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EUROPEAN USED CAR MARKET BAROMETER

October 2026

Stock availability keeps improving across Europe, while demand and repricing diverge sharply from one market to another.

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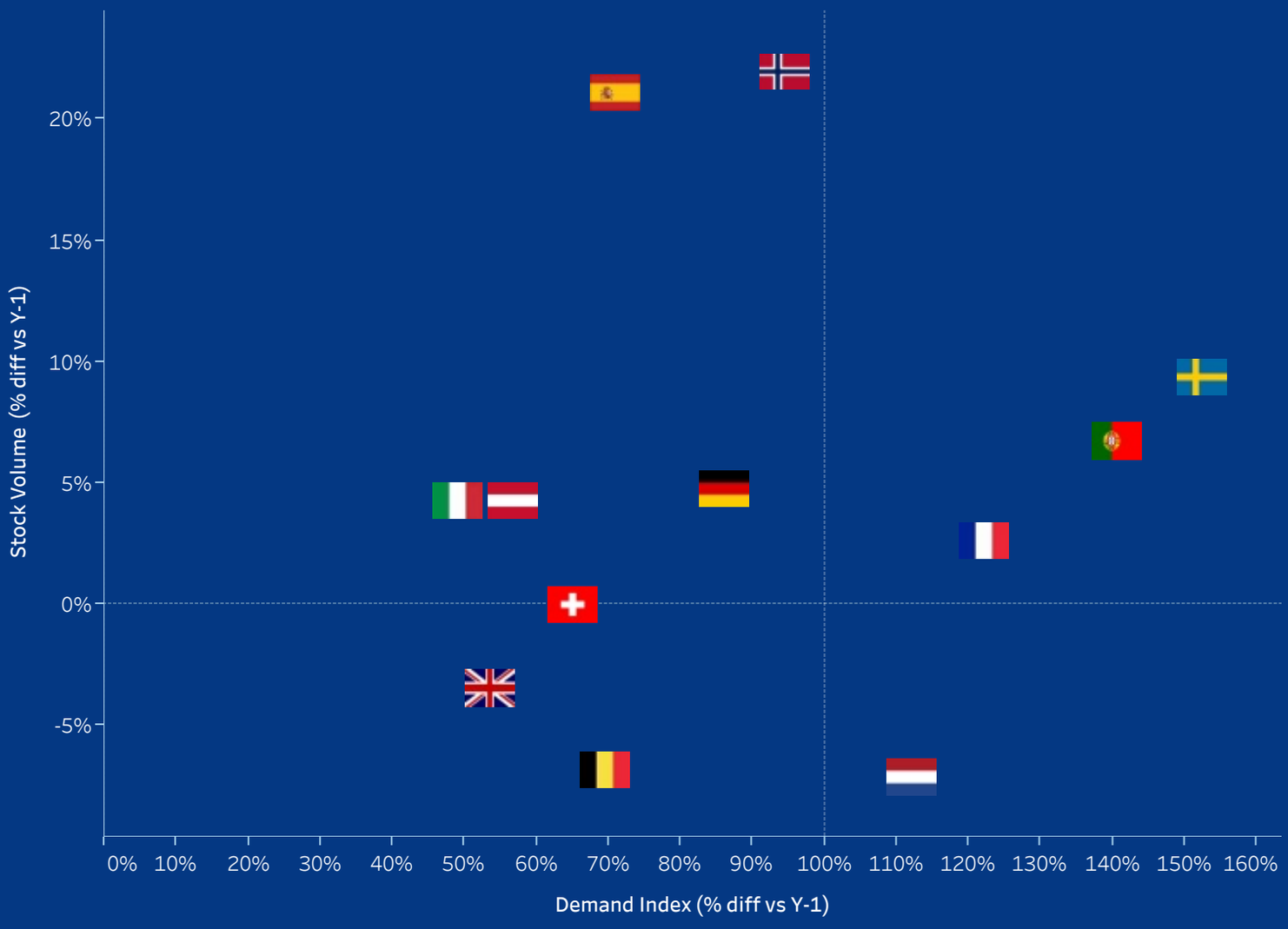
KEY LEARNINGS

Global observation

Compared with last year, European markets remain highly polarised. Demand is below last year's level in most countries, while stock levels are higher in the majority of markets. This growing gap between supply and demand is increasing pressure on professionals to sell vehicles, particularly where stocks are rising fastest. Only a small group of markets, led by Sweden and Portugal, combine strong demand with moderate stock growth.

Country level observation

Sweden and Portugal stand out with the strongest demand compared with last year, while stock growth remains moderate, pointing to a tighter market environment. France shows a similar but more balanced profile. The Netherlands is the only market combining higher demand with declining stocks, suggesting supply constraints.
Norway and Spain record the strongest stock increases while demand remains below last year, creating a clear imbalance that could weigh on prices, as already visible in Norway's repricing.
Germany, Austria and Italy also combine moderate stock growth with weaker demand, with Italy recording the softest demand in the panel.
By contrast, Belgium, Switzerland and the UK show stable or declining stocks alongside lower demand, indicating a more subdued but balanced market, with the UK remaining among the weakest demand markets.



