



June 2025 | Edition 64

Prices remain stable for all fuel types except BEVs



A boost in new BEV registrations in 2025 has contributed to almost one percentage point of market share growth in May through tactical sales channels for used cars.

Fully electric vehicle sales are pulling away from diesel, which continues to decline.

Even in Türkiye, young used BEVs are making a strong leap of 1.4 percentage points to 9.7%.

In Sweden, the downward sales trend for used BEVs since the beginning of 2025 has now been broken.

In the 3–4-year age segment, electric vehicles are growing by an average of 0.8 percentage points to 10.7% of total market sales.

Premium manufacturers are contributing to the success of used PHEVs in the middle age group. They account for over 40% of sales at Volvo, more than one in four Mercedes and more than 20% at BMW. Even Porsche has a share of more than 18%.

Following a surge in used car sales in the first quarter of 2025, Q2 has seen an inventory build-up and rising MDS values.

Of the fastest-selling models, five are from Mini. These include seasonal Mini convertibles, but also the new Aceman.

Electric LCVs have still very poor MDS values. In the segment up to 2 years, values are above 180 and in the overall average of all age groups above 160, while diesel is at 80.

Even in ‘electrophobic’ markets such as Poland, the MDS fuel type spread for passenger cars is significantly lower than for LCVs.

BEV passenger cars in Poland have improved by almost 70 MDS points since the beginning of the year and are now well below 100.

Pricing behaviour of remarketers has further consolidated and stabilised in almost all markets compared with the previous month.

Only the UK shows greater amplitude in price adjustments in the price index and is currently in a pronounced recovery phase again.

A comparatively high proportion of electric vehicles in Denmark, due to volume weighting in the overall price index, resulted in an average loss of 0.6 index points last month.

Diesel models are catching up with combustion engines in terms of price development in Denmark.

In the Netherlands and Sweden, diesel cars are exceptionally stable in terms of price because they are becoming increasingly rare.

In France, full hybrids are showing an upward trend. Kia Full Hybrid models, with an average index increase of 2.5 points, have contributed particularly strongly to this.

Despite low EV affinity, Spain has been experiencing a phase of price stabilisation for BEVs for several months now, mainly driven by mainstream brands such as VW, Opel and Peugeot, but also Tesla.

Country	Latest used car price percentage point movement versus Jan 2023
Turkey	83.5pp
Poland	-6.7pp
Spain	-8.7pp
Sweden	-11.6pp
Portugal	-12.1pp
The Netherlands	-10.9pp
Italy	-12.6pp
Belgium	-11.9pp
France	-12.5pp
Austria	-12.1pp
Germany	-10.5pp
United Kingdom	-14.5pp
Denmark	-20.4pp
Average	-4.7pp
EU Region	-12.1pp

Electric vehicles are catching up

Since the beginning of the year, the market share of used BEVs in the youngest passenger car age segment (up to two years old) has been growing steadily in the observed part of Europe, both in terms of supply and sales. Not least, the boost from the sharp increase in new registrations in 2025 compared to a rather disappointing 2024 is contributing to this through tactical sales channels.

Used car sales gained almost one percentage point of market share on average in May alone, setting fully electric vehicles apart from diesel

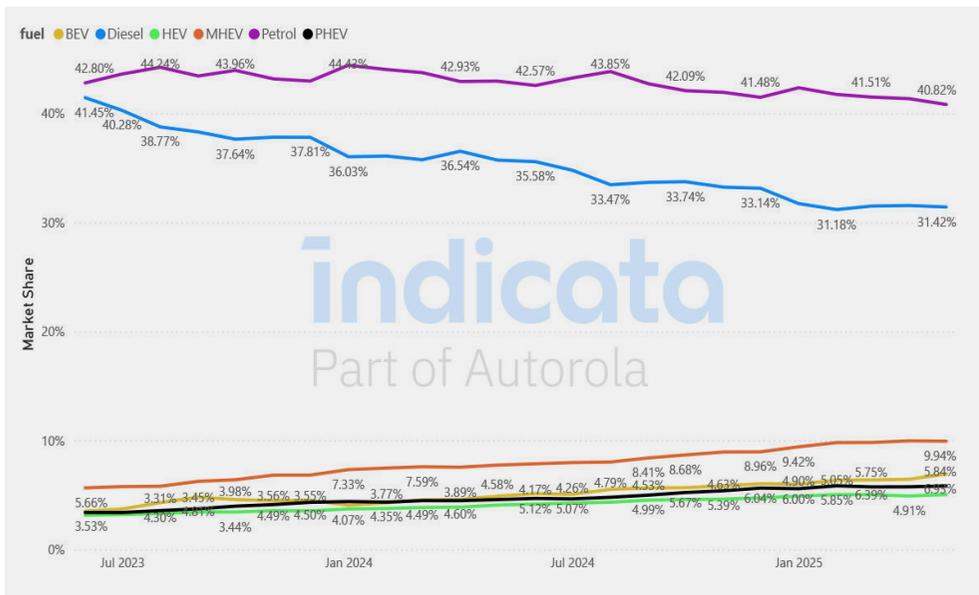
cars, which continue to decline. They are now the third-largest sales volume of young used cars after petrol and mild hybrids. Even in Türkiye, used electric vehicles up to two years old made a strong jump of 1.4 percentage points to 9.7% last month, and in Sweden, too, the downward trend since the beginning of the year has now been broken.

