

Indicata
Market Watch™

Informação sobre o mercado de automóveis usados



Setembro de 2025 | Edição 67

O mercado europeu de usados procura equilibrar estabilidade e fragmentação

indicata
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O mercado europeu de veículos ligeiros de passageiros usados, continua a ajustar-se a um novo equilíbrio. Os volumes permanecem estáveis, os índices de preços após os recentes picos estão novamente a diminuir e a atratividade do mercado está a divergir acentuadamente por tipo de combustível e país. Setembro destaca uma dinâmica de normalização seletiva, em que alguns segmentos recuperam o ímpeto, enquanto outros continuam a enfrentar dificuldades.

A gasolina mantém-se firme, o gasóleo divide, enquanto os elétricos ficam para trás. Os motores a gasolina continuam a ser o porto seguro do mercado europeu de veículos ligeiros de passageiros usados, especialmente nos segmentos compactos e urbanos. Combina custos de funcionamento aceitáveis, oferta abundante e confiança do consumidor, o que explica o seu MDS baixo.

Os a gasóleo, contudo, revelam uma realidade europeia com duas faces: penalizado nos mercados do norte e do oeste por políticas fiscais e ambientais restritivas, mas ainda altamente relevante na Alemanha, Itália e Polónia, onde continua a ser a solução preferida para condutores e frotas com elevada quilometragem.

Os híbridos (HEV, MHEV) estão a encontrar um ponto de equilíbrio, aumentando gradualmente a sua quota de mercado graças à sua imagem mais ecológica sem restrições de carregamento.

Os BEVs e PHEVs continuam a progredir lentamente, principalmente em mercados pioneiros (Escandinávia, Benelux), mas a sua atratividade no mercado de usados é limitada pela forte desvalorização e pelas preocupações dos consumidores com a durabilidade das baterias.

Os preços estabilizam, mas fraturas permanecem em toda a Europa - os índices de preços estão a voltar à normalidade após os aumentos excecionais de 2022-2023.

Em **França, Alemanha e Reino Unido**, os valores estão a estabilizar, apoiados pela procura firme de veículos mais recentes e pela oferta limitada de stock com menos de 4 anos.

Em Itália, Espanha e Portugal, as correções são mais acentuadas, uma vez que as famílias têm optado por veículos ligeiros de passageiros não tão recentes e mais acessíveis, pressionando os preços médios.

No **norte da Europa**, os BEVs estão a registar as quedas mais acentuadas, refletindo a oferta abundante das frotas e os fortes incentivos à compra de veículos ligeiros de passageiros novos. O resultado é um mercado onde os preços já não são uniformes, mas refletem as especificidades económicas e regulamentares nacionais. Os ICEs mantêm-se fortes, mas os modelos elétricos continuam frágeis.

O mercado de usados da Europa está agora a funcionar a duas velocidades distintas: por um lado, os ICEs (a gasolina e alguns a diesel) mantêm uma rotação rápida e avaliações robustas, sustentadas pela sua acessibilidade.

Por outro lado, os modelos eletrificados, embora com um crescimento nos novos registos, continuam a enfrentar dificuldades no mercado de veículos ligeiros de passageiros usados: o elevado MDS e a forte desvalorização revelam um desequilíbrio entre a oferta crescente e a procura hesitante. Esta polarização destaca o desafio de traduzir a transição energética no mercado dos usados, onde as decisões das famílias divergem das dos compradores de veículos novos. Os modelos elétricos enfrentam o desafio de provar o seu valor.

Os próximos meses serão críticos para confirmar as tendências atuais. Os motores a gasolina provavelmente continuarão dominantes, enquanto a trajetória dos a diesel dependerá de escolhas políticas e fiscais que variam amplamente na Europa. O verdadeiro campo de batalha, no entanto, está nos veículos elétricos: se o mercado de usados poderá absorver uma onda crescente de BEVs e PHEVs dependerá tanto da confiança do consumidor nos valores residuais quanto do apoio de políticas direcionadas.

Para os intervenientes no mercado, a mensagem é clara: os veículos com motor de combustão interna oferecem clareza a curto prazo, mas o equilíbrio a médio prazo será determinado pelo grau de sucesso com que os veículos eletrificados se posicionarem.

Mantemos o nosso compromisso de fornecer ao mercado europeu de veículos usados dados actualizados sobre vendas, stock e preços, ajudando-o a acompanhar um sector em constante mudança.

Continuaremos a publicar, nos meses de Janeiro, Abril, Julho e Outubro, a nossa análise aprofundada do mercado de usados, acompanhada de comentários detalhados por país, relativos aos quatro trimestres do ano. Nos restantes oito meses, disponibilizaremos versões Lite do relatório, com um resumo geral da evolução do mercado europeu, incluindo gráficos e tabelas por país.

Esperamos que continue a acompanhar e a valorizar os nossos relatórios.

Tendências de Vendas, 'Market Day's Supply' e Carros Mais Vendidos

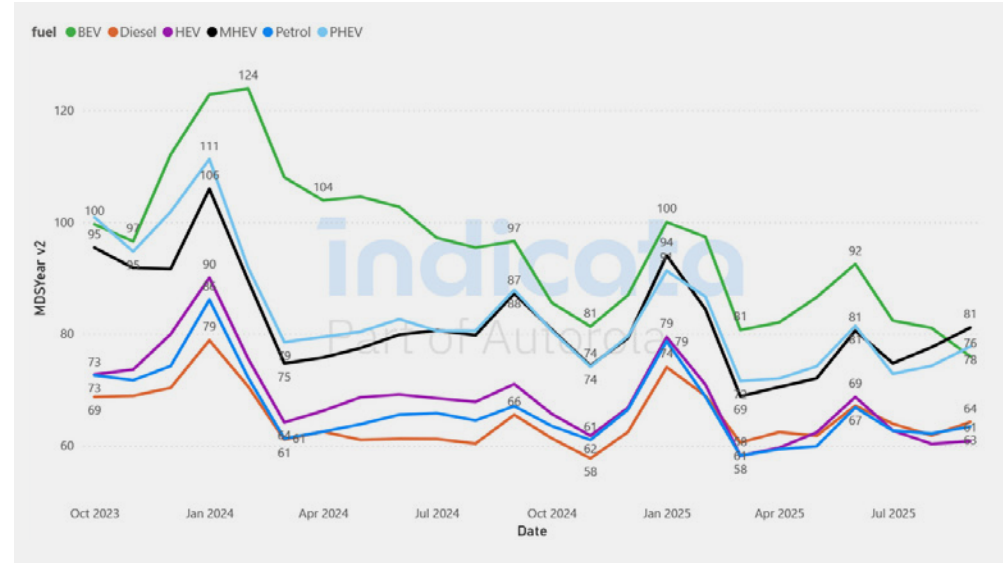
Top selling car models up to 4-years-old by volume

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

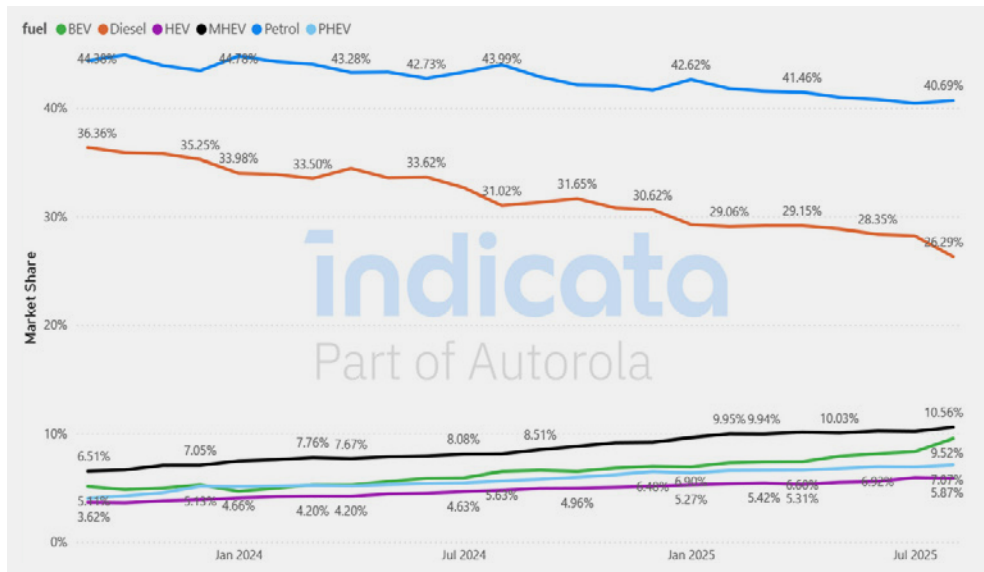
Fastest selling car models up to 4-years-old by Market Days Supply

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

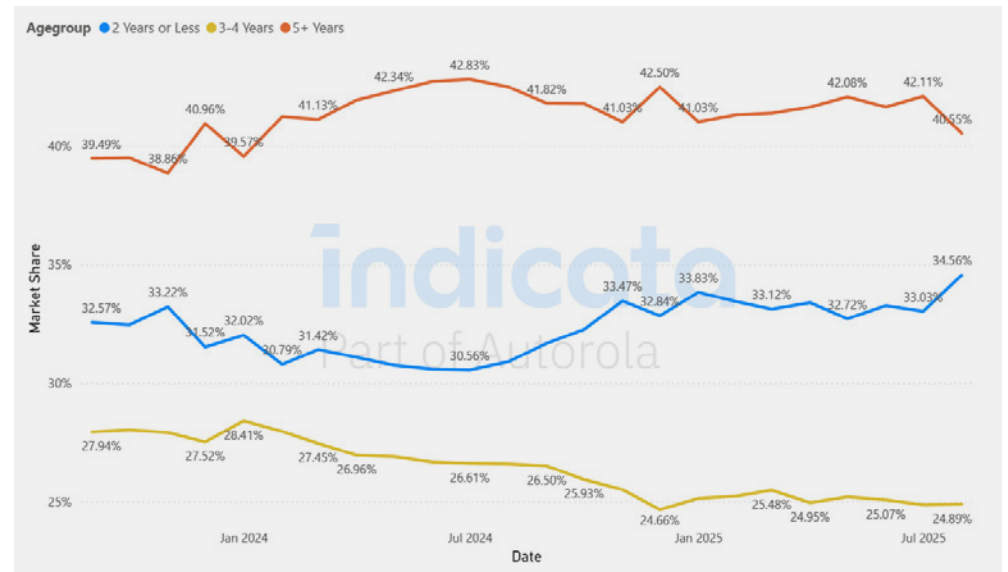
MDS by Fuel Type - European Market



Sales Market Share by Month and Fuel Type - European Market



Sales Market Share by Month and Age Group - European Market



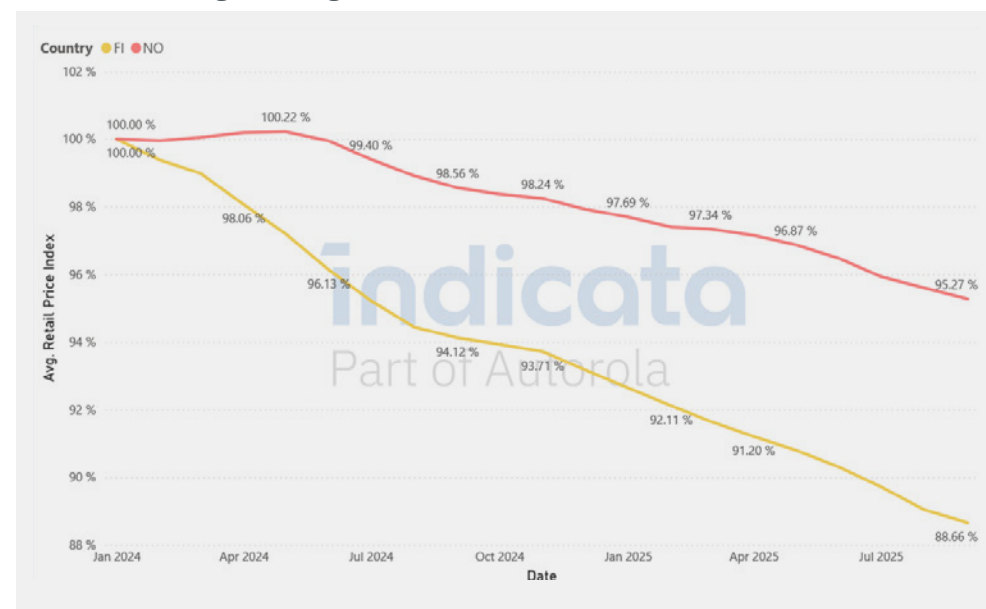
Preços de Retalho e Movimentos Mensais de Preços por País

Informamos que o Indicata está atualmente a melhorar o Índice de Preços de Retalho do Marketwatch. Como resultado, poderão existir variações em relação às versões disponibilizadas nos meses anteriores. Agradecemos a sua compreensão enquanto trabalhamos para oferecer uma experiência ainda melhor.

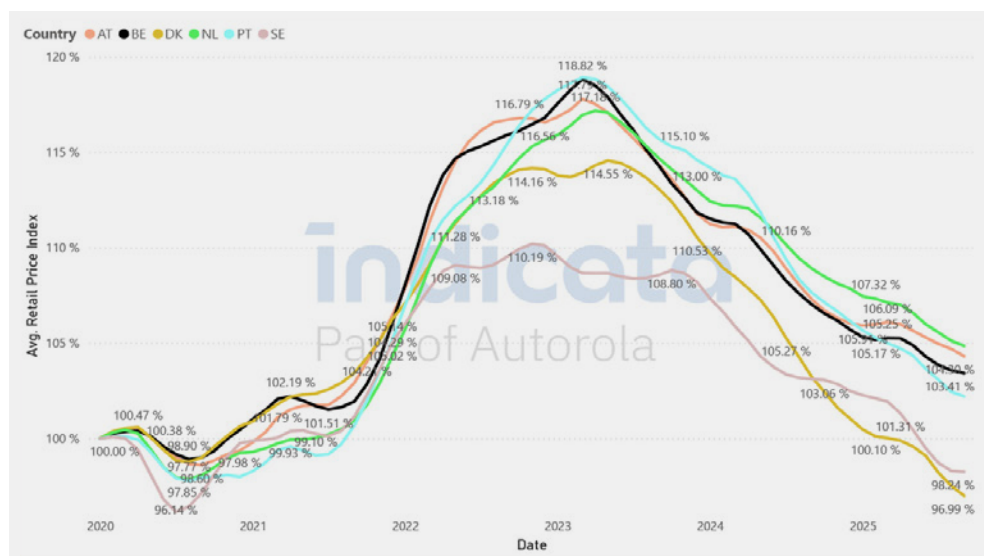
Country	Latest used car price percentage point movement versus Jan 2020
Türkiye	301.7pp
Spain	11.6pp
Poland	9.5pp
Italy	8.5pp
Germany	7.0pp
Netherlands	4.8pp
Austria	4.3pp
France	3.5pp
Belgium	3.4pp
United Kingdom	3.4pp
Portugal	2.2pp
Sweden	-1.8pp
Denmark	-3.0pp
Average excl. Türkiye	2.1pp
Norway*	-4.7pp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

