

NEW

autobiz

BEV BAROMETER

APRIL 2026

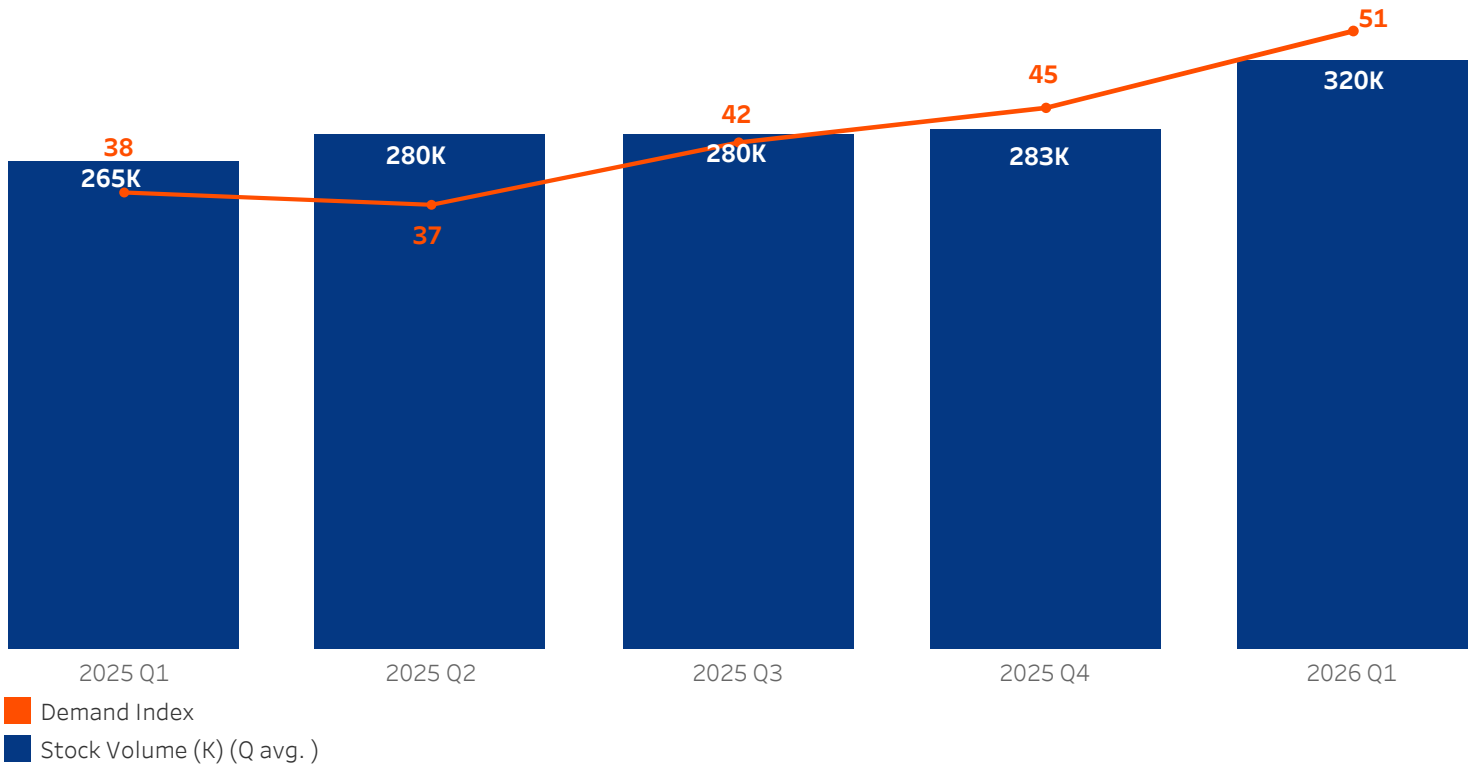
(Data for Q1 2026)

Stock volumes vs demand index in Europe

Quarterly evolution



+21% vs 2025 Q1 in stock volume  **+26%** vs 2025 Q1 in demand index 



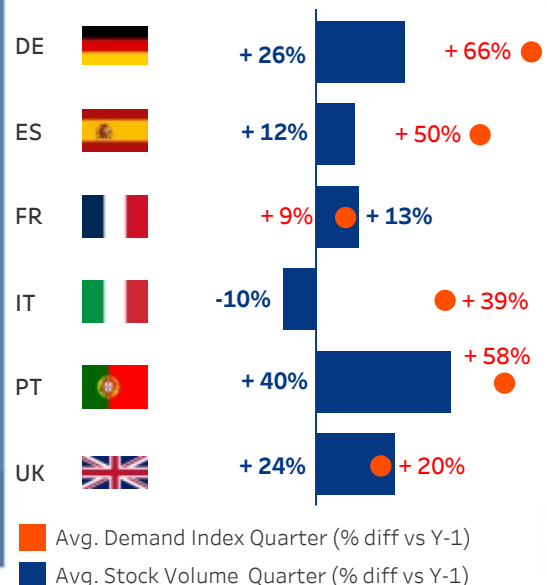
Source: autobiz, BEV only, online professional stock volume vs demand index, Age <8 YO