With a 26.7% share of sales and an increase of 2.2 percentage points, BEVs are once again ahead of PHEVs. In the middle age segment of 3-4 years, on the other hand, BEVs continued to

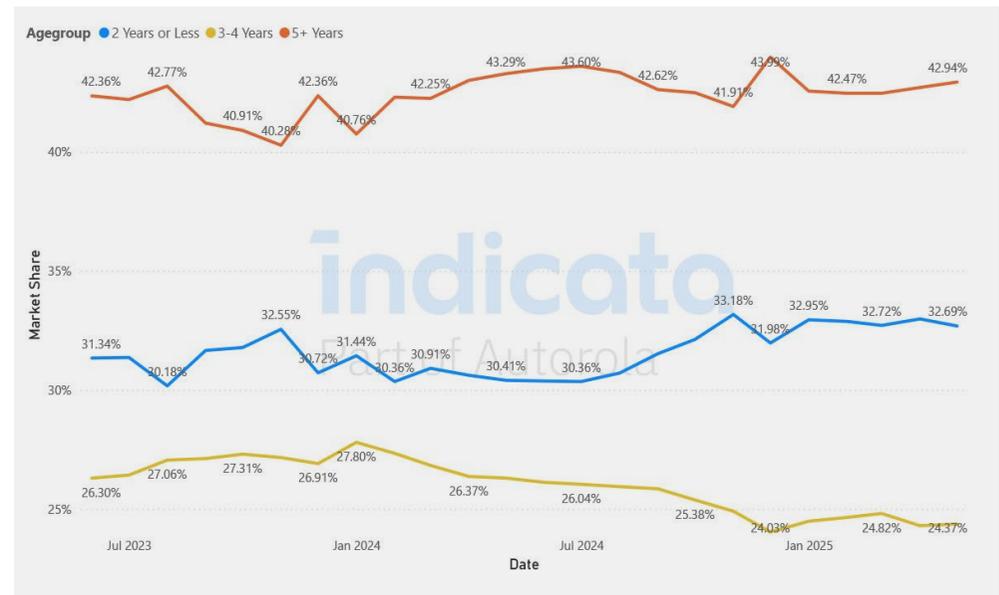
secure market share, gaining 0.8 percentage points on average to 10.7%, but diesel and plug-in hybrids are still more relevant overall and are still ahead of them in terms of volume.

Premium manufacturers in particular are contributing to the success of PHEVs in this age group. More than 40% of used Volvos sold in the mid-age segment are plug-ins, more than one in four Mercedes and more than 20% of BMWs. Even Porsche accounts for more than 18% of sales, not to mention that more than a quarter of Porsche's mid-age sales consist of Taycans.