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

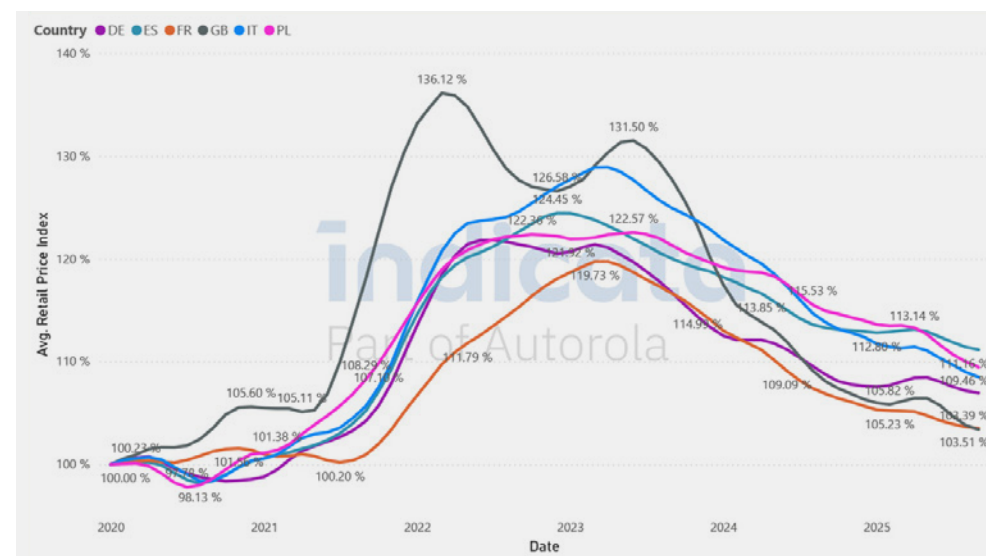
Retail Price (weighted. avg.) Index 100 = Jan - CH, FL, NO



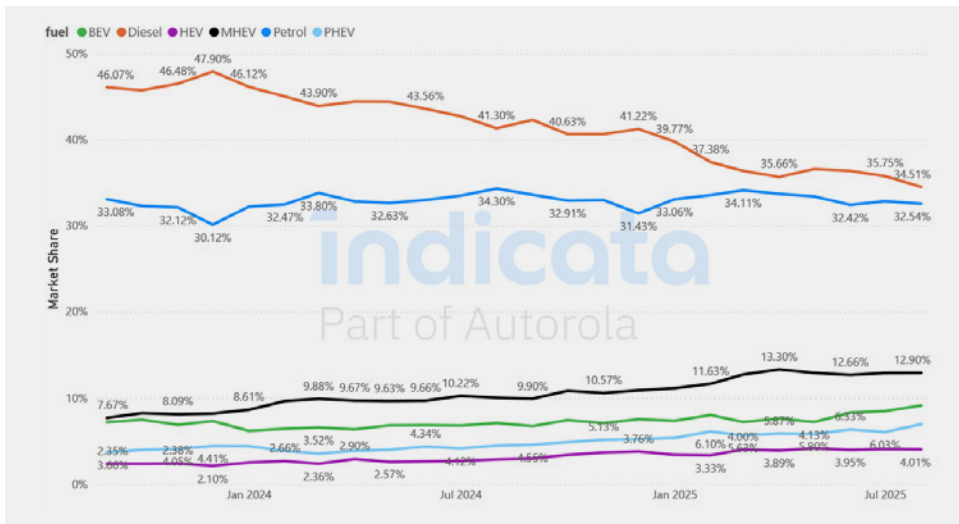
Retail Price (weighted. avg.) Index 100 = Jan - AT, BE, DK, NE, PT, SE



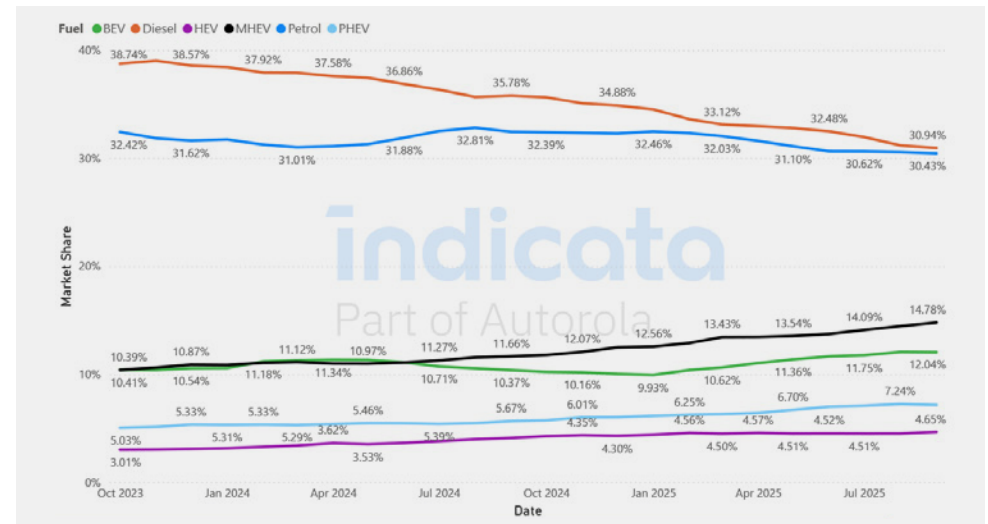
Retail Price (weighted. avg.) Index 100 = Jan - FR, DE, IT, PL, ES, GB



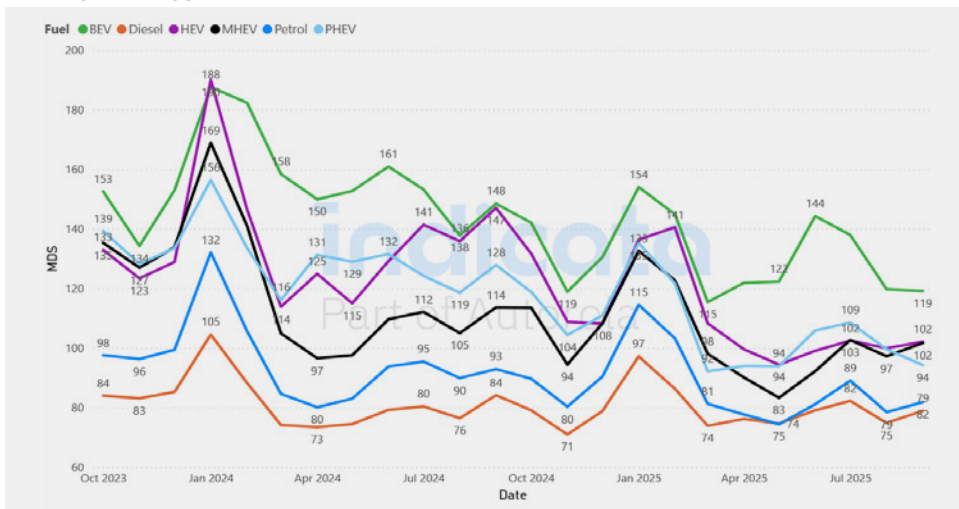
Sales Market Share by Month and Fuel Type - Austria



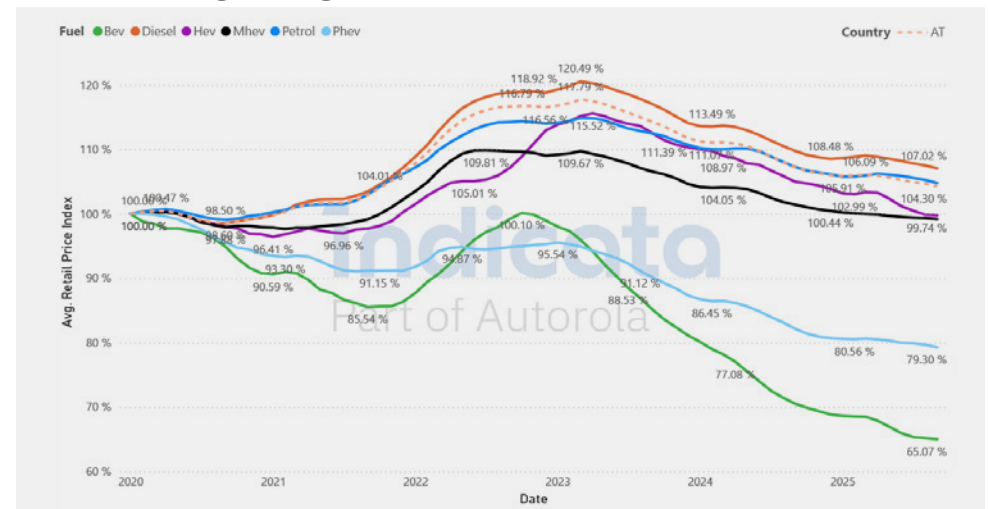
Stock Market Share by Month and Fuel Type - Austria



MDS by Fuel Type - Austria



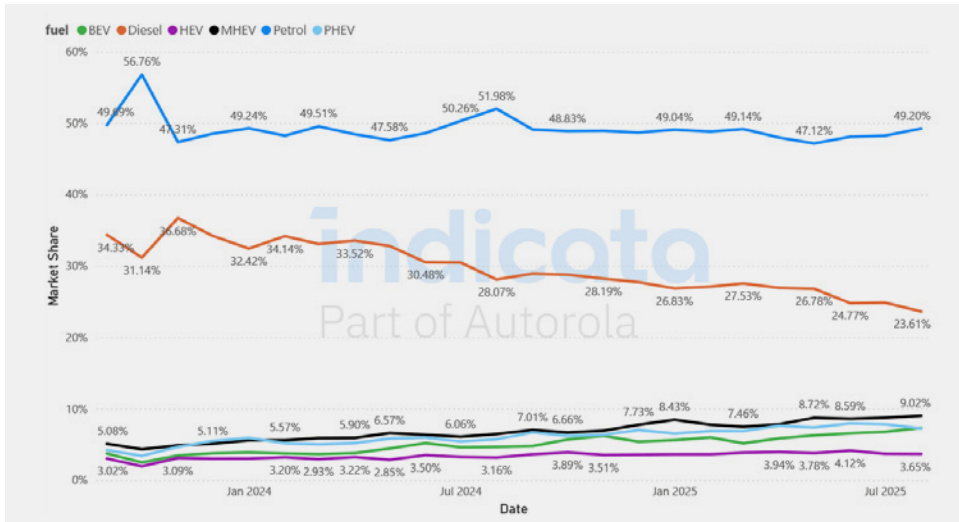
Retail Price (Weighted Avg.) Index 100 = Jan - Austria



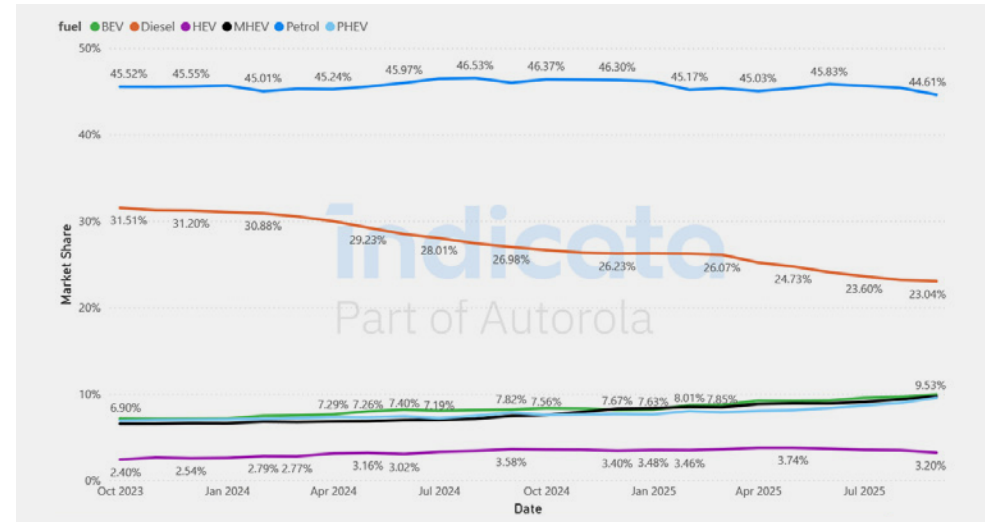
Top selling < 4-years-old by volume		
Make	Model	MDS
Škoda	Octavia	58.5
Volkswagen	Golf	63.6
BMW	3 Series	69.6

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

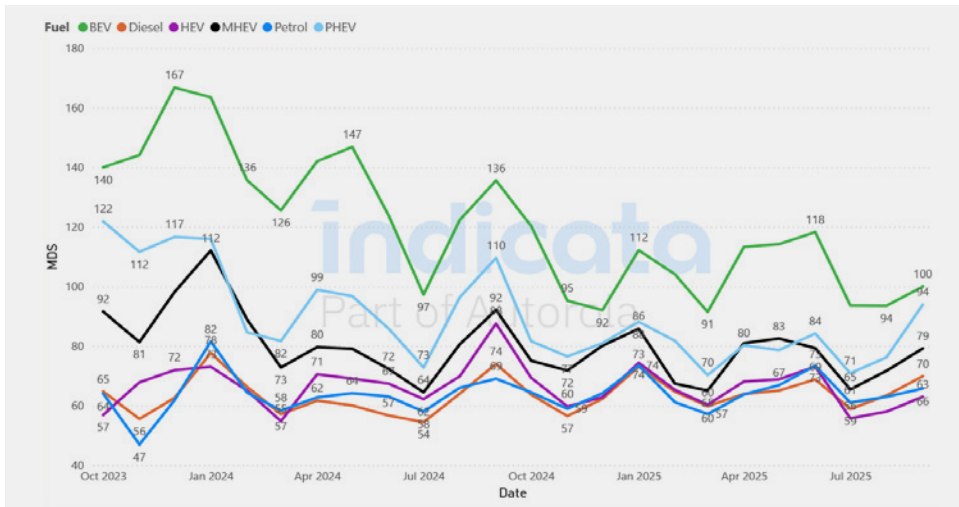
Sales Market Share by Month and Fuel Type - Belgium



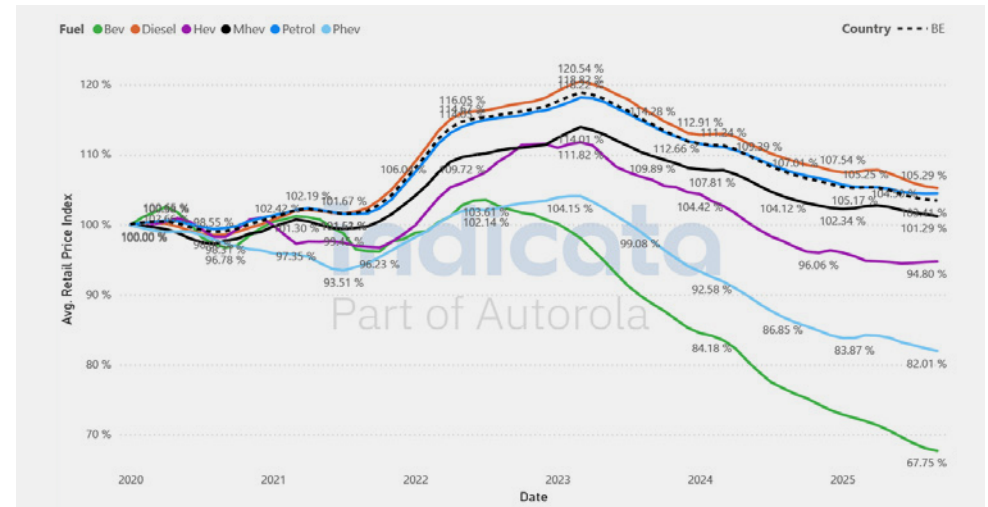
Stock Market Share by Month and Fuel Type - Belgium



