



September 2025 | Edition 67

European used car market balances stability and division



Europe's used car market continues to settle into a new equilibrium. Volumes remain steady, price indices are easing after recent peaks, and market attractiveness is diverging sharply by fuel type and country. September highlights a dynamic of selective normalisation, where some segments regain momentum while others continue to struggle.

Petrol holds firm, diesel divides, while electrics lag behind. Petrol remains the safe haven of Europe's used car market, especially in compact and urban segments. It combines reasonable running costs, abundant supply, and consumer trust, which explains its low MDS.

Diesel, however, paints a two-faced European picture: penalised in Northern and Western markets by restrictive fiscal and environmental policies, yet still highly relevant in Germany, Italy and Poland, where it remains the go-to solution for high-mileage drivers and fleets.

Hybrids (HEV, MHEV) are carving out a middle ground, gradually increasing share thanks to their greener image without charging constraints.

BEVs and PHEVs continue to progress slowly, mainly in pioneering markets (Scandinavia, Benelux), but their attractiveness in used is limited by steep depreciation and consumer concerns over battery durability.

Prices stabilise, but fractures remain across Europe.

Price indices are moving back towards normality after the exceptional rises of 2022-2023.

In France, Germany and the UK, values are stabilising, supported by firm demand for younger vehicles and constrained supply of <4-year-old stock.

In Italy, Spain and Portugal, corrections are sharper as households trade down to older, more affordable cars, pressuring mid-range prices.

In Northern Europe, BEVs are recording the steepest drops, reflecting abundant supply from fleets and strong new-car incentives. The result is a market where pricing is no longer uniform but mirrors national economic and regulatory specificities.

ICE stays strong, electrified models remain fragile.

Europe's used market is now operating at two distinct speeds.

On one side, ICE — petrol and some diesels — maintain fast turnover and robust valuations, sustained by their affordability.

On the other, electrified models, while growing in new registrations, still struggle in used: high MDS and steep depreciation reveal a mismatch between rising supply and hesitant demand. This polarisation highlights the challenge of translating the energy transition into the used market, where household decisions diverge from those of new-car buyers.

Electrified models face the challenge of proving their place.

The coming months will be critical in confirming current trends. Petrol is likely to remain dominant, while diesel's trajectory will depend on political and fiscal choices that vary widely across Europe. The real battleground, however, lies with electrified vehicles: whether the used market can absorb a growing wave of BEVs and PHEVs will hinge as much on consumer confidence in residual values as on targeted policy support.

For market players, the message is clear: ICE vehicles offer short-term clarity, but the medium-term balance will be decided by how successfully electrified vehicles carve out their place.

We are committed to providing the European used market with live used car data on sales, stock, and pricing to keep you abreast of the fast-moving environment.

We will continue to publish our comprehensive used market analysis and country commentary for Q1, Q2, Q3 and Q4 in January, April, July and October.

Meanwhile, Lite versions of the report will be published for the remaining eight months of the year which will include an overall European summary and country graphs and tables.

We hope you continue to enjoy our report.

Sales trends, Market Day's Supply and Top Selling Cars

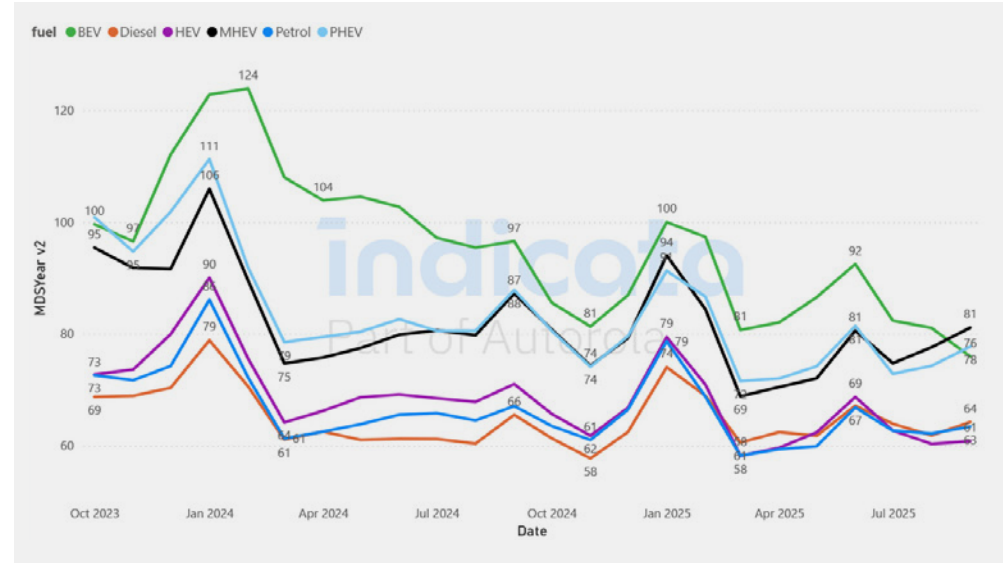
Top selling car models up to 4-years-old by volume

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

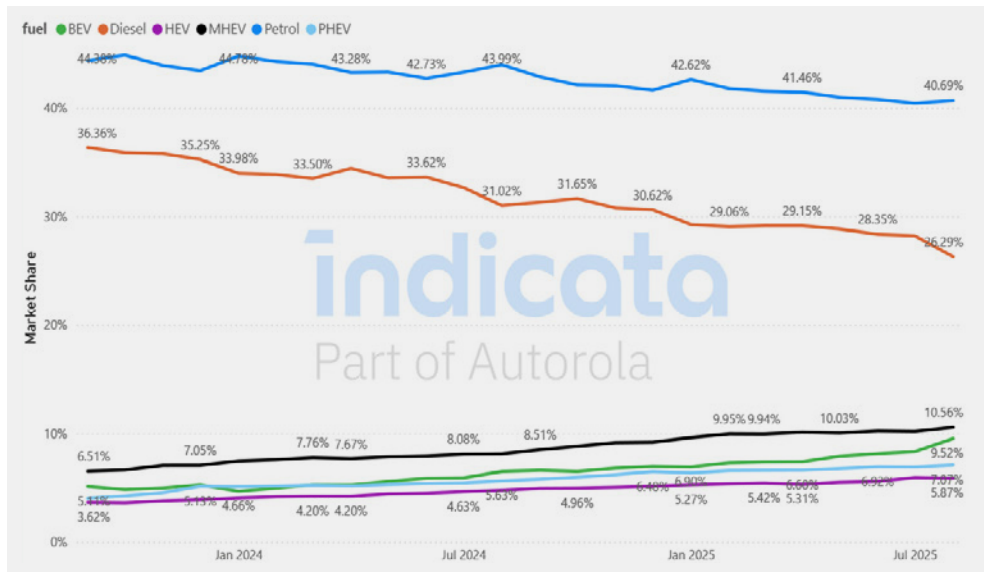
Fastest selling car models up to 4-years-old by Market Days Supply

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

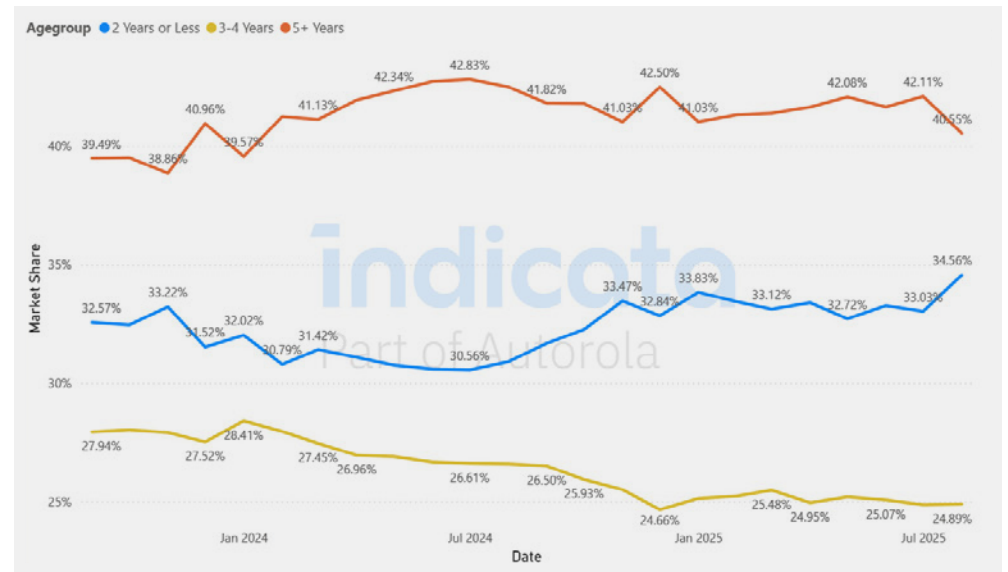
MDS by Fuel Type - European Market



Sales Market Share by Month and Fuel Type - European Market



Sales Market Share by Month and Age Group - European Market



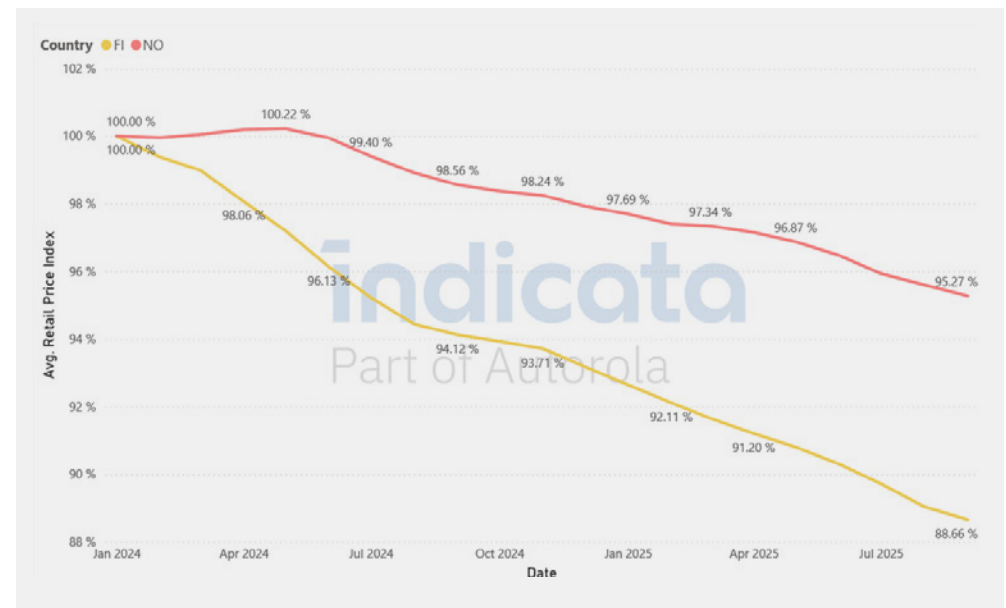
Retail pricing and monthly pricing movements by country

Please note that Indicata is currently in the process of enhancing the Marketwatch Retail Price Index. As a result, there may be variations compared to the versions available in previous months. We appreciate your understanding as we strive to deliver a better experience.

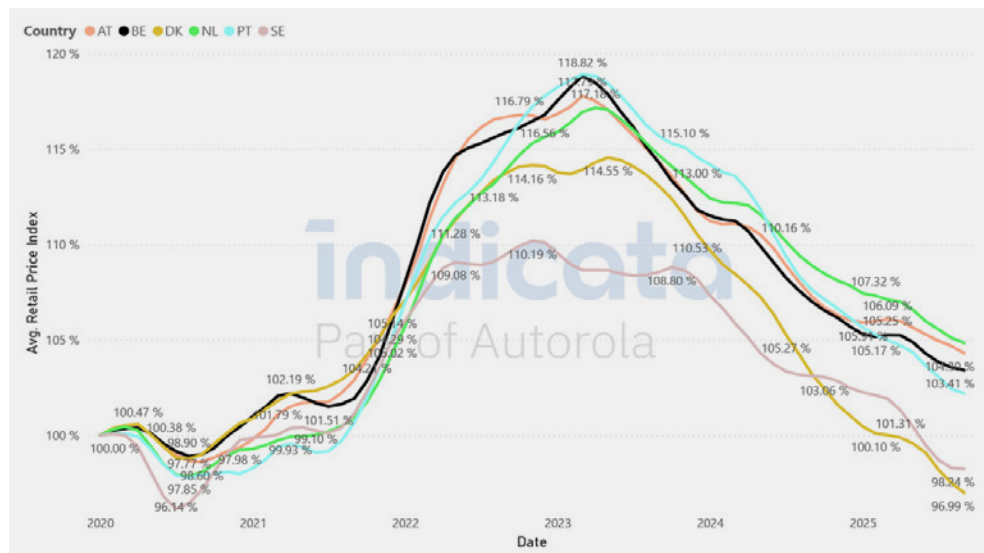
Country	Latest used car price percentage point movement versus Jan 2020
Türkiye	301.7pp
Spain	11.6pp
Poland	9.5pp
Italy	8.5pp
Germany	7.0pp
Netherlands	4.8pp
Austria	4.3pp
France	3.5pp
Belgium	3.4pp
United Kingdom	3.4pp
Portugal	2.2pp
Sweden	-1.8pp
Denmark	-3.0pp
Average excl. Türkiye	2.1pp
Norway*	-4.7pp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

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

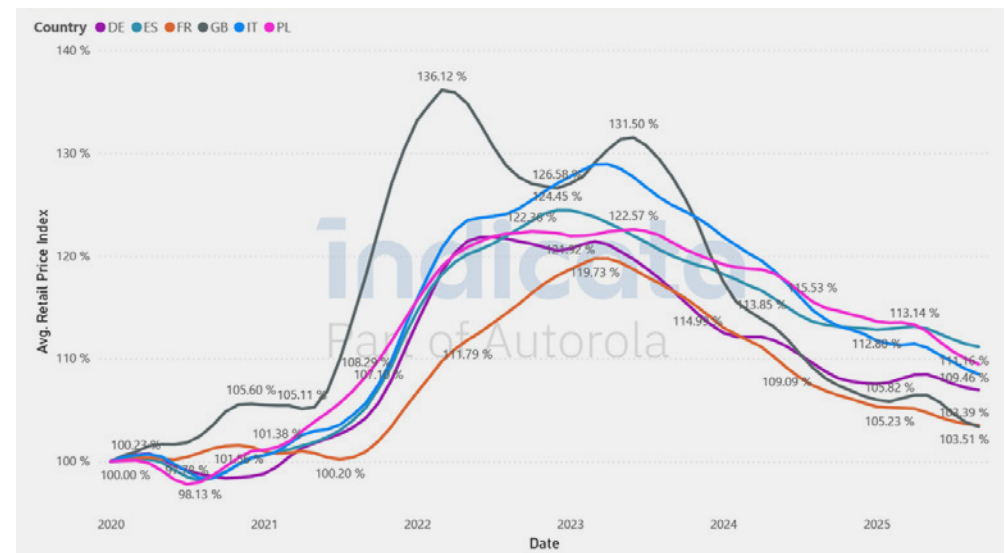
Retail Price (weighted. avg.) Index 100 = Jan - CH, FL, NO



