



September 2025 | Udgave 67

Det europæiske marked for brugte biler balancerer mellem stabilitet og splittelse



Det europæiske marked for brugte biler fortsætter med at finde en ny ligevægt. Salgstallene forbliver stabile, prisindeksene falder efter de seneste toppe, og markedets attraktivitet varierer kraftigt alt efter brændstoftype og land. September viser en dynamik med selektiv normalisering, hvor nogle segmenter genvinder momentum, mens andre fortsat kæmper.

Benzin holder sig stabilt, diesel er splittet, mens elbiler halter bagefter. Benzin er fortsat det sikre valg på det europæiske marked for brugte biler, især i segmenterne for kompakte biler og bybiler. Det kombinerer rimelige driftsomkostninger, rigeligt udbud og forbrugernes tillid, hvilket forklarer det lave MDS.

Diesel tegner imidlertid et tvetydigt billede i Europa: den straffes på de nordlige og vestlige markeder af restriktive skatte- og miljøpolitikker, men er stadig meget relevant i Tyskland, Italien og Polen, hvor den fortsat er den foretrukne løsning for bilister og flåder med højt kilometertal.

Hybrider (HEV, MHEV) er ved at skabe sig en mellemposition og øger gradvist deres markedsandel takket være deres grønnere image uden opladningsbegrænsninger.

BEV'er og PHEV'er fortsætter med at vinde langsomt frem, hovedsageligt på de førende markeder (Skandinavien, Benelux), men deres attraktivitet på brugtmarkedet er begrænset af kraftig værdiforringelse og forbrugernes bekymringer om batteriets holdbarhed.

Priserne stabiliserer sig, men der er stadig forskelle på tværs af Europa – prisindeksene er ved at vende tilbage til det normale efter de ekstraordinære stigninger i 2022-2023.

I Frankrig, Tyskland og Storbritannien er værdierne ved at stabilisere sig, understøttet af en stabil efterspørgsel efter yngre biler og et begrænset udbud af biler, der er mindre end 4 år gamle.

I Italien, Spanien og Portugal er korrektionerne mere markante, da husholdningerne skifter til ældre, mere overkommelige biler, hvilket sætter pres på priserne i mellemklassen.

I Nordeuropa registrerer BEV'er de største fald, hvilket afspejler et stort udbud fra flåder og stærke incitamenter til køb af nye biler. Resultatet er et marked, hvor priserne ikke længere er ensartede, men afspejler nationale økonomiske og lovgivningsmæssige særpræg. ICE forbliver stærk, elektrificerede modeller forbliver skrøbelige.

Det europæiske brugtmarked fungerer nu i to forskellige hastigheder – på den ene side opretholder ICE – benzin og nogle dieselmotorer – en hurtig omsætning og solide værdiansættelser, understøttet af deres overkommelige priser.

På den anden side kæmper elektrificerede modeller, selvom de vokser i nye registreringer, stadig på brugtmarkedet: høje MDS og kraftig værdiforringelse afslører en uoverensstemmelse mellem stigende udbud og tøvende efterspørgsel. Denne polarisering understreger udfordringen med at omsætte energiomstillingen til brugtmarkedet, hvor husholdningernes beslutninger adskiller sig fra nybils købernes. Elektrificerede modeller står over for udfordringen med at bevise deres plads.

De kommende måneder vil være afgørende for at bekræfte de nuværende tendenser. Benzin vil sandsynligvis fortsat være dominerende, mens dieselens udvikling vil afhænge af politiske og finanspolitiske valg, der varierer meget på tværs af Europa. Den virkelige kampplads ligger dog hos de elektrificerede køretøjer: Om brugtmarkedet kan absorbere en voksende bølge af BEV'er og PHEV'er vil afhænge lige så meget af forbrugernes tillid til restværdier som af målrettet politisk støtte.

For markedsaktørerne er budskabet klart: ICE-køretøjer giver kortvarig klarhed, men på mellemlang sigt vil balancen blive afgjort af, hvor succesfuldt elektrificerede køretøjer formår at skabe sig en plads.

Vi er forpligtet til at forsyne det europæiske brugtbilsmarked med live-data om salg, lagerbeholdning og priser for at holde dig ajour med det hurtigt skiftende miljø.

Vi vil fortsat offentliggøre vores omfattende analyse af brugtbilsmarkedet og landekommentarer for 1., 2., 3. og 4. kvartal i hhv. januar, april, juli og oktober.

I mellemtiden vil der blive udgivet pixi-versioner af rapporten for de resterende otte måneder af året, som vil indeholde et overordnet europæisk resumé og landegrafer og -tabeller.

Vi håber, at du fortsat vil nyde vores rapport.

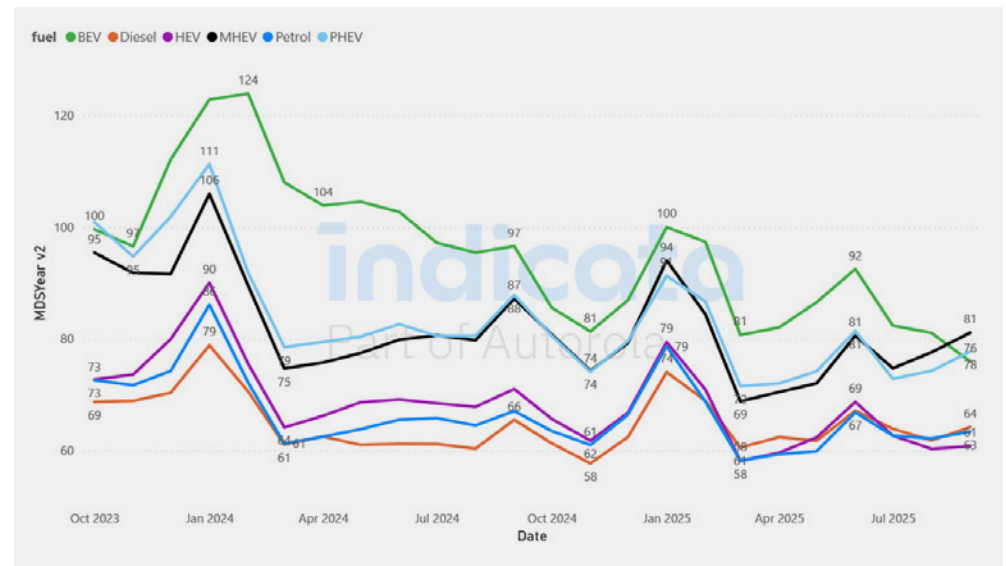
Top selling car models up to 4-years-old by volume

All powertrains	MDS	ICE	MDS	Hybrid	MDS	BEV	MDS
Volkswagen Golf	80.4	Volkswagen Golf	79.9	Toyota Yaris	45.2	Volkswagen ID.3	49.8
Peugeot 208	70.3	Volkswagen T-ROC	70.7	Toyota C-HR	62.7	Volkswagen ID.4	55.6
Volkswagen T-ROC	70.7	Volkswagen Polo	63.0	Toyota Yaris Cross	50.4	Tesla Model 3	29.2

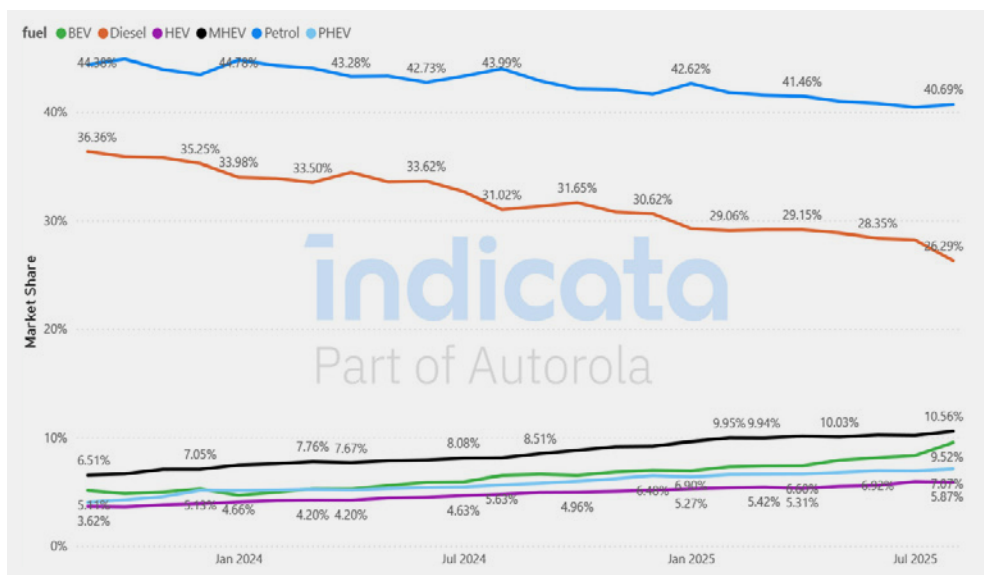
Fastest selling car models up to 4-years-old by Market Days Supply

All powertrains	MDS	ICE	MDS	Hybrid	MDS	BEV	MDS
Tesla Model 3	29.2	MG HS / EHS	35.3	Lynk & Co 01	44.9	Tesla Model 3	29.2
Tesla Model Y	31.3	MG ZS	43.2	Toyota Yaris	45.2	Tesla Model Y	31.3
MG 5	41.2	MG 3	45.8	Kia Creed	45.9	MG 5	41.2

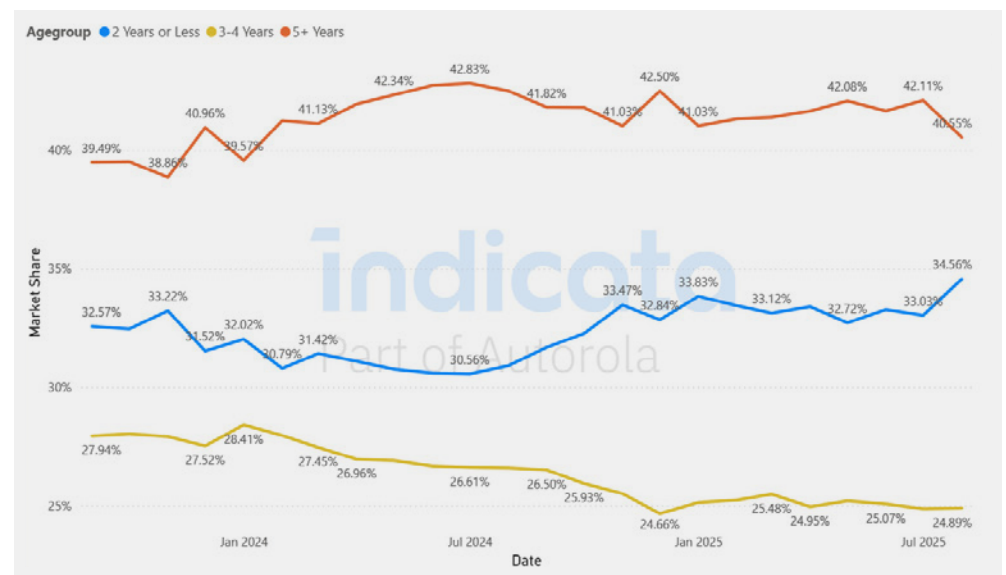
MDS by Fuel Type - European Market



Sales Market Share by Month and Fuel Type - European Market



Sales Market Share by Month and Age Group - European Market



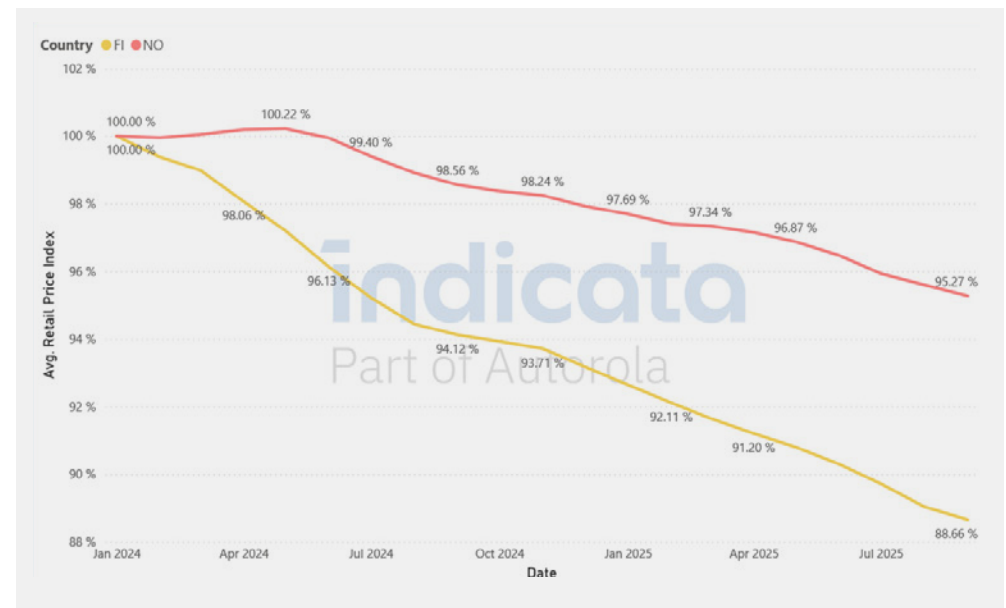
Detailpriser og månedlige prisbevægelser pr. land

Bemærk venligst, at Indicata i øjeblikket er i gang med at forbedre Marketwatch Retail Price Index. Som følge heraf kan der være afvigelser i forhold til de versioner, der var tilgængelige i de foregående måneder. Vi sætter pris på din forståelse, mens vi stræber efter at levere en bedre oplevelse.

