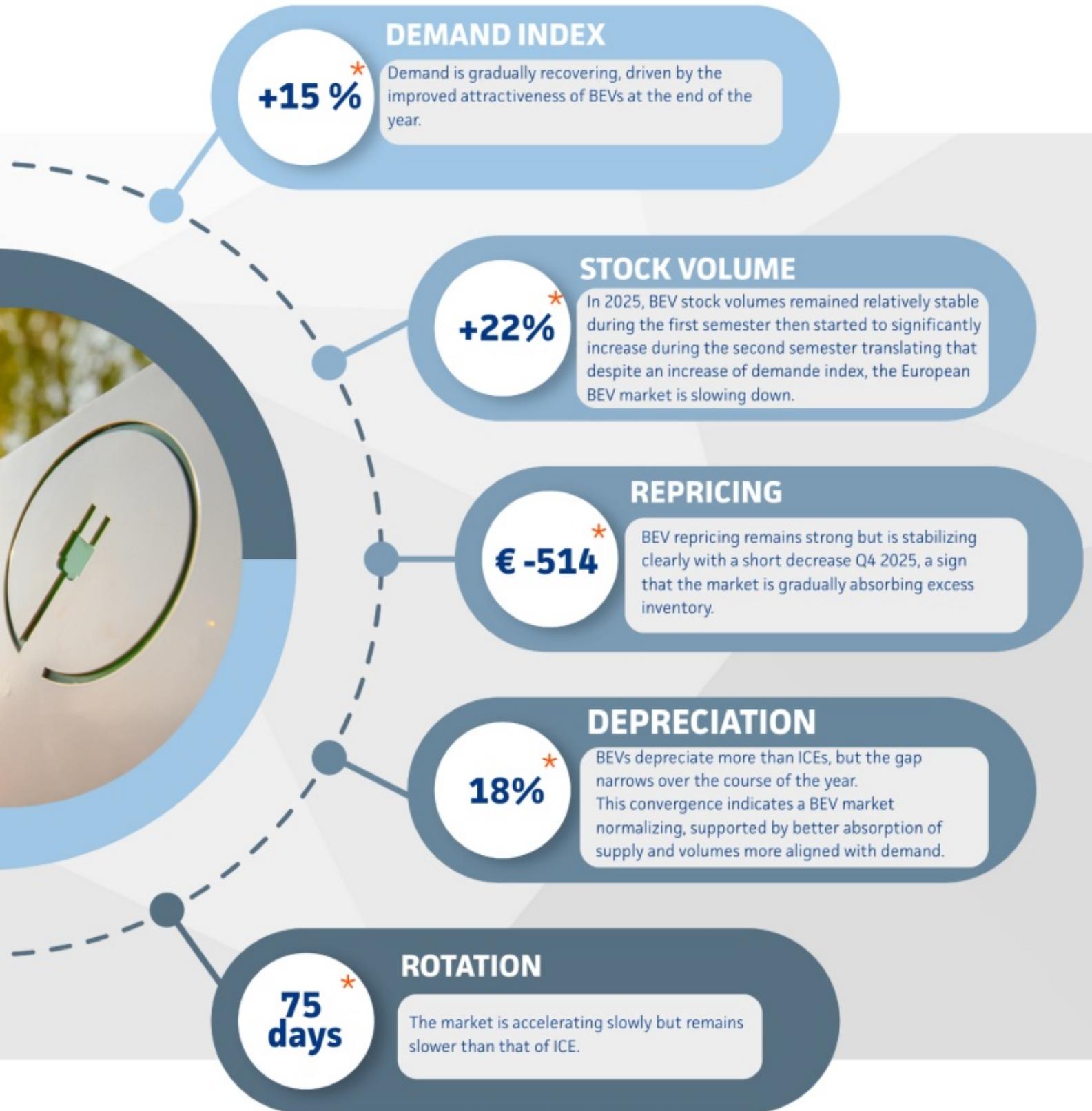


NEW

autobiz

BEV BAROMETER

DECEMBER 2025



*2025 monthly average

Stock volumes vs demand index in Europe

Quarterly evolution

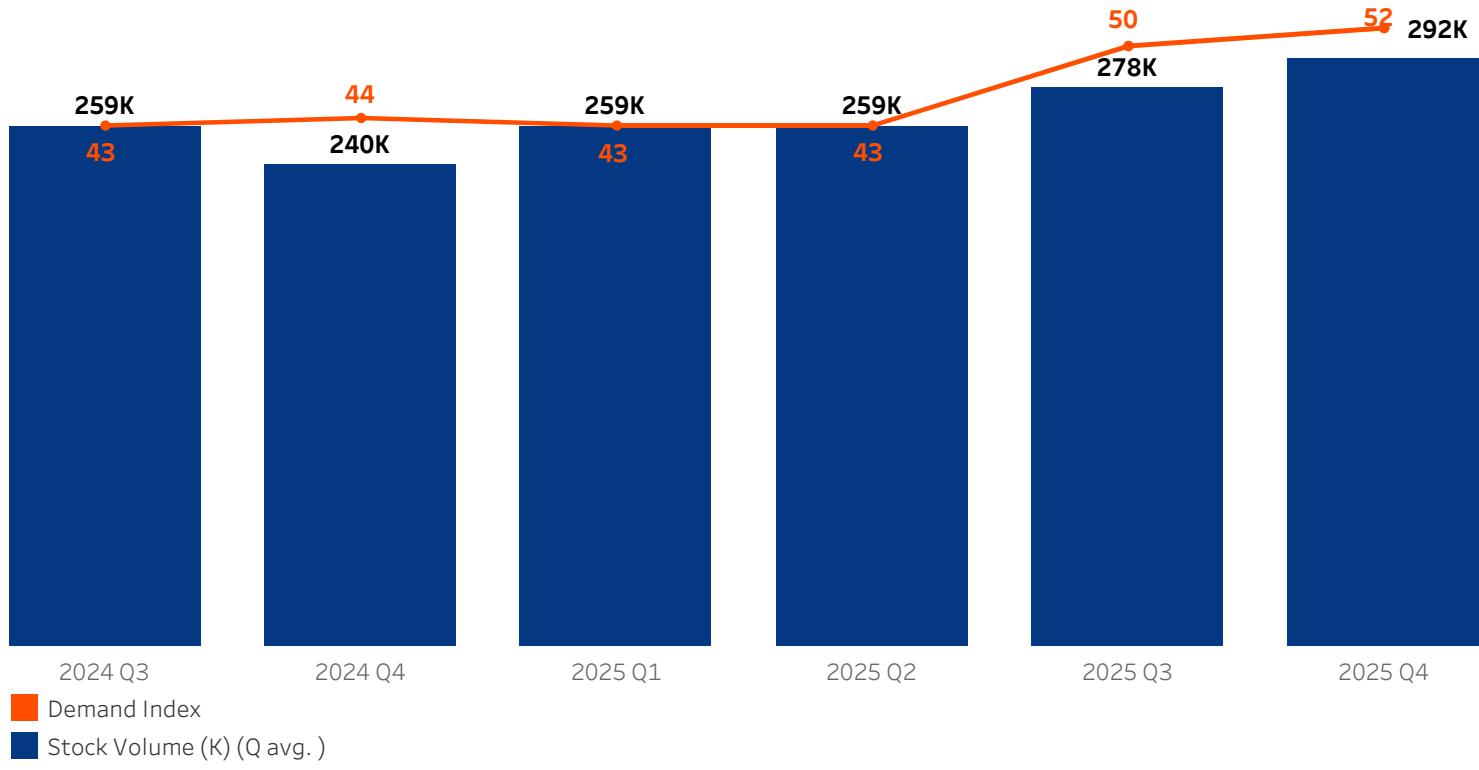


+22%

vs 2024 Q4 in stock volume

+18%