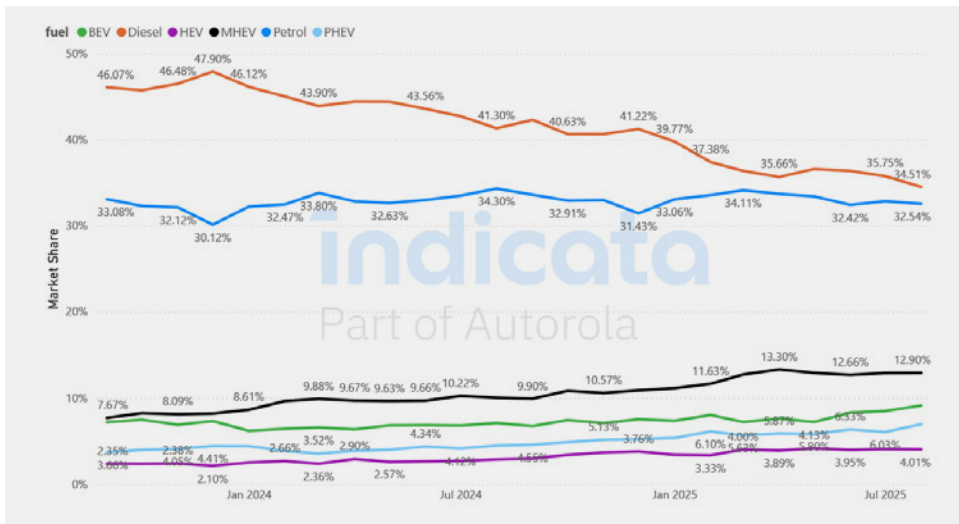
Retail Price (weighted. avg.) Index 100 = Jan - AT, BE, DK, NE, PT, SE



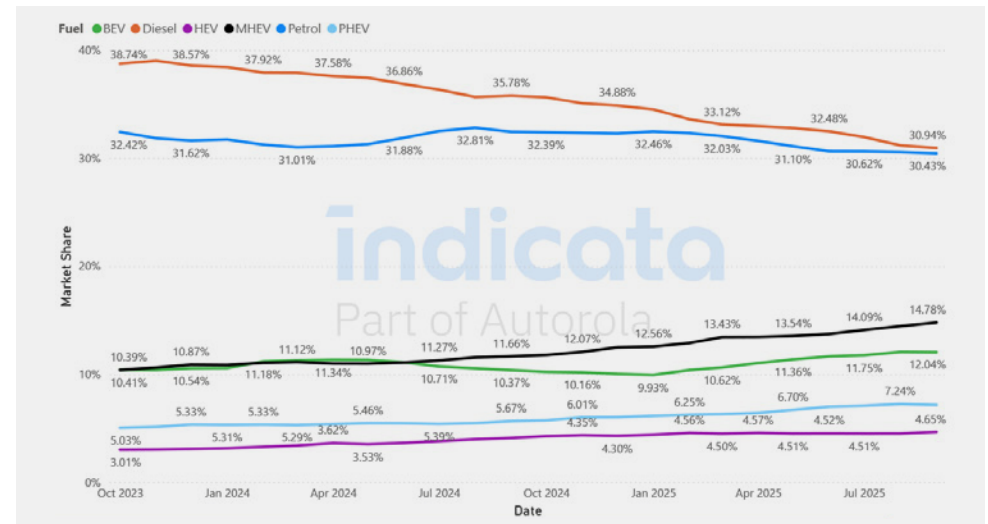
Retail Price (weighted. avg.) Index 100 = Jan - FR, DE, IT, PL, ES, GB



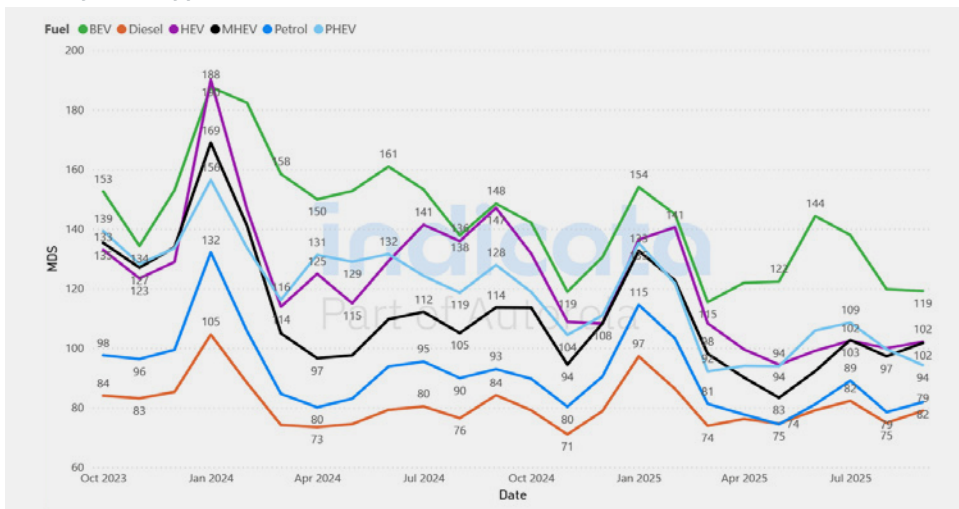
Sales Market Share by Month and Fuel Type - Austria



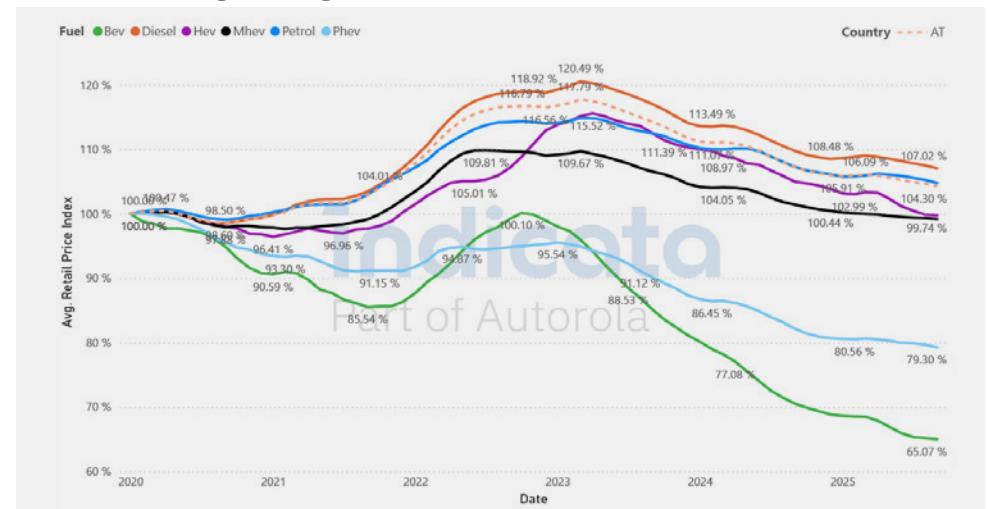
Stock Market Share by Month and Fuel Type - Austria



MDS by Fuel Type - Austria



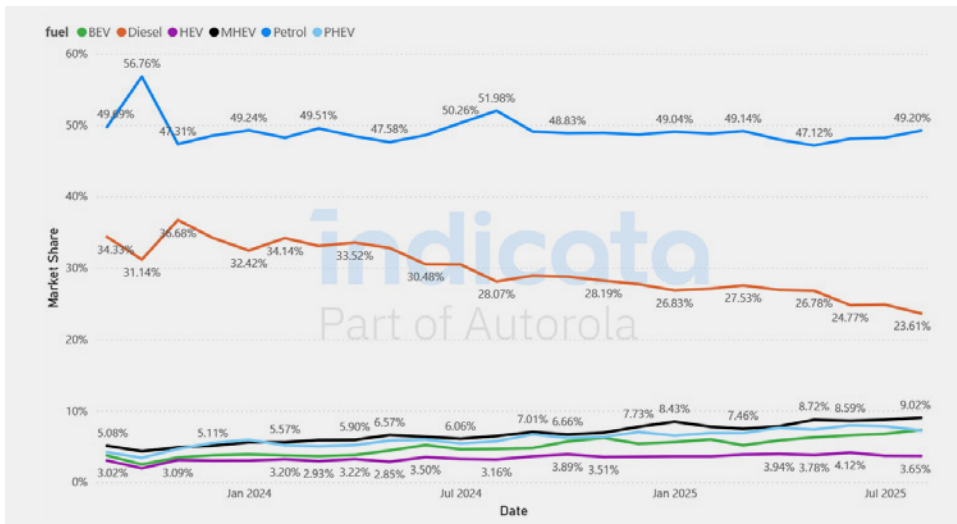
Retail Price (Weighted Avg.) Index 100 = Jan - Austria



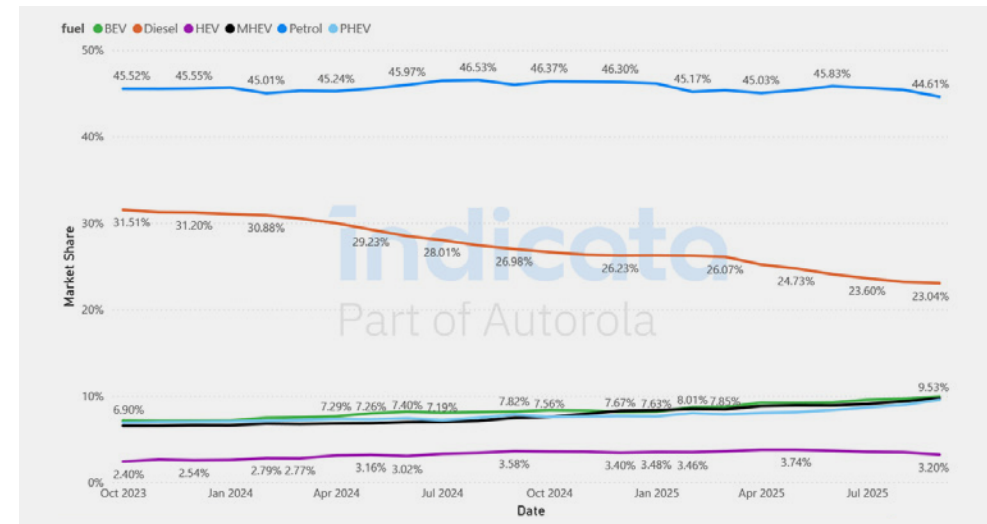
Top selling < 4-years-old by volume		
Make	Model	MDS
Škoda	Octavia	58.5
Volkswagen	Golf	63.6
BMW	3 Series	69.6

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

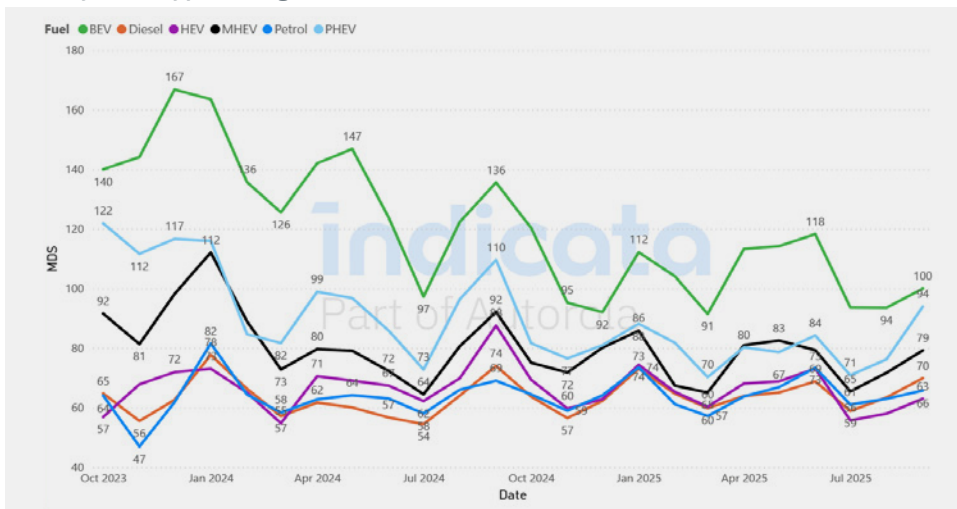
Sales Market Share by Month and Fuel Type - Belgium



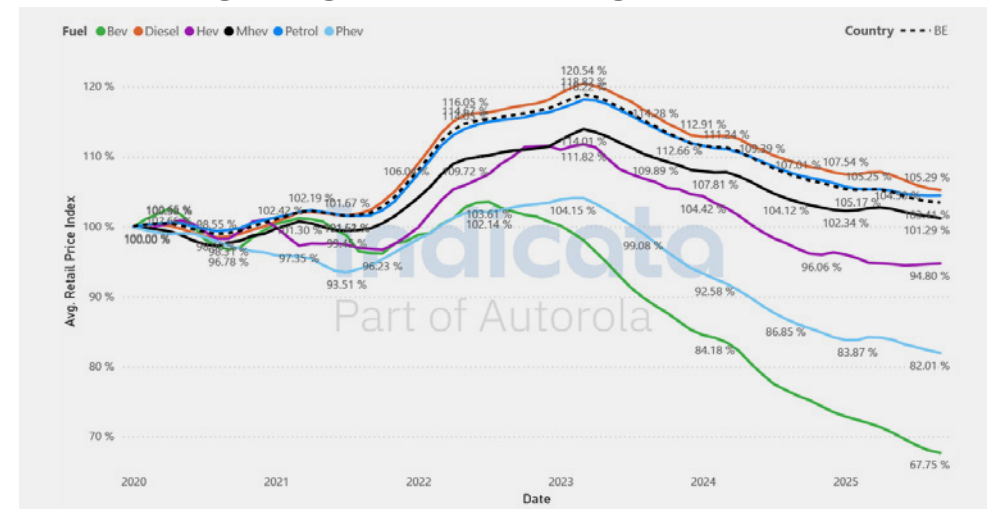
Stock Market Share by Month and Fuel Type - Belgium



MDS by Fuel Type - Belgium



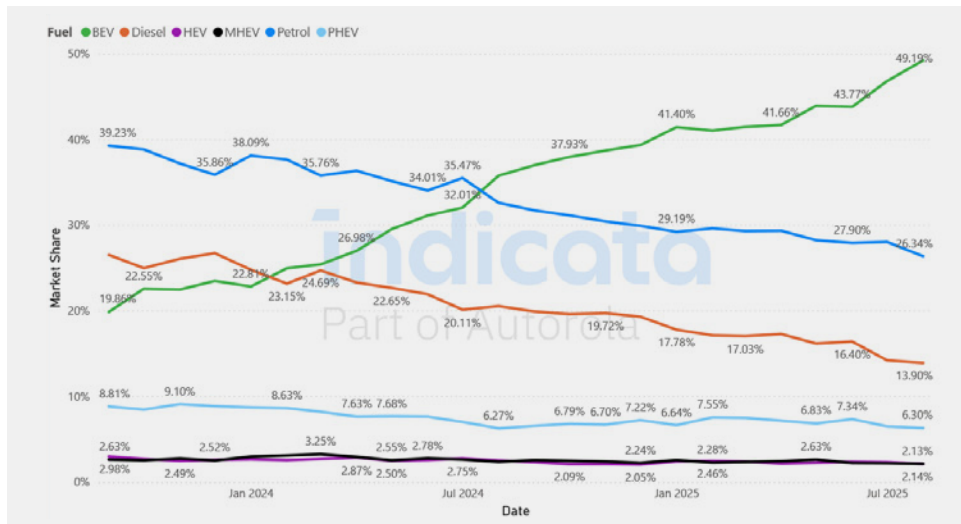
Retail Price (Weighted Avg.) Index 100 = Jan - Belgium