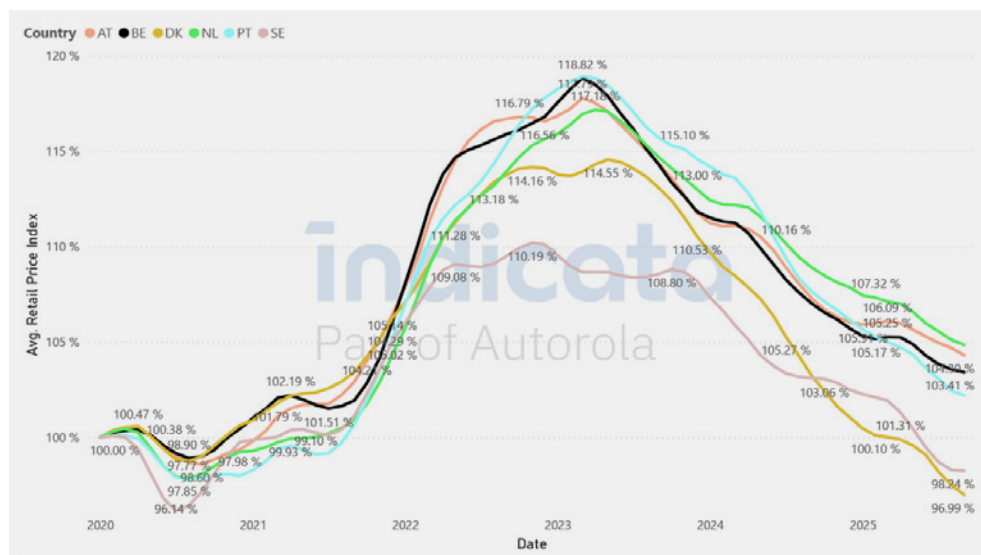
Country	Latest used car price percentage point movement versus Jan 2020
Türkiye	301.7pp
Spain	11.6pp
Poland	9.5pp
Italy	8.5pp
Germany	7.0pp
Netherlands	4.8pp
Austria	4.3pp
France	3.5pp
Belgium	3.4pp
United Kingdom	3.4pp
Portugal	2.2pp
Sweden	-1.8pp
Denmark	-3.0pp
Average excl. Türkiye	2.1pp
Norway*	-4.7pp
Switzerland*	-
Finland*	-11.3pp

*FL and NO versus Jan 2024, CH versus May 2024

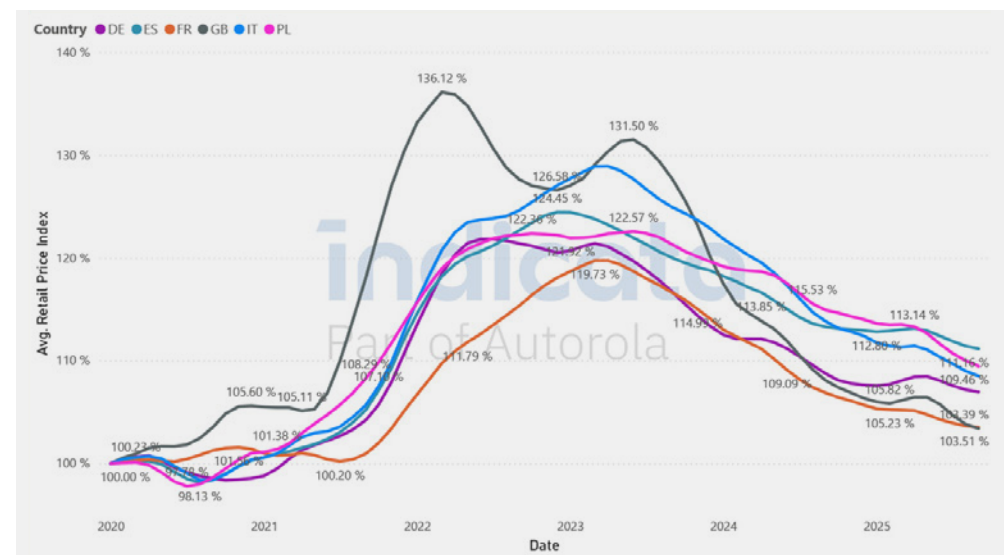
Retail Price (weighted. avg.) Index 100 = Jan - CH, FL, NO



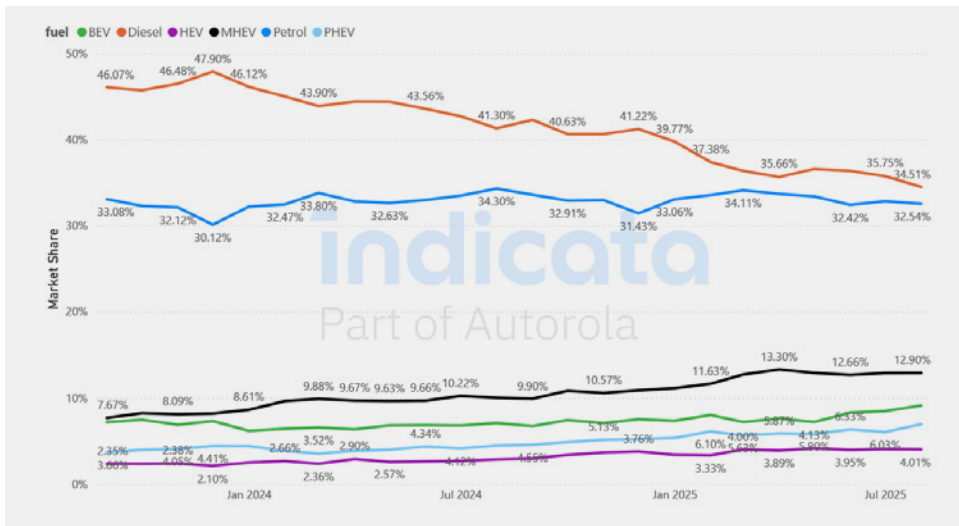
Retail Price (weighted. avg.) Index 100 = Jan - AT, BE, DK, NE, PT, SE



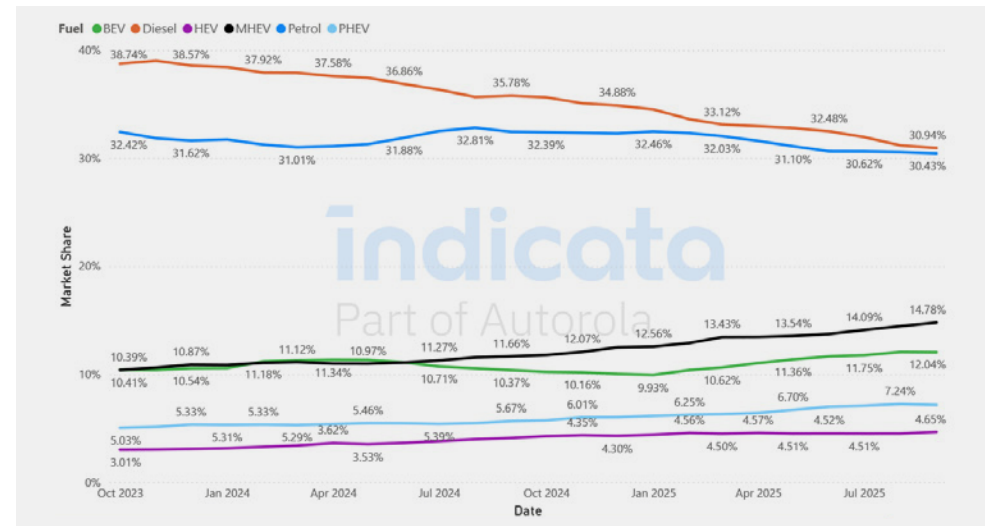
Retail Price (weighted. avg.) Index 100 = Jan - FR, DE, IT, PL, ES, GB



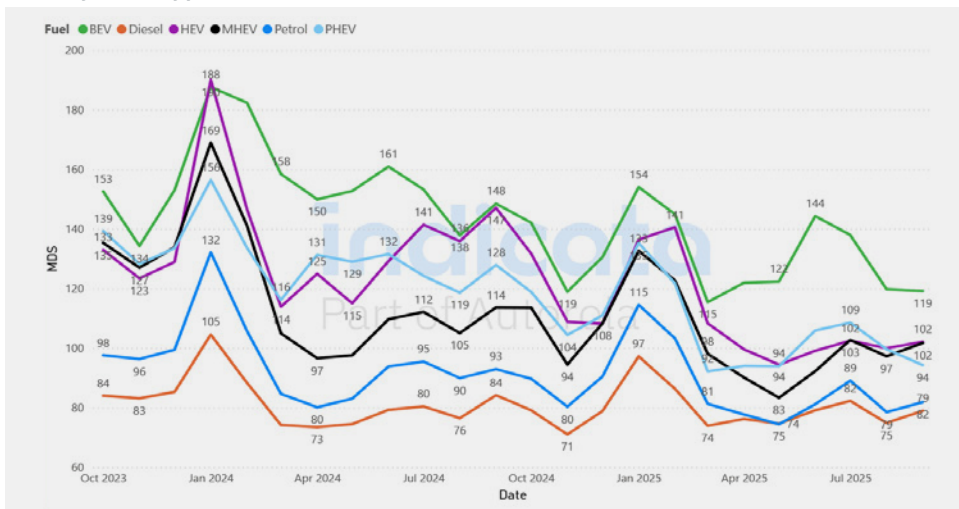
Sales Market Share by Month and Fuel Type - Austria



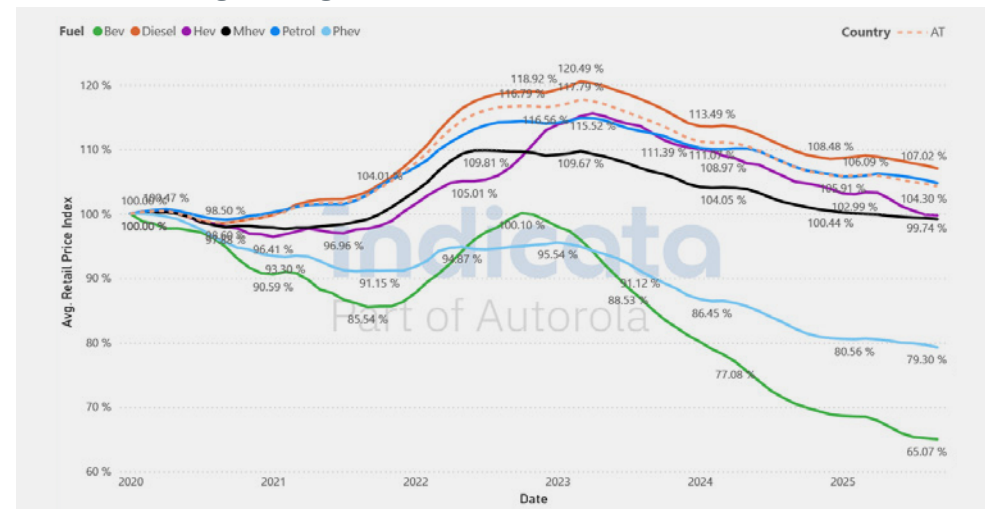
Stock Market Share by Month and Fuel Type - Austria



MDS by Fuel Type - Austria



Retail Price (Weighted Avg.) Index 100 = Jan - Austria



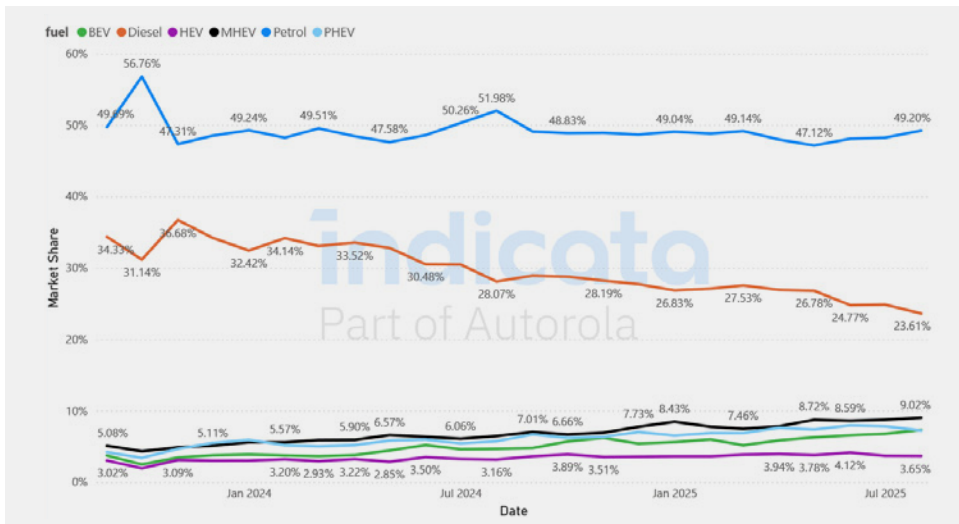
Top selling < 4-years-old by volume

Make	Model	MDS
Škoda	Octavia	58.5
Volkswagen	Golf	63.6
BMW	3 Series	69.6

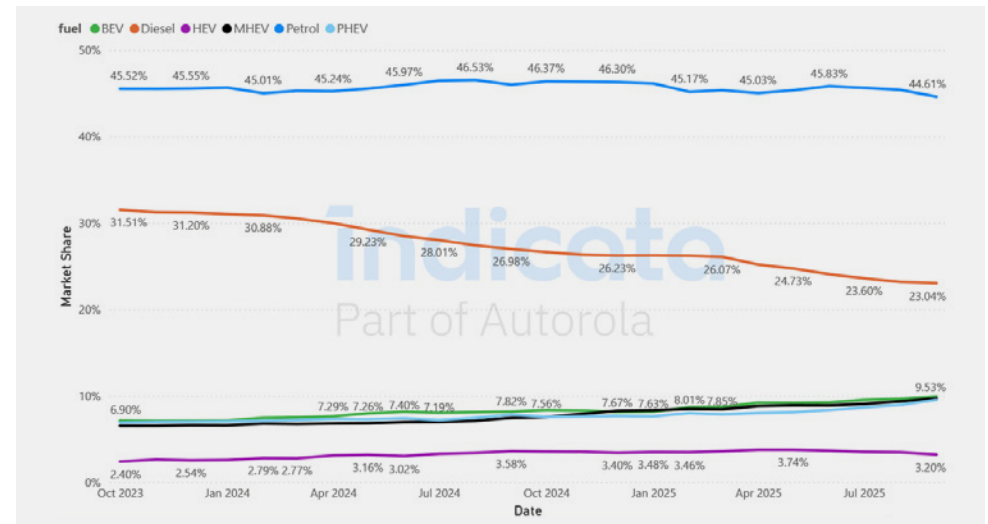
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Tesla	Model Y	13x	28.5
Dacia	Sandero	9x	39.8
Cupra	Ateca	8x	43.5

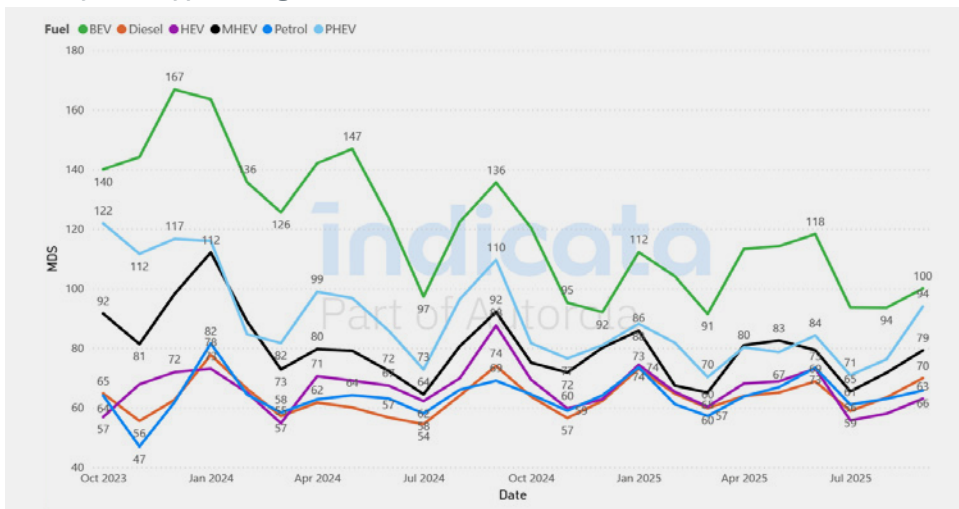
Sales Market Share by Month and Fuel Type - Belgium



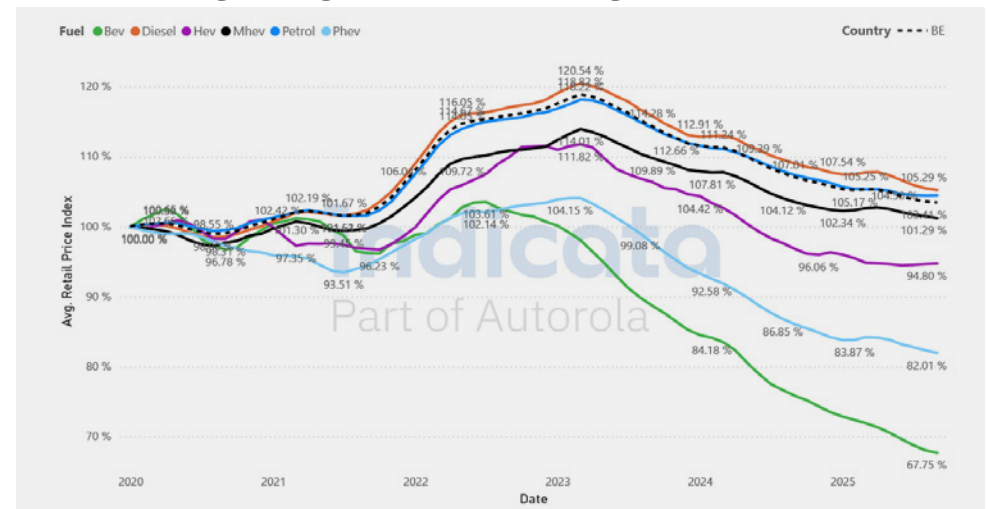
Stock Market Share by Month and Fuel Type - Belgium