In Q1 2026, stock volumes rose by a notable **21% compared to Q1 2025**, while the **demand index** also showed positive momentum. **Quarter-on-quarter**, stock levels remained increased a lot beginning of 2026, alongside with the demand index.

Across major European markets, **Portugal** posted the **strongest growth** in stock volumes, followed by **Germany**, and the **United-Kingdom**.

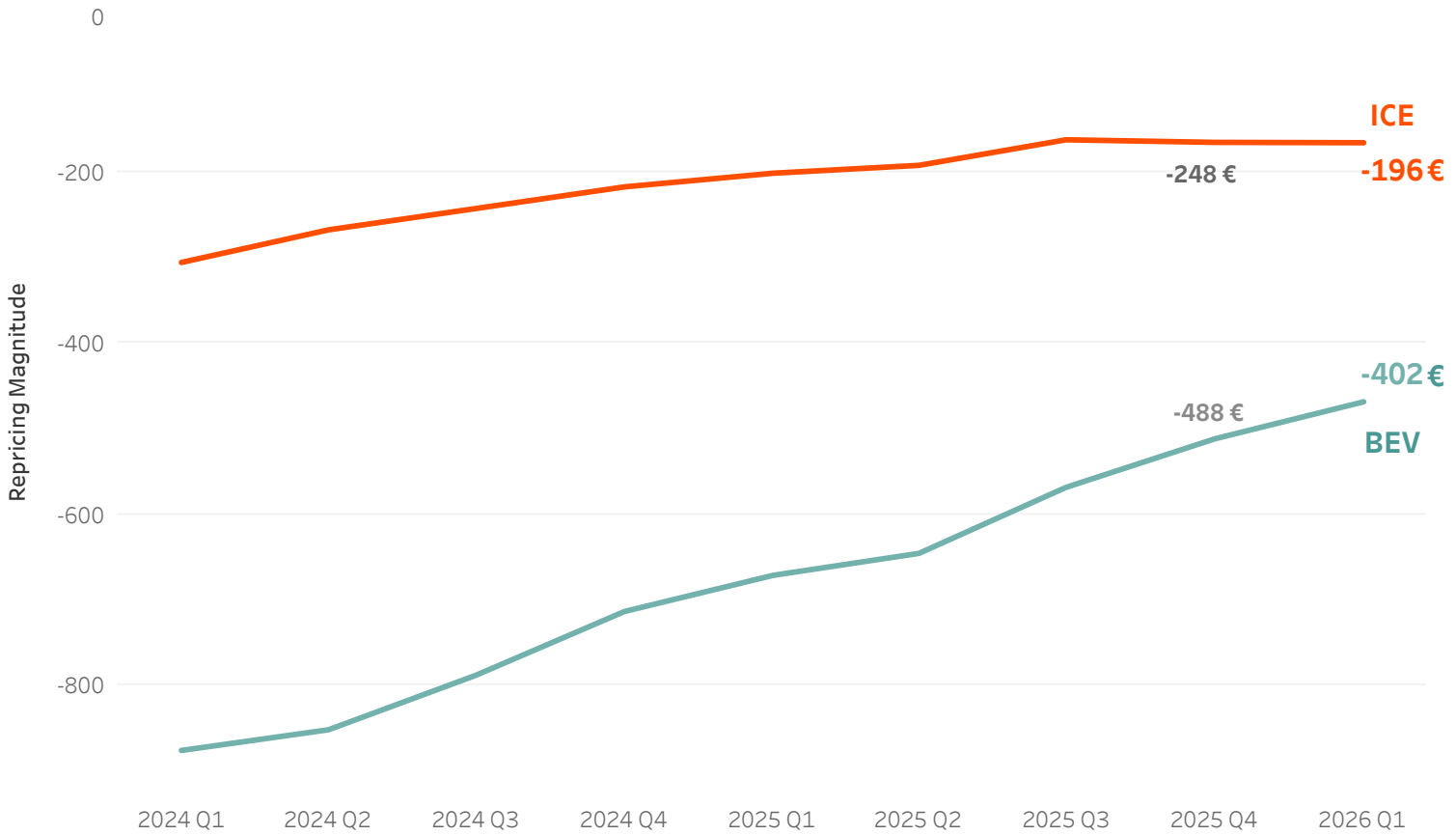
Although **overall stock availability** continued to rise, with the exception of **Italy**, demand dynamics evolved during the quarter: **Spain, Italy, and Portugal** all saw a **substantial increase in their demand index**.