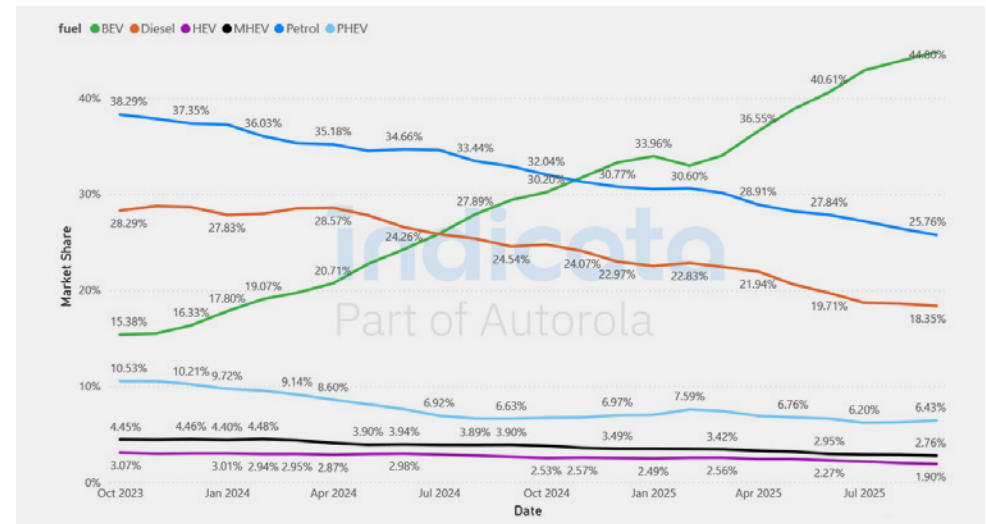
Top selling < 4-years-old by volume		
Make	Model	MDS
Volkswagen	Golf	79.3
BMW	3 Series	95.9
Opel	Corsa	52.1

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

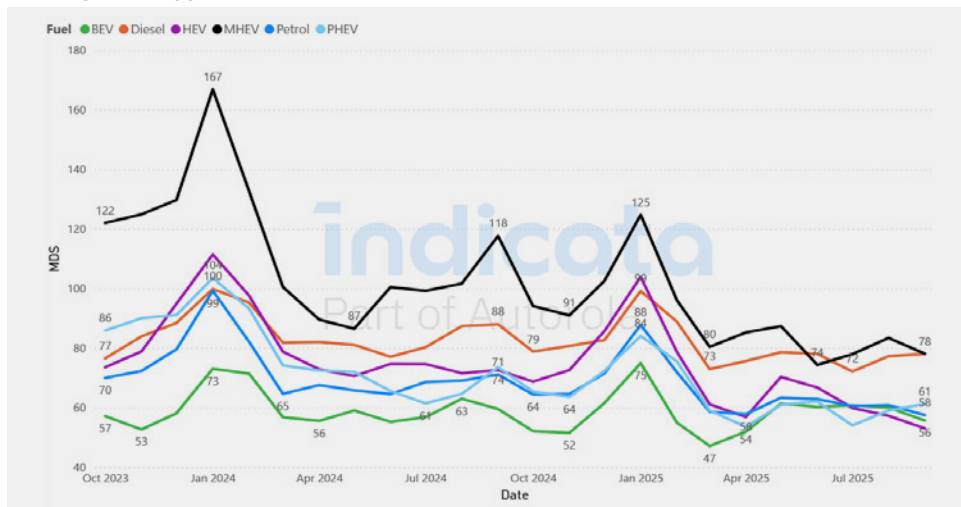
Sales Market Share by Month and Fuel Type - Denmark



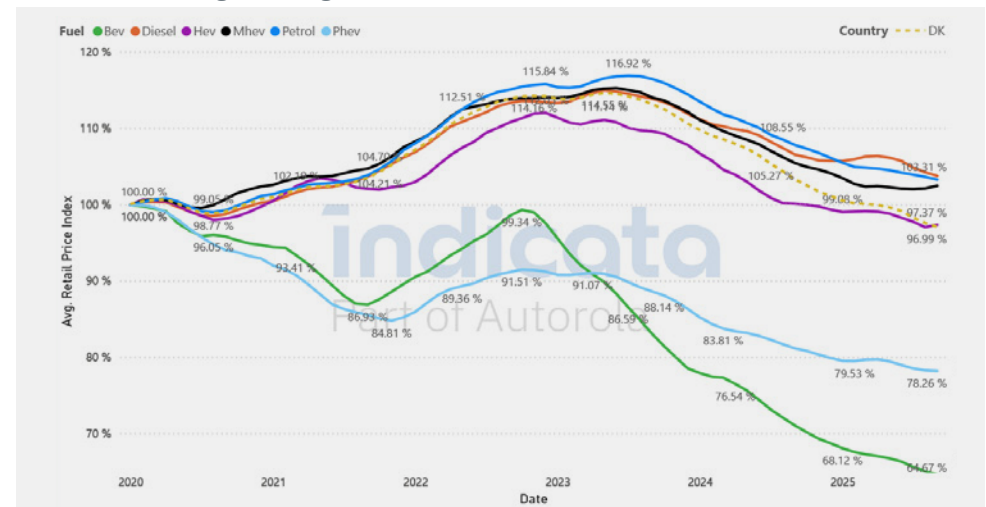
Stock Market Share by Month and Fuel Type - Denmark



MDS by Fuel Type - Denmark



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



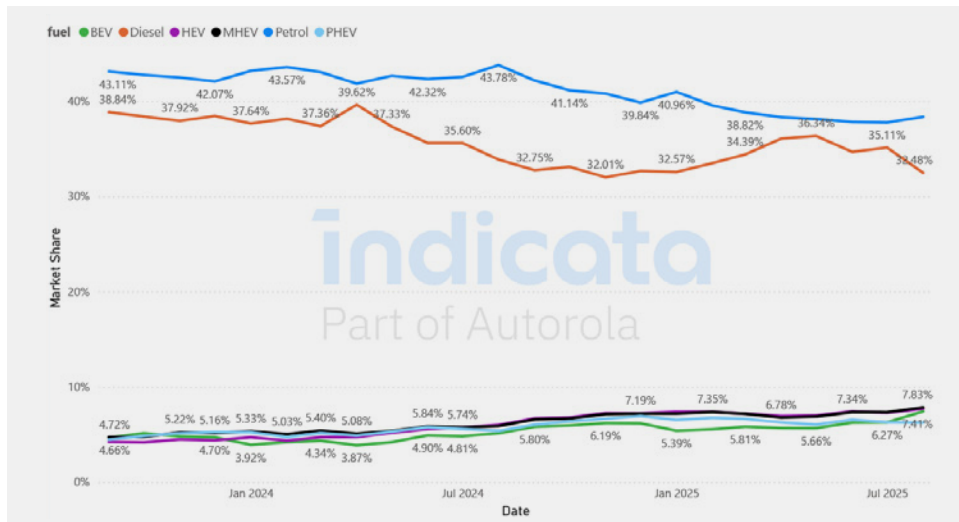
Top selling < 4-years-old by volume

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

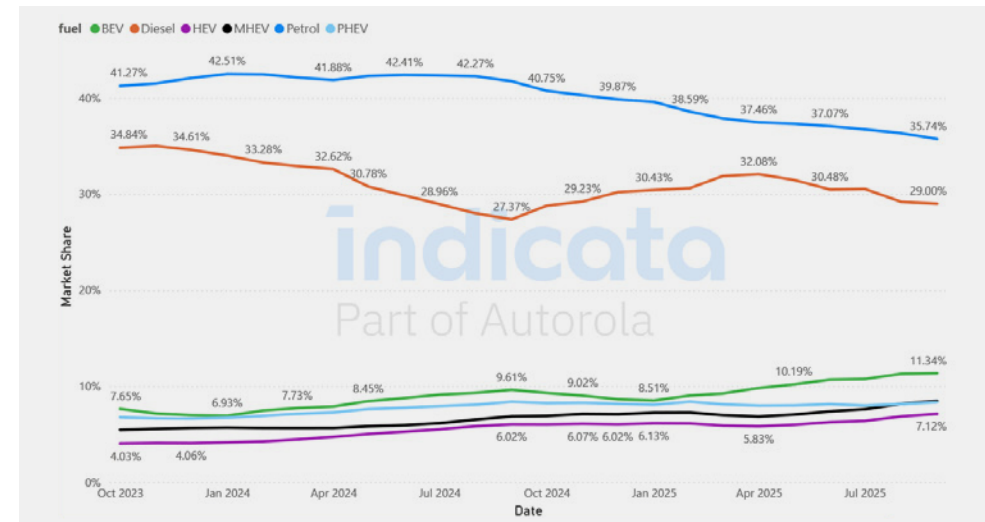
Fastest selling < 4-years-old by Market Days Supply

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

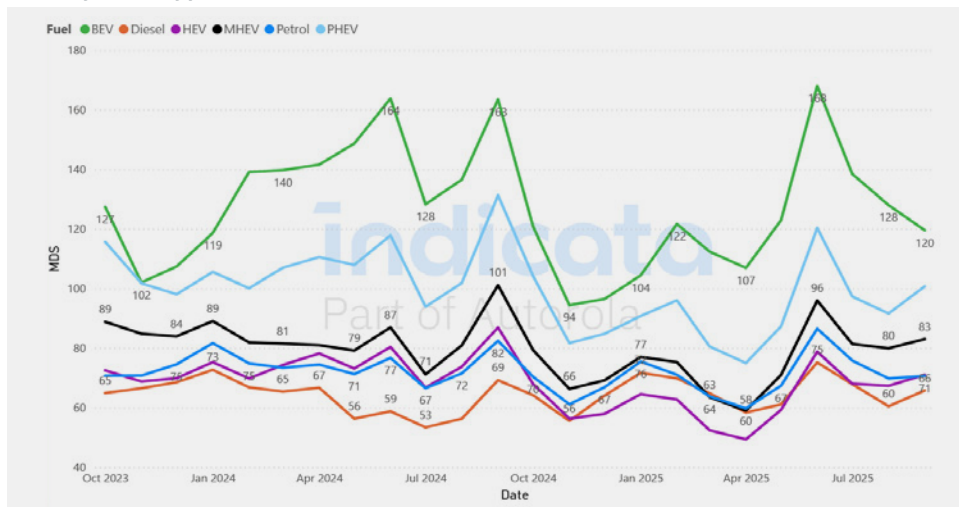
Sales Market Share by Month and Fuel Type - France



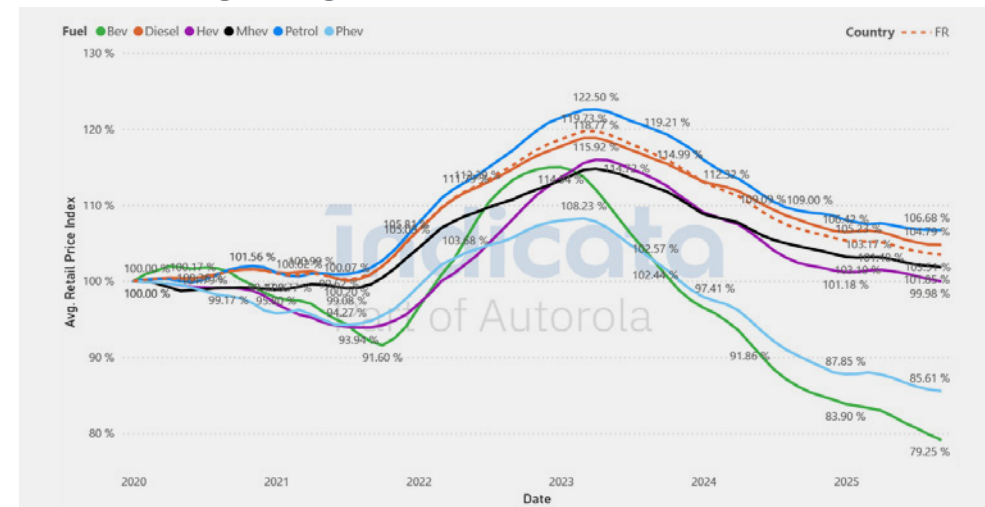
Stock Market Share by Month and Fuel Type - France



MDS by Fuel Type - France



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



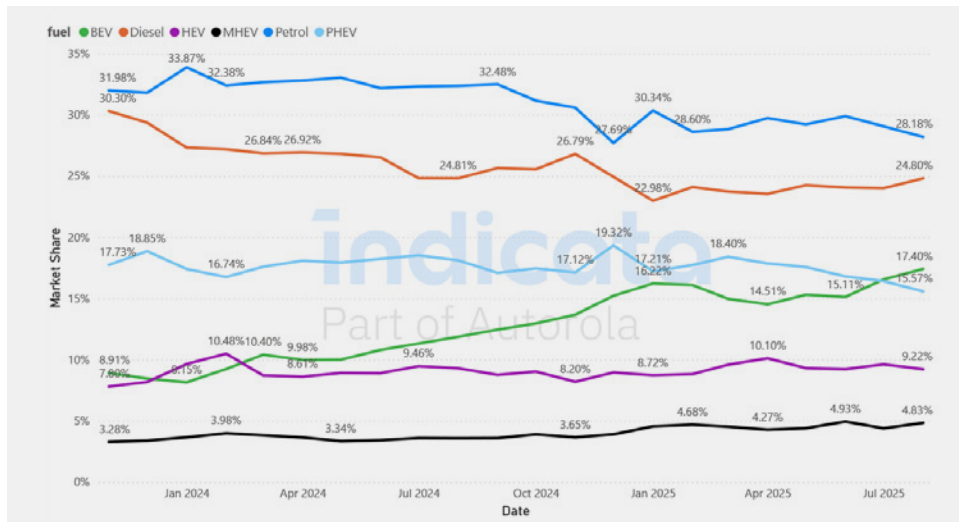
Top selling < 4-years-old by volume

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

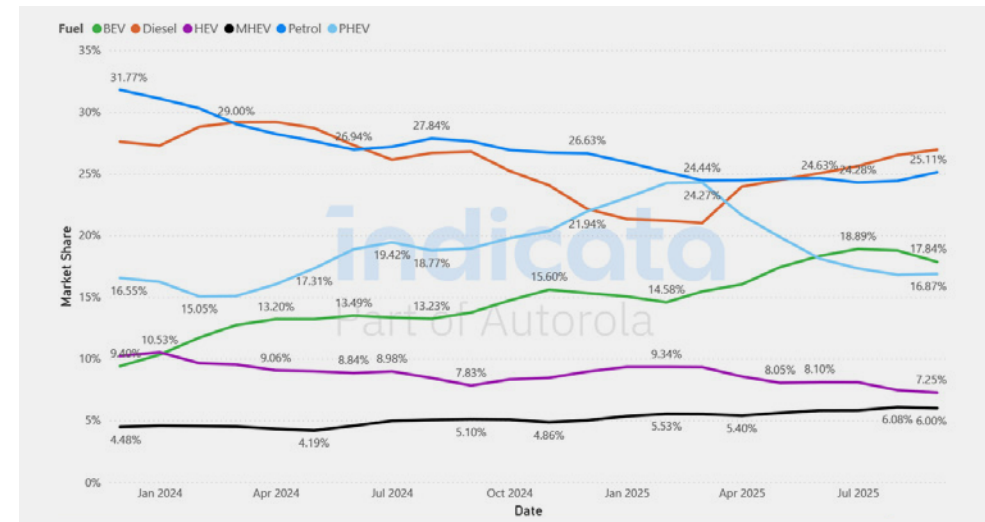
Fastest selling < 4-years-old by Market Days Supply