MDS by Fuel Type - Belgium



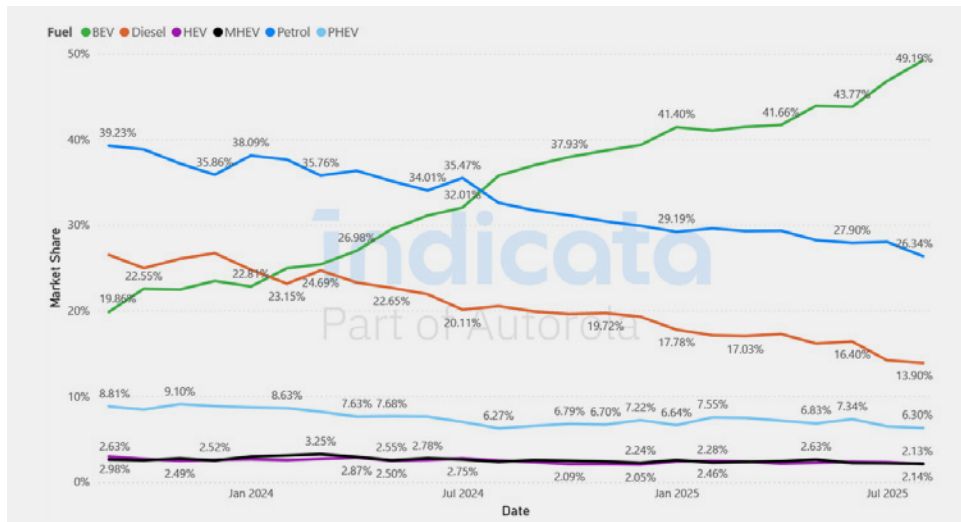
Retail Price (Weighted Avg.) Index 100 = Jan - Belgium



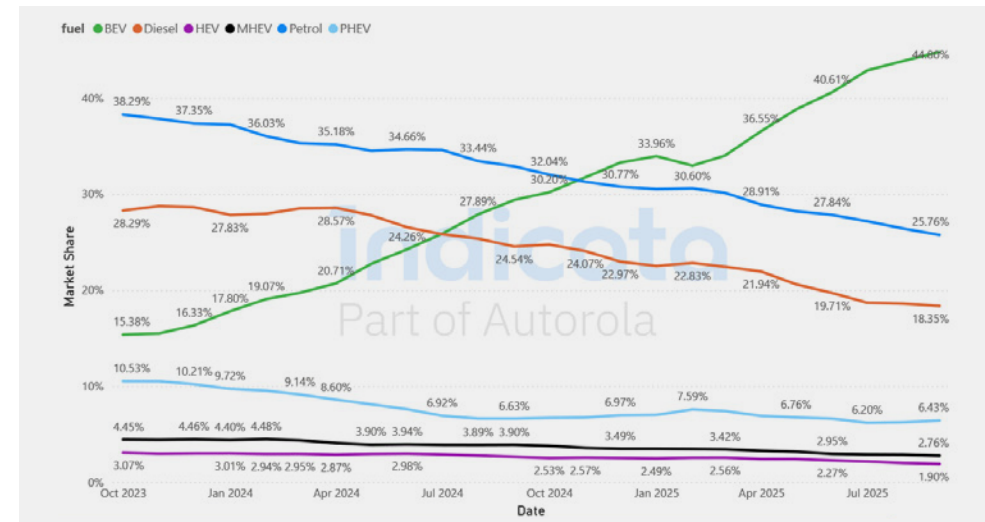
Top selling < 4-years-old by volume		
Make	Model	MDS
Volkswagen	Golf	79.3
BMW	3 Series	95.9
Opel	Corsa	52.1

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

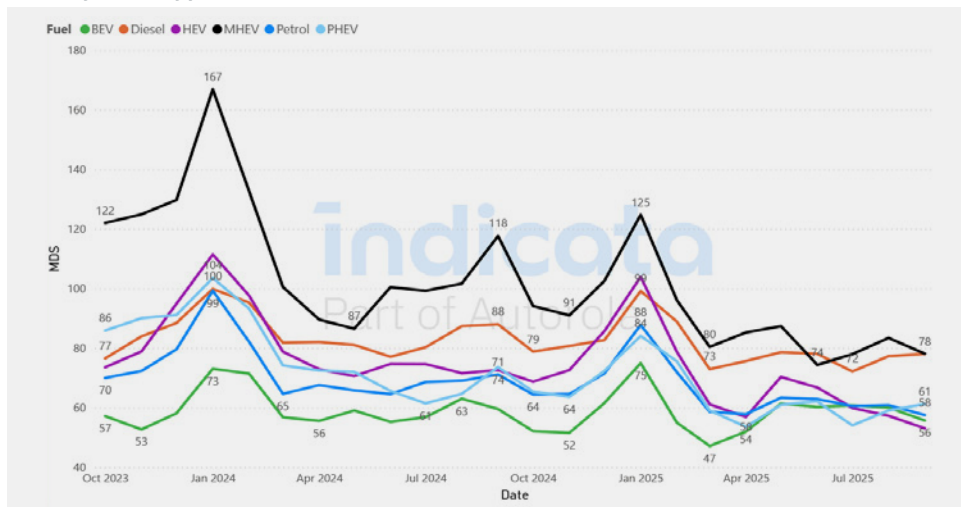
Sales Market Share by Month and Fuel Type - Denmark



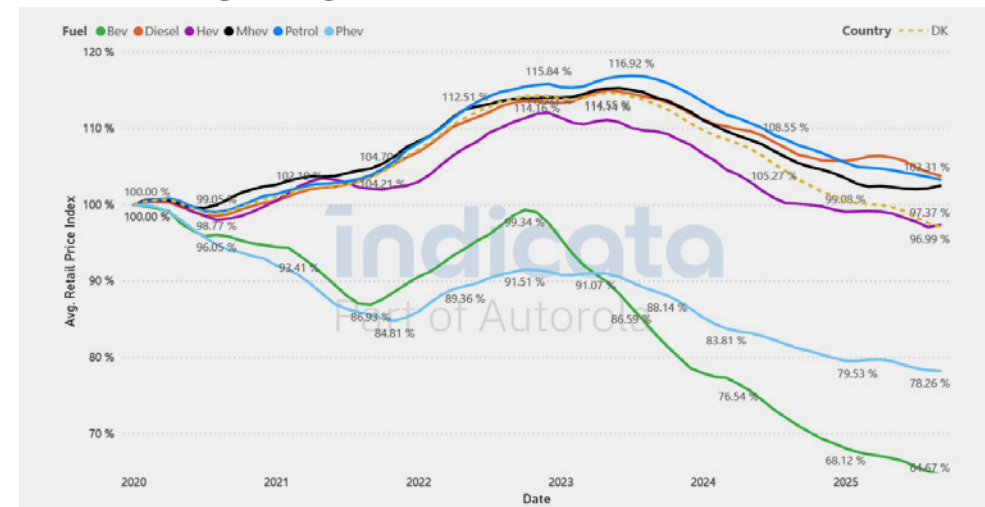
Stock Market Share by Month and Fuel Type - Denmark



MDS by Fuel Type - Denmark



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



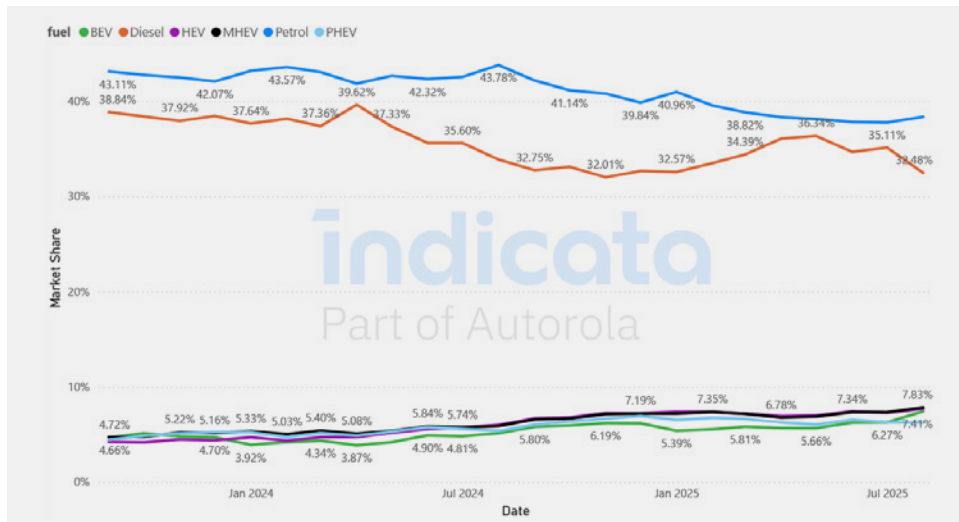
Top selling < 4-years-old by volume

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

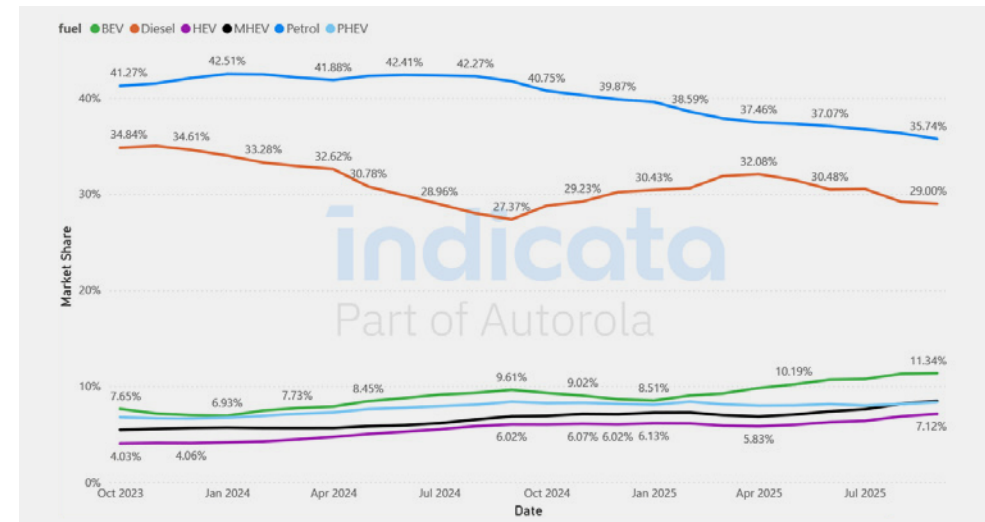
Fastest selling < 4-years-old by Market Days Supply

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

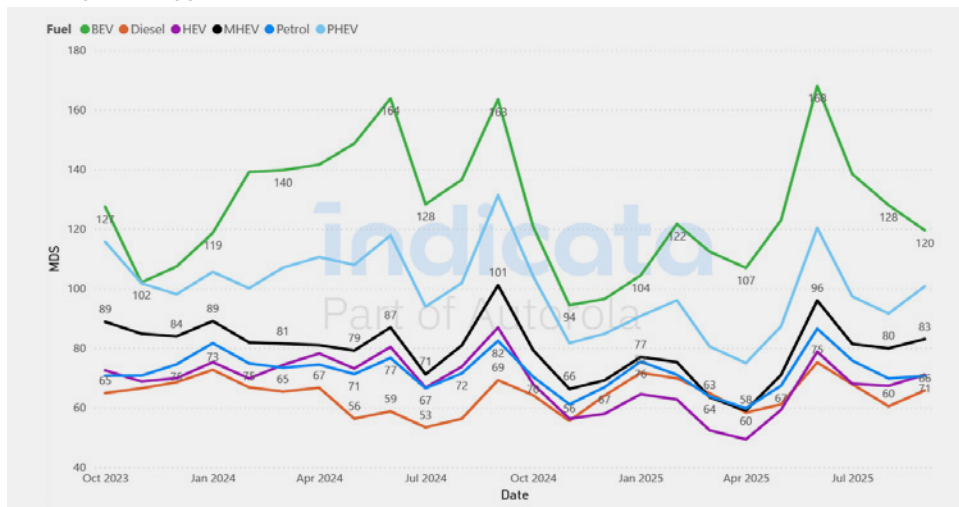
Sales Market Share by Month and Fuel Type - France



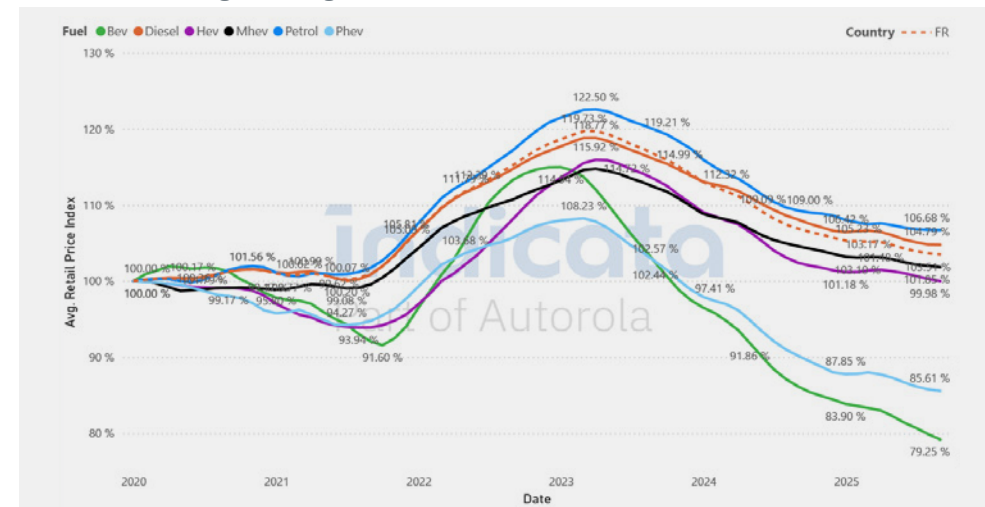
Stock Market Share by Month and Fuel Type - France



