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EUROPEAN USED CAR MARKET BAROMETER

MAY 2026

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

KEY LEARNINGS

Global observation

European market dispersion is widening further, with demand softening in some countries while stock levels continue to rise in others. This growing imbalance is increasing pressure on professionals to sell vehicles and may lead to stronger price reductions. At the same time, the current geopolitical environment is accelerating shifts in consumer behaviour and supporting stronger interest in BEVs across several markets.

Country level observation

Portugal continues to stand out with the strongest demand momentum, supporting a tighter market environment despite limited stock growth, leading potentially to a high imbalance. Belgium also shows strong demand, although rising stock levels suggest a more balanced market situation.
Austria, Switzerland and Spain all record stock increases while demand remains quite steady, indicating that additional supply is still being absorbed without creating major pricing pressure. France and Germany remain comparatively stable, with moderate stock growth and relatively balanced market conditions.
By contrast, Italy, the Netherlands, Sweden and Norway continue to face supply constraints, with declining stocks. The UK remains the clearest outlier, showing the sharpest stock contraction in the panel and pointing to a more pressured and less replenished market environment.

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EUROPE OVERVIEW

	Stock volume		Demand		Repricing	
	% M vs Y-1	M	% M vs Y-1	M	M vs Y-1	M
AT	14%	80K	-6%	19	56	150 EUR
BE	17%	110K	33%	10	-26	-150 EUR
CH	11%	98K	-11%	23	116	-450 CHF
DE	1%	733K	8%	20	-52	-350 EUR
ES	9%	219K	-24%	20	-49	-250 EUR
FR	4%	456K	4%	13	116	-250 EUR
IT	-9%	261K	-24%	13	-228	-500 EUR
NL	-10%	190K	-4%	11	119	-100 EUR
NO	-6%	24K	-37%	7	-206	-3,400 NOK
PT	10%	48K	89%	10	-59	-400 EUR
SE	-10%	47K	29%	7	2,718	400 SEK
UK	-16%	383K	-5%	16	-162	-350 GBP

Compared with Q1 2026, Q2 repricing trends reveal a more polarized picture across Europe.
Austria, France, Sweden, Switzerland and the Netherlands all recorded positive repricing levels in Q2, suggesting that professionals are expecting a more supportive market environment in which used cars can be sold more easily.
By contrast, Italy and Portugal declined over the quarter. Germany, Norway, Spain and the UK also remained in negative territory, with no major shift compared with the previous quarter, reflecting more difficult market conditions and continued reliance on promotions and price adjustments to sustain transactions.
Overall, Q2 confirms increasingly fragmented repricing dynamics across Europe, reflecting diverging market expectations and different levels of pricing pressure from one country to another.

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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.

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