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

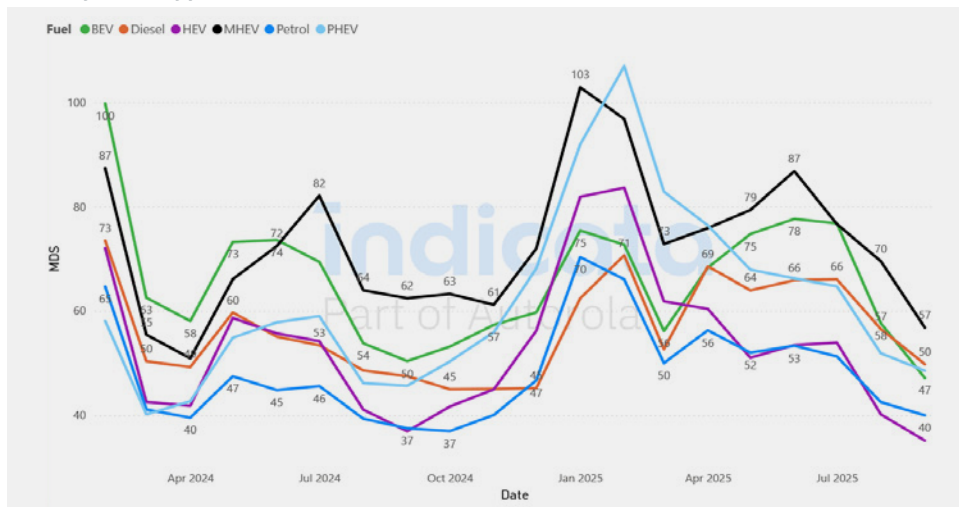
Sales Market Share by Month and Fuel Type - Finland



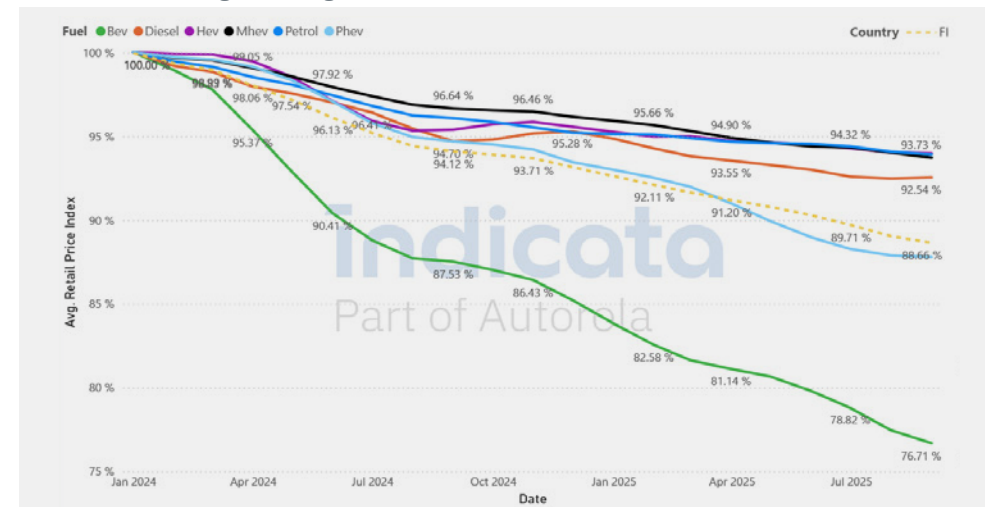
Stock Market Share by Month and Fuel Type - Finland



MDS by Fuel Type - Finland



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



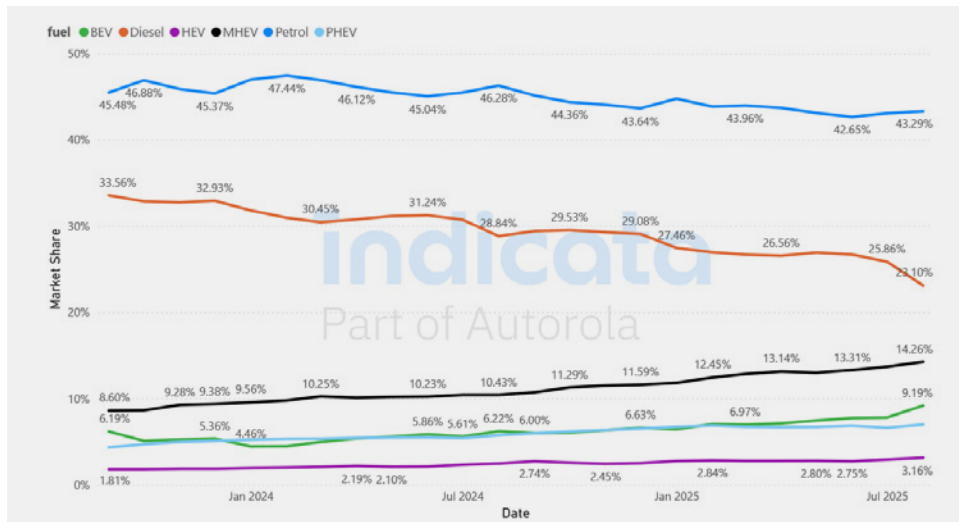
Top selling < 4-years-old by volume

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

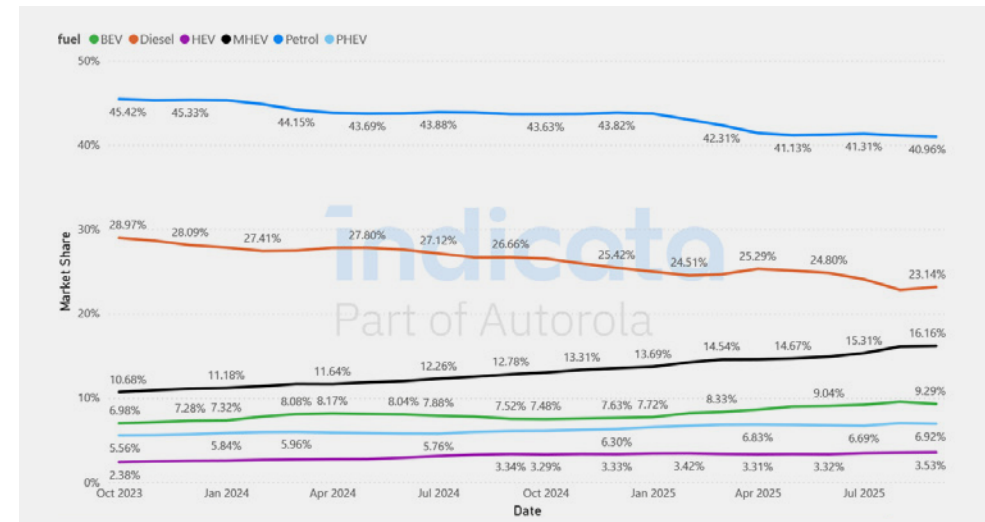
Fastest selling < 4-years-old by Market Days Supply

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

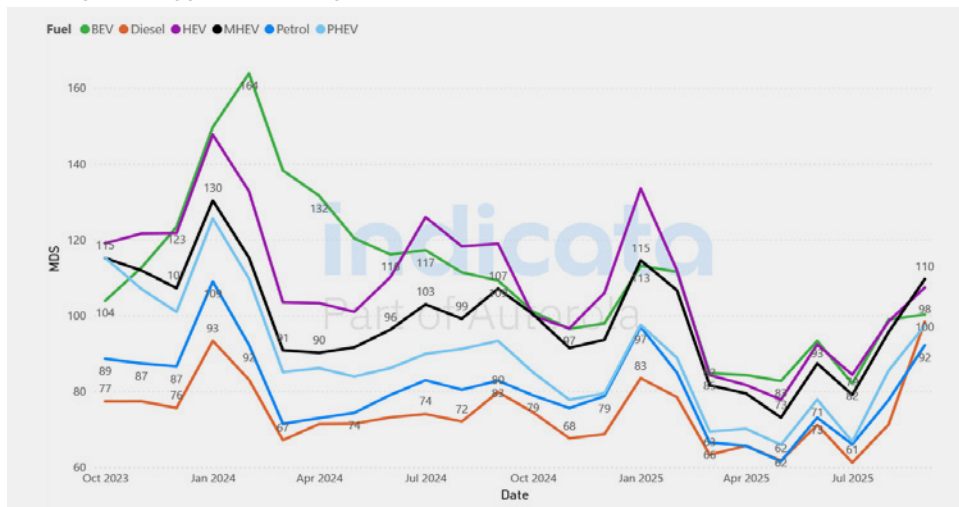
Sales Market Share by Month and Fuel Type - Germany



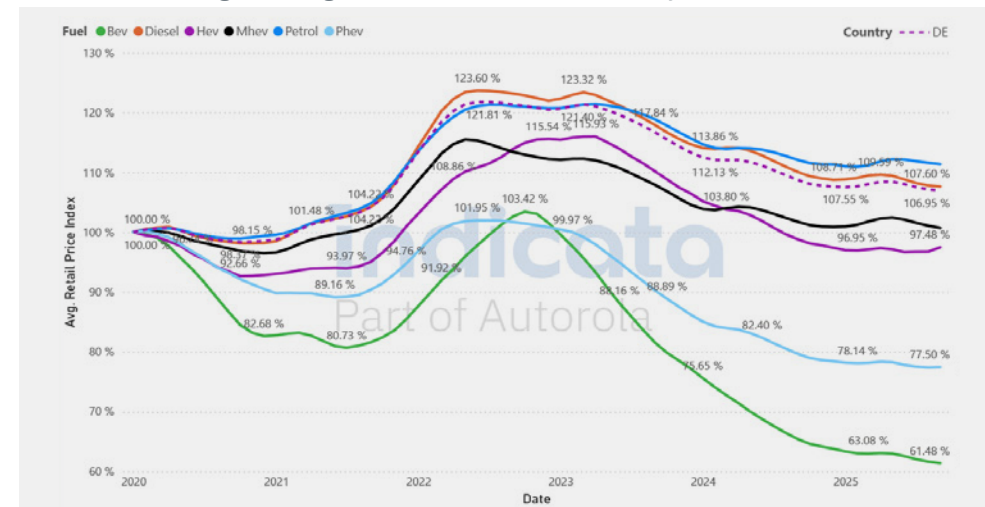
Stock Market Share by Month and Fuel Type - Germany



MDS by Fuel Type - Germany



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



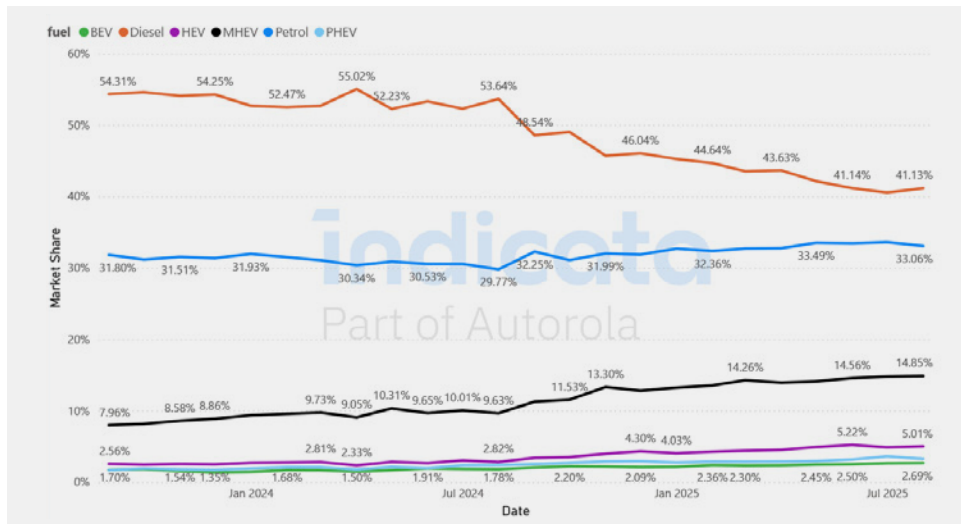
Top selling < 4-years-old by volume

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

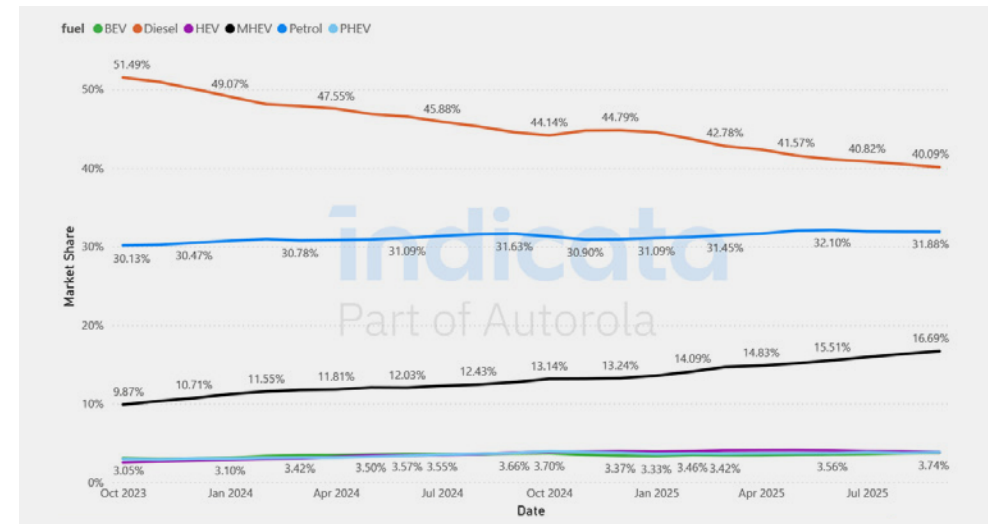
Fastest selling < 4-years-old by Market Days Supply