MDS by Fuel Type - France



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



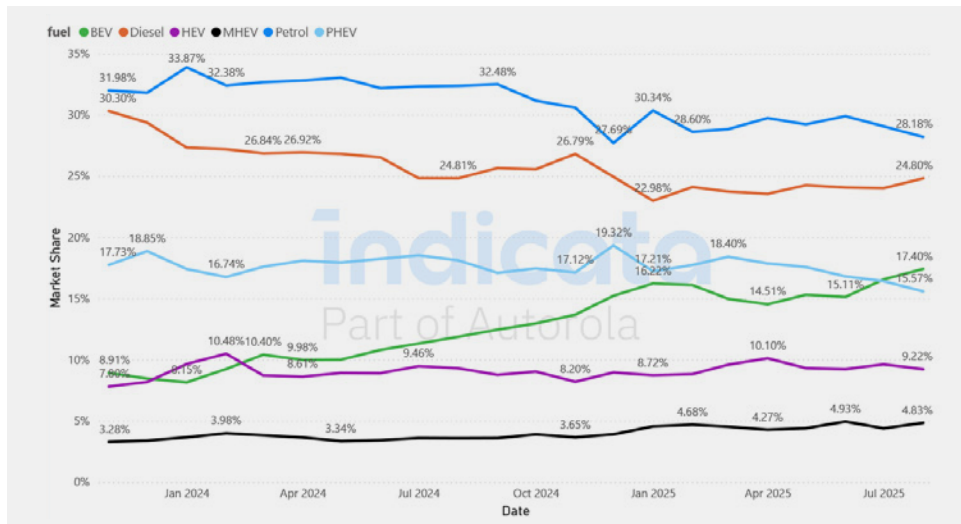
Top selling < 4-years-old by volume

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

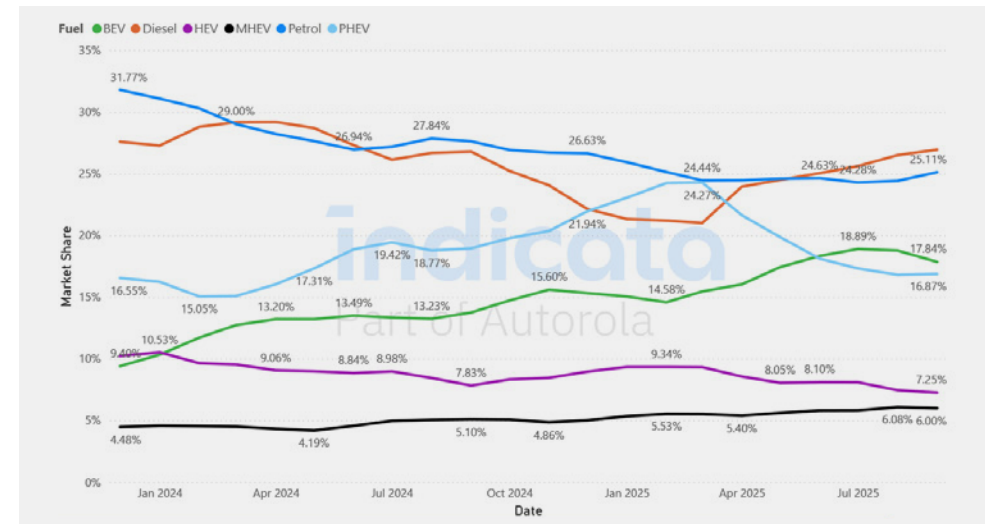
Fastest selling < 4-years-old by Market Days Supply

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

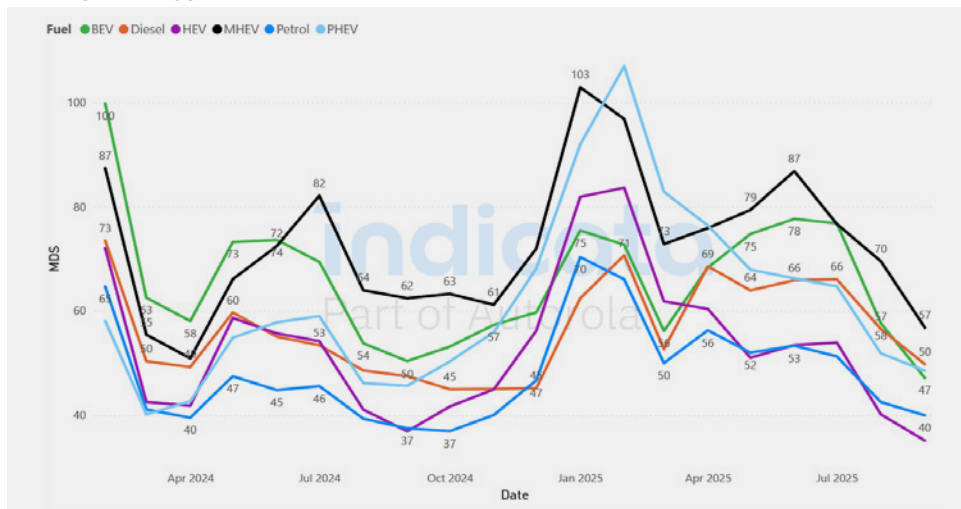
Sales Market Share by Month and Fuel Type - Finland



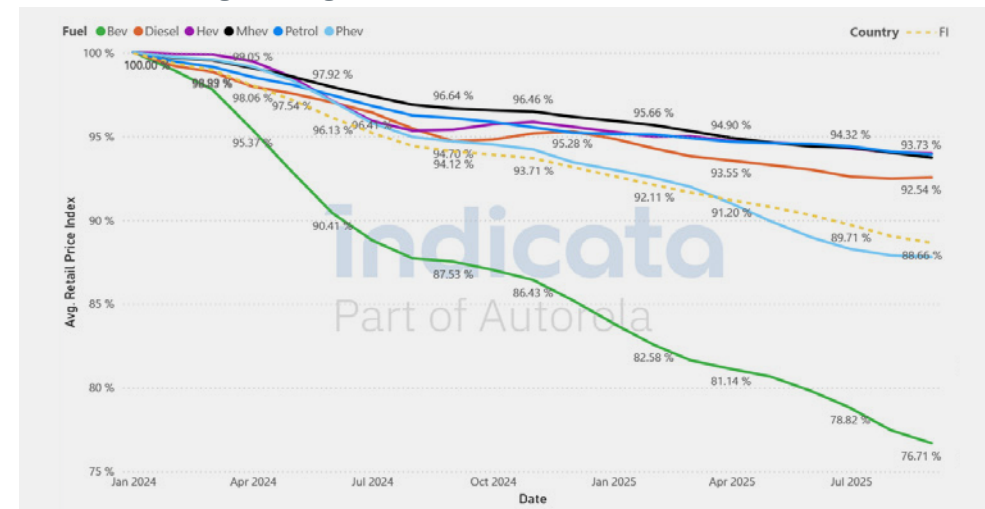
Stock Market Share by Month and Fuel Type - Finland



MDS by Fuel Type - Finland



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



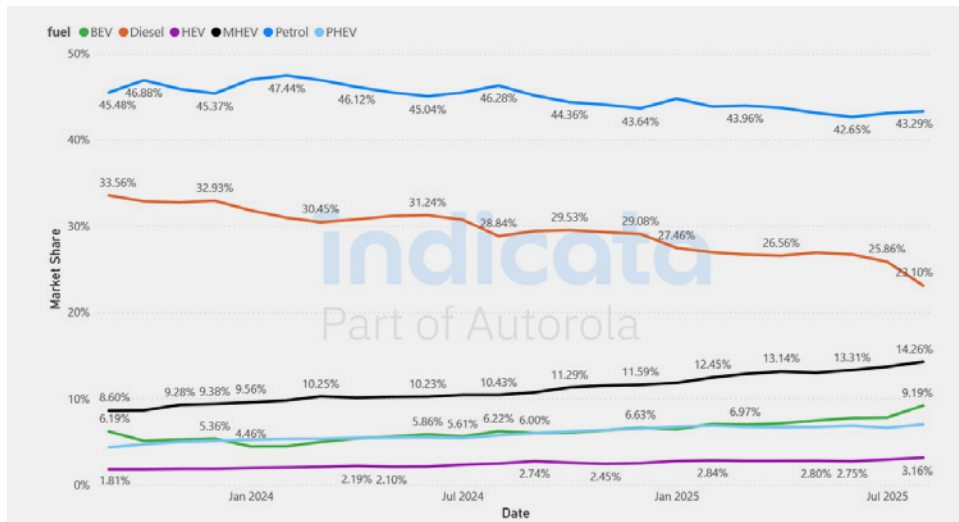
Top selling < 4-years-old by volume

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

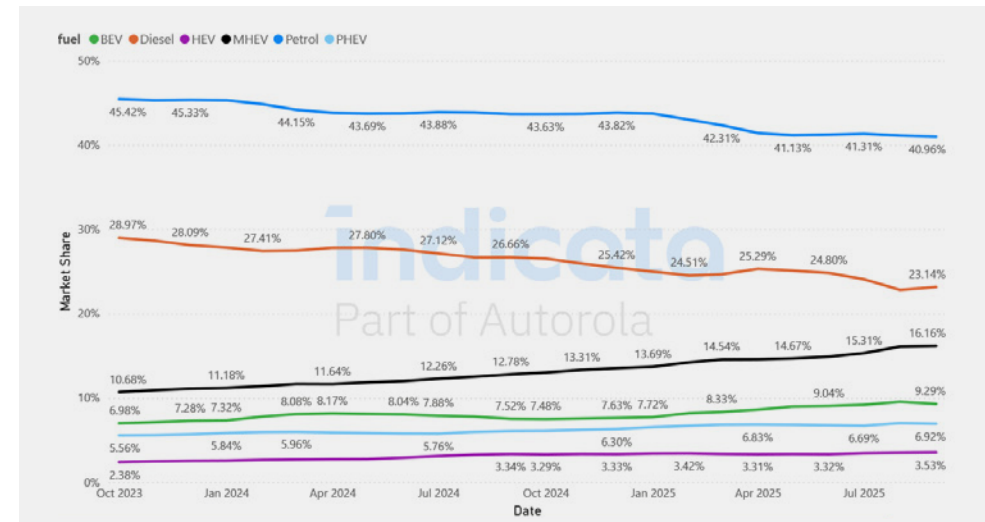
Fastest selling < 4-years-old by Market Days Supply

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

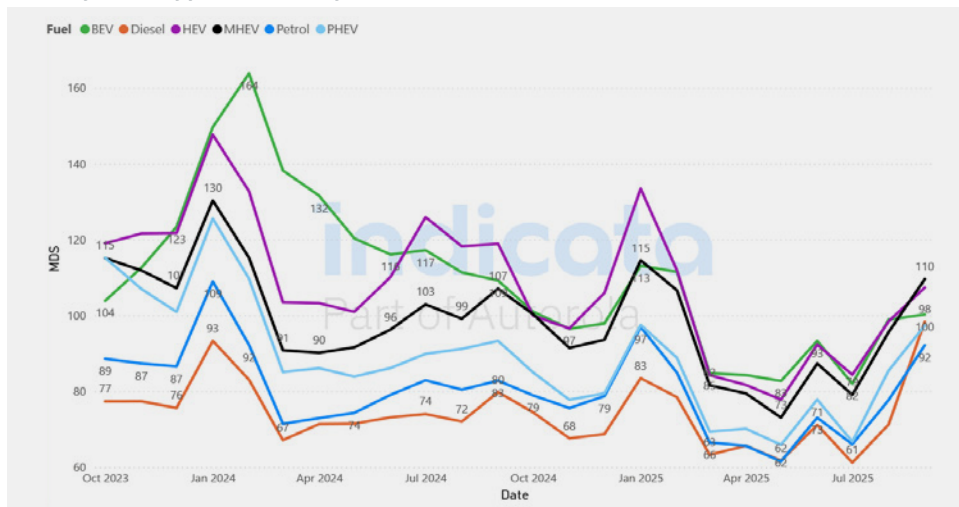
Sales Market Share by Month and Fuel Type - Germany



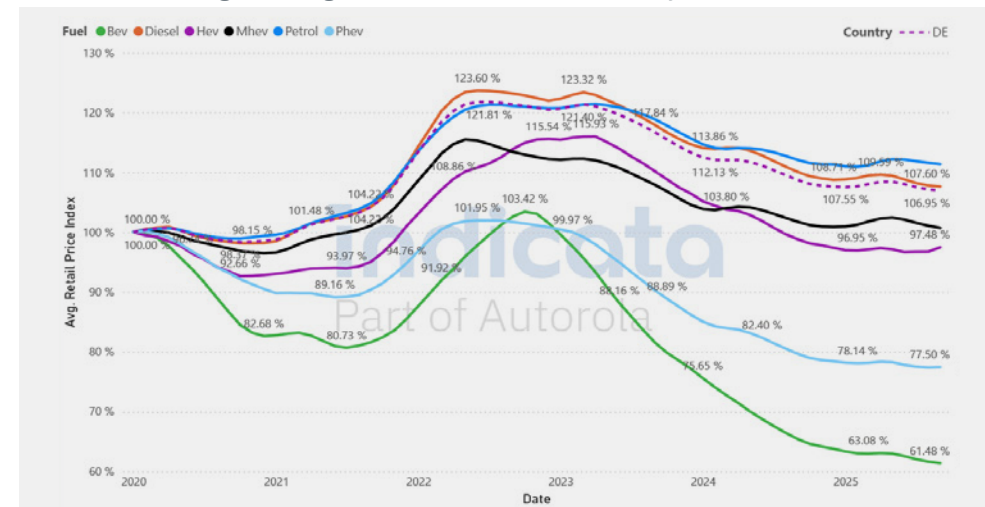
Stock Market Share by Month and Fuel Type - Germany



MDS by Fuel Type - Germany



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



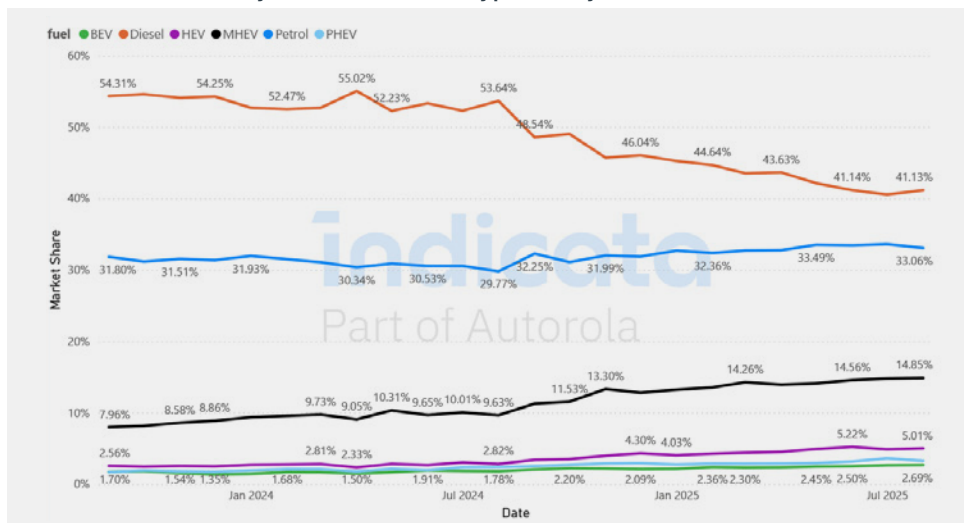
Top selling < 4-years-old by volume

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

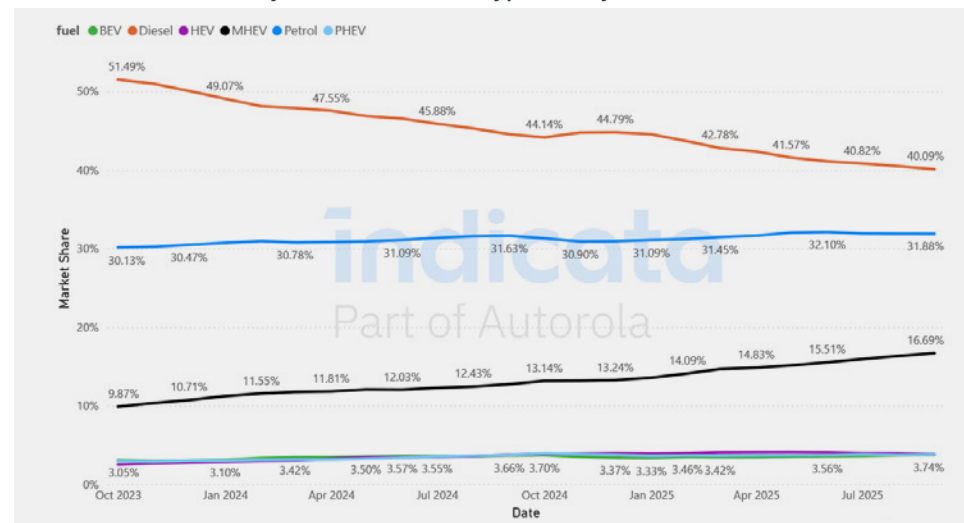
Fastest selling < 4-years-old by Market Days Supply