MDS by Fuel Type - Belgium



Retail Price (Weighted Avg.) Index 100 = Jan - Belgium



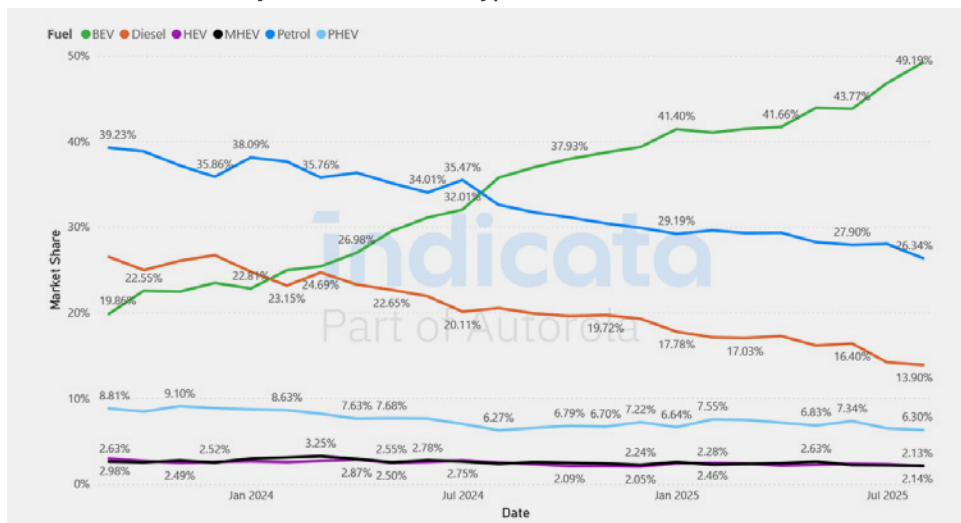
Top selling < 4-years-old by volume

Make	Model	MDS
Volkswagen	Golf	79.3
BMW	3 Series	95.9
Opel	Corsa	52.1

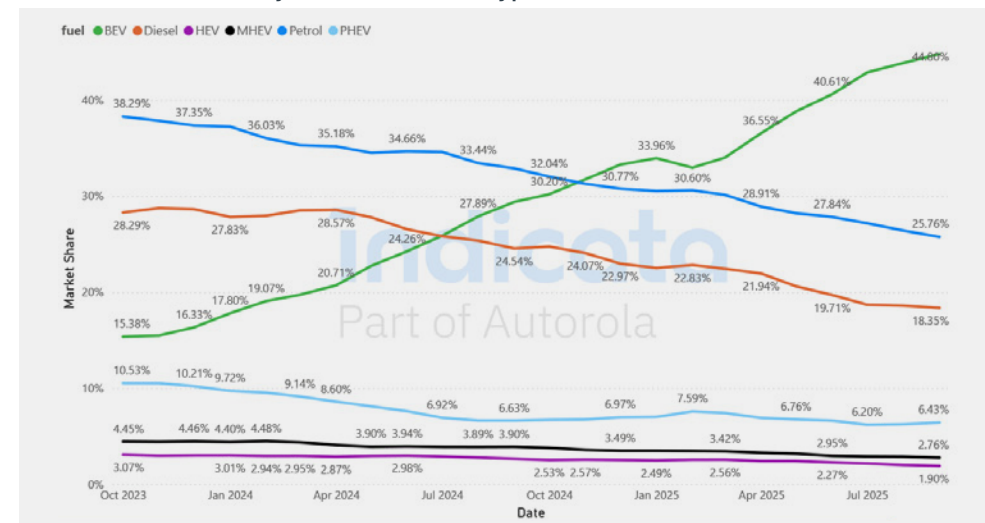
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
MG	MG 3	14x	26.7
MG	HS / EHS	10x	34.9
Dacia	Jogger	10x	35.1

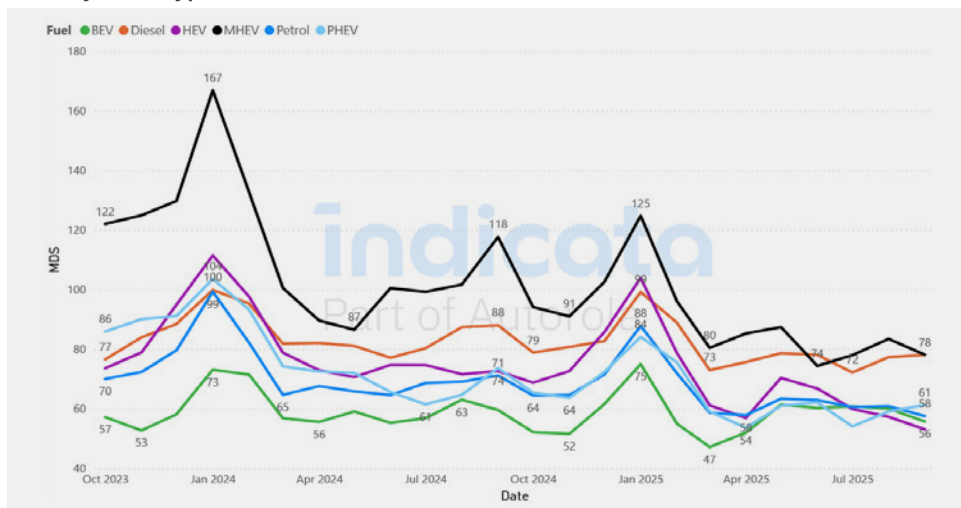
Sales Market Share by Month and Fuel Type - Denmark



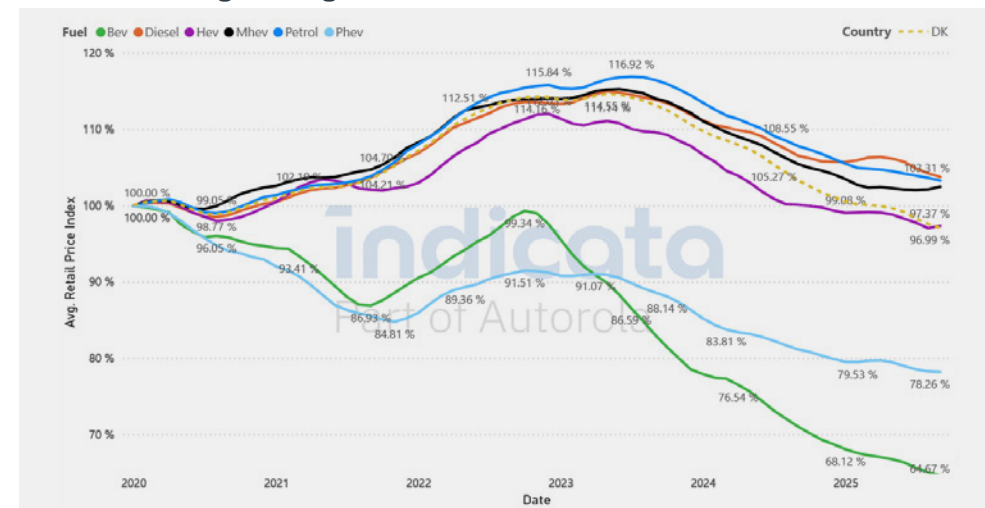
Stock Market Share by Month and Fuel Type - Denmark



MDS by Fuel Type - Denmark



Retail Price (Weighted Avg.) Index 100 = Jan - Denmark



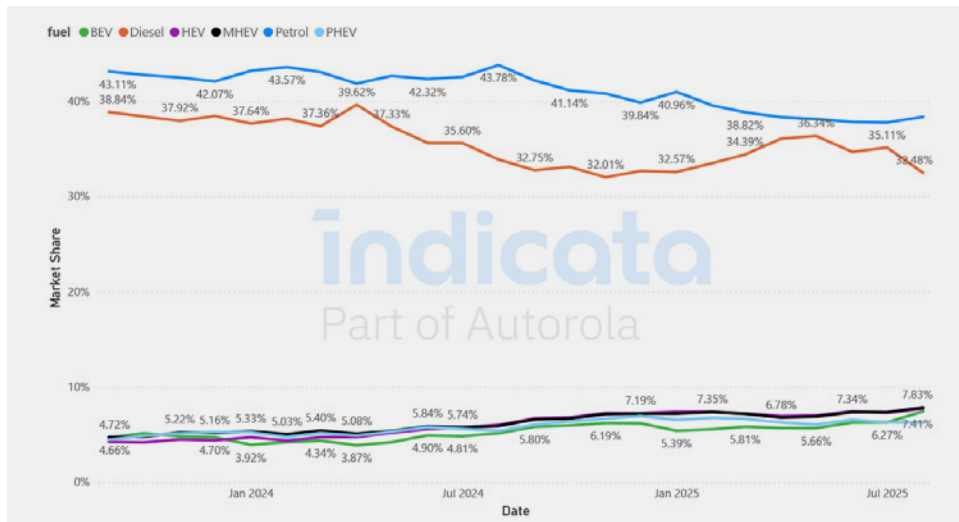
Top selling < 4-years-old by volume

Make	Model	MDS
Volkswagen	ID.3	33.1
Volkswagen	ID.4	54.8
Škoda	Enyaq	56.5

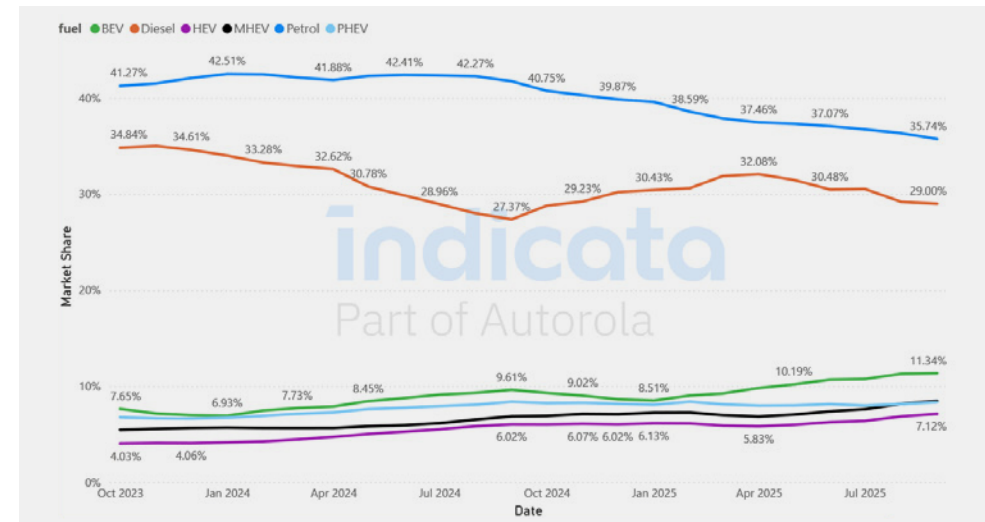
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
MG	MG 5	22x	16.5
BYD	Atto 3	17x	21.2
MG	MG 4	15x	23.6

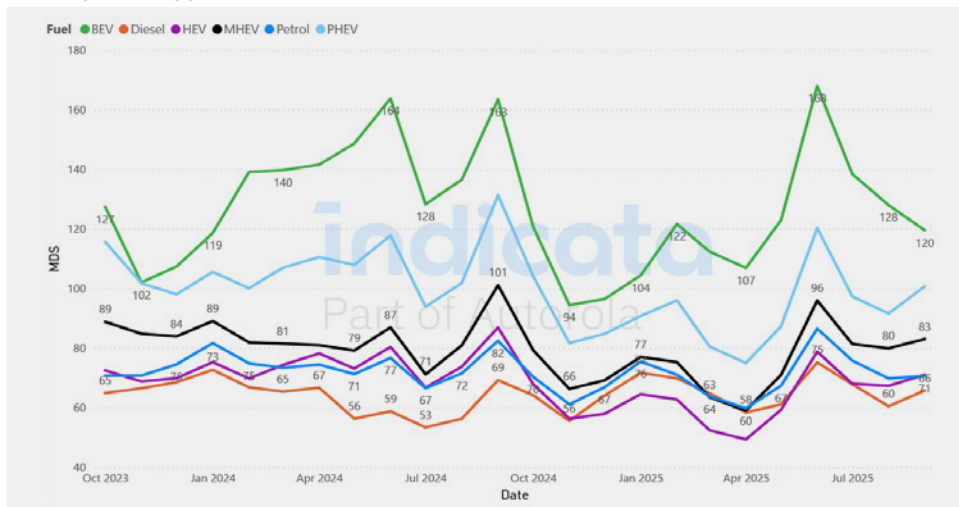
Sales Market Share by Month and Fuel Type - France



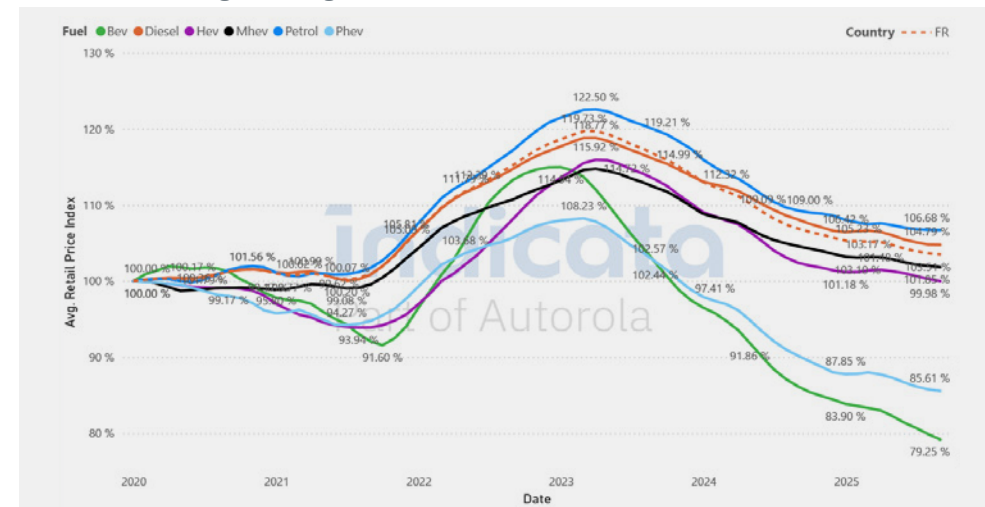
Stock Market Share by Month and Fuel Type - France