Demand index & stock volume evolution vs Q1 2025



Repricing

Quarterly evolution



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

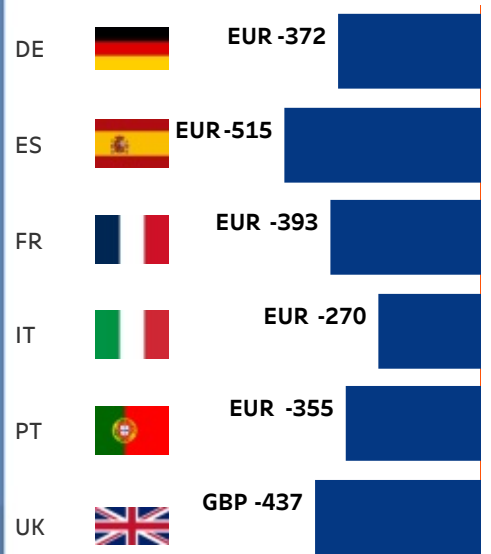
At the European level, the price gap between BEVs and ICE vehicles continues to narrow in terms of **actual market prices**, although it remains significant.

The sharper convergence observed in Q1 2026 mainly reflects **repricing dynamics**, indicating faster price adjustments for BEVs rather than a direct reduction of the underlying price gap.

Across all markets, **average prices are still declining**, but at a **slower pace**, approaching a point of **stabilization**.

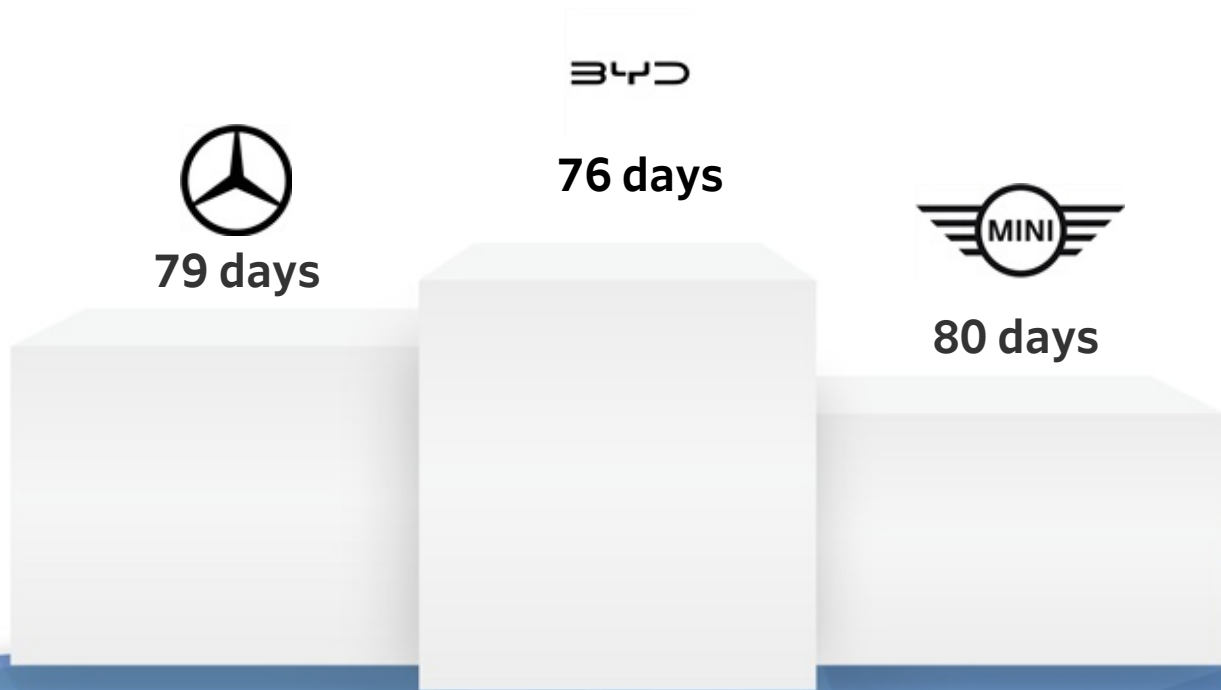
The **sharpest decreases** were observed in **Spain (-515€)** and in the **UK**. This trend highlights an **ongoing market correction**, impacted by the recent conflicts that emerged.