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

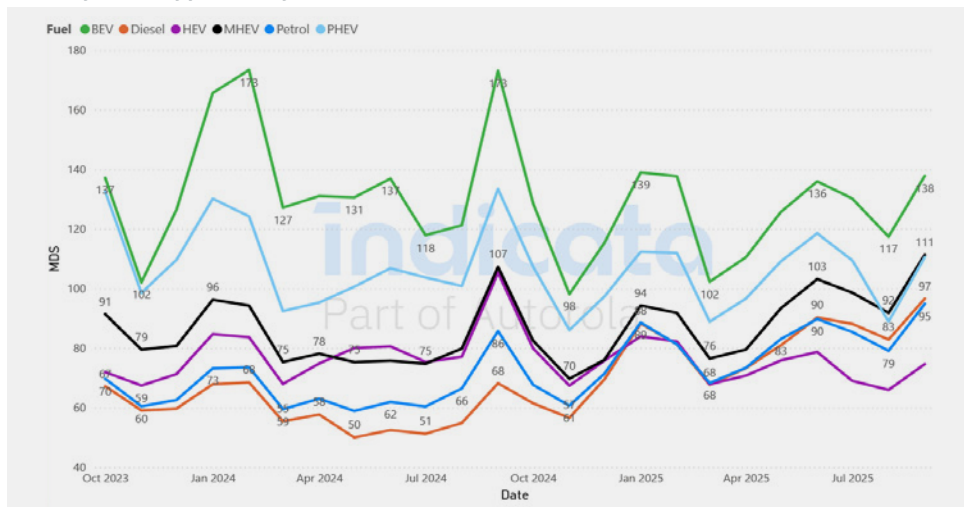
Sales Market Share by Month and Fuel Type - Italy



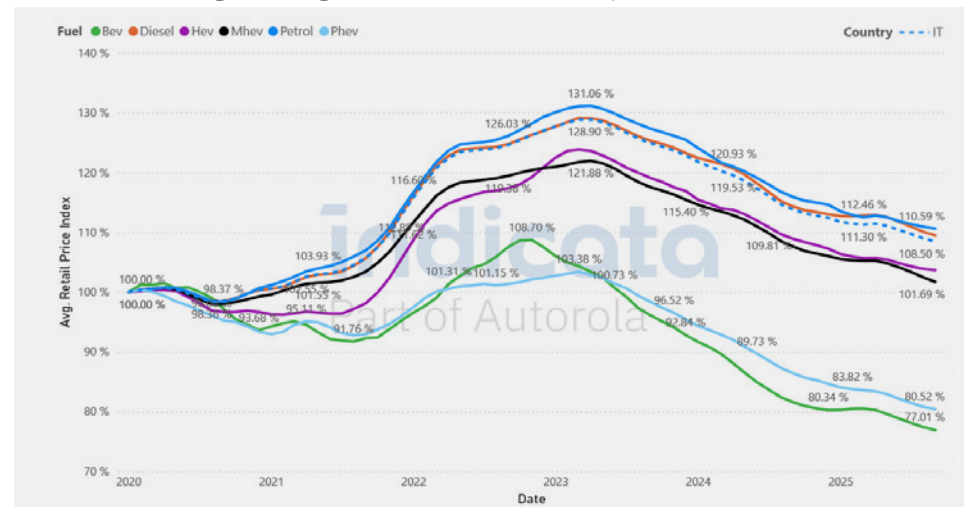
Stock Market Share by Month and Fuel Type - Italy



MDS by Fuel Type - Italy



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



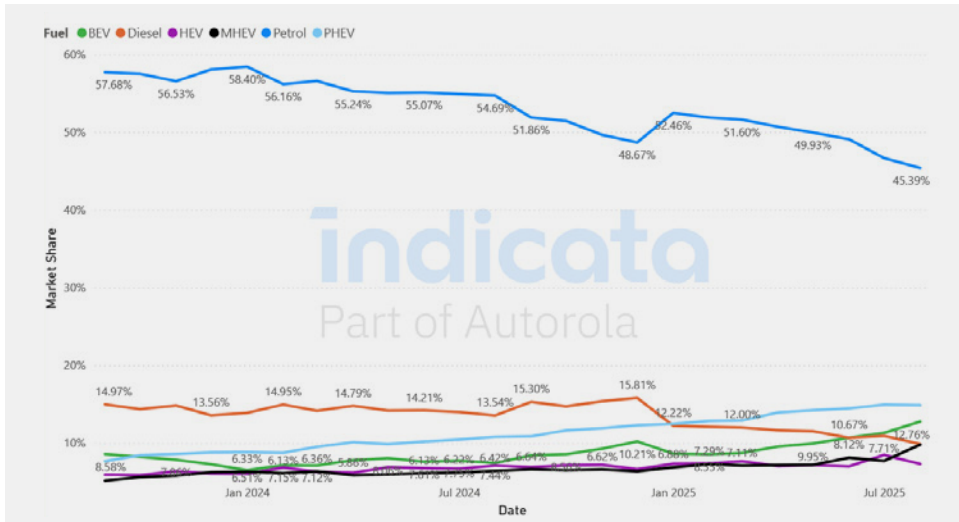
Top selling < 4-years-old by volume

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

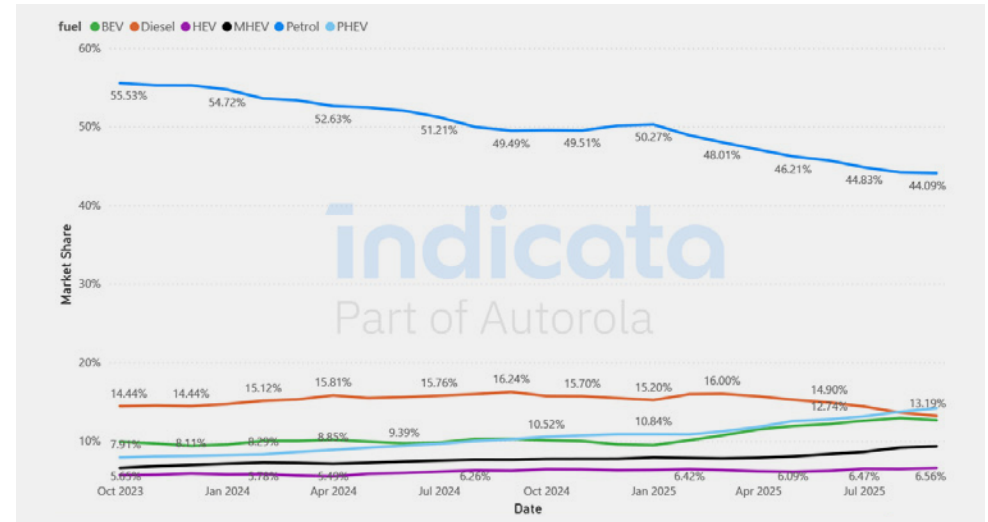
Fastest selling < 4-years-old by Market Days Supply

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

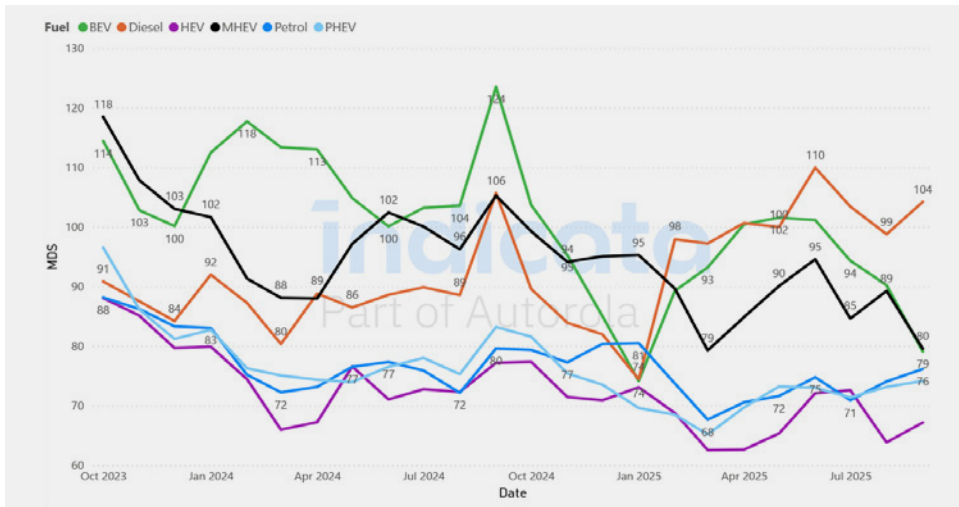
Sales Market Share by Month and Fuel Type - Netherlands



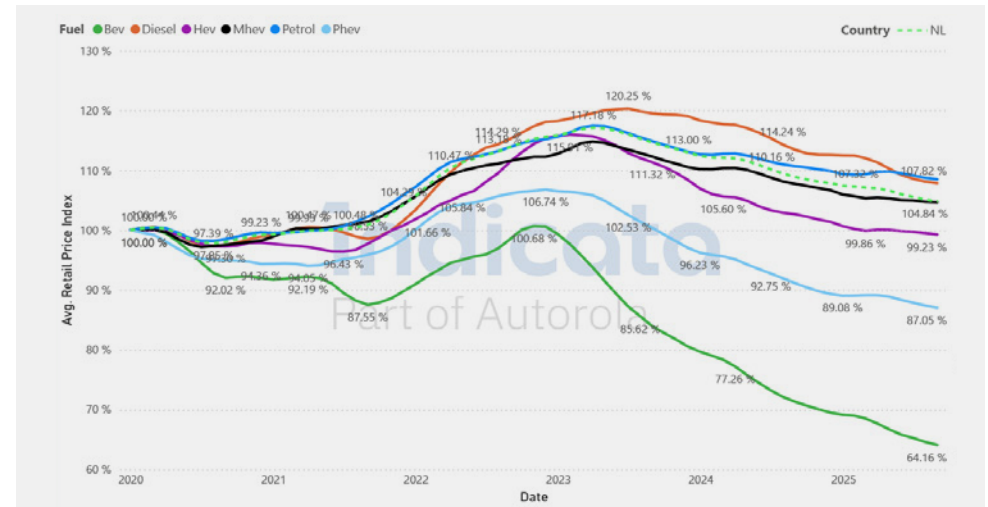
Stock Market Share by Month and Fuel Type - Netherlands



MDS by Fuel Type - Netherlands



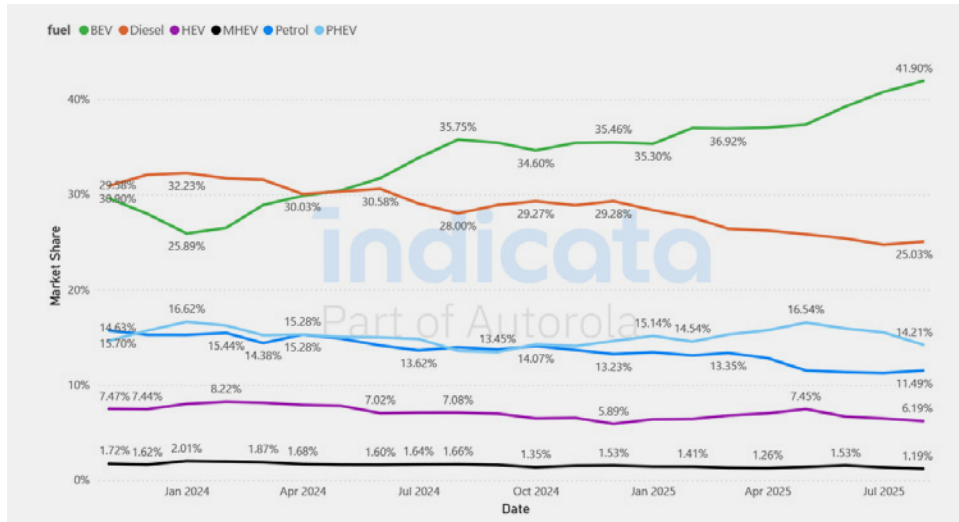
Retail Price (Weighted Avg.) Index 100 = Jan - Netherlands



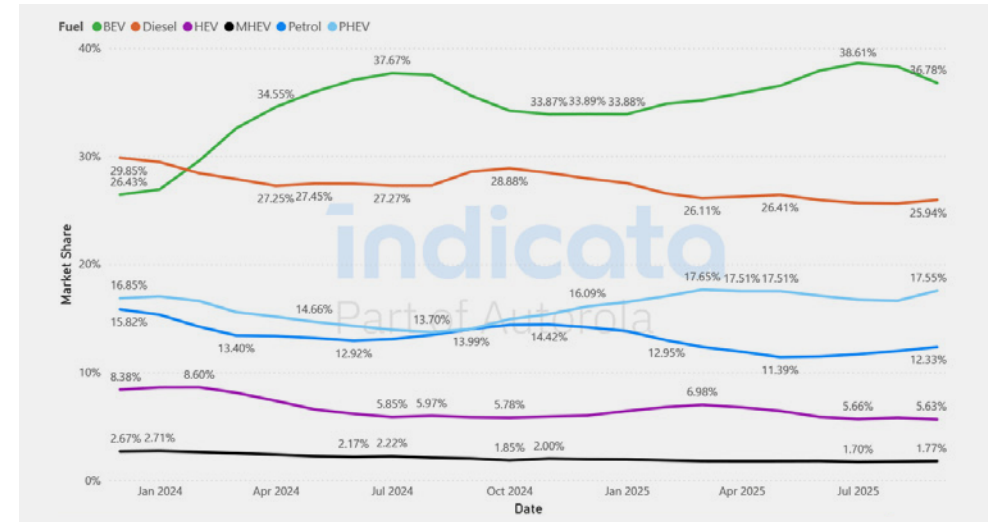
Top selling < 4-years-old by volume		
Make	Model	MDS
Lynk & Co	01	41.4
Toyota	Yaris Cross	53.4
Volkswagen	Golf	81.3