MDS by Fuel Type - France



Retail Price (Weighted Avg.) Index 100 = Jan - France



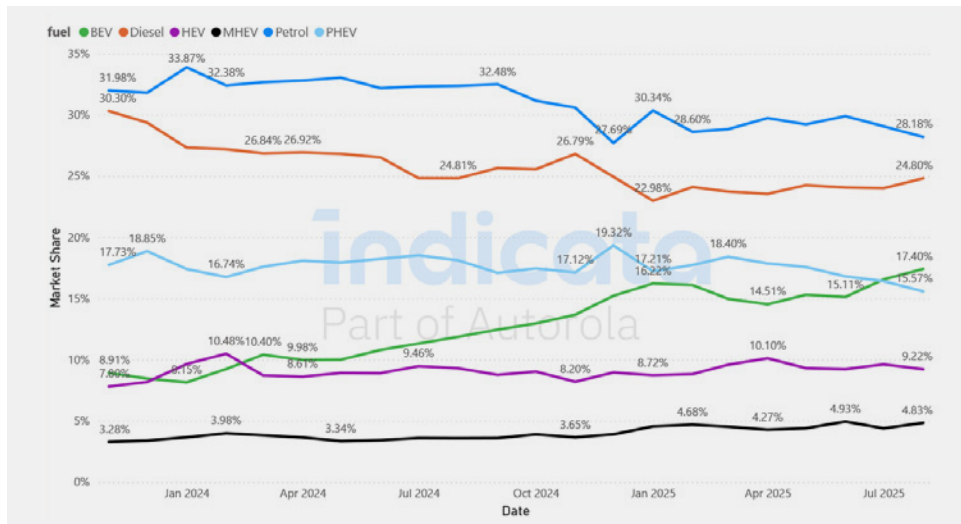
Top selling < 4-years-old by volume

Make	Model	MDS
Peugeot	208	77.5
Renault	Clio	57.1
Peugeot	2008	83.7

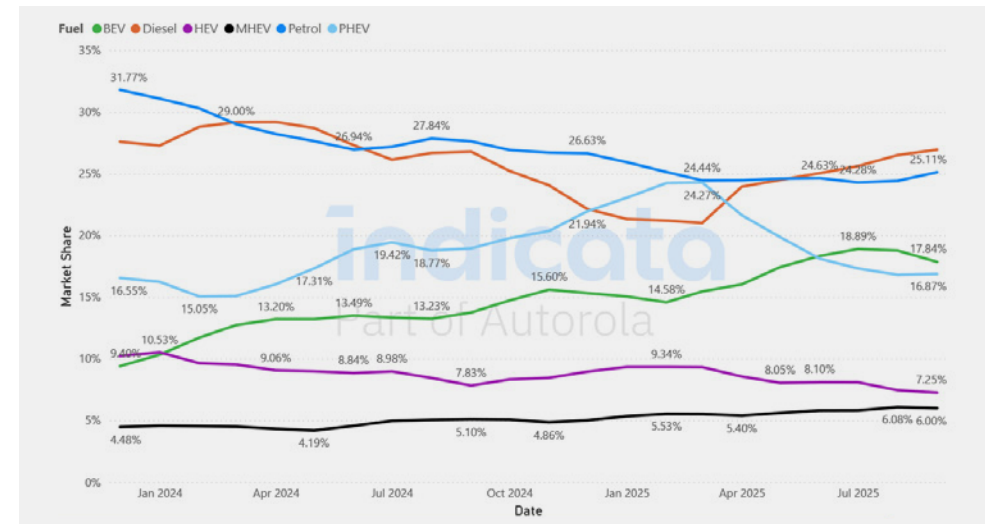
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Toyota	Yaris	9x	39.4
Peugeot	108	9x	42.2
Tesla	Model Y	8x	44.7

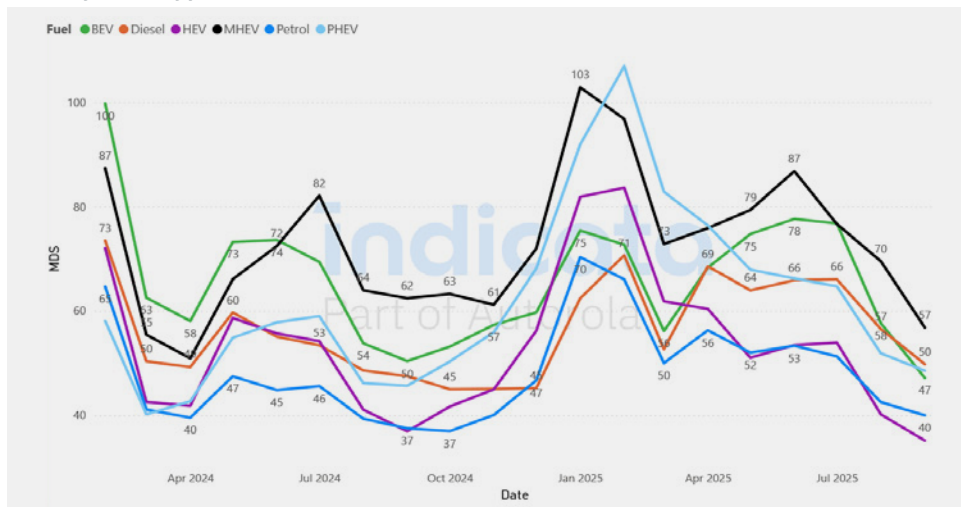
Sales Market Share by Month and Fuel Type - Finland



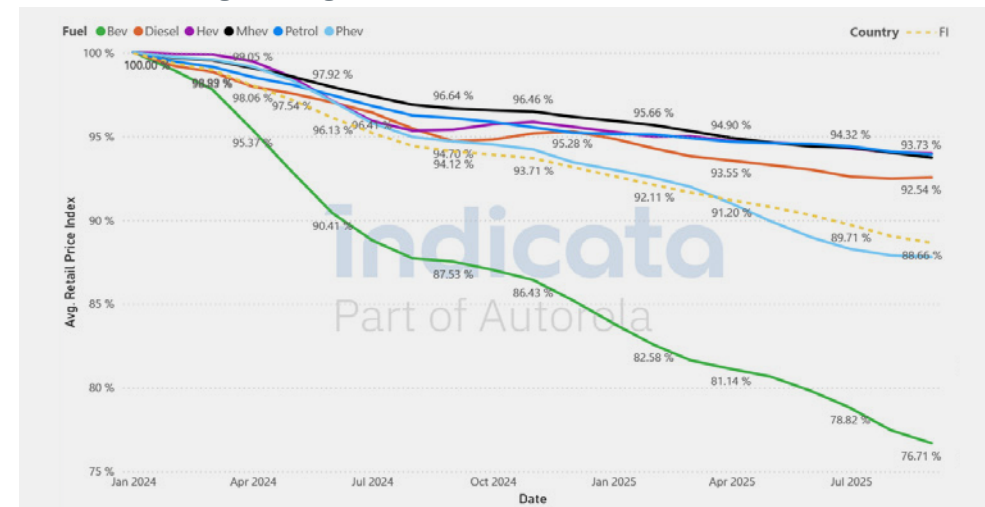
Stock Market Share by Month and Fuel Type - Finland



MDS by Fuel Type - Finland



Retail Price (Weighted Avg.) Index 100 = Jan - Finland



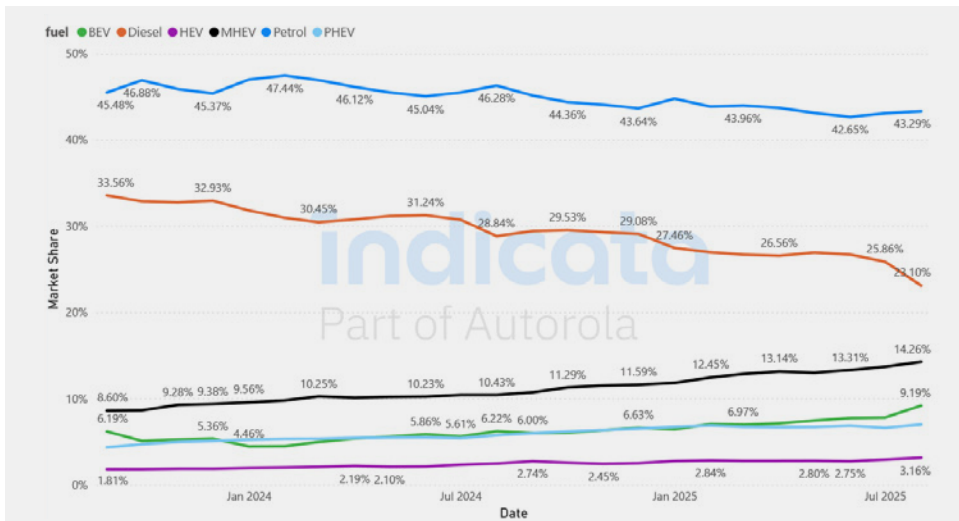
Top selling < 4-years-old by volume

Make	Model	MDS
Toyota	Corolla	29.6
Polestar	2	31.8
Volkswagen	ID.4	30.7

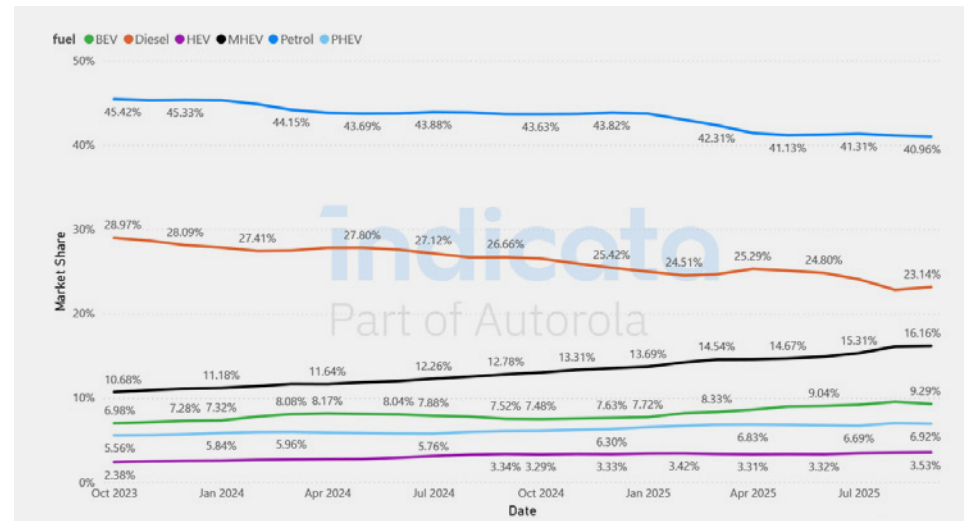
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Tesla	Model 3	21x	17.2
Tesla	Model Y	19x	18.6
Nissan	Leaf	16x	22.5

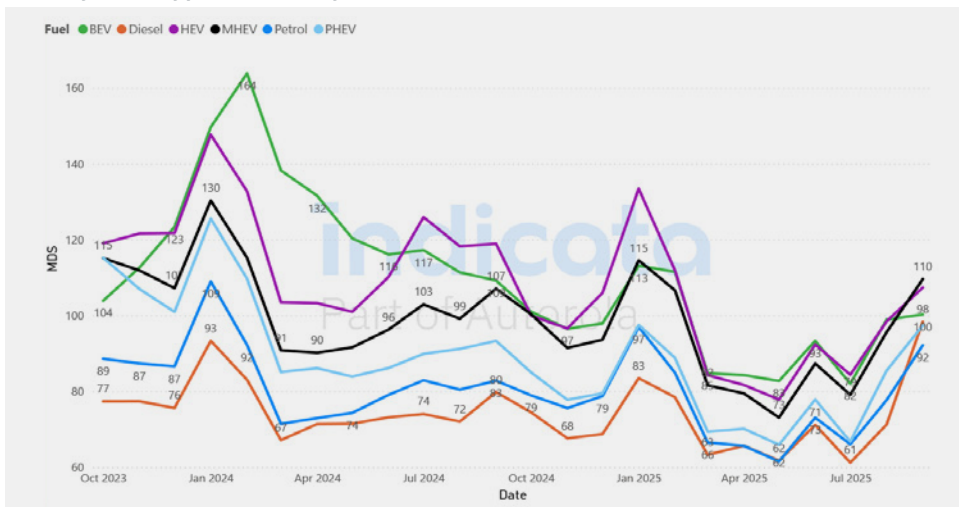
Sales Market Share by Month and Fuel Type - Germany



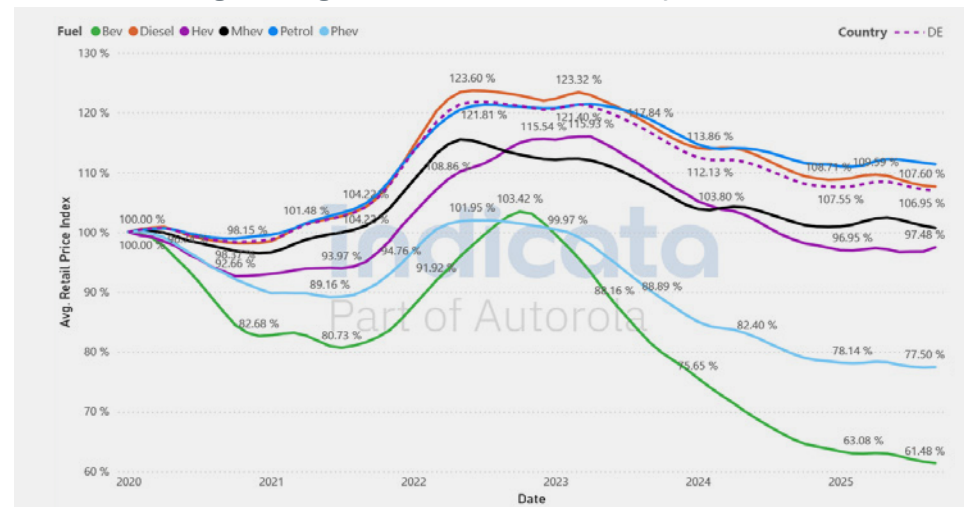
Stock Market Share by Month and Fuel Type - Germany



MDS by Fuel Type - Germany



Retail Price (Weighted Avg.) Index 100 = Jan - Germany



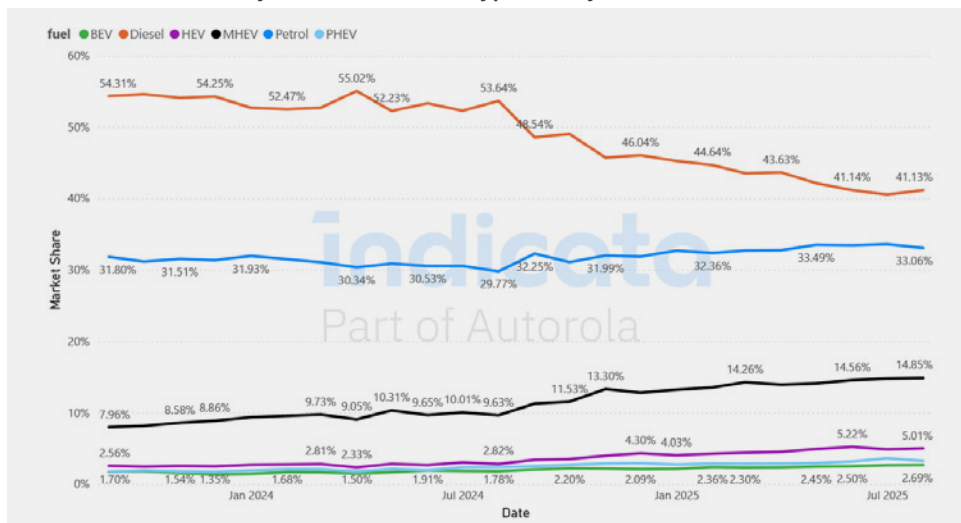
Top selling < 4-years-old by volume

Make	Model	MDS
Volkswagen	Golf	99.0
Volkswagen	T-ROC	75.5
Volkswagen	Tiguan	99.3

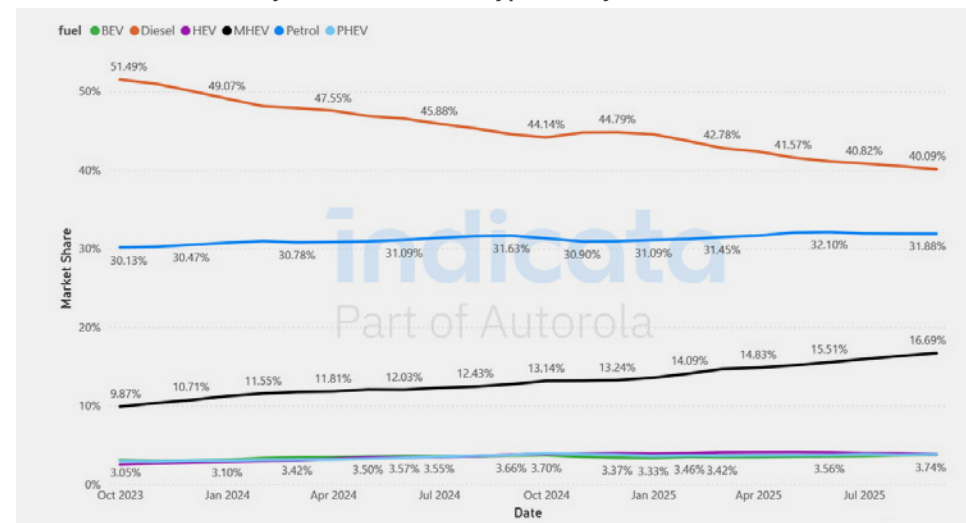
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Tesla	Model 3	15x	24.2
MG	MG 5	13x	27.2
Tesla	Model Y	10x	36.3