vs 2024 Q4 in demand index



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

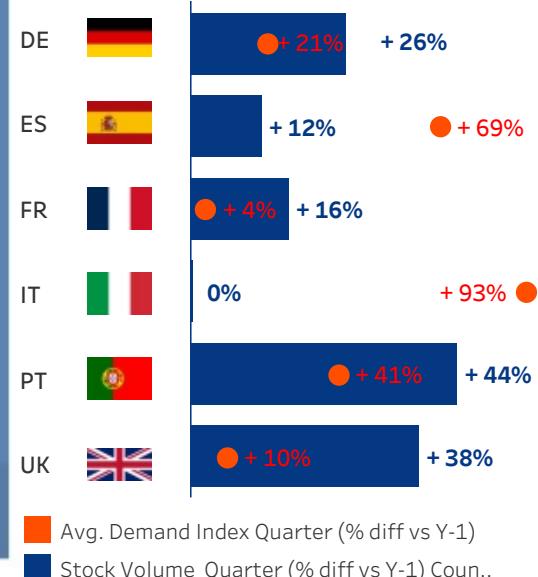
In 2025, stock volumes steadily increased, peaking in Q4, while demand strengthened significantly from mid-year onward, pointing to a more active and better-balanced market by year-end.

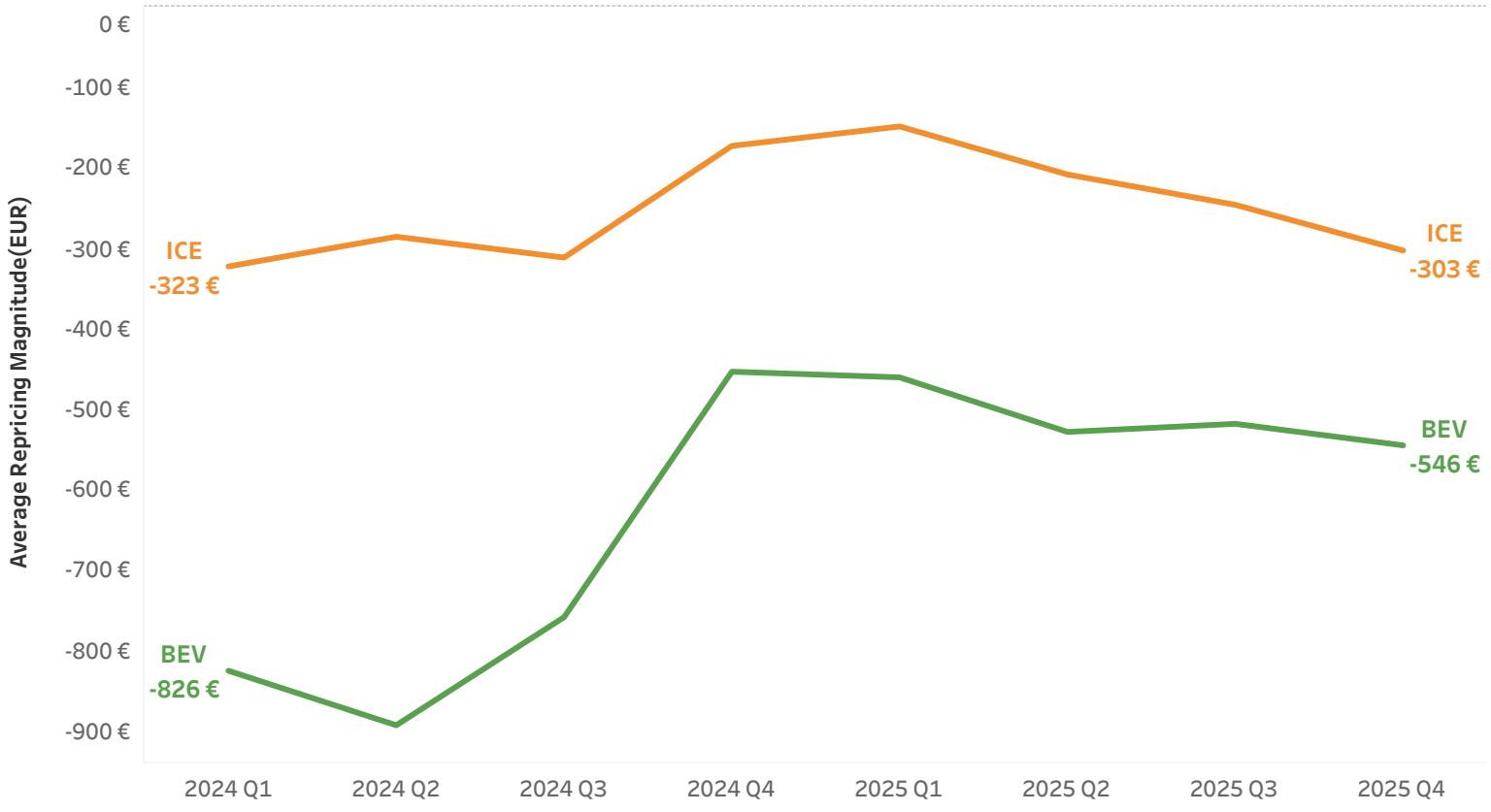
Portugal and the UK show strong stock growth (+44% and +38% respectively), with demand rising sharply in Portugal (+41%) and more moderately in the UK (+10%).