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

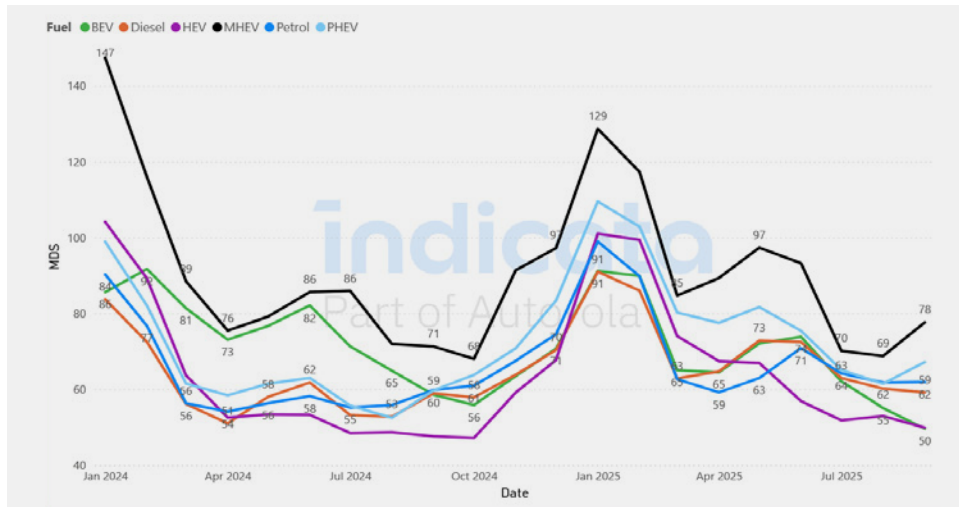
Sales Market Share by Month and Fuel Type - Norway



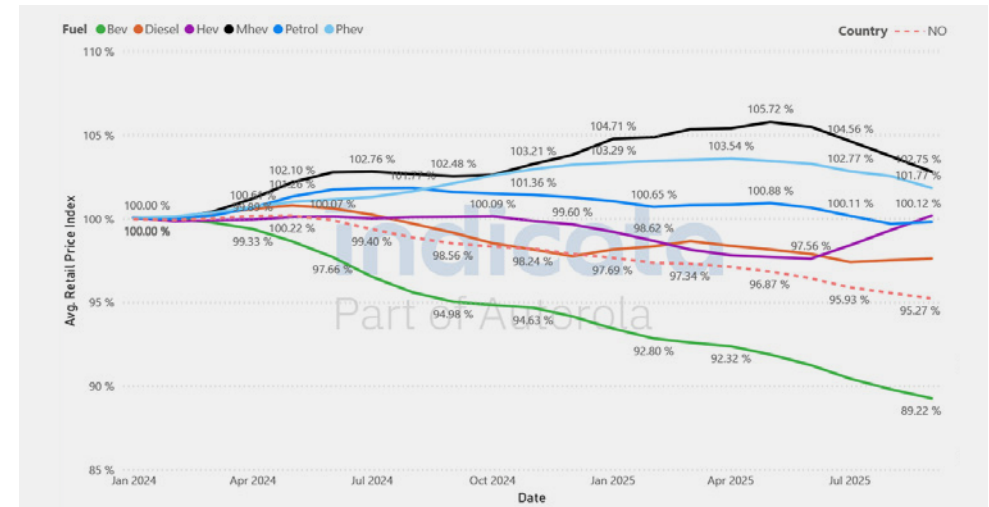
Stock Market Share by Month and Fuel Type - Norway



MDS by Fuel Type - Norway



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



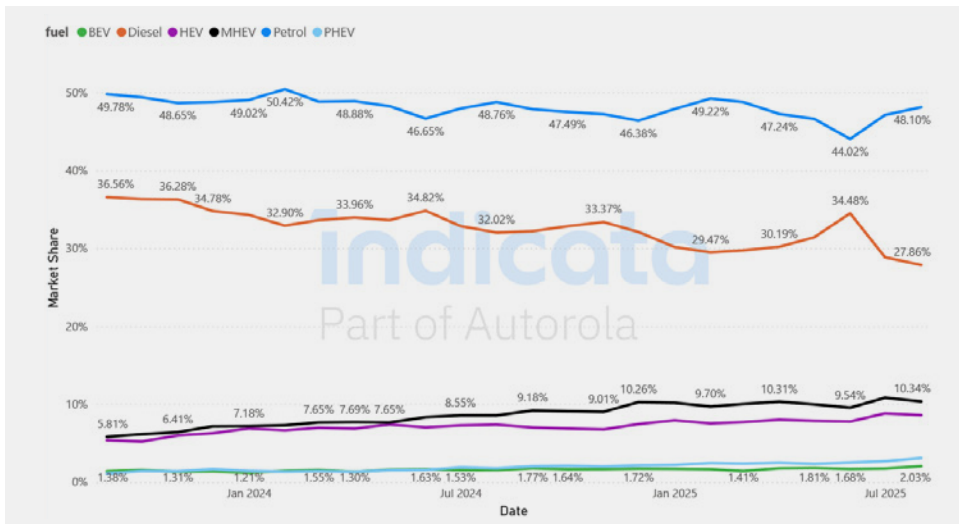
Top selling < 4-years-old by volume

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

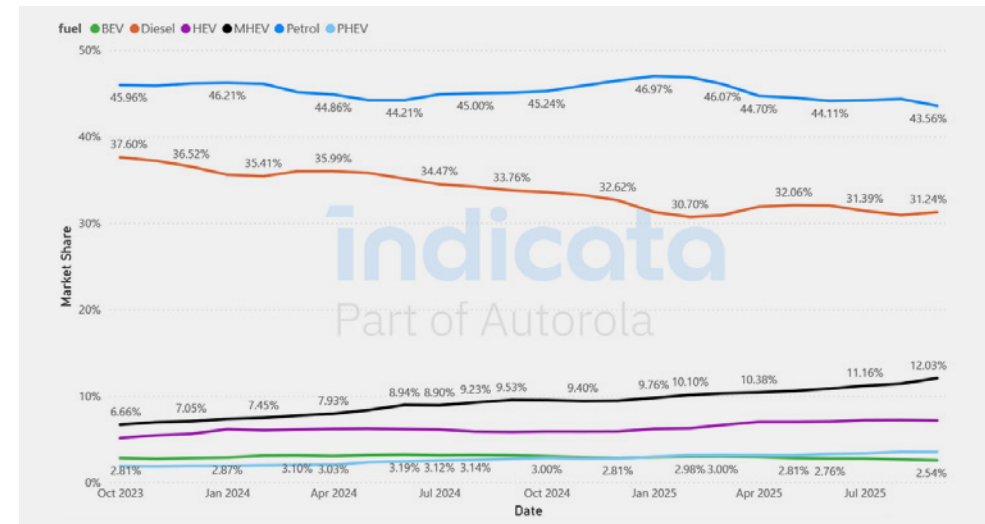
Fastest selling < 4-years-old by Market Days Supply

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

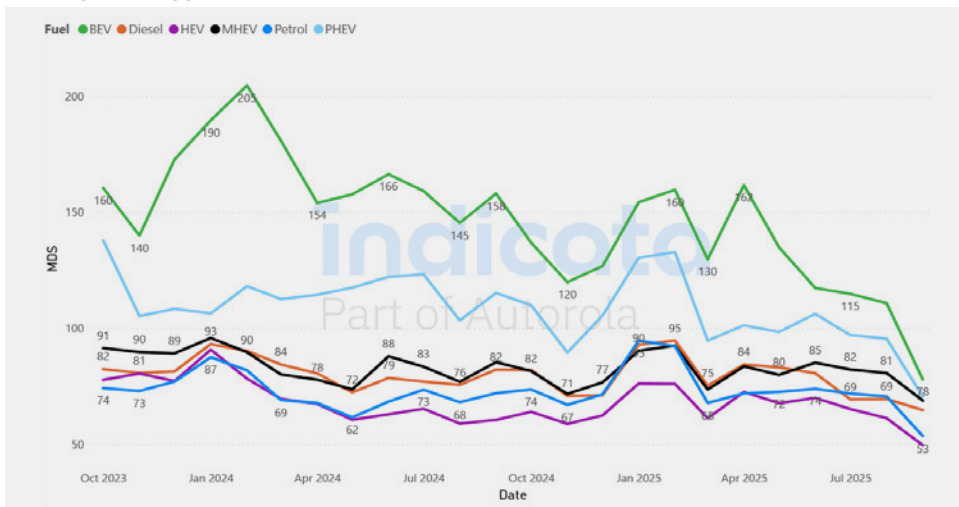
Sales Market Share by Month and Fuel Type - Poland



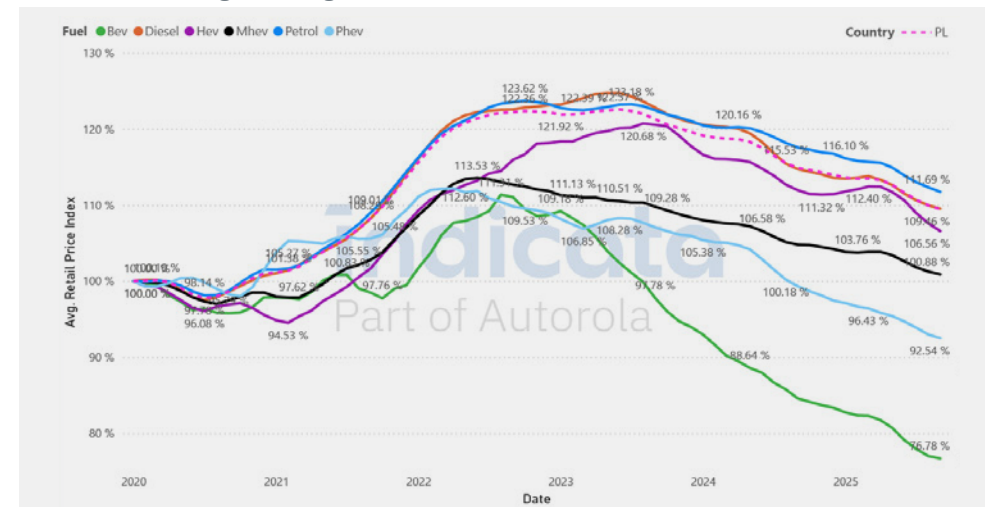
Stock Market Share by Month and Fuel Type - Poland



MDS by Fuel Type - Poland



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



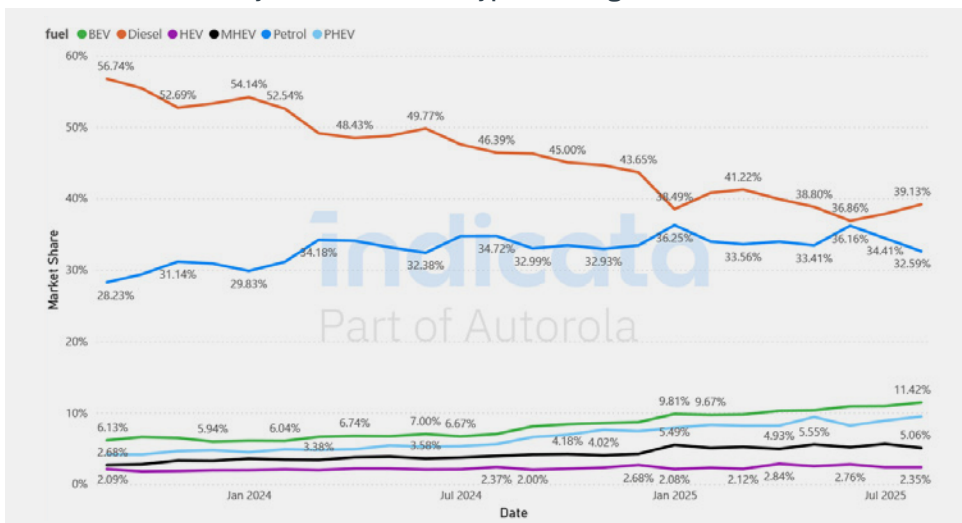
Top selling < 4-years-old by volume

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

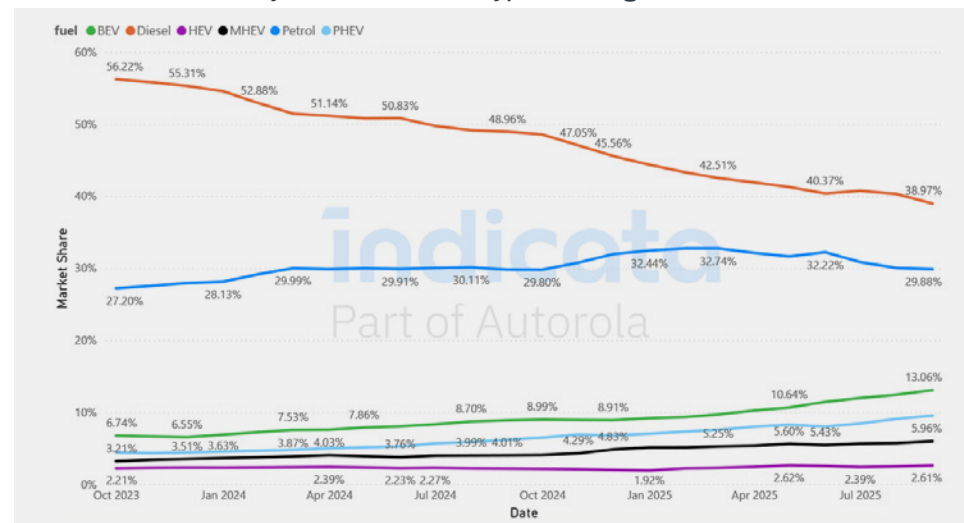
Fastest selling < 4-years-old by Market Days Supply

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

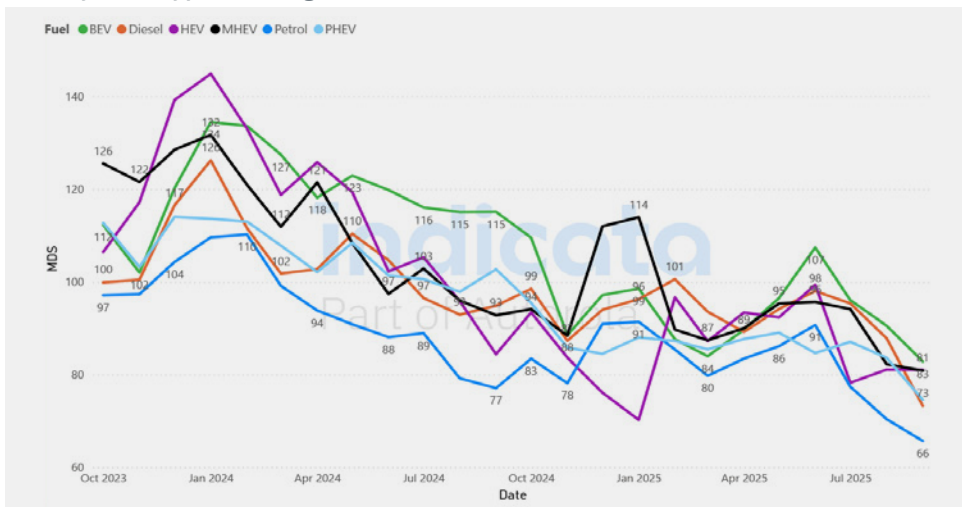
Sales Market Share by Month and Fuel Type - Portugal