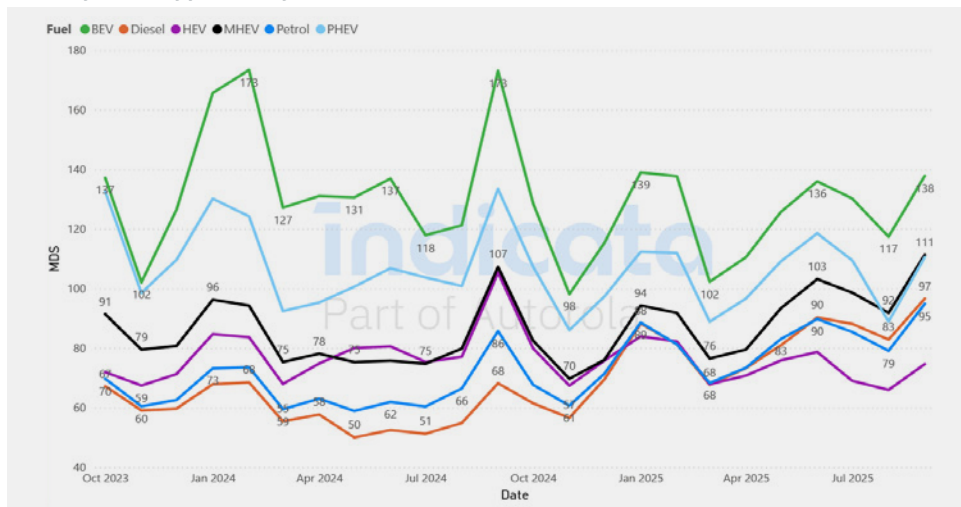
Sales Market Share by Month and Fuel Type - Italy



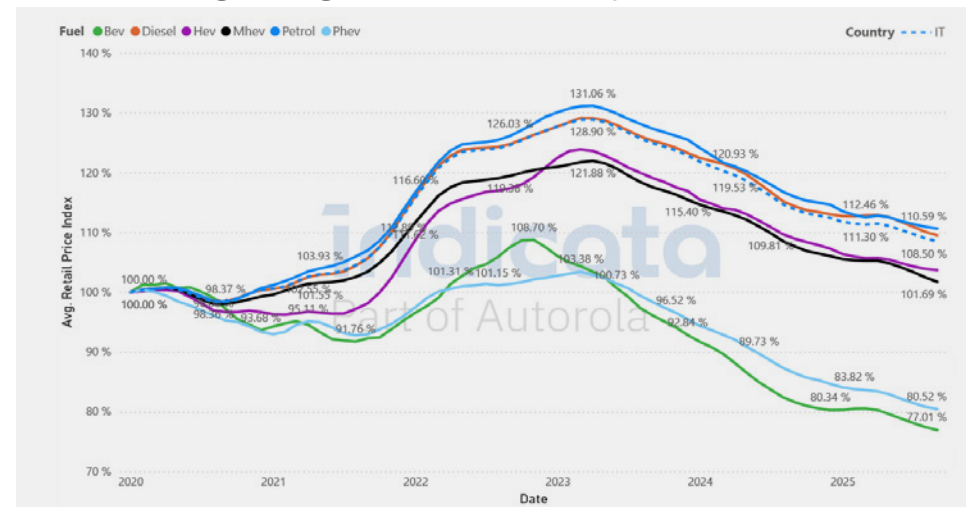
Stock Market Share by Month and Fuel Type - Italy



MDS by Fuel Type - Italy



Retail Price (Weighted Avg.) Index 100 = Jan - Italy



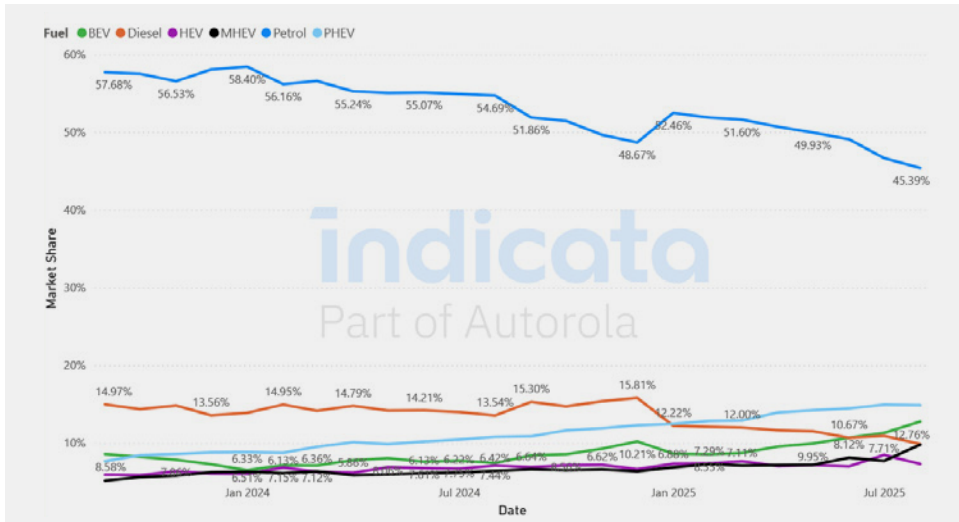
Top selling < 4-years-old by volume

Make	Model	MDS
Fiat	Panda	88.4
Volkswagen	T-ROC	98.6
Fiat	500	97.6

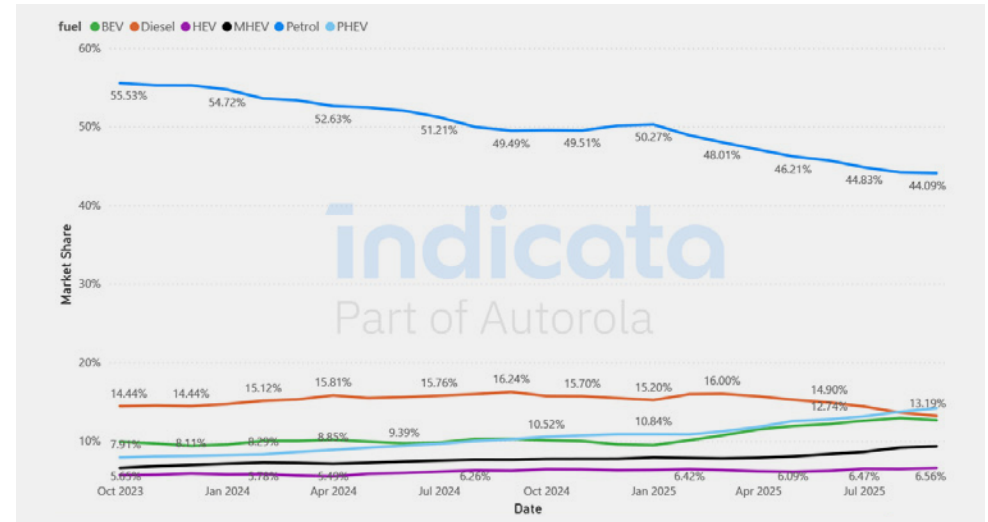
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Tesla	Model 3	12x	29.5
BYD	Seal U	9x	38.7
Toyota	Corolla	9x	38.7

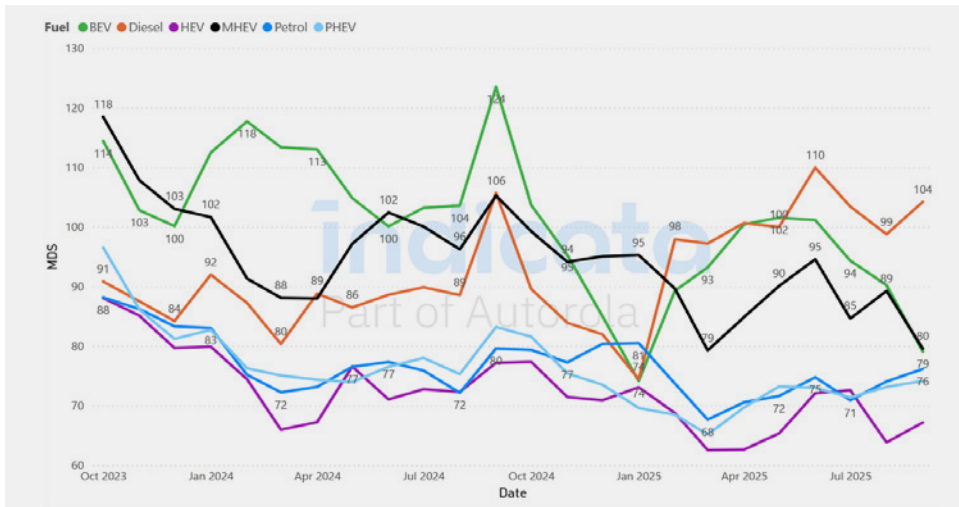
Sales Market Share by Month and Fuel Type - Netherlands



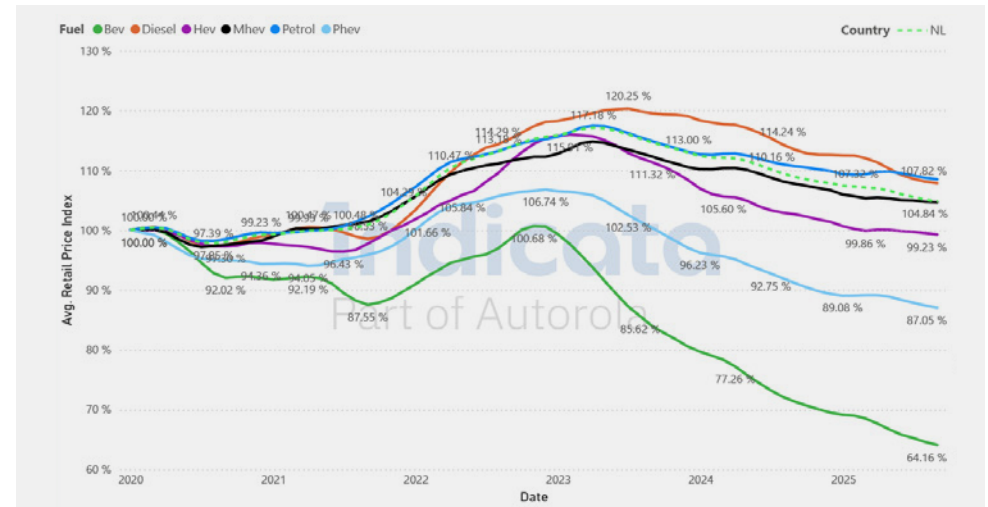
Stock Market Share by Month and Fuel Type - Netherlands



MDS by Fuel Type - Netherlands



Retail Price (Weighted Avg.) Index 100 = Jan - Netherlands



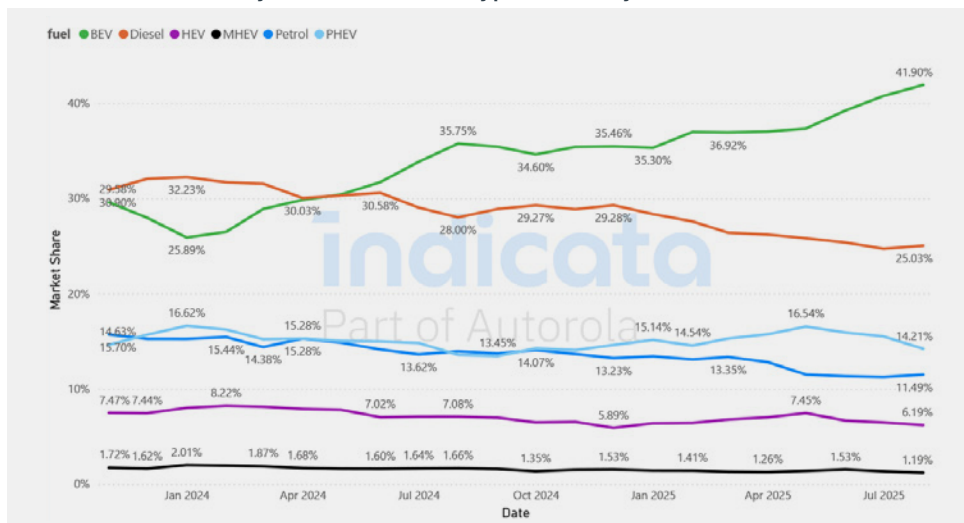
Top selling < 4-years-old by volume

Make	Model	MDS
Lynk & Co	01	41.4
Toyota	Yaris Cross	53.4
Volkswagen	Golf	81.3

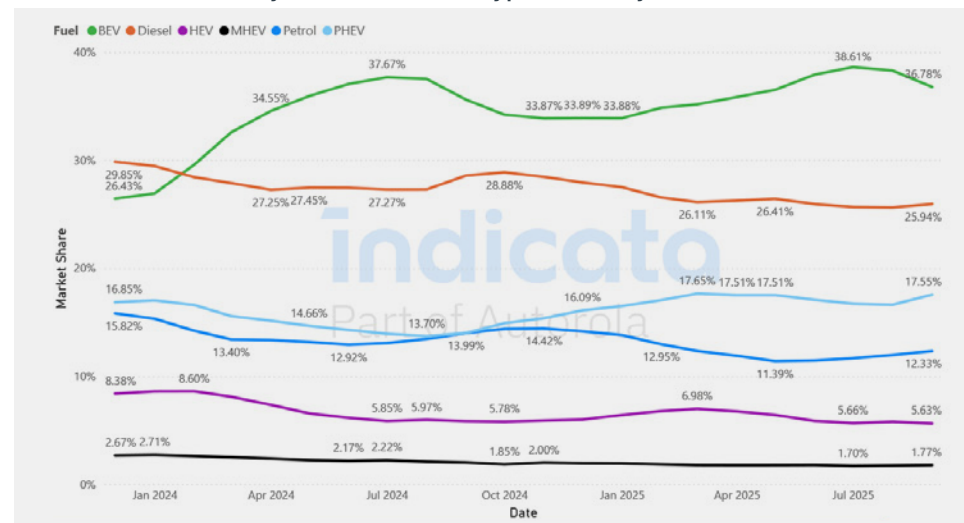
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Cupra	Tavascan	22x	16.3
Lancia	Ypsilon	19x	19.1
Tesla	Model 3	13x	27.0

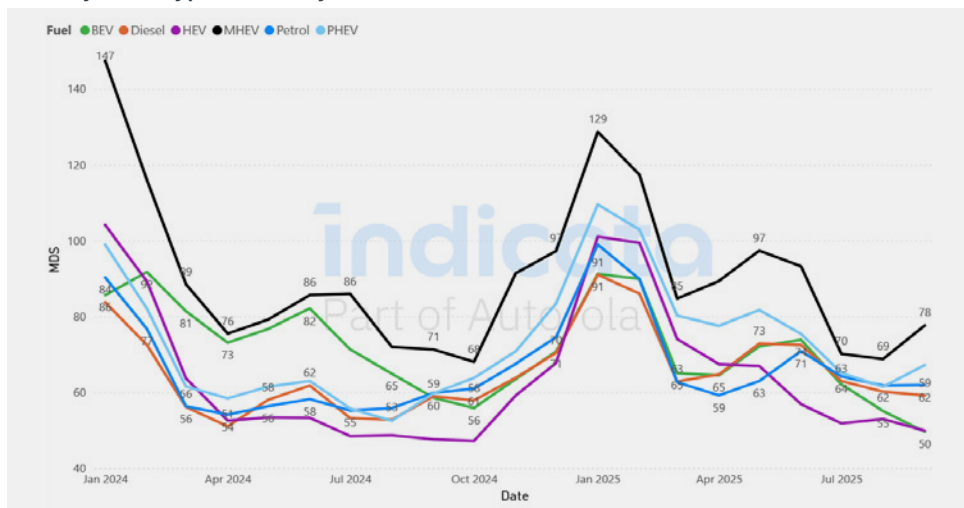
Sales Market Share by Month and Fuel Type - Norway