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

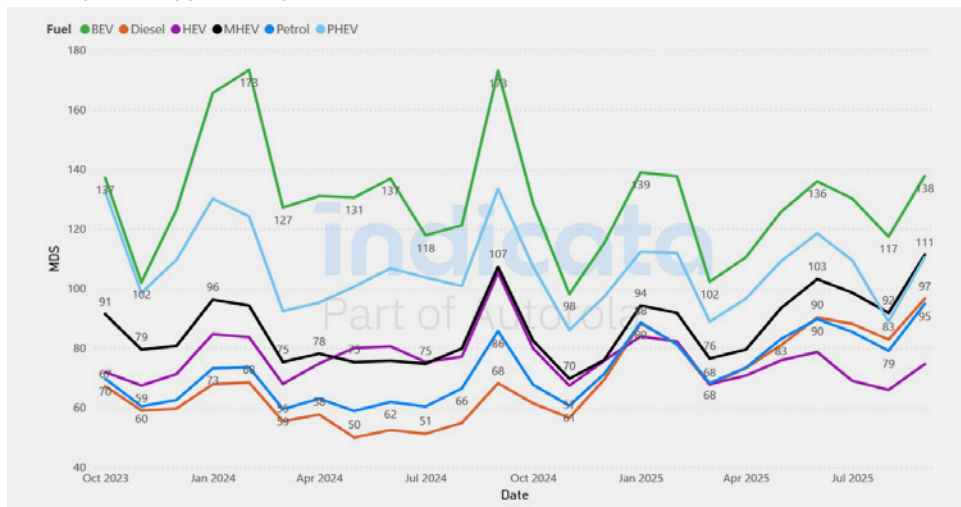
Sales Market Share by Month and Fuel Type - Italy



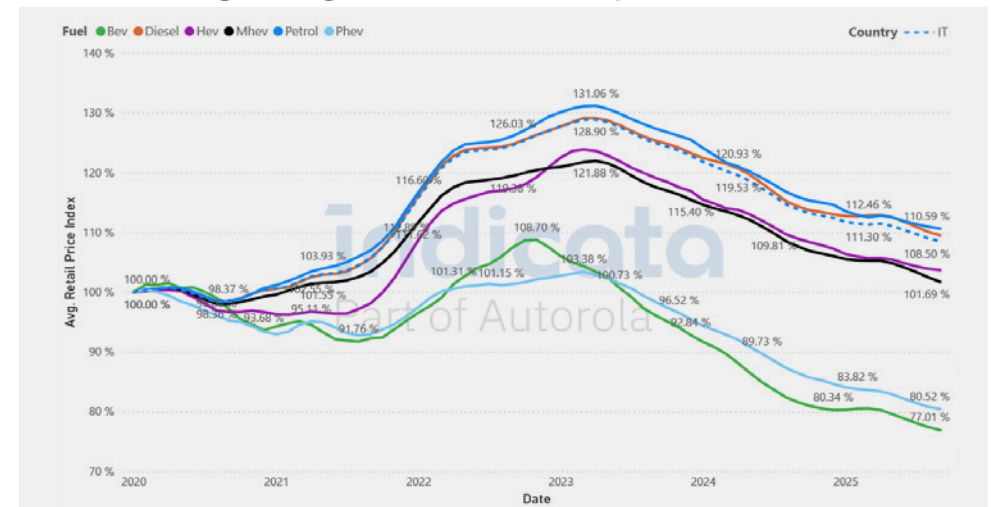
Stock Market Share by Month and Fuel Type - Italy



MDS by Fuel Type - Italy



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



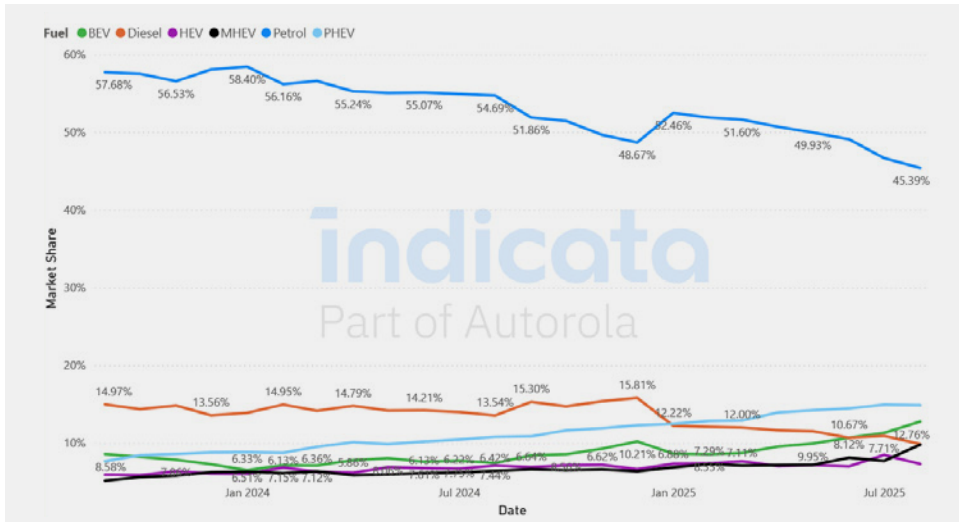
Top selling < 4-years-old by volume

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

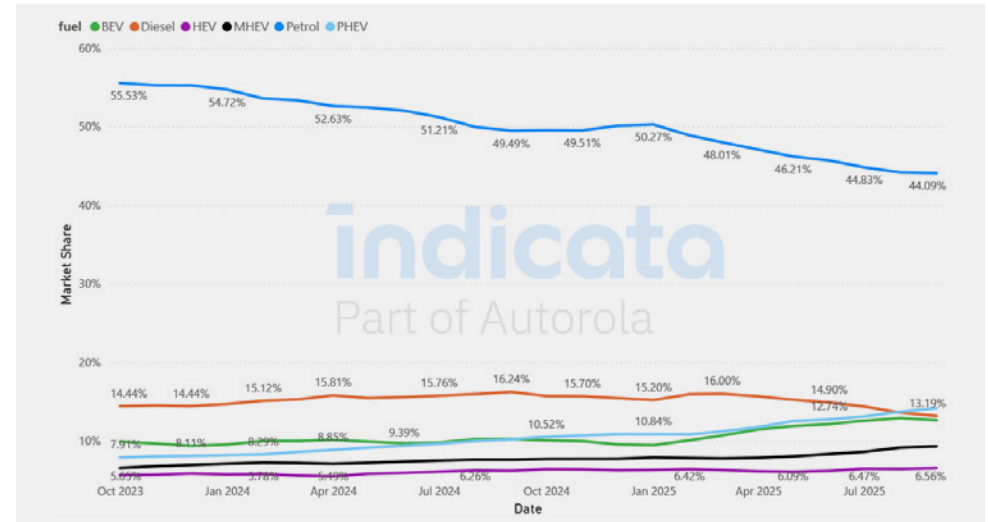
Fastest selling < 4-years-old by Market Days Supply

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

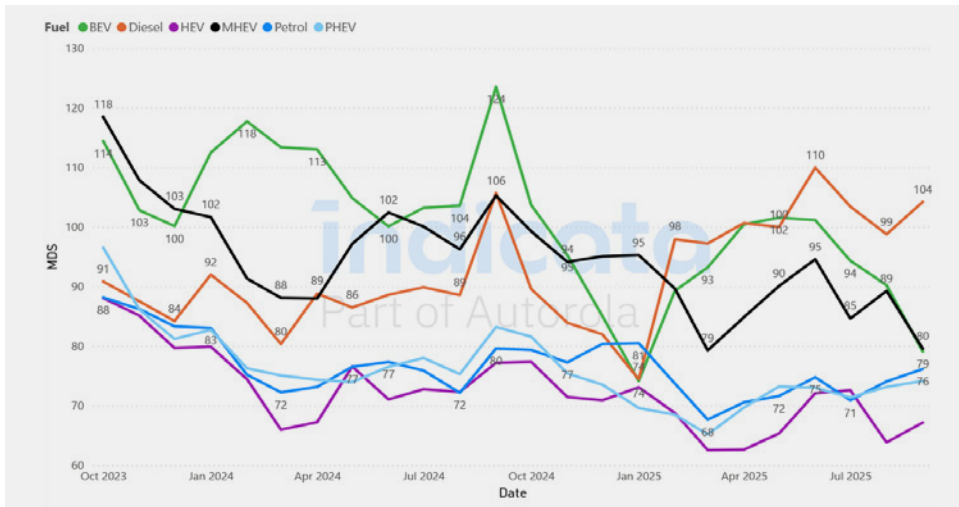
Sales Market Share by Month and Fuel Type - Netherlands



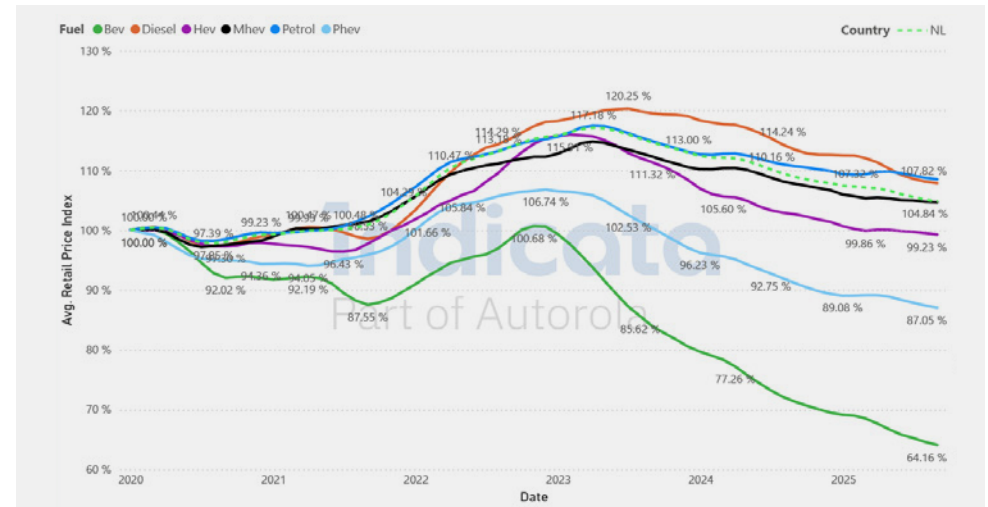
Stock Market Share by Month and Fuel Type - Netherlands



MDS by Fuel Type - Netherlands



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



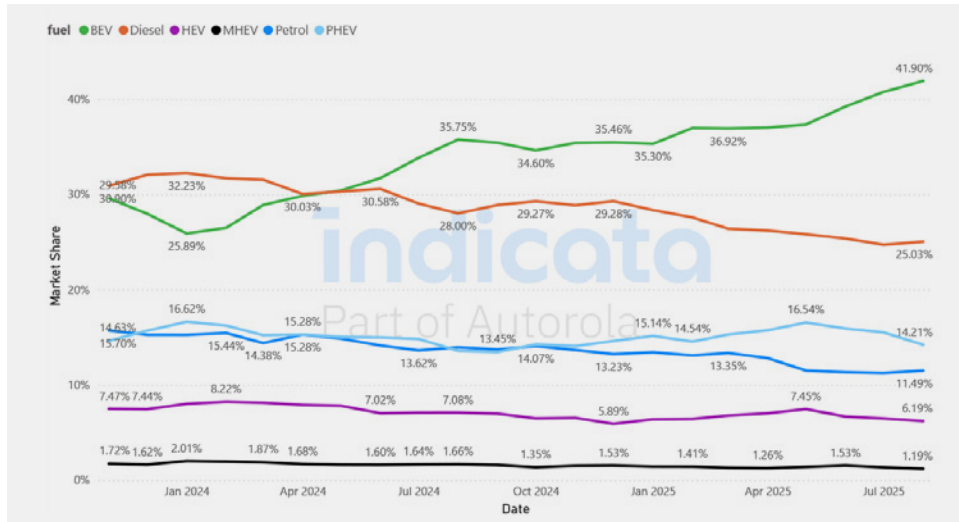
Top selling < 4-years-old by volume

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

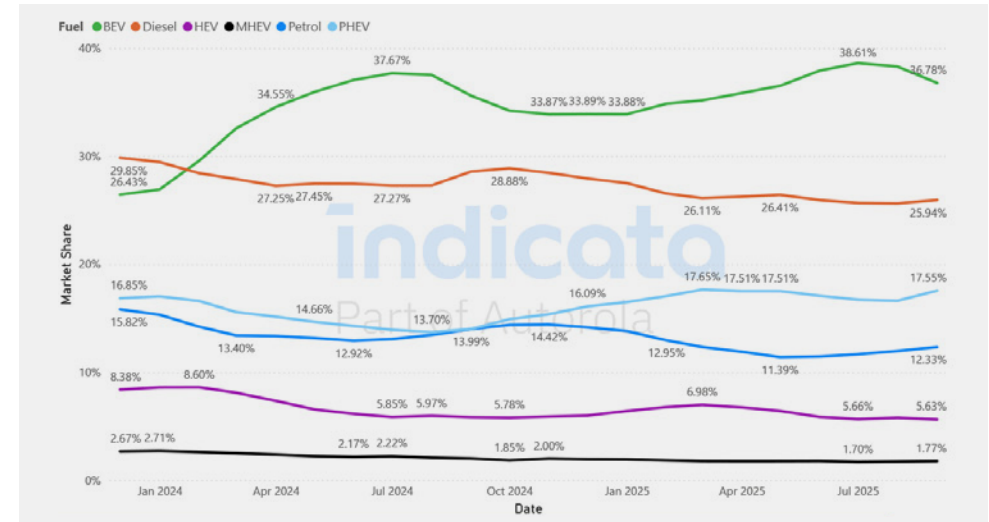
Fastest selling < 4-years-old by Market Days Supply

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

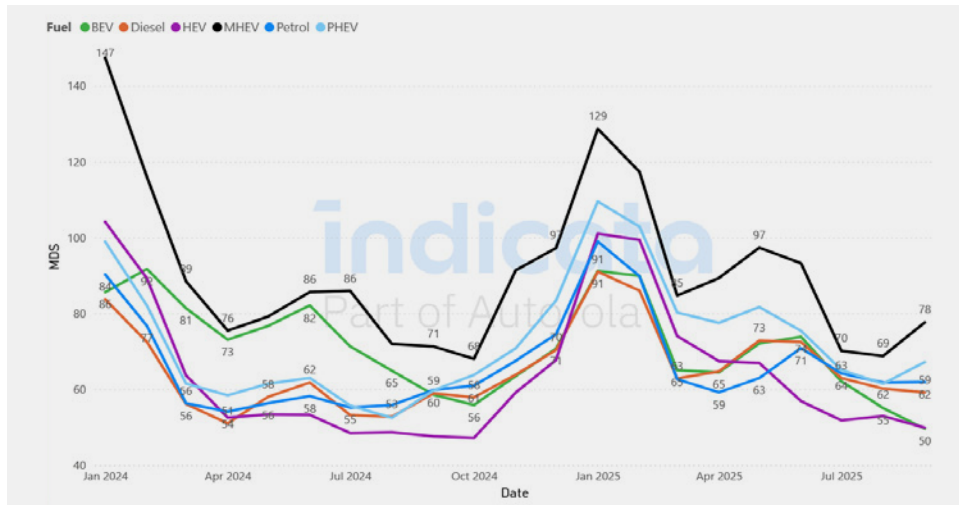
Sales Market Share by Month and Fuel Type - Norway