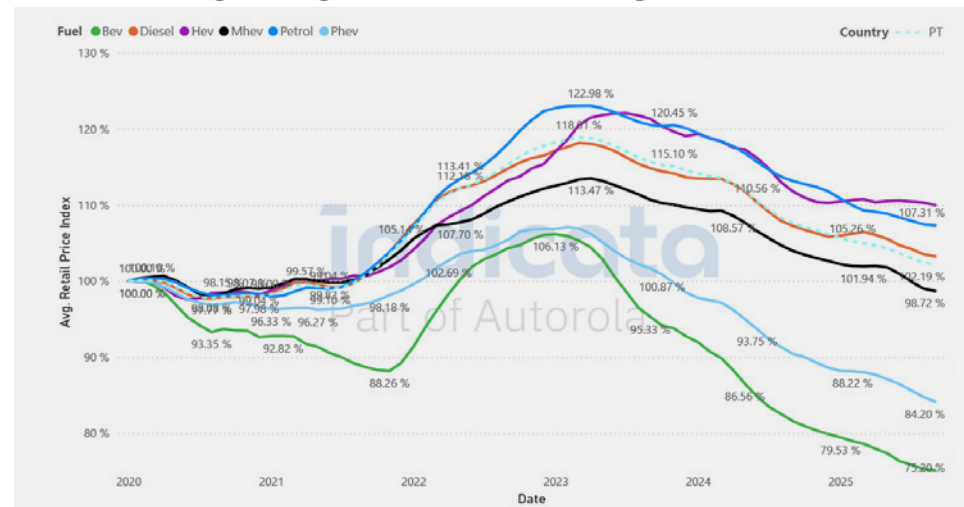
Stock Market Share by Month and Fuel Type - Portugal



MDS by Fuel Type - Portugal



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



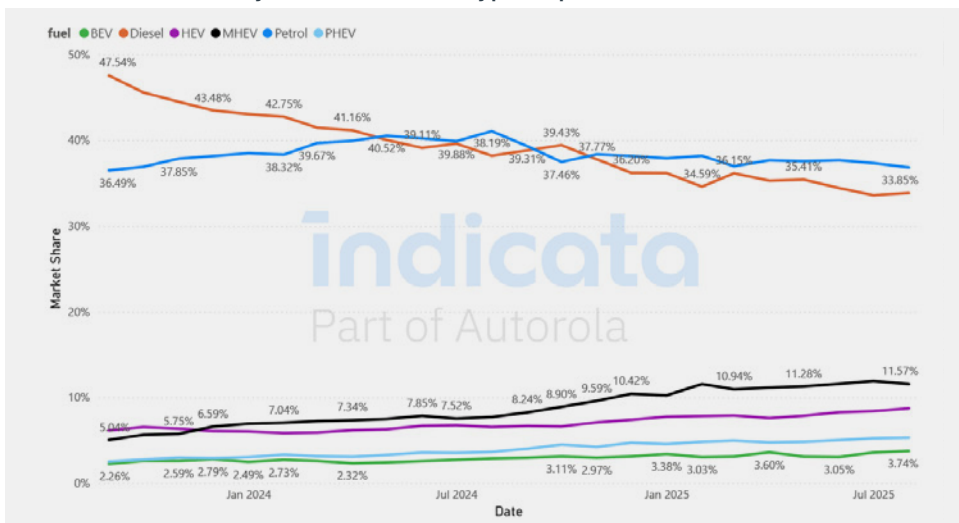
Top selling < 4-years-old by volume

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

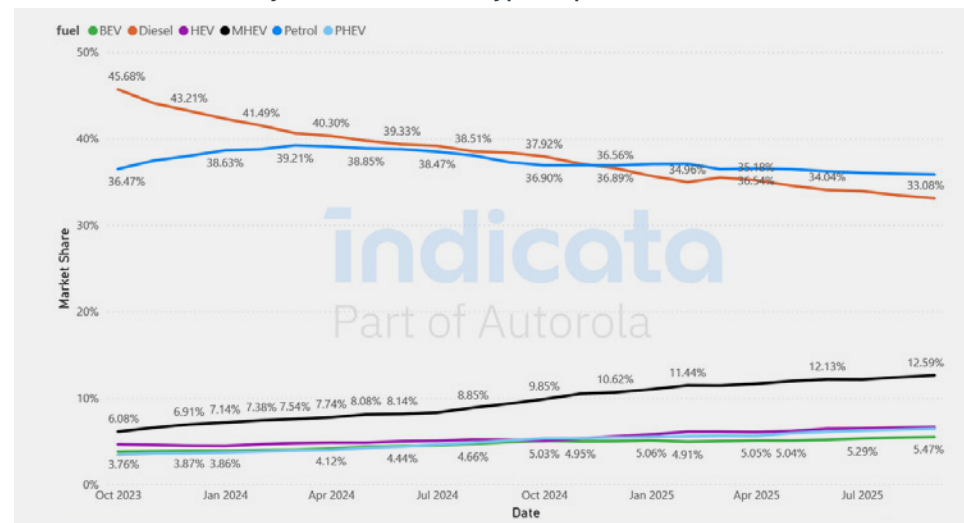
Fastest selling < 4-years-old by Market Days Supply

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

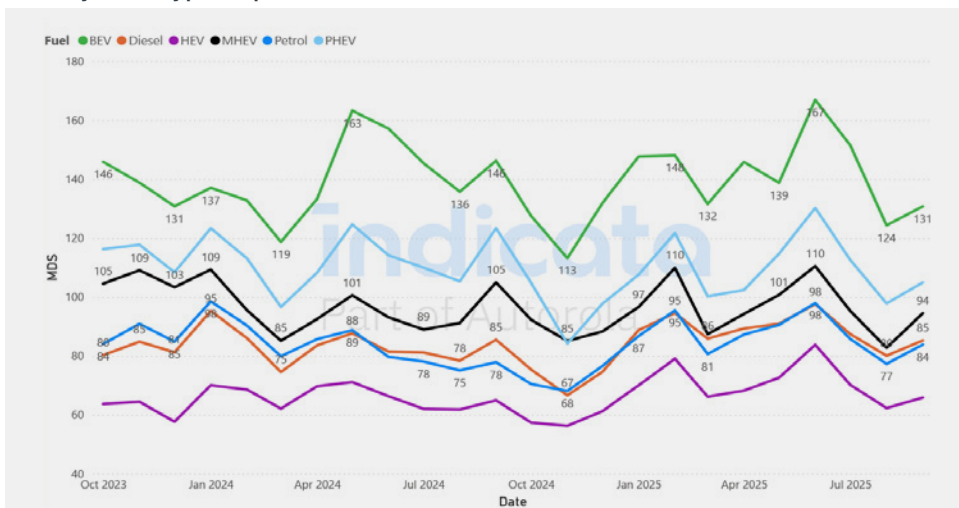
Sales Market Share by Month and Fuel Type - Spain



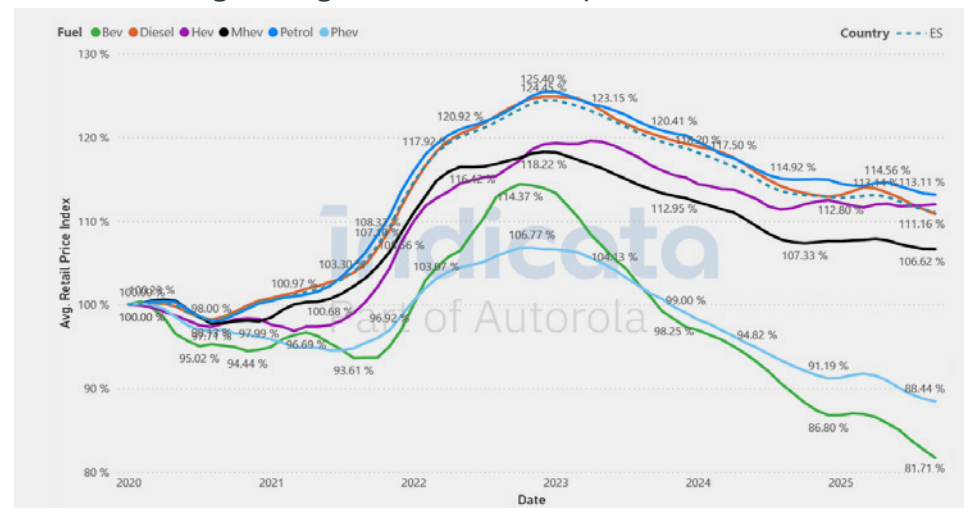
Stock Market Share by Month and Fuel Type - Spain



MDS by Fuel Type - Spain



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



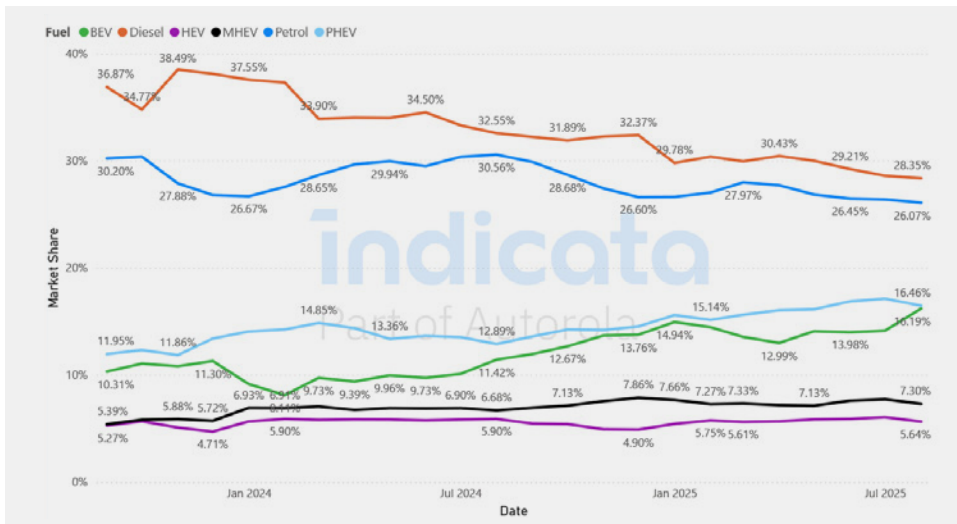
Top selling < 4-years-old by volume

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

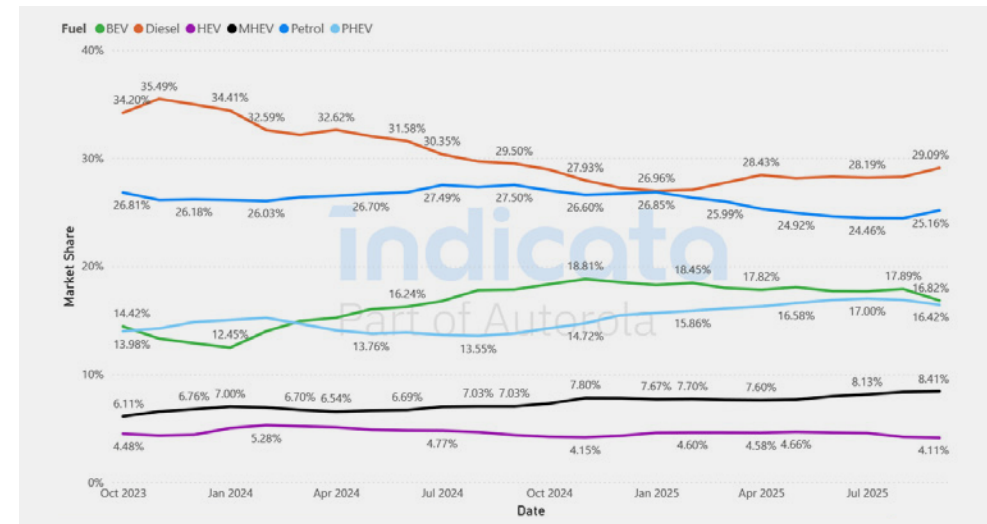
Fastest selling < 4-years-old by Market Days Supply

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

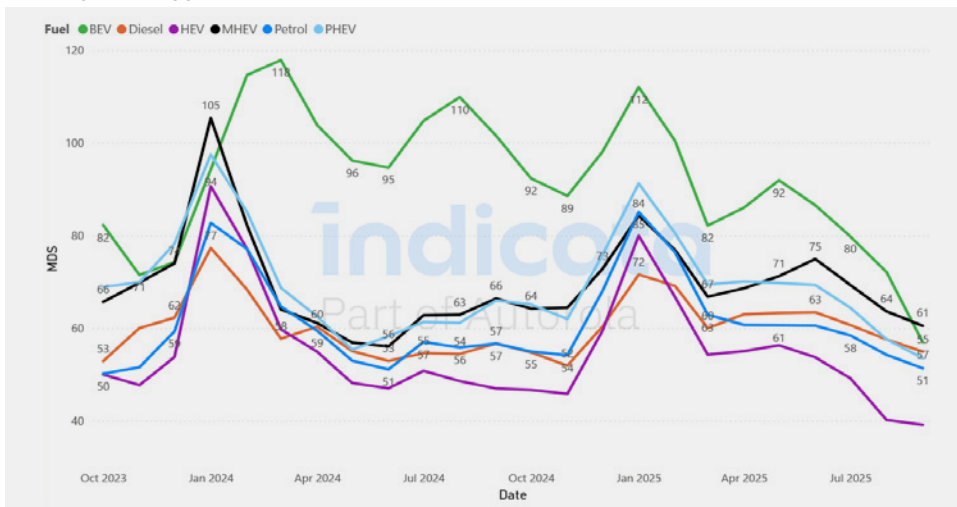
Sales Market Share by Month and Fuel Type - Sweden



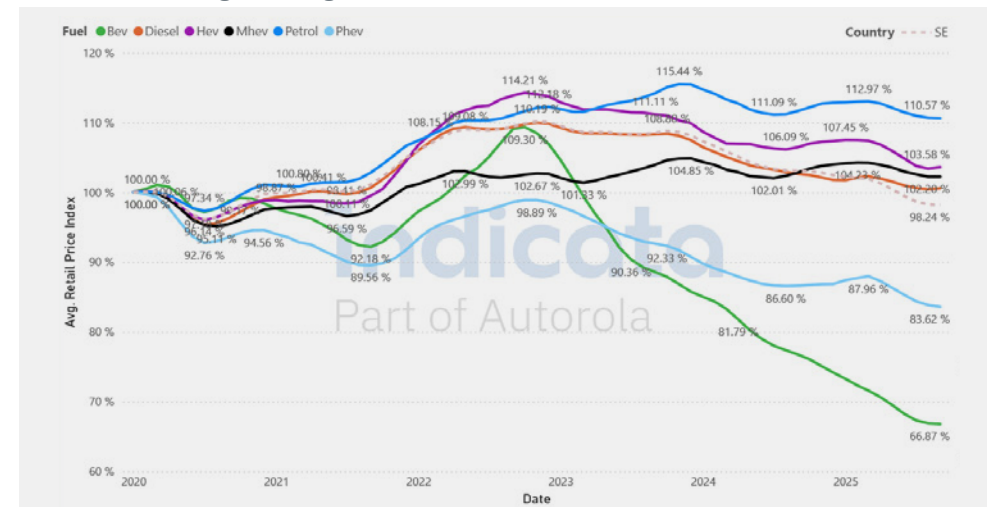
Stock Market Share by Month and Fuel Type - Sweden



