

NEW

autobiz

BEV BAROMETER

DECEMBER 2025

DEMAND INDEX

+15 %*

Demand is gradually recovering, driven by the improved attractiveness of BEVs at the end of the year.

STOCK VOLUME

+22 %*

In 2025, BEV stock volumes remained relatively stable during the first semester then started to significantly increase during the second semester translating that despite an increase of demand index, the European BEV market is slowing down.

REPRICING

€ -514*

BEV repricing remains strong but is stabilizing clearly with a short decrease Q4 2025, a sign that the market is gradually absorbing excess inventory.

DEPRECIATION

18 %*

BEVs depreciate more than ICEs, but the gap narrows over the course of the year. This convergence indicates a BEV market normalizing, supported by better absorption of supply and volumes more aligned with demand.

ROTATION

75 days*

The market is accelerating slowly but remains slower than that of ICE.

*2025 monthly average

Stock volumes vs demand index in Europe

Quarterly evolution

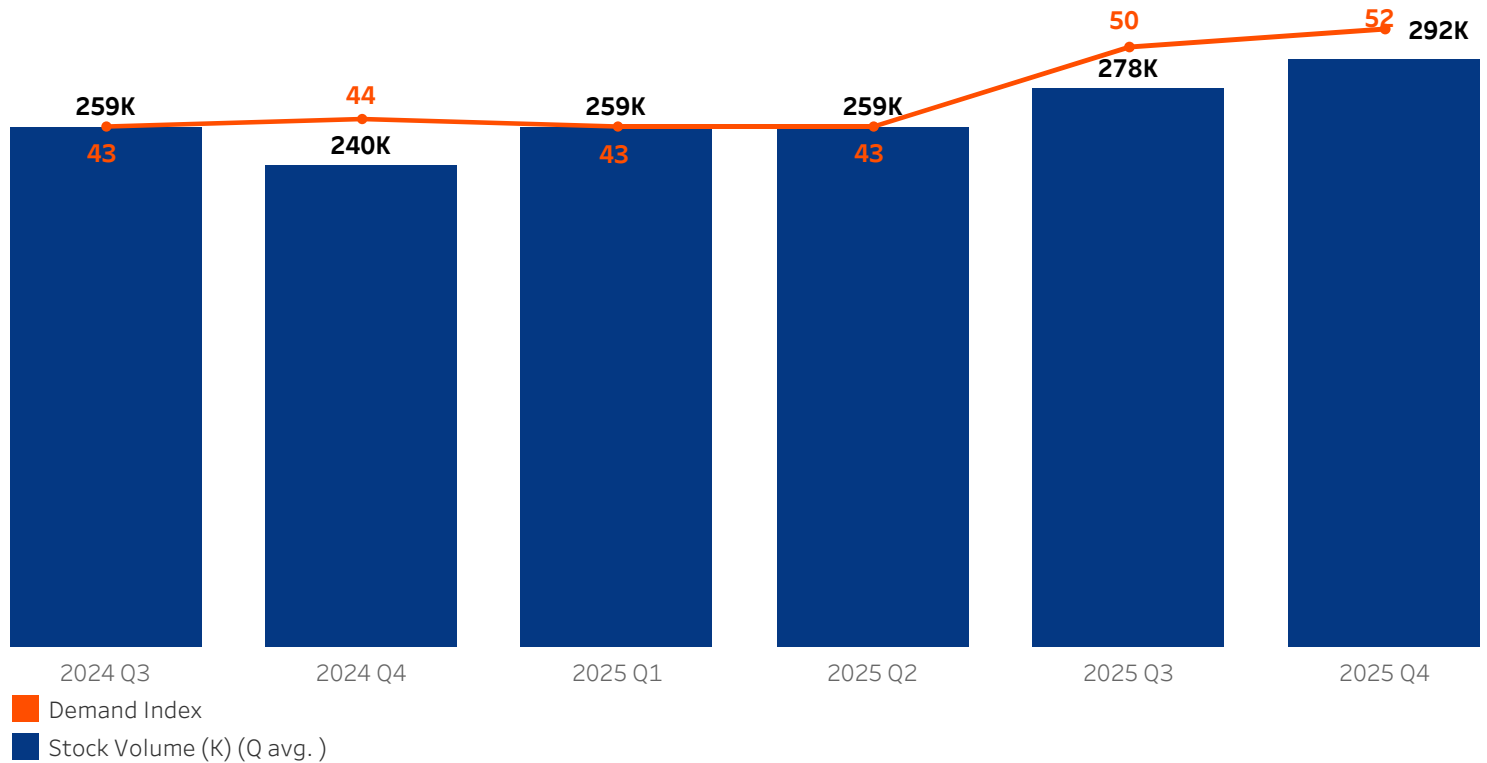


+22%

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

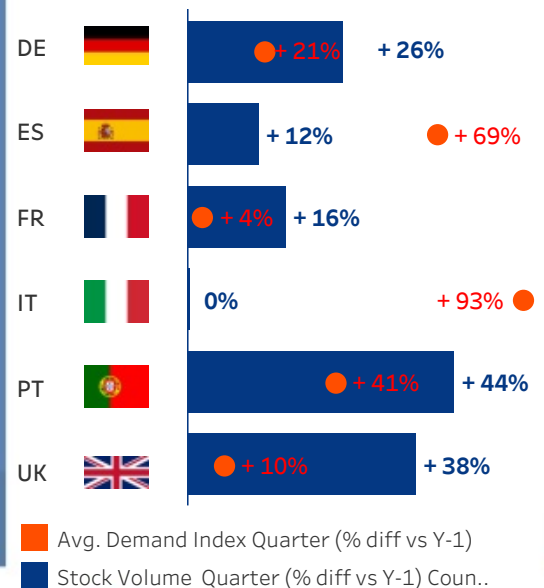
In 2025, stock volumes steadily increased, peaking in Q4, while demand strengthened significantly from mid-year onward, pointing to a more active and better-balanced market by year-end.

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.

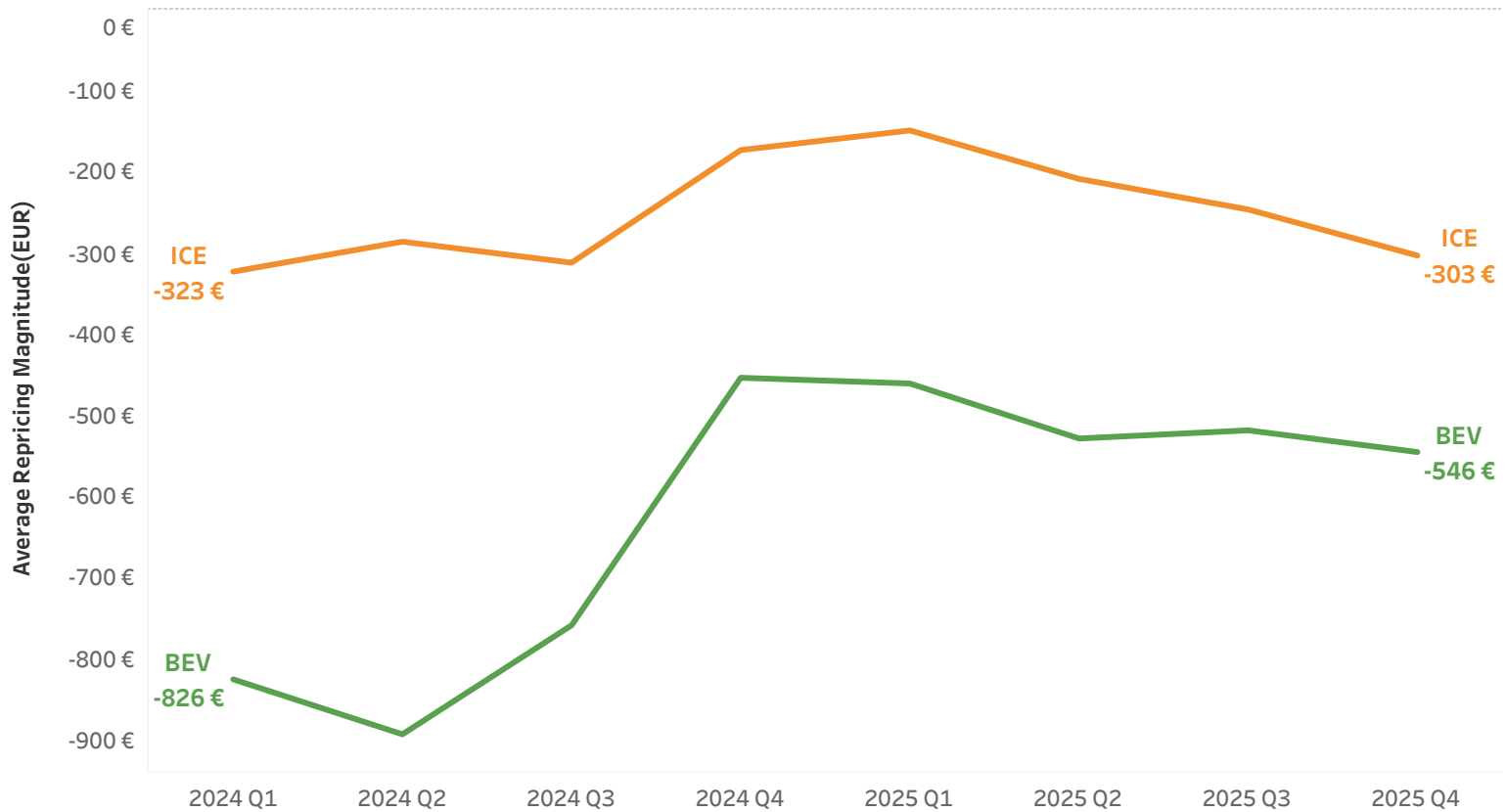
Italy stands out with exceptionally strong demand growth (+93%), pointing to a rapid market rebound, while stock levels remain stable (0%).