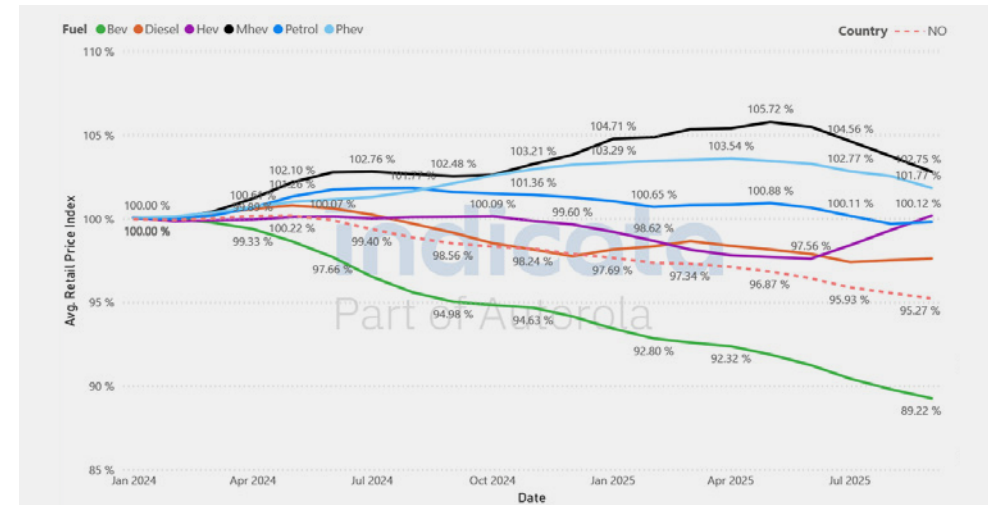
Stock Market Share by Month and Fuel Type - Norway



MDS by Fuel Type - Norway



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



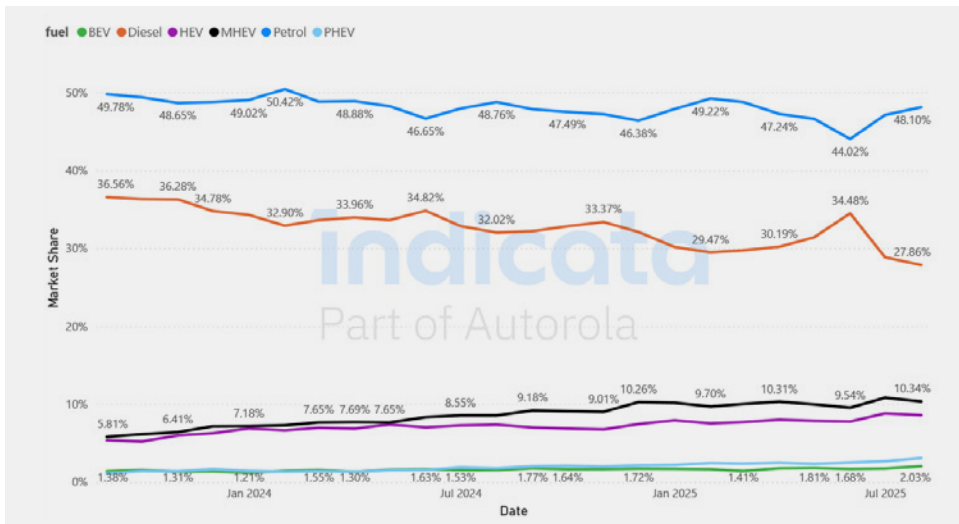
Top selling < 4-years-old by volume

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

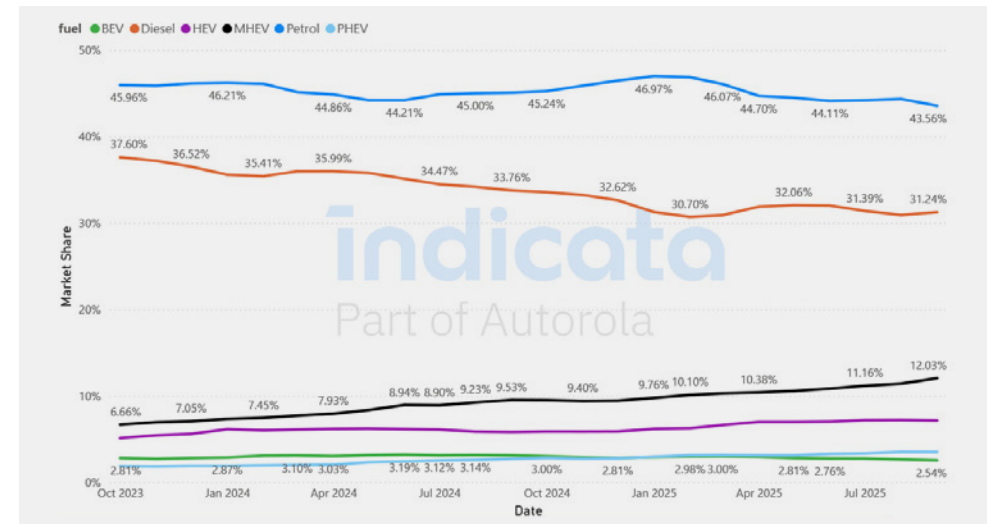
Fastest selling < 4-years-old by Market Days Supply

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

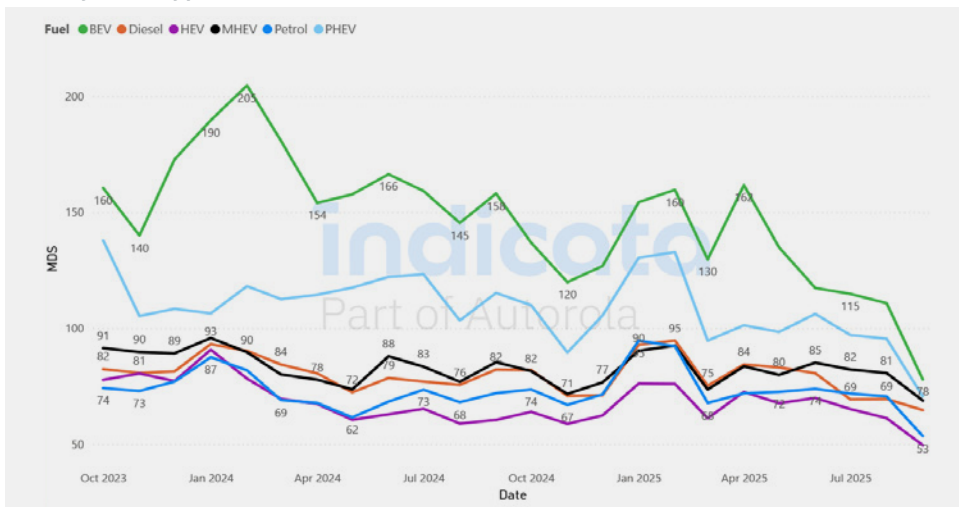
Sales Market Share by Month and Fuel Type - Poland



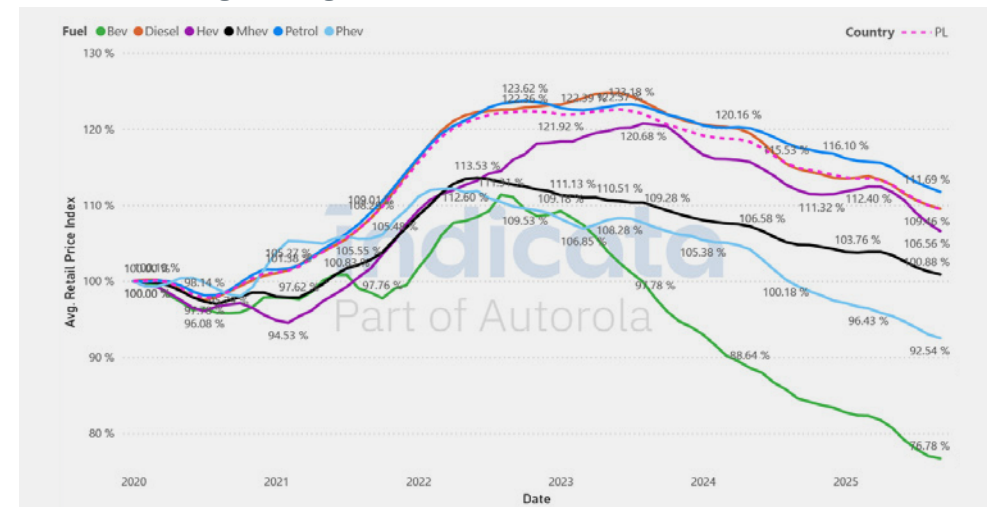
Stock Market Share by Month and Fuel Type - Poland



MDS by Fuel Type - Poland



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



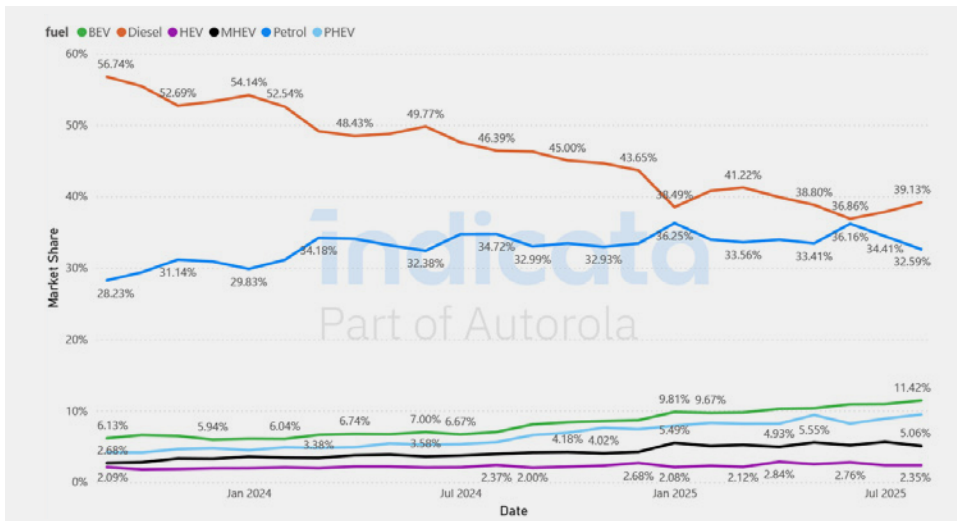
Top selling < 4-years-old by volume

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

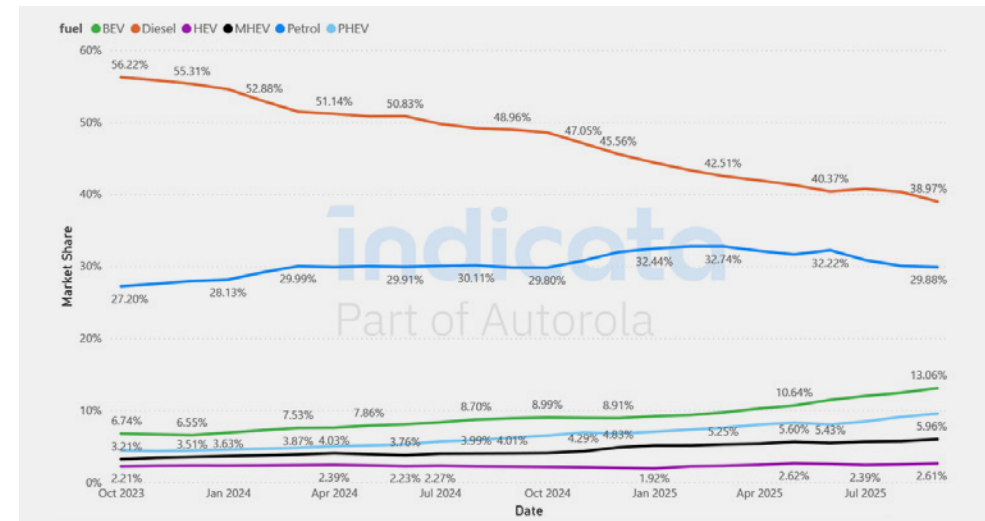
Fastest selling < 4-years-old by Market Days Supply

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

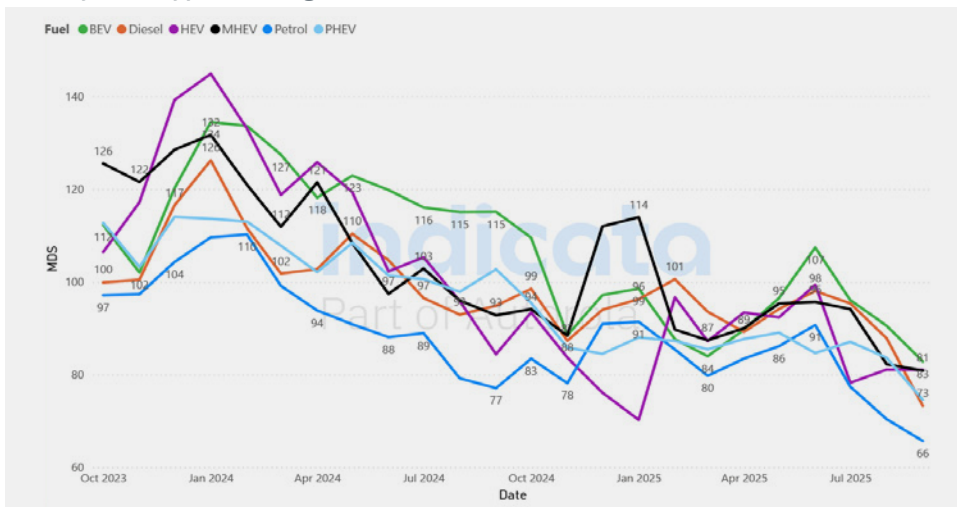
Sales Market Share by Month and Fuel Type - Portugal