Repricing per country - BEV only



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

Stock turn Top 3 brands Q1 2026



Source: autobiz, average Europe, BEV only

During Q1 2026 BYD led the ranking, achieving the fastest time to sell, reflecting strong market traction and growing demand for its models in Europe.

Following closely, Mercedes recorded an average turnover of 79 days, supported by its strong brand positioning and a well-balanced product offering.

Finally, Mini secured third place on the podium with 80 days, benefiting from a strong brand appeal and consistently high demand despite slightly longer stock turnover.

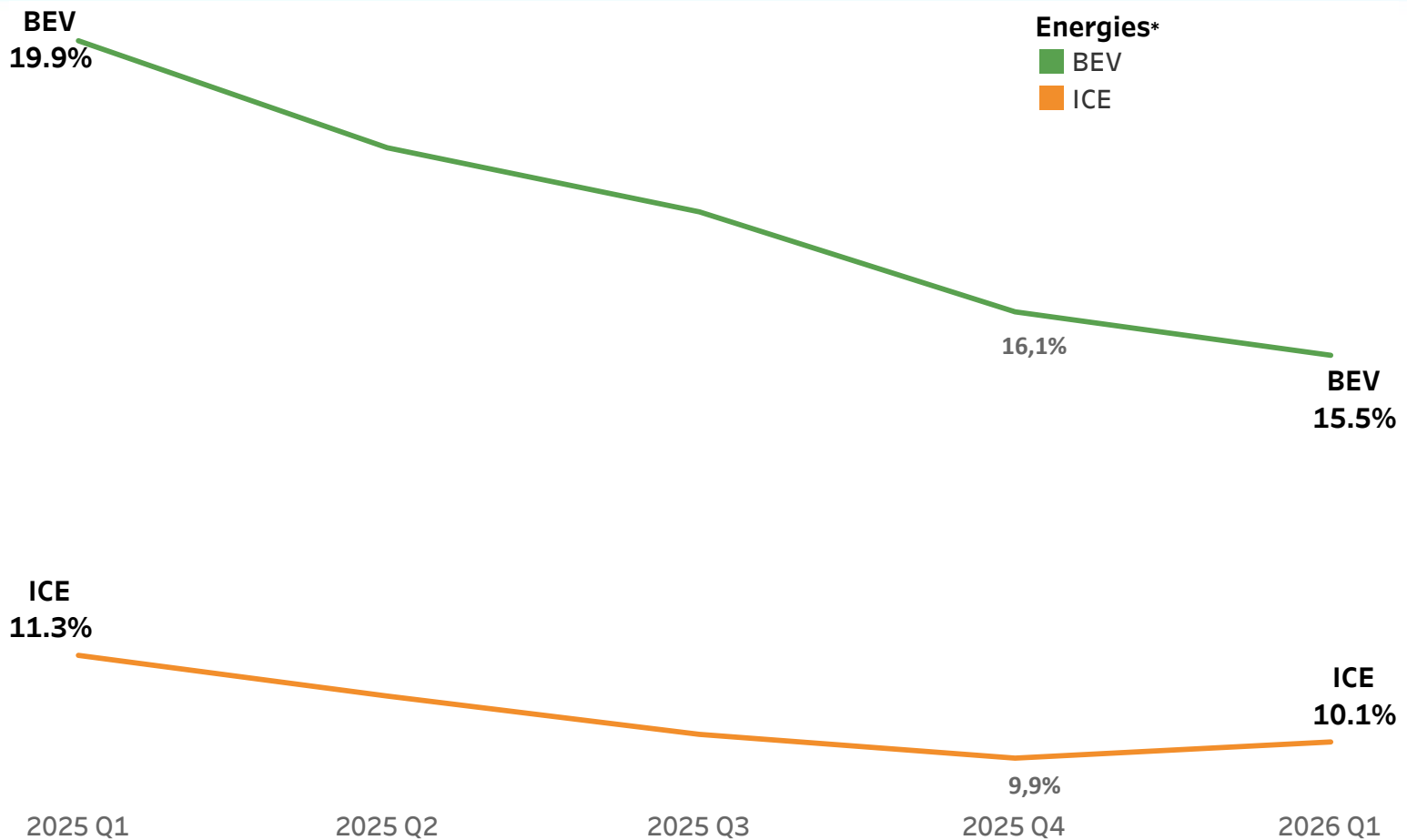
Focus

BEV vs ICE depreciation



During the first quarter of 2026, the depreciation trend continued to show a slight improvement. BEVs recorded an average depreciation of 16%, compared to 10% for ICE vehicles. The depreciation gap has narrowed compared to previous quarters and remains significantly lower than in the same period last year. ICE cars are knowing a slight increase of depreciation but remains below 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.

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