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EUROPE OVERVIEW

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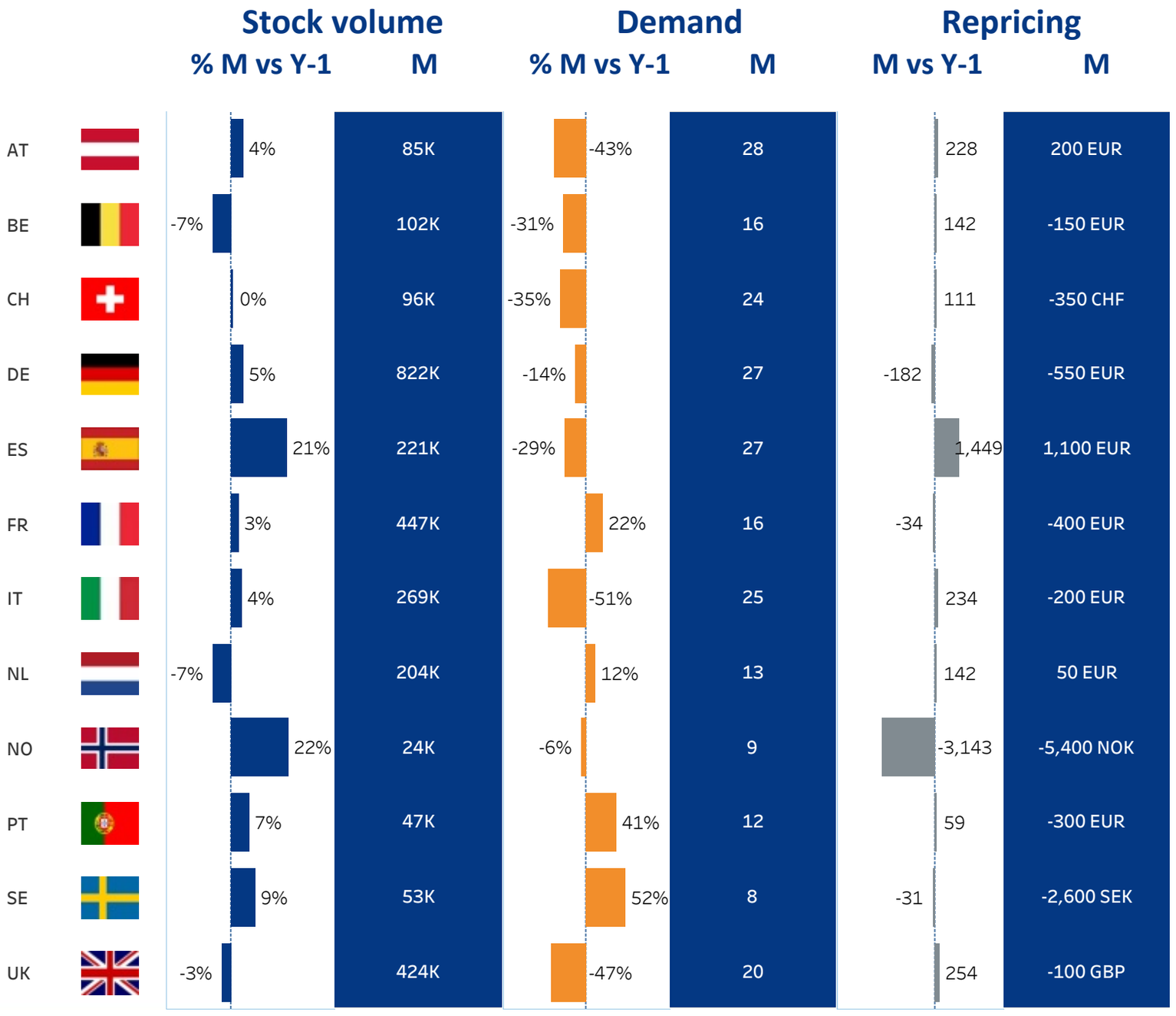

In October 2026, stock levels remain above last year in most European markets, while demand is highly contrasted, with only four markets growing year-on-year.

Norway and Spain lead stock growth, with Sweden and Portugal also clearly above last year. Switzerland is stable, while the UK, Belgium and the Netherlands remain below last year.

Demand growth is driven by Sweden and Portugal, with France and the Netherlands also above last year. Elsewhere demand remains below last year, with Italy, the UK and Austria showing the sharpest declines.

Repricing remains fragmented. Spain stands out with clearly positive repricing (+1,100 EUR) and the strongest improvement versus last year, while Austria and the Netherlands are also positive. Norway and Sweden record the most negative repricing, and Germany and France are more negative than last year.

Overall, October confirms improving vehicle availability across Europe, while demand and repricing are increasingly driven by a small number of markets.

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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 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.

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