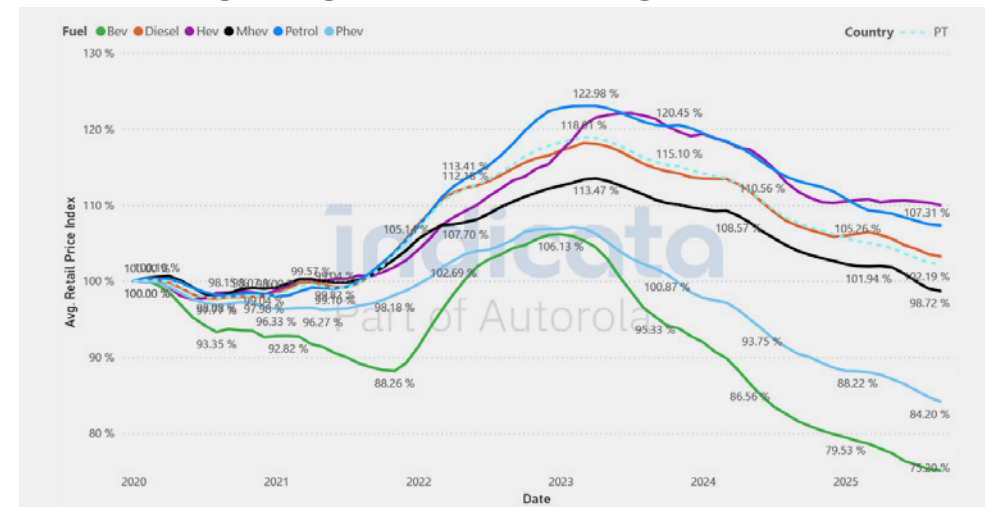
Stock Market Share by Month and Fuel Type - Portugal



MDS by Fuel Type - Portugal



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



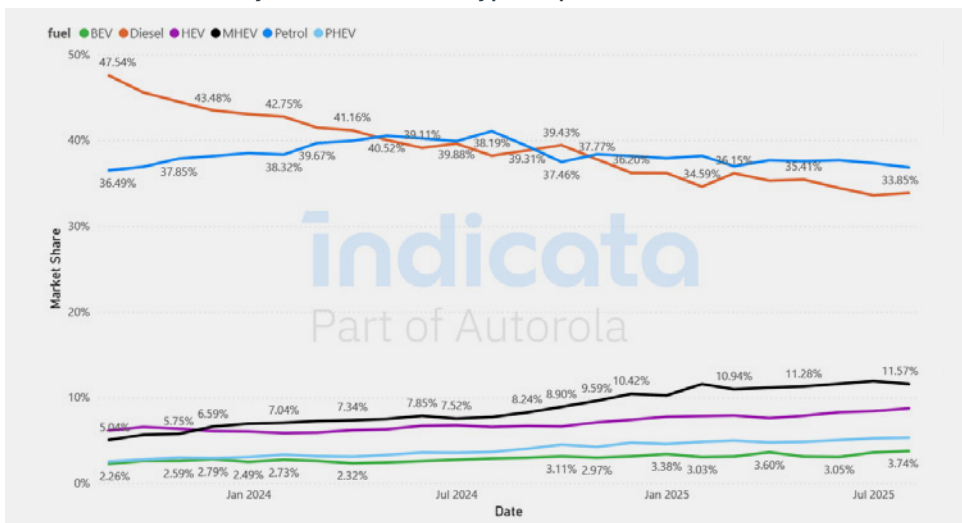
Top selling < 4-years-old by volume

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

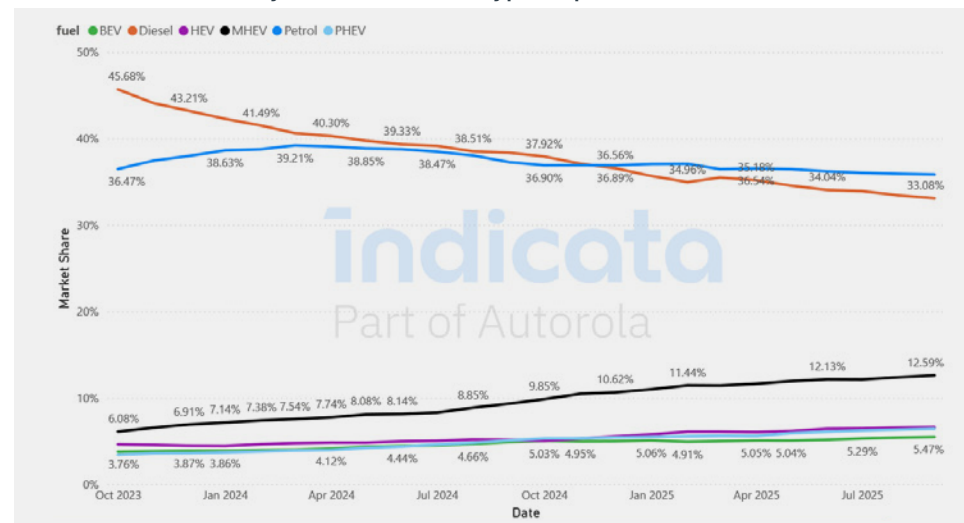
Fastest selling < 4-years-old by Market Days Supply

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

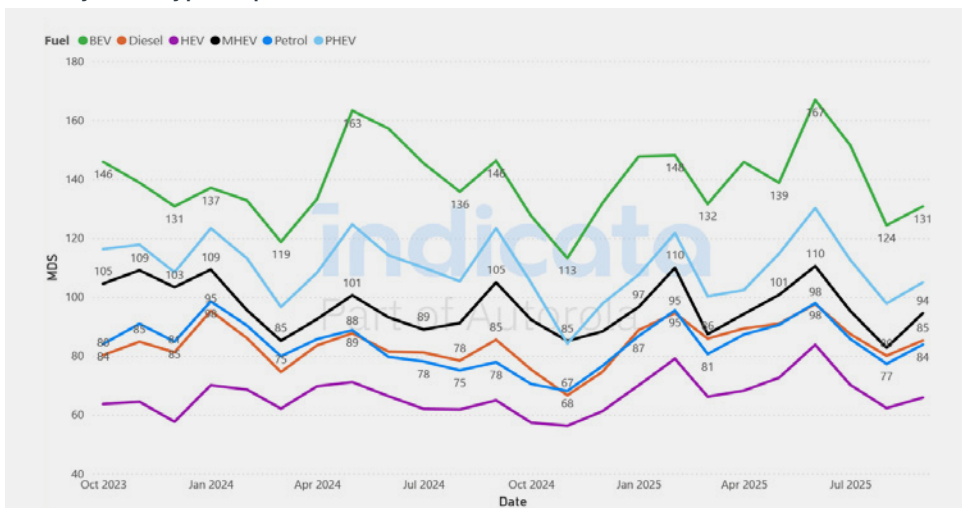
Sales Market Share by Month and Fuel Type - Spain



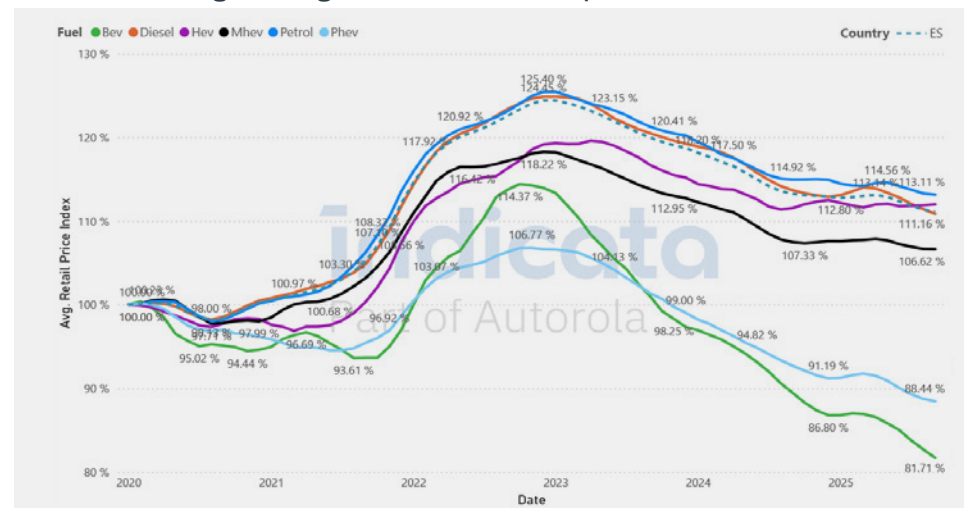
Stock Market Share by Month and Fuel Type - Spain



MDS by Fuel Type - Spain



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



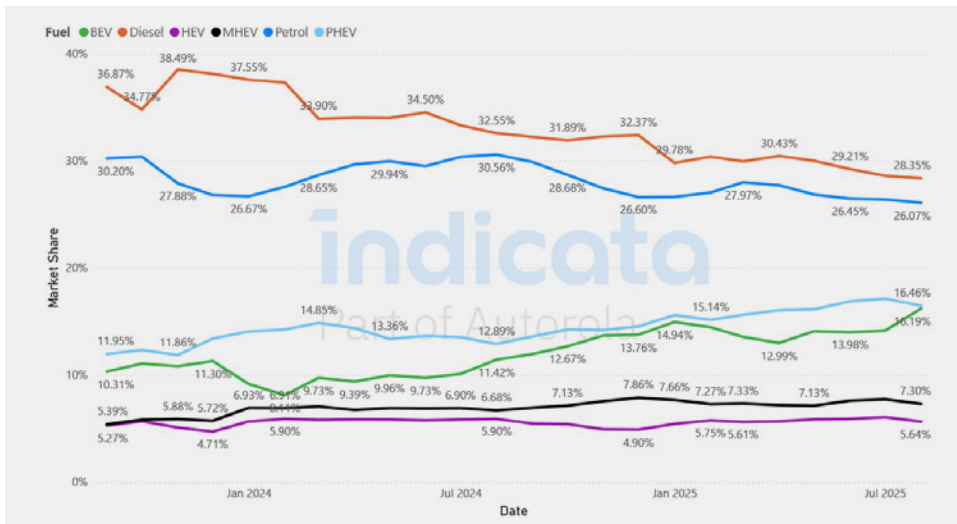
Top selling < 4-years-old by volume

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

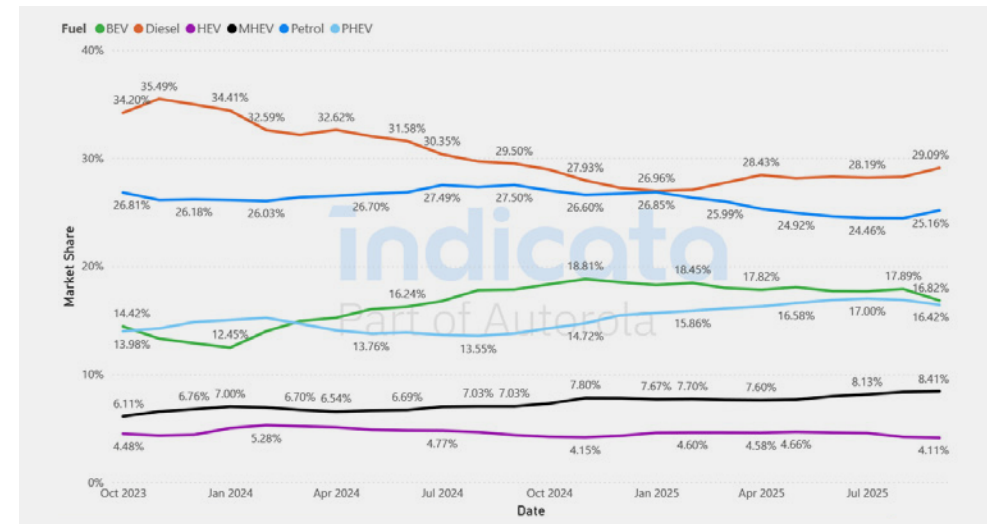
Fastest selling < 4-years-old by Market Days Supply

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

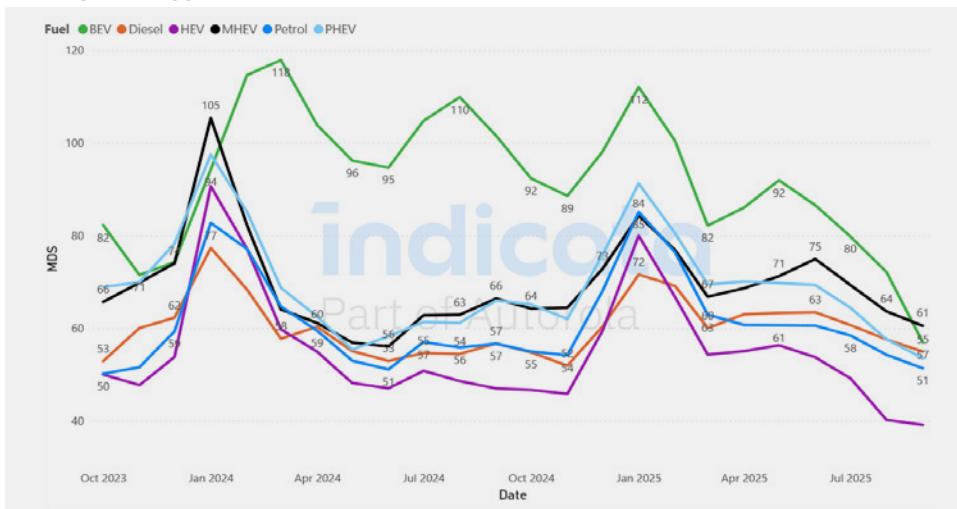
Sales Market Share by Month and Fuel Type - Sweden



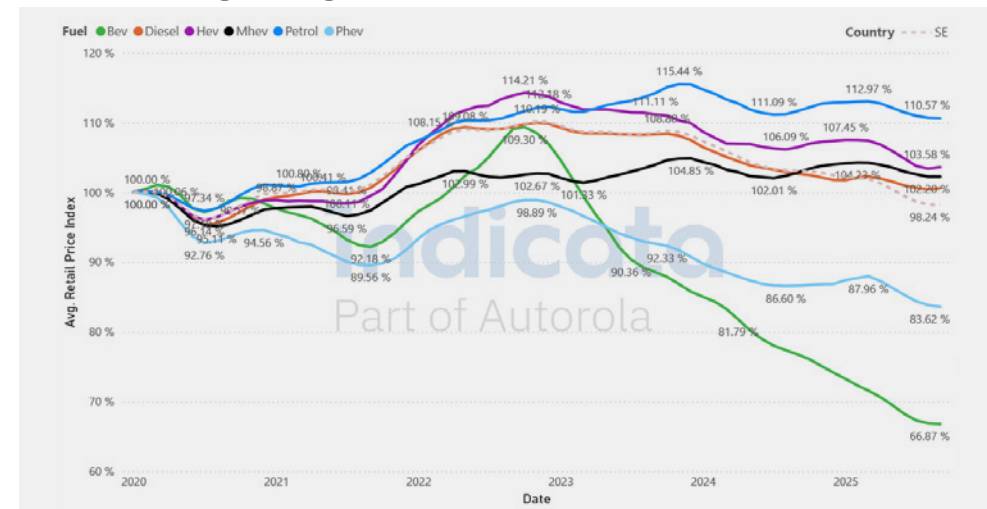
Stock Market Share by Month and Fuel Type - Sweden