MDS by Fuel Type - Sweden



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



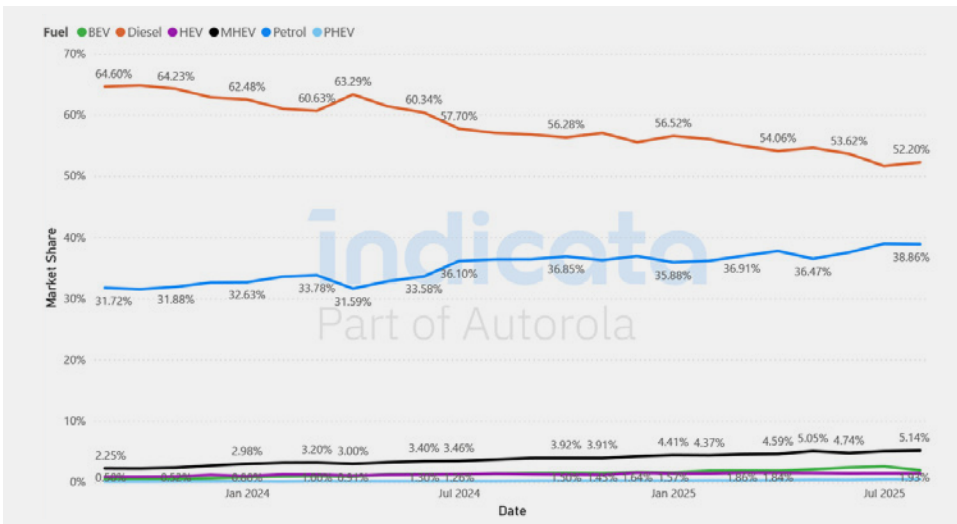
Top selling < 4-years-old by volume

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

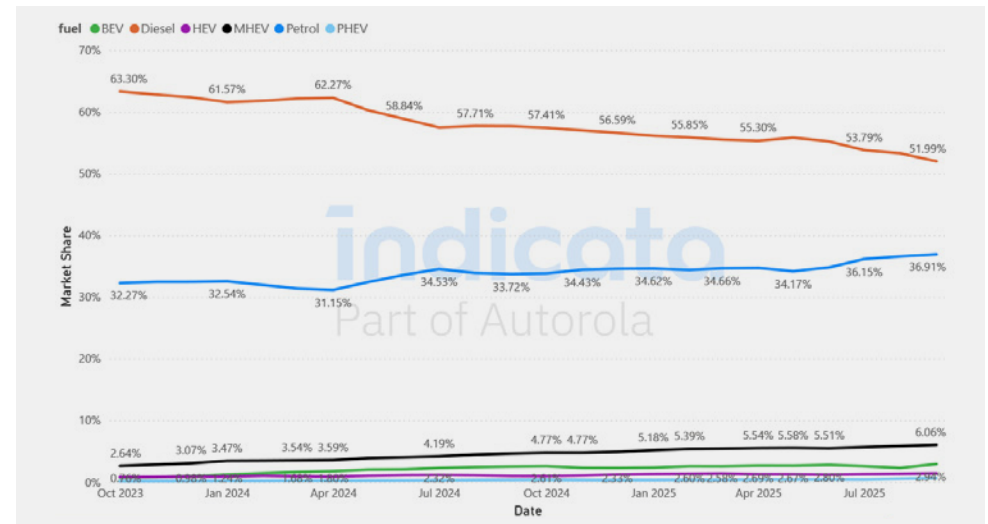
Fastest selling < 4-years-old by Market Days Supply

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

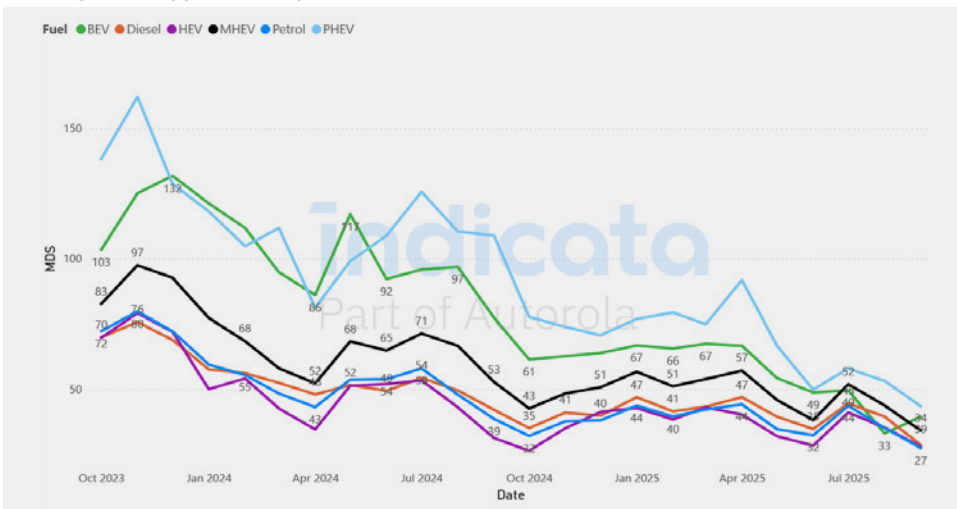
Sales Market Share by Month and Fuel Type - Türkiye



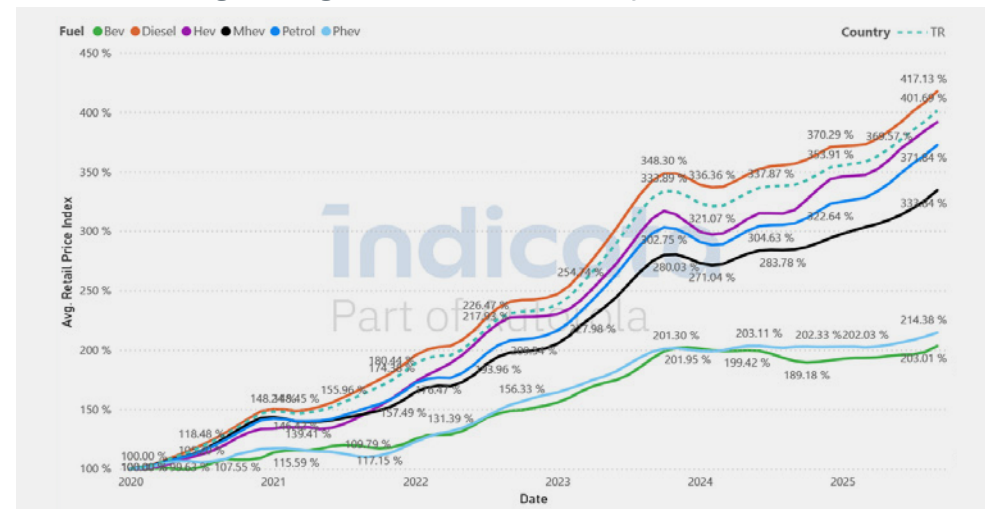
Stock Market Share by Month and Fuel Type - Türkiye



MDS by Fuel Type - Türkiye



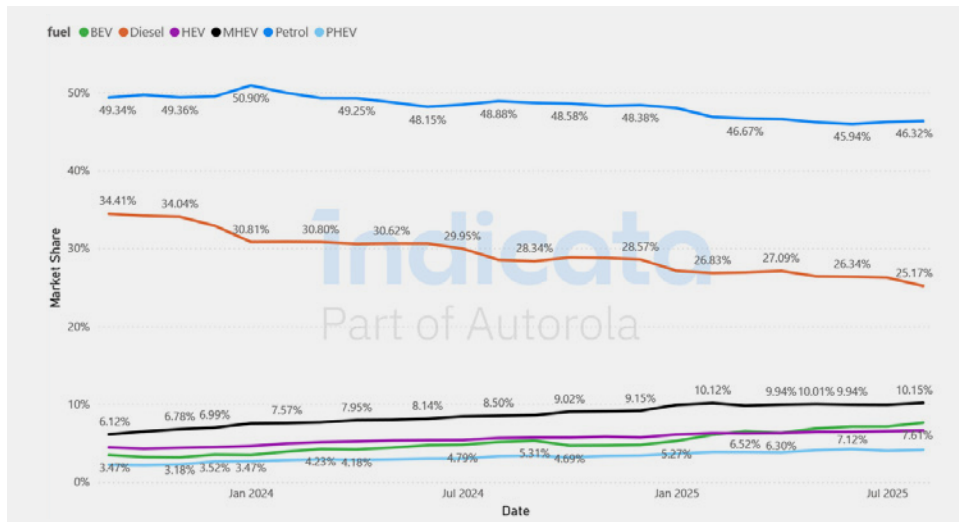
Retail Price (Weighted Avg.) Index 100 = Jan - Türkiye



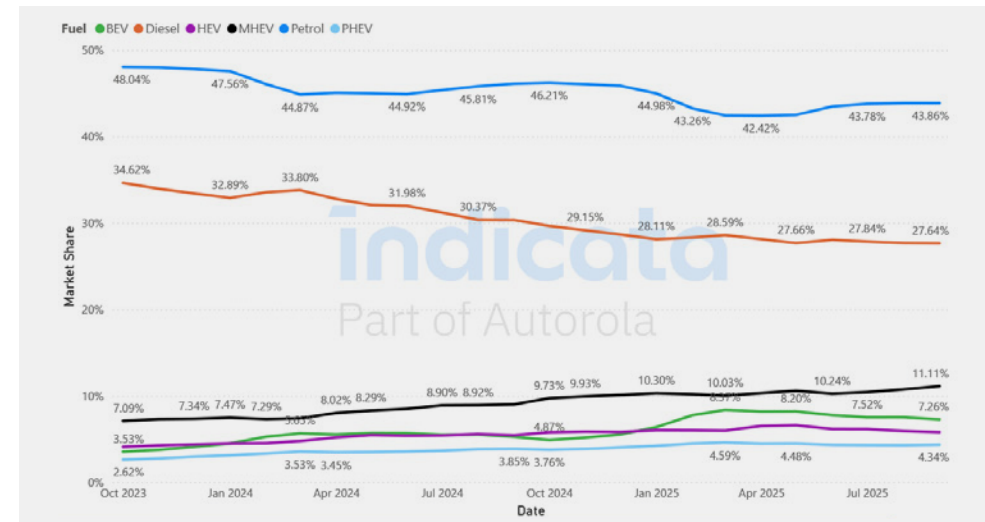
Top selling < 4-years-old by volume		
Make	Model	MDS
Fiat	Tipo	25.1
Renault	Clio	23.8
Renault	Mégane	26.4

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

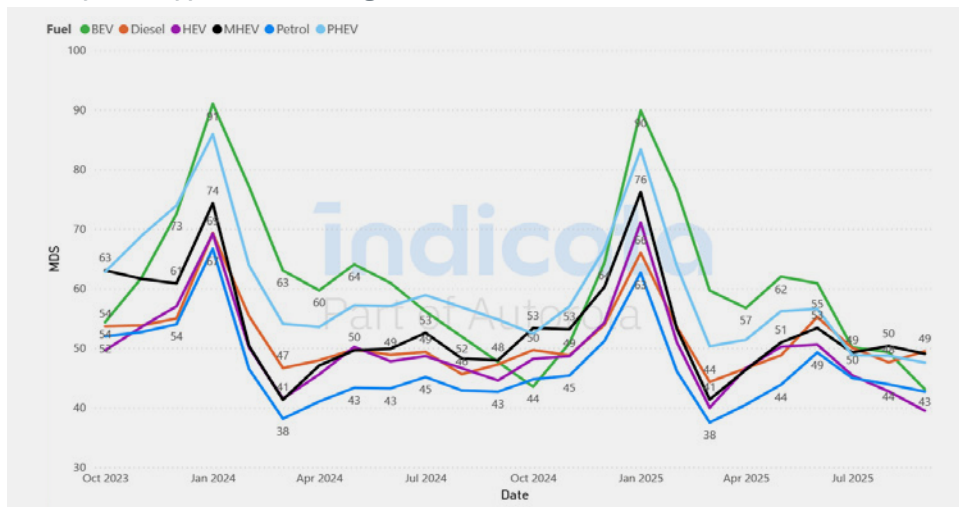
Sales Market Share by Month and Fuel Type - United Kingdom



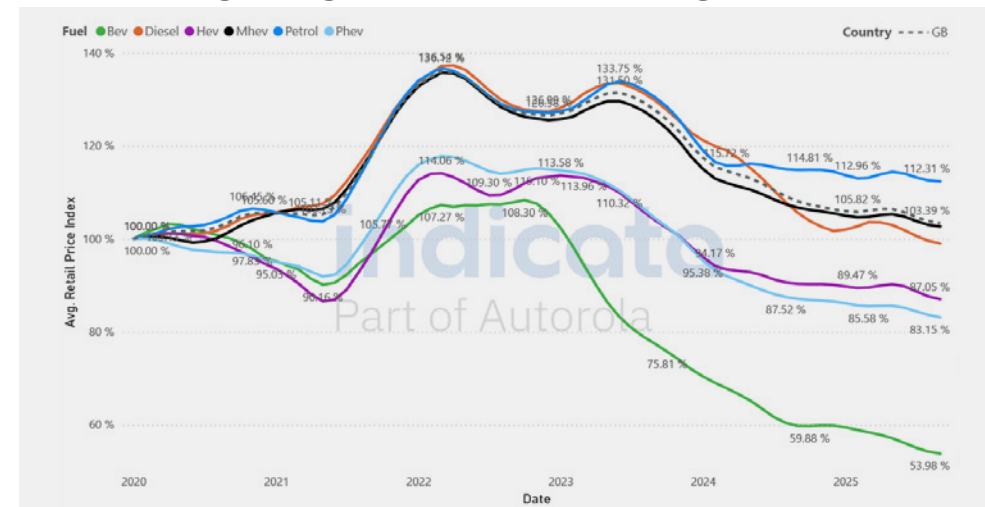
Stock Market Share by Month and Fuel Type - United Kingdom



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

Se você estiver interessado em entrar em contato com a Indicata, veja abaixo uma lista de contatos do país ou registre-se através do [Indicata.com](https://indicata.com)

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A 24 de Março de 2020 o INDICATA publicou o estudo *“COVID-19: Até que ponto o mercado de usados será afectado (e como sobreviver)?*

Este documento explorou:

Tendências iniciais do mercado

O impacto inicial do vírus e das medidas de distanciamento social implementadas.

Cenários

Uma variedade de impactos com base no desenvolvimento da taxa de infecção e no histórico de dados de mercado.

Mitigação

Avaliação de riscos por sector, associada a possíveis acções correctivas.

O Indicata Market Watch é um PDF regular, publicado por volta do dia 20 do mês, que inclui tendências de stocks, vendas e Market Days' Supply por tipo de combustível.

Estamos empenhados em actualizar o mercado com dados em tempo real e em fornecer informações sobre vendas, stocks e preços para o manter a par do ambiente em rápida evolução.

Temos o prazer de apresentar a nossa mais recente iteração do **"Indicata Market Watch"**, que abrange 16 países europeus e o Brasil. Estamos a fornecer uma análise abrangente do mercado de usados com comentários para cada país para o Q1, Q2, Q3 e Q4 em Janeiro, Abril, Julho e Outubro.

Entretanto, serão publicadas versões Lite do relatório para os outros oito meses do ano, que incluem um sumário europeu global e gráficos e quadros por país.

Como é que produzimos os nossos dados?

O Indicata analisa diariamente 9 milhões de anúncios de veículos usados em toda a Europa, e o nosso sistema passa por extensos processos de limpeza de dados para garantir a integridade dos mesmos.

As vendas (anúncios retirados) deste relatório tem como base os anúncios de automóveis usados de profissionais reconhecidos. Como tal, não inclui dados relacionados a anúncios de particulares (P2P).

Quando um anúncio é retirado da Internet, é classificado como uma "Venda".



Indicata
Market Watch™

Informação sobre o mercado de automóveis usados



Para mais informações
sobre as tendências
do mercado B2B, visite
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