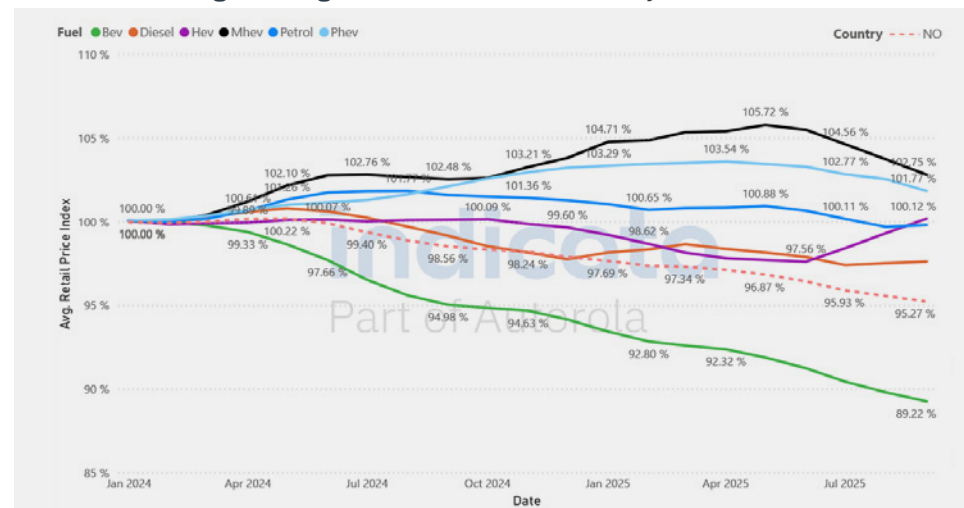
Stock Market Share by Month and Fuel Type - Norway



MDS by Fuel Type - Norway



Retail Price (Weighted Avg.) Index 100 = Jan - Norway



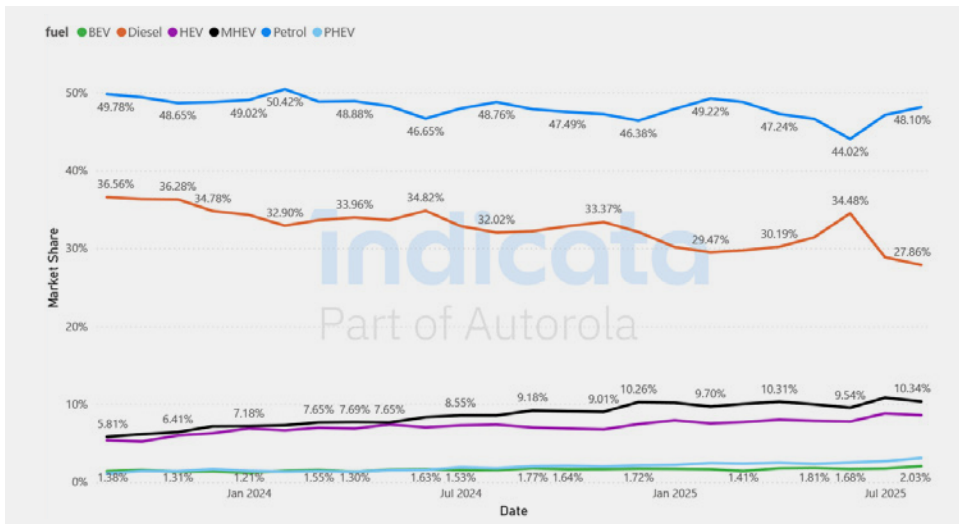
Top selling < 4-years-old by volume

Make	Model	MDS
Volkswagen	ID.4	32.4
Tesla	Model Y	35.4
Toyota	RAV 4	69.2

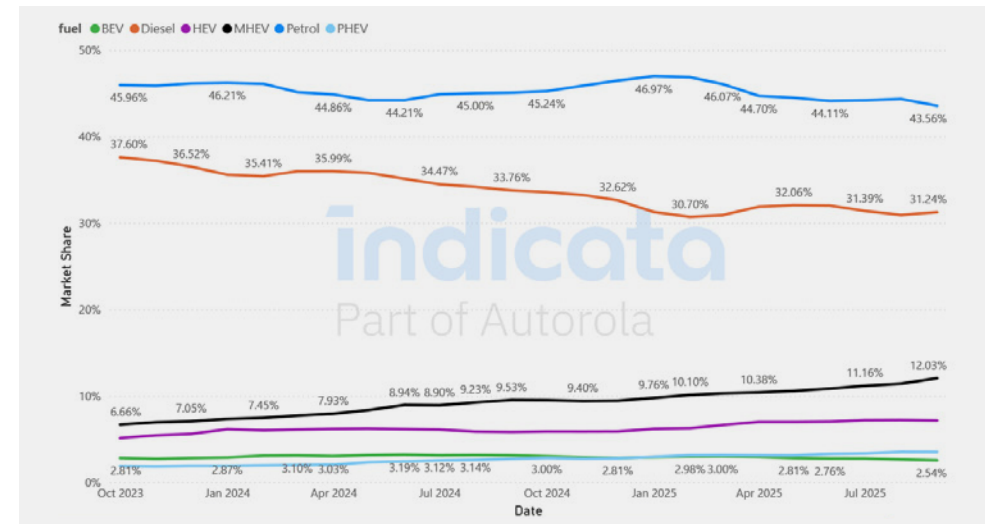
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Volkswagen	UP!	34x	10.6
Nissan	Leaf	16x	22.7
Audi	Q6 e-Tron	15x	23.4

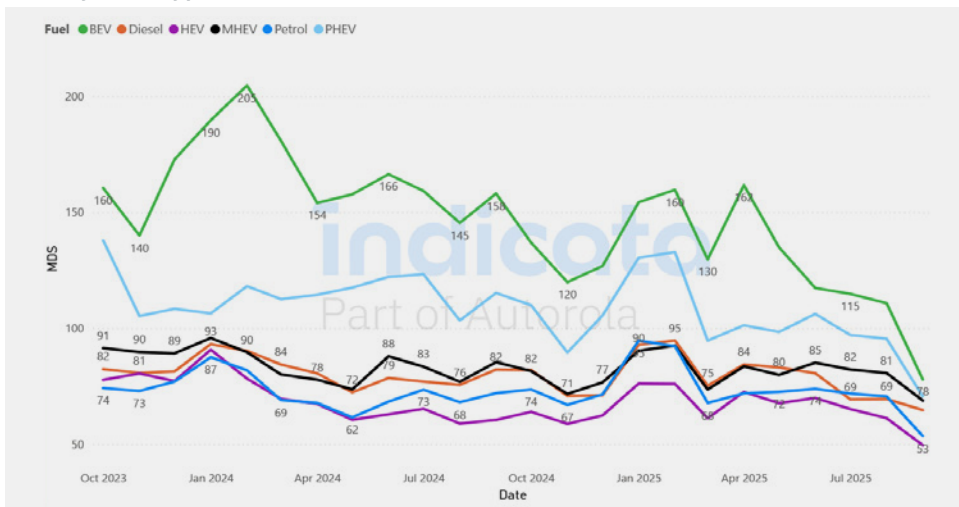
Sales Market Share by Month and Fuel Type - Poland



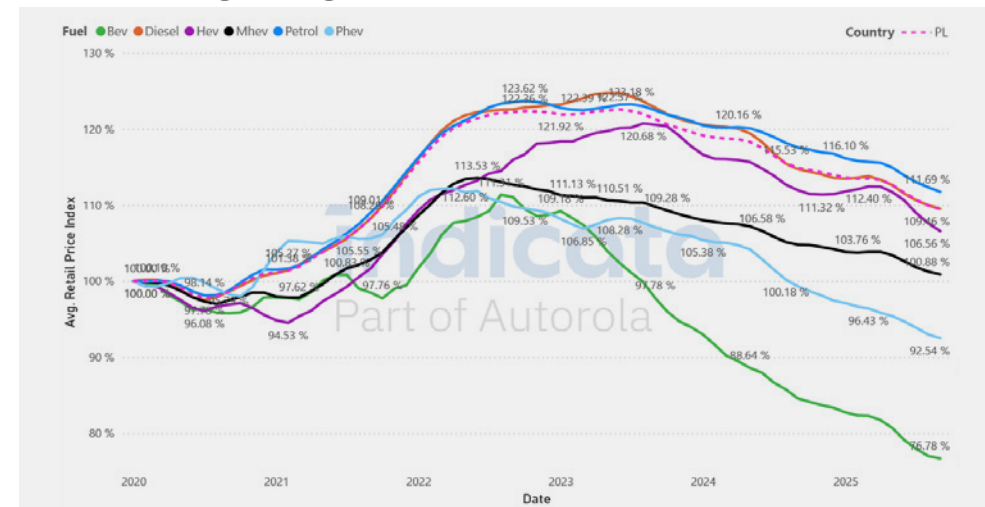
Stock Market Share by Month and Fuel Type - Poland



MDS by Fuel Type - Poland



Retail Price (Weighted Avg.) Index 100 = Jan - Poland



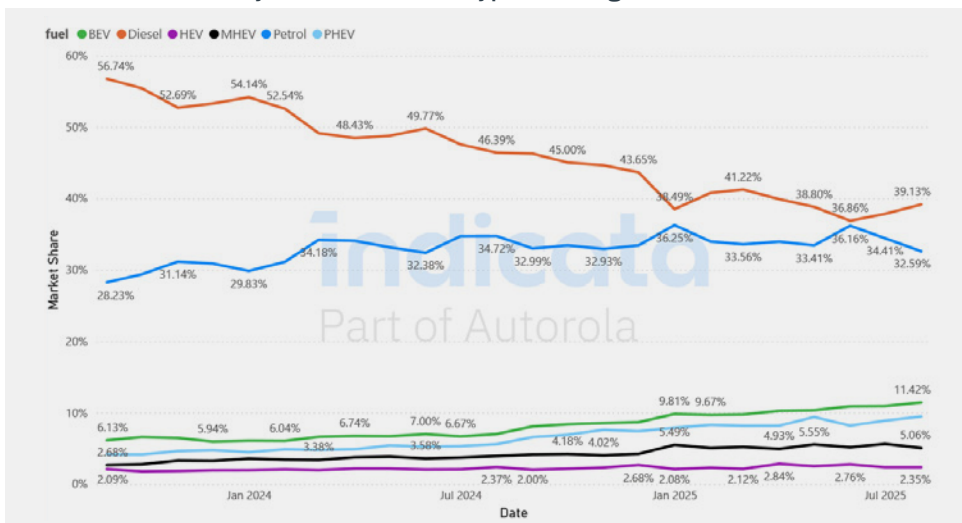
Top selling < 4-years-old by volume

Make	Model	MDS
Toyota	Corolla	47.4
Škoda	Octavia	51.7
Toyota	Yaris	38.5

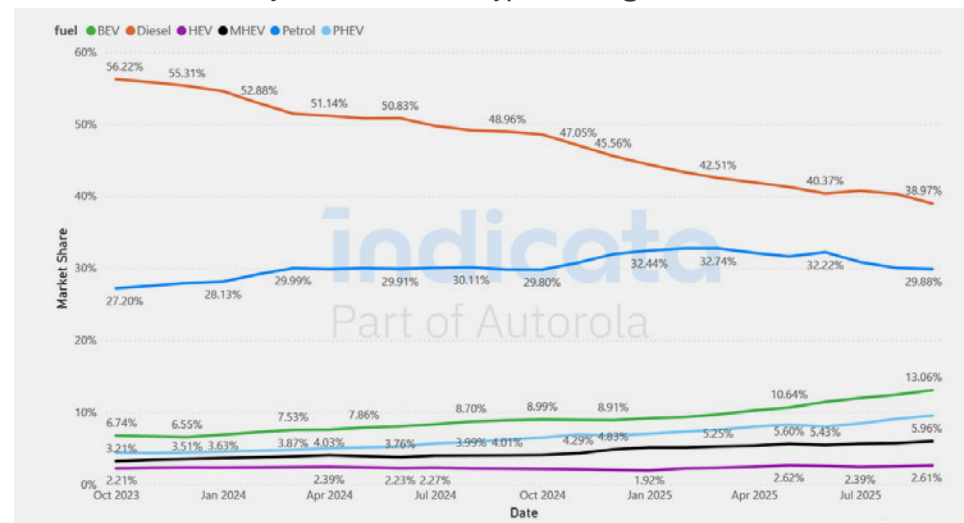
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Toyota	Aygo Aygo X	13x	27.2
Toyota	RAV4	12x	29.8
Toyota	Highlander	11x	32.3

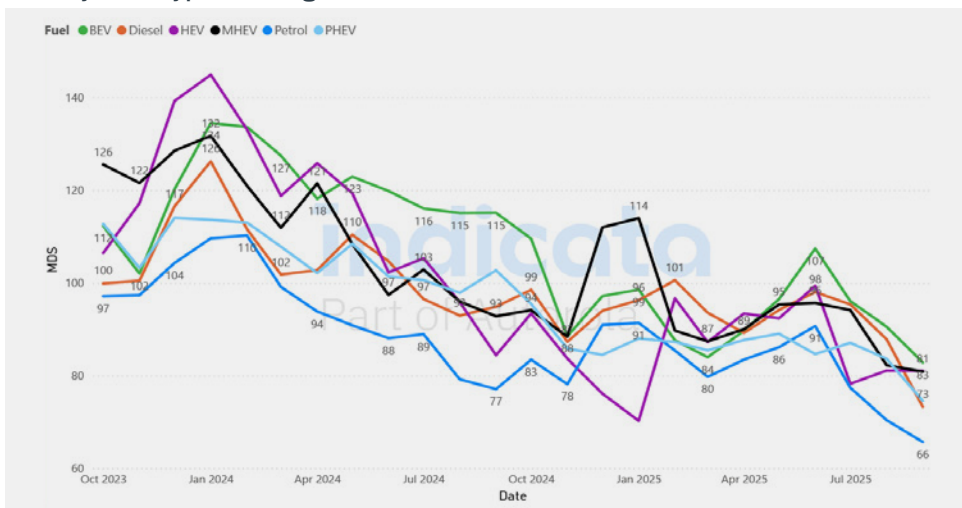
Sales Market Share by Month and Fuel Type - Portugal



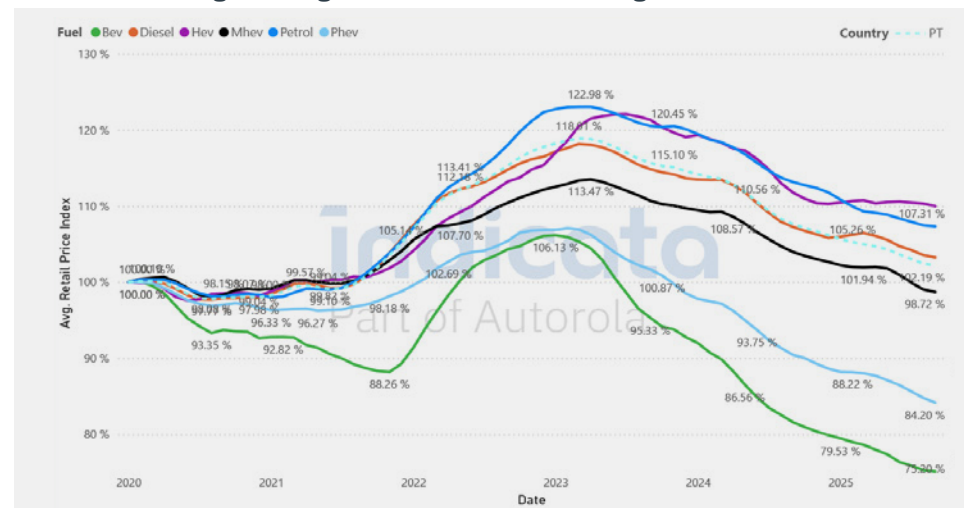
Stock Market Share by Month and Fuel Type - Portugal