MDS by Fuel Type - Sweden



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



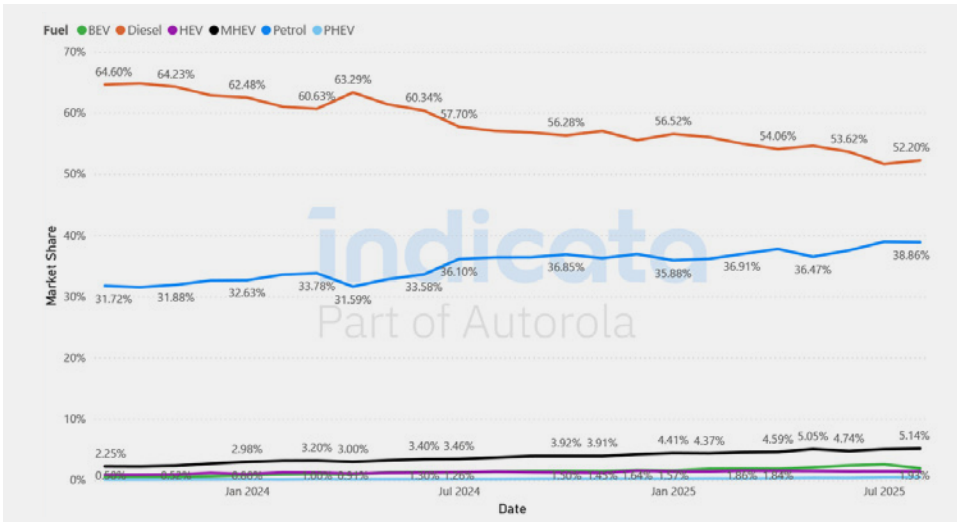
Top selling < 4-years-old by volume

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

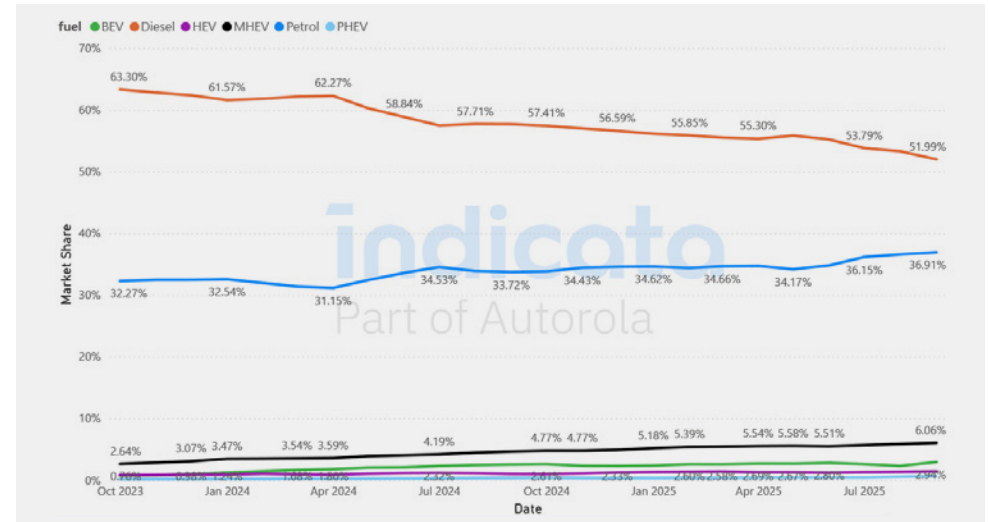
Fastest selling < 4-years-old by Market Days Supply

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

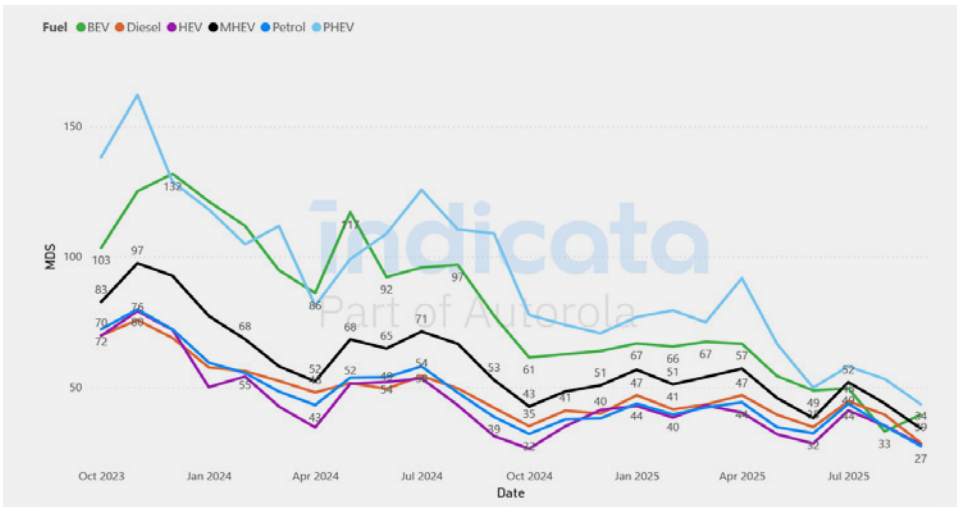
Sales Market Share by Month and Fuel Type - Türkiye



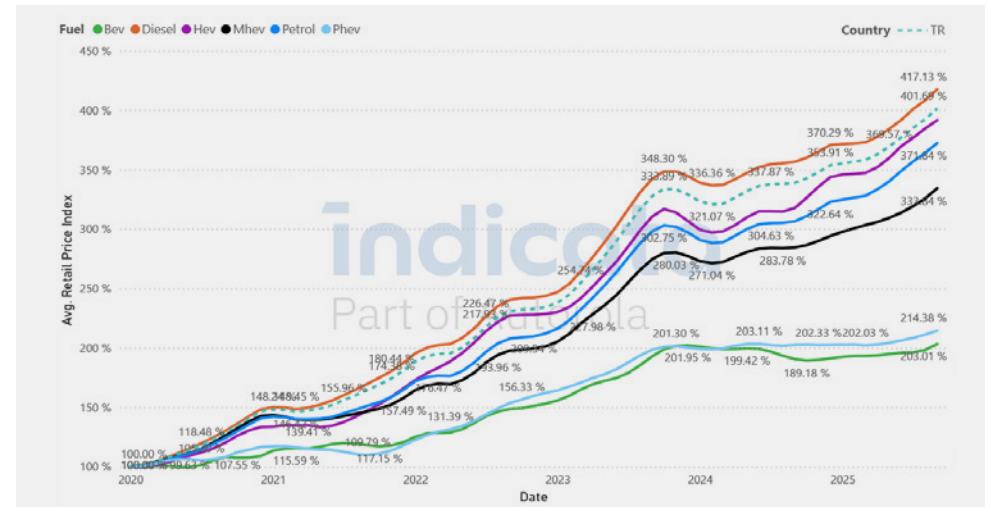
Stock Market Share by Month and Fuel Type - Türkiye



MDS by Fuel Type - Türkiye



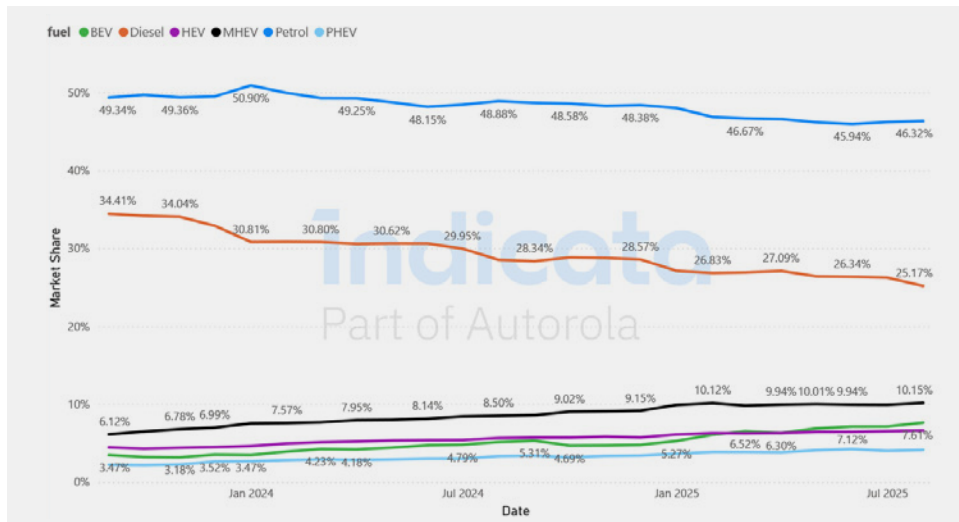
Retail Price (Weighted Avg.) Index 100 = Jan - Türkiye



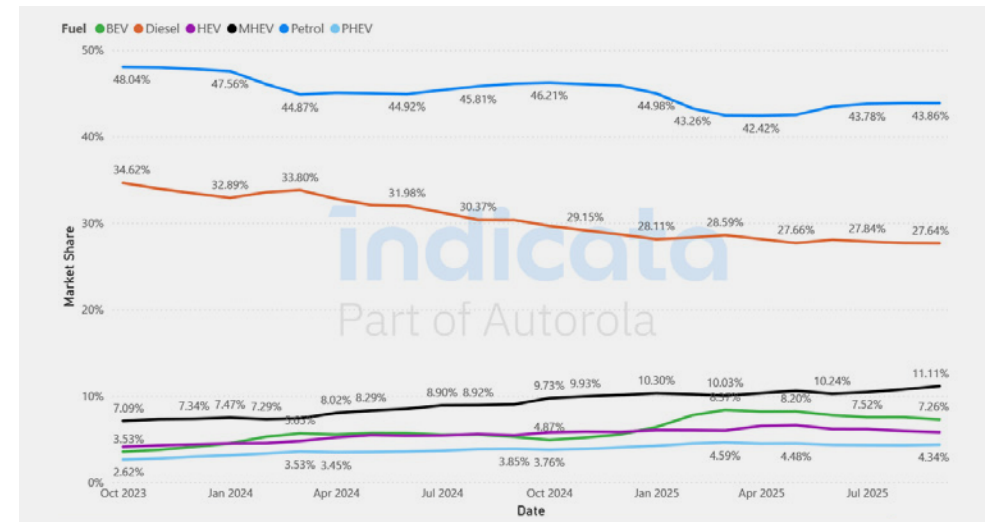
Top selling < 4-years-old by volume		
Make	Model	MDS
Fiat	Tipo	25.1
Renault	Clio	23.8
Renault	Mégane	26.4

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

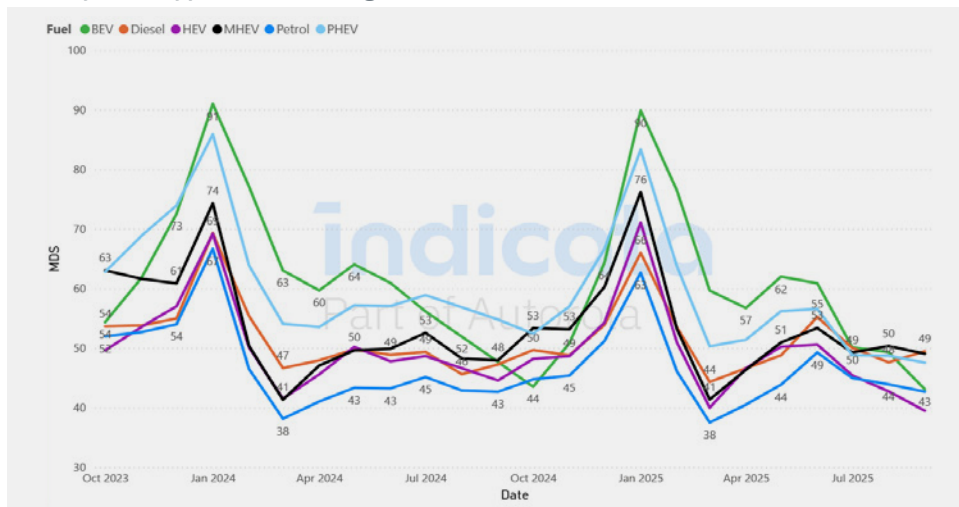
Sales Market Share by Month and Fuel Type - United Kingdom



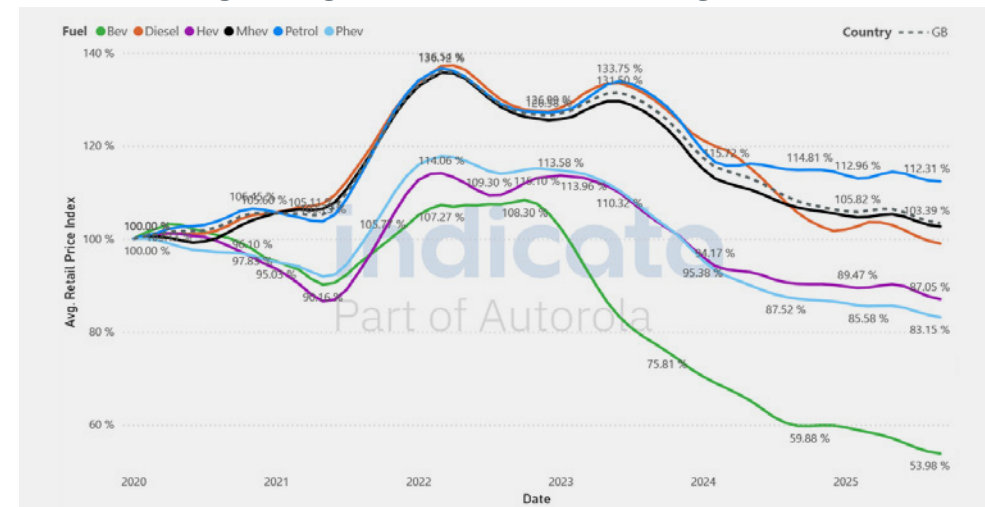
Stock Market Share by Month and Fuel Type - United Kingdom



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

If you are interested in contacting Indicata, please see below a list of country contacts or register through [Indicata.com](https://indicata.com)

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On the 24th of March 2020 Indicata published its White Paper *“COVID-19 To what extent will the used car market be affected (and how to survive)?”*

This document explored:

Early market trends

Initial impact of the virus and the social distancing measures implemented.

Market scenarios

A range of impacts based on infection rate development and historical market data.

Mitigation

Risk assessment by sector coupled with potential corrective actions.

We committed to keeping the market Indicata Market Watch is a regular PDF published on or around the 20th of the month which includes stocking, sales and Market Day's Supply trends split by fuel type.

We are committed to updating the market with live data and providing information on sales, stock, and pricing to keep you abreast of the fast-moving environment.

We are pleased to present our latest **“Indicata Market Watch”** iteration which covers 16 European countries and Brazil. We are providing a comprehensive used market analysis with commentary for each country for Q1, Q2, Q3 and Q4 in January, April, July and October

Meanwhile, Lite versions of the report will be published for the other eight months of the year which include an overall European summary and country graphs and tables.

How do we produce our data?

Indicata analyses 9m Used Vehicle adverts across Europe daily, and our system goes through extensive data cleansing processes to ensure data integrity.

This report's sales (deinstall data) are based on advertisements from recognised automotive retailers for actual used vehicles. As such, it does not include data related to private (P2P) advertisements.

When an advert is removed from the internet, it is classified as a “Sale.”



Indicata
Market Watch™
Used Car Insights Report



For more insights
on B2B market
trends, please visit
indicata.com/market-watch