In Germany, both demand and stock increase at a similar pace (+21% and +26%), indicating balanced market dynamics. France and Spain also record rising stock levels, but demand diverges: Spain posts a sharp increase (+69%), while France shows more modest growth (+4%), reflecting a slower and more cautious normalization.

Italy stands out with exceptionally strong demand growth (+93%), pointing to a rapid market rebound, while stock levels remain stable (0%).

Demand index & stock volume evolution vs Q4 2024





After a period of moderate decline, BEV repricing trends across Europe showed signs of stabilization during the second half of 2025. ICE models experienced a gradual decrease, with price narrowing from -173€ to -303€ by Q4 2025.

BEVs, still facing deeper discounts, declined from -454€ to -546€ over the year, with renewed downward pressure emerging toward year-end, underlining ongoing market volatility and persistent supply-demand imbalances.

Repricing for BEVs remains negative across major European markets, but the intensity varies significantly by country. **France (-678€)** and **Spain (-669€)** show the strongest downward adjustments, indicating higher pricing pressure and slower market absorption of used BEVs. **Germany (-566€)** also faces notable repricing, though slightly less severe.

In contrast, **Italy (-485€)** and particularly **Portugal (-374€)** display more moderate price corrections, suggesting healthier market conditions or better alignment between supply and demand. The **UK (-519 GBP)** sits in the middle range, reflecting a market still adjusting but less strained than France and Spain.

Repricing per country - BEV only



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

Stock turn

Top 3 brands

Q3 2025



99 days



62 days



102 days

Source: autobiz, average Europe, BEV only

In Q4 2025, Mitsubishi continues to lead the ranking with the fastest turnover, averaging just **62 days**. This performance may reflect a competitive edge, supported by the brand's long-standing focus on hybrid and battery electric vehicles and its strong expertise in this area.

Skoda follows with an average turnover of **99 days**, driven by the strong performance of its new 2025 model. Close behind, **Cupra** rounds out the top three this quarter, posting an average turnover of **102 days**.



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

Contact us



Bertrand CHATAING
Chief Sales & Development Officer
+33 (0)7 60 51 98 67
b.chataing@autobiz.com

Georges-Olivier CHAUMEIL
International Key Account Manager
+33 (0)6 68 85 49 13
go.chaumeil@autobiz.com