MDS by Fuel Type - Portugal



Retail Price (Weighted Avg.) Index 100 = Jan - Portugal



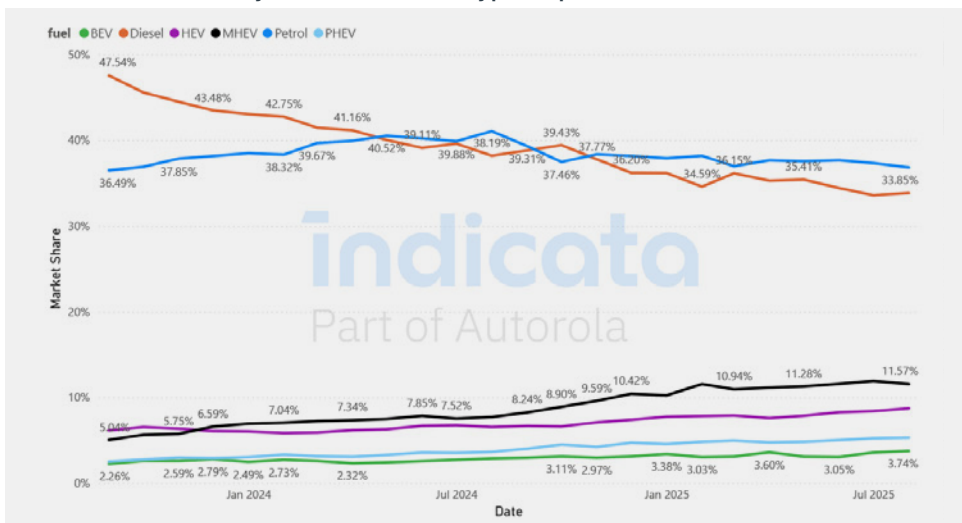
Top selling < 4-years-old by volume

Make	Model	MDS
Peugeot	2008	53.2
Peugeot	208	68.5
Renault	Captur	65.0

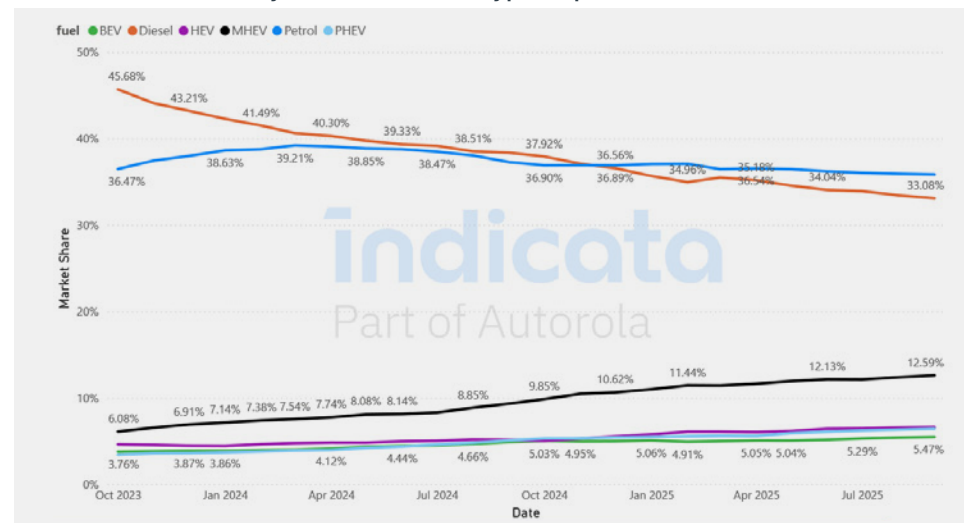
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
MG	HS / EHS	11x	34.2
Hyundai	Bayon	10x	34.6
Volkswagen	Polo	9x	39.4

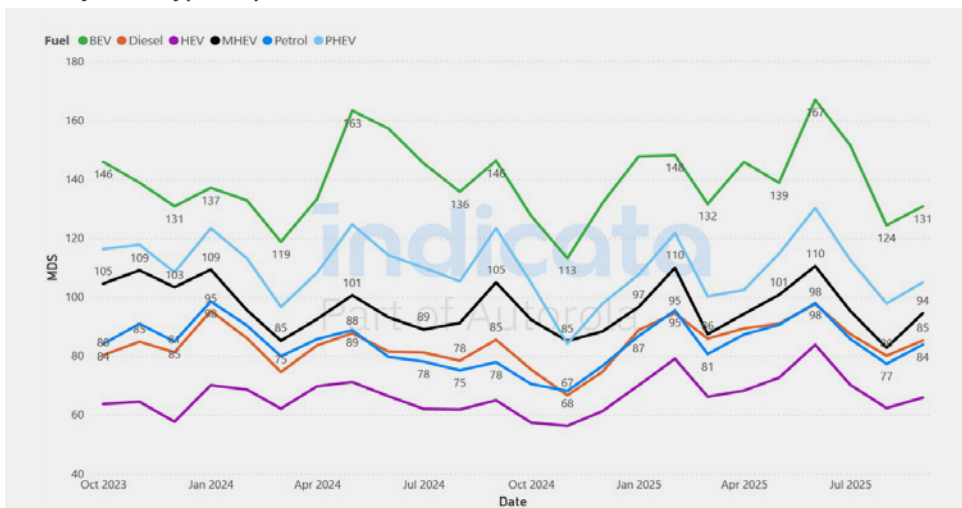
Sales Market Share by Month and Fuel Type - Spain



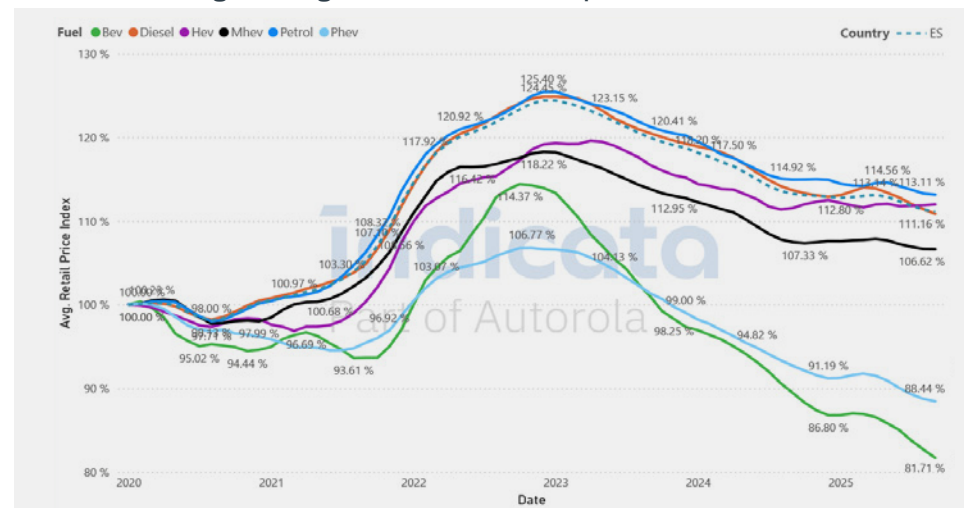
Stock Market Share by Month and Fuel Type - Spain



MDS by Fuel Type - Spain



Retail Price (Weighted Avg.) Index 100 = Jan - Spain



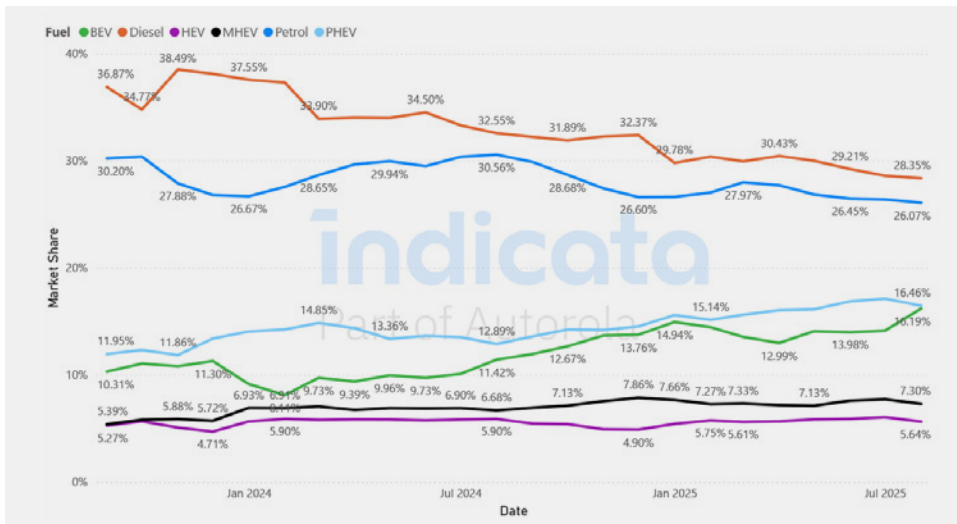
Top selling < 4-years-old by volume

Make	Model	MDS
Toyota	C-HR	49.2
Nissan	Qashqai	79.5
Opel	Corsa	64.4

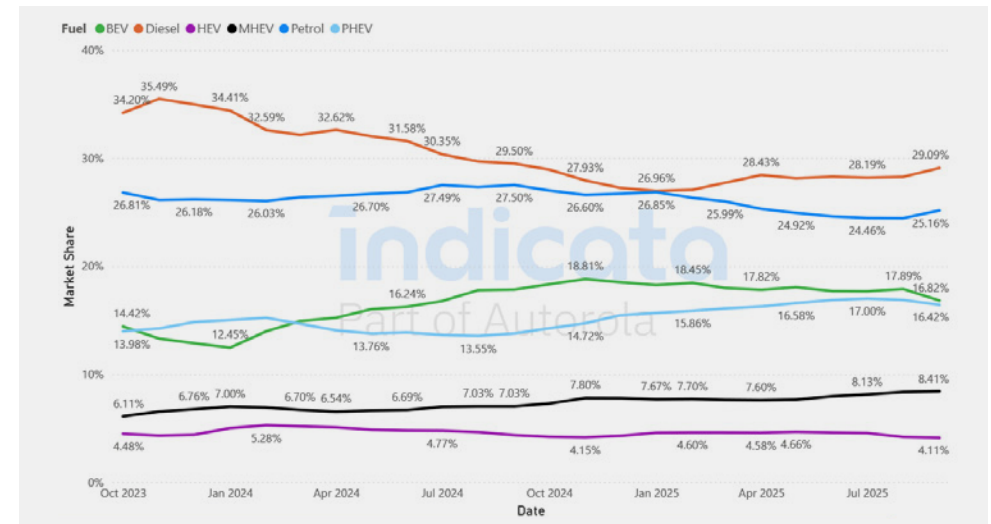
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Cupra	Ateca	10x	36.6
Toyota	Yaris Cross	8x	42.8
Toyota	RAV4	8x	47.7

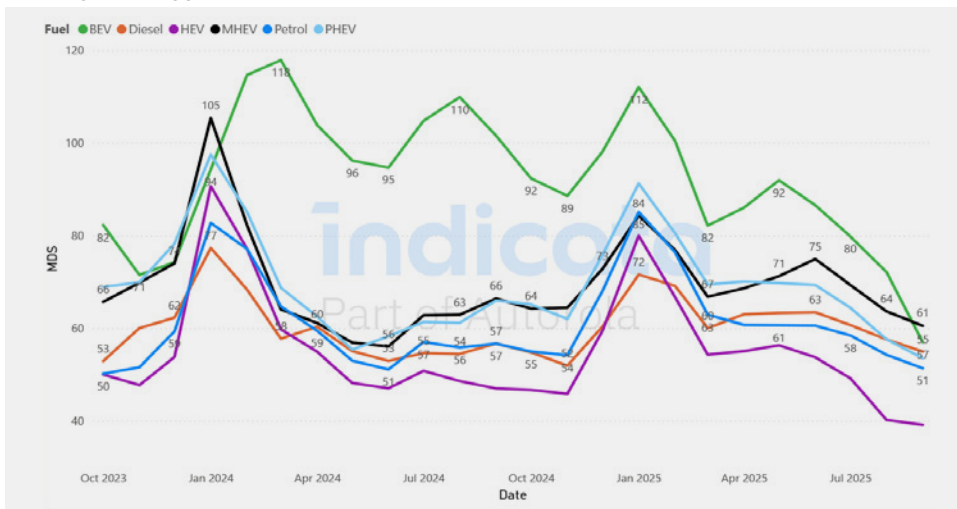
Sales Market Share by Month and Fuel Type - Sweden



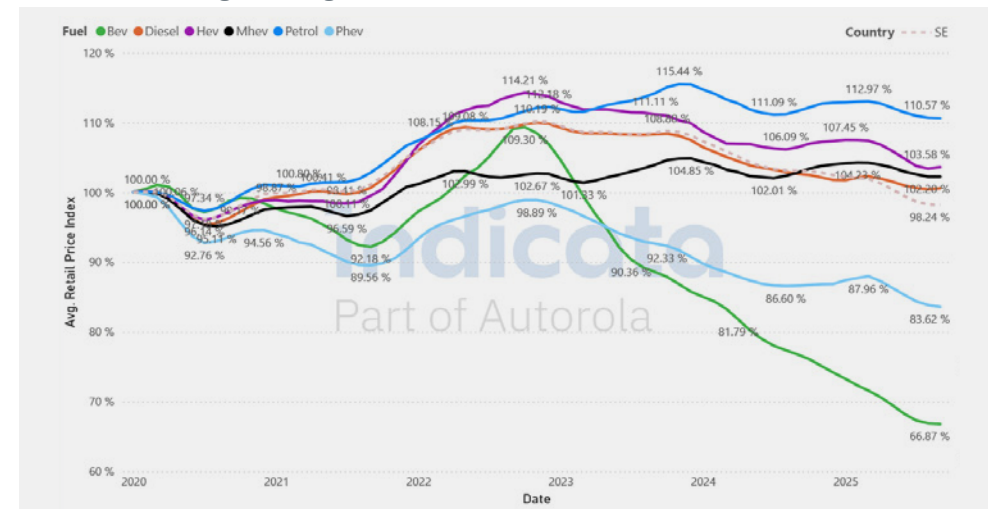
Stock Market Share by Month and Fuel Type - Sweden