Demand index & stock volume evolution vs Q4 2024



Repricing

Quarterly evolution



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

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.

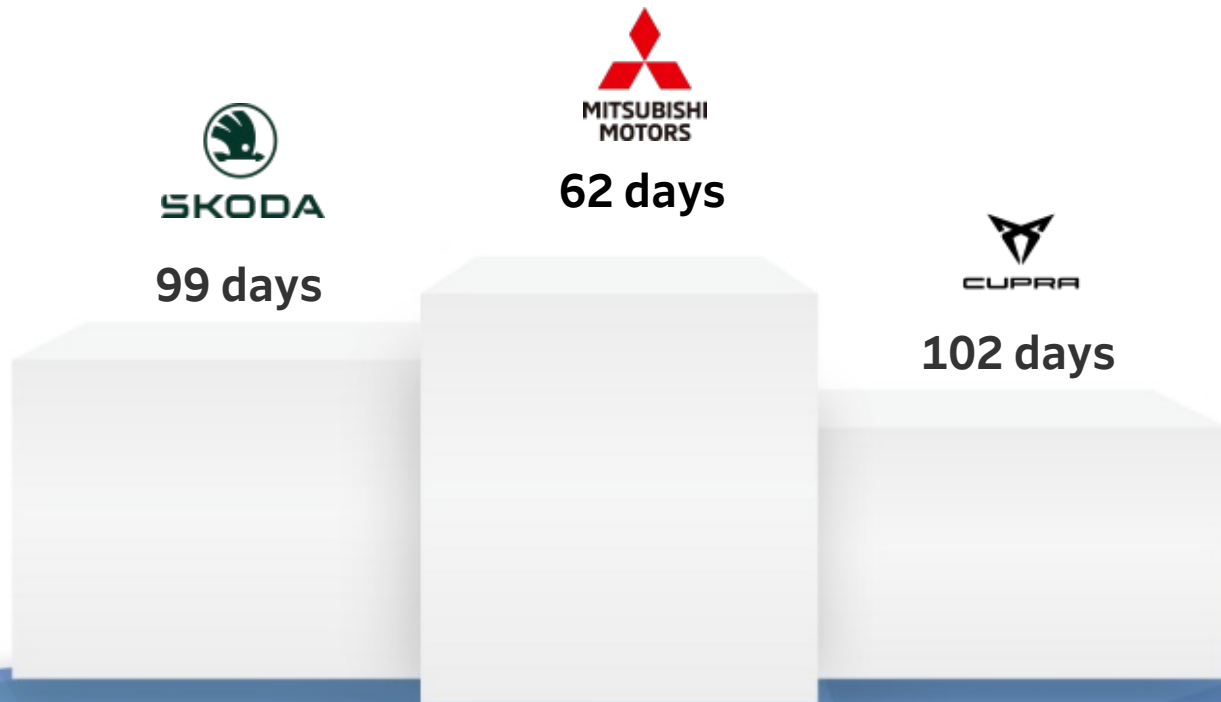
In contrast, **Italy (-485€)** and particularly **Portugal (-374€)** display more moderate price corrections, suggesting healthier market conditions or better alignment between supply and demand. The **UK (-519 GBP)** sits in the middle range, reflecting a market still adjusting but less strained than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

Repricing per country - BEV only



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

Stock turn Top 3 brands Q3 2025



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

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