MDS by Fuel Type - Sweden



Retail Price (Weighted Avg.) Index 100 = Jan - Sweden



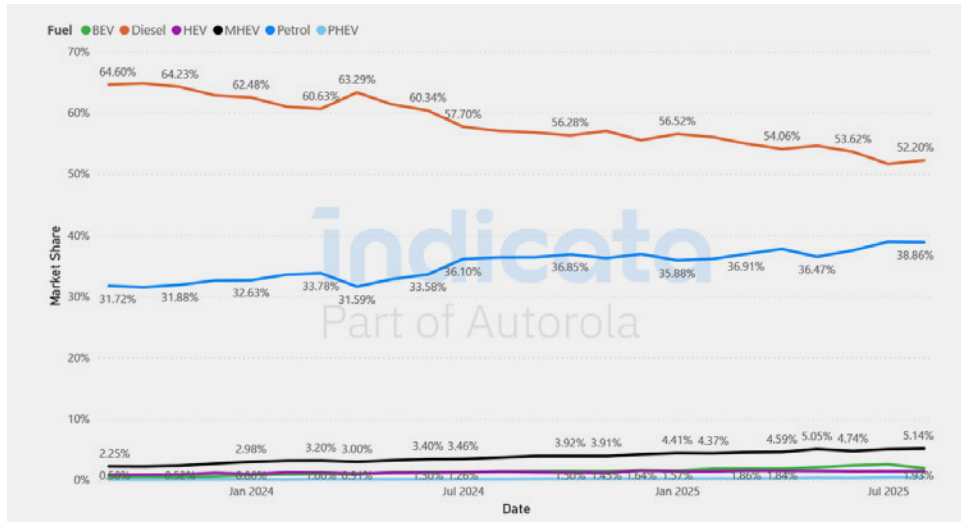
Top selling < 4-years-old by volume

Make	Model	MDS
Volvo	XC40	21.7
Volvo	XC60	30.0
Volvo	V60	38.0

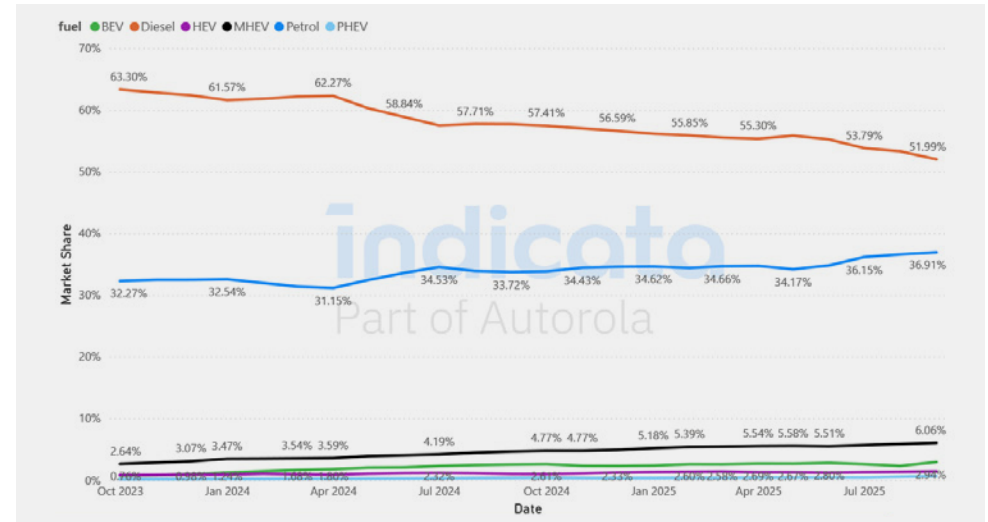
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Tesla	Model Y	25x	14.2
Renault	Zoe	20x	17.8
Tesla	Model 3	19x	19.1

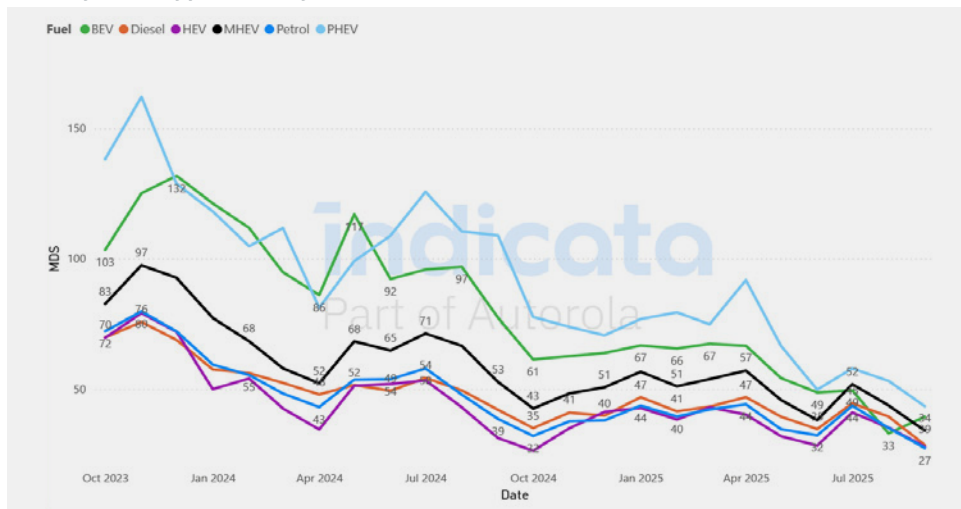
Sales Market Share by Month and Fuel Type - Türkiye



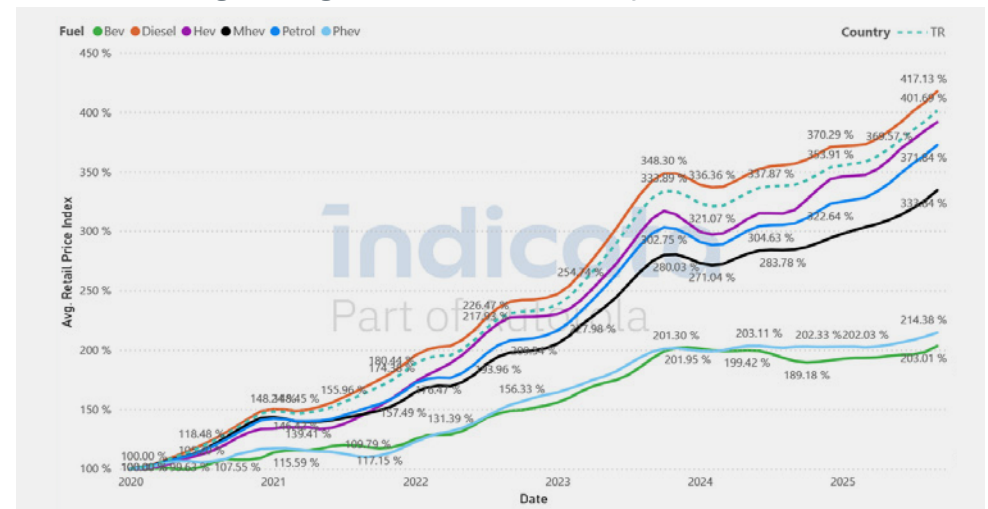
Stock Market Share by Month and Fuel Type - Türkiye



MDS by Fuel Type - Türkiye



Retail Price (Weighted Avg.) Index 100 = Jan - Türkiye



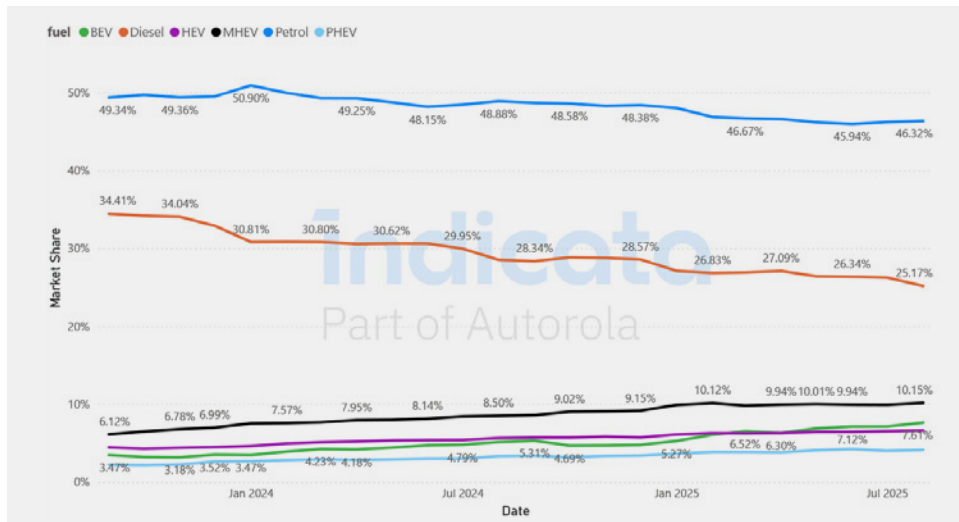
Top selling < 4-years-old by volume

Make	Model	MDS
Fiat	Tipo	25.1
Renault	Clio	23.8
Renault	Mégane	26.4

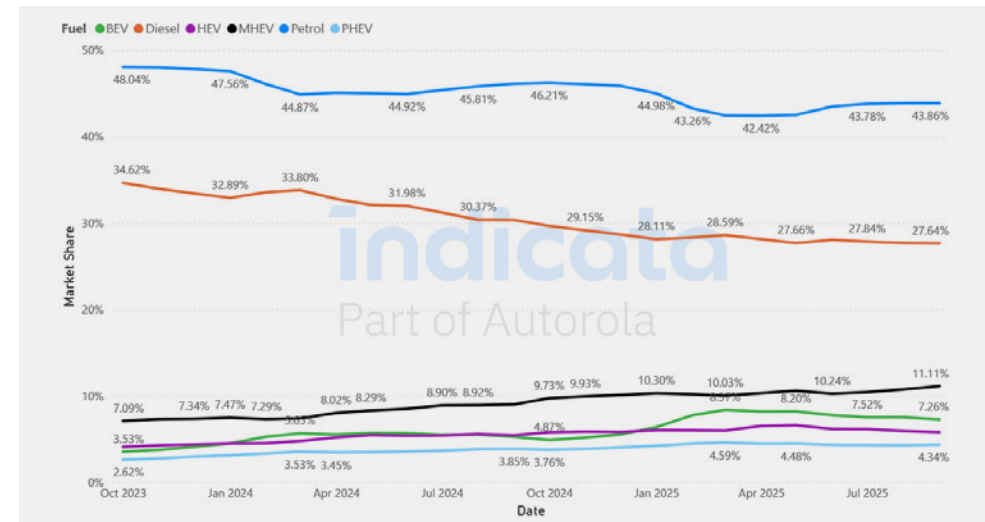
Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
Alfa Romeo	Tonale	22x	16.5
Chery	Tiggo7	20x	17.7
Hyundai	Elantra	19x	18.6

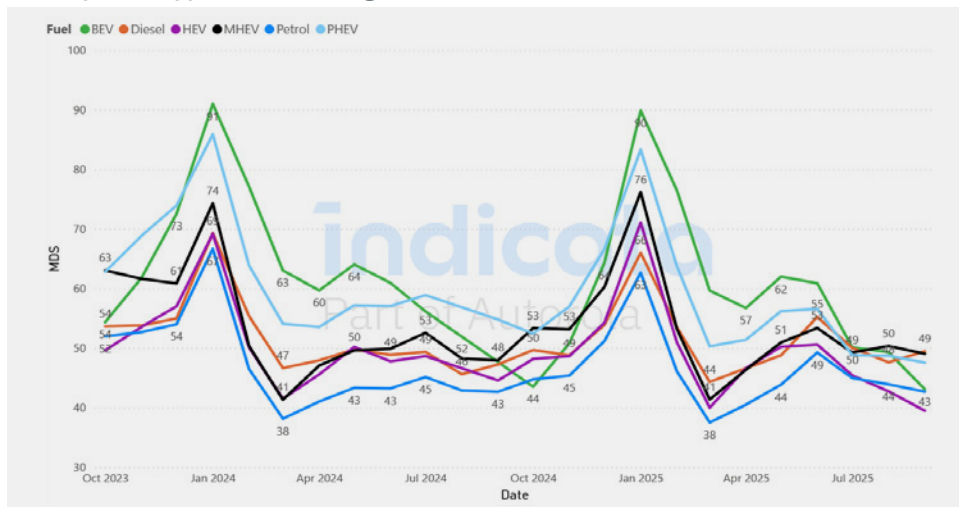
Sales Market Share by Month and Fuel Type - United Kingdom



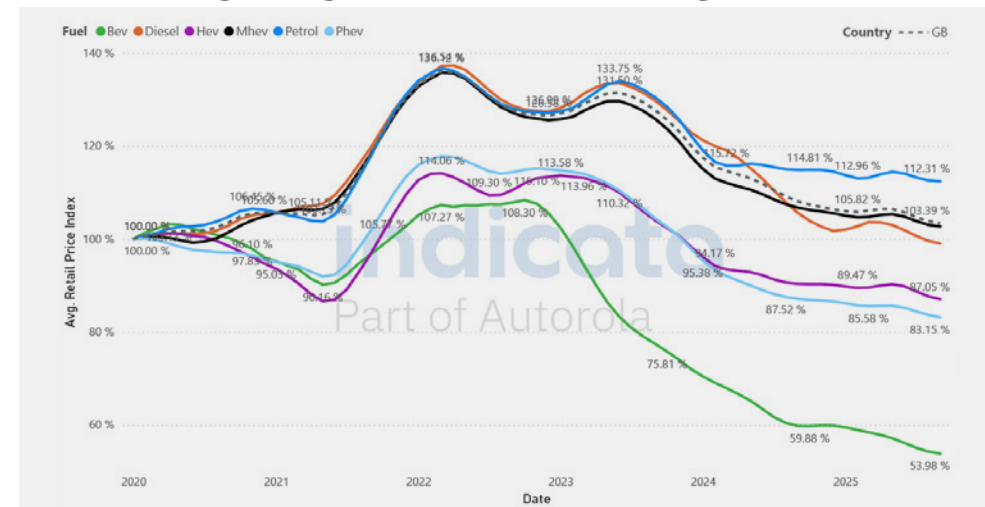
Stock Market Share by Month and Fuel Type - United Kingdom



MDS by Fuel Type - United Kingdom



Retail Price (Weighted Avg.) Index 100 = Jan - United Kingdom



Top selling < 4-years-old by volume

Make	Model	MDS
Ford	Puma	40.8
Vauxhall	Corsa	37.7
Kia	Sportage	41.5

Fastest selling < 4-years-old by Market Days Supply

Make	Model	Stock turn	MDS
BMW	i3	18x	20.0
Tesla	Model 3	18x	20.5
Mercedes-Benz	EQB	16x	23.2

Hvis du er interesseret i at kontakte Indicata, kan du se en liste over landekontakter nedenfor eller registrere dig via [Indicata.dk](https://indicata.dk)

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Den 24. marts udgav Indicata den første hvidbog *“COVID-19 I hvilket omfang vil markedet for brugte biler blive påvirket (og hvordan kan man overleve)?”*.

Dette dokument udforskede:

Tidlige markedstendenser

Virussens indledende indvirkning og de sociale distanceringsforanstaltninger, der er gennemført.

Markedsscenarier

En række påvirkninger baseret på udviklingen i infektionsraten og historiske markedsdata.

Afhjælpning

Risikovurdering efter sektor, kombineret med potentielle korrigerende handlinger.

Indicata Market Watch er en pdf-rapport, der udgives omkring den 20. i måneden. Den indeholder tendenser for lagerbeholdning, salg og markeds dages udbud (MDU) fordelt på brændstoftype.

Vi har forpligtet os til at opdatere med live-data fra markedet og oplyse om salg, lager og priser for at holde dig ajour med det hurtigt omskiftelige marked.

Vi glæder os til fremover at kunne præsentere den nyeste udgave af **“Indicata Market Watch”**, som dækker 16 europæiske lande og Brasilien. I januar, april, juli og oktober, vil vi levere en omfattende analyse af brugtbilsmarkedet med kommentarer for hvert land for Q1, Q2, Q3 og Q4.

I de mellemliggende perioder udgiver vi pixi-versioner af rapporten for årets øvrige otte måneder, inklusive en samlet europæisk oversigt med landegrafer og -tabeller.

Hvordan producerer vi vores data?

Indicata analyserer dagligt 9 mio. annoncer for brugte køretøjer i hele Europa, og vores system gennemgår omfattende datarensningssprocesser for at sikre dataintegritet.

Denne rapports salg er baseret på annoncer fra anerkendte bilforhandlere for faktiske brugte køretøjer. Den omfatter derfor ikke data relateret til private (P2P) annoncer.

Når en annonce fjernes fra internettet, klassificeres den som et 'salg'.



Indicata

Market Watch™

Rapport om brugtbil-indsigt



For mere indsigt i B2B
-markedstendenser,
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