Sales Market Share by Month and Fuel Type - European Market



Sales Market Share by Month and Age Group - European Market



Convertibles are top while eLCVs are a flop

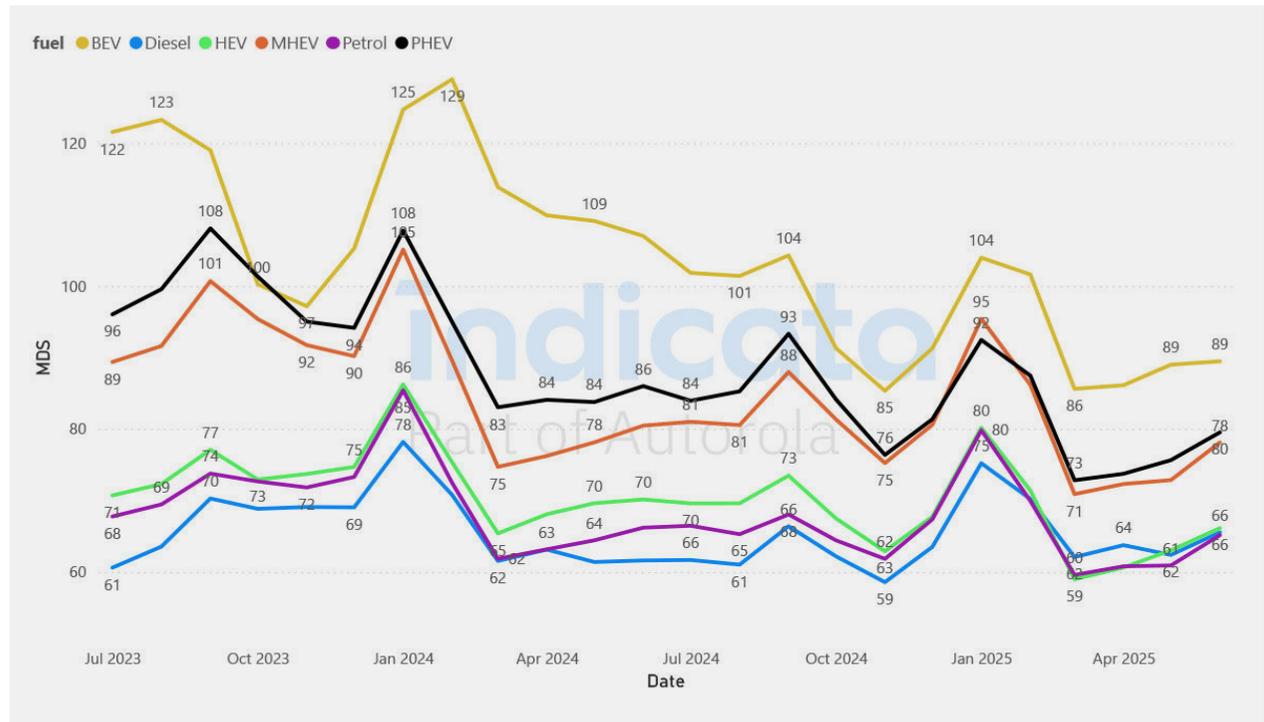
Although the market attractiveness ratings for almost all drive types and age segments deteriorated significantly last month, this is partly due to seasonal factors, which lead to an increase in inventories and a deterioration in the supply/demand situation in Q2 following the surge in sales in the first quarter of 2025.

Combustion engines in particular have deteriorated by several points compared to the same month last year. Battery electric cars, on the other hand, were mostly able to improve on their previous year's results and, even in the youngest age cluster, are still just below the 100 mark on average.

It is striking that five of the top three model rankings are occupied by Mini models. In addition to the seasonally popular Mini convertibles, which are available in limited numbers, the relatively new Aceman BEV series also achieved top marks. The newcomer Škoda Elroq fared even better, entering the Danish top 3 in terms of supply and demand with a dream MDS value of just 20.0.

Electric small vans are at the other end of the scale. In the youngest age segment of up to two years, their MDS values are above 180 and the overall average for all age groups is above 160. These can therefore be described as slow sellers with some justification. In comparison, the still dominant diesel-powered commercial vehicles have an average value of less than 80, which corresponds to twice the rotation speed. Such a spread is not found in passenger cars, even in "electrophobic" markets such as Poland. On the contrary, BEVs have improved by almost 70 MDS points since the beginning of the year and are now well below 100.

MDS by Fuel Type - European Market



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

All powertrains	MDS	ICE	MDS	Hybrid	MDS	BEV	MDS
Volkswagen Golf	74.2	Volkswagen Golf	74.3	Toyota Yaris	57.3	Volkswagen ID.3	61.3
Volkswagen T-ROC	63.1	Volkswagen T-ROC	63.1	Toyota C-HR	66.9	Tesla Model 3	36.3
Peugeot 208	75.3	Peugeot 208	70.1	Toyota Corolla	55.0	Volkswagen ID.4	53.1

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

All powertrains	MDS	ICE	MDS	Hybrid	MDS	BEV	MDS
Mini Aceman	32.4	MG HS	33.5	Lynk & Co 01	43.9	Mini Aceman	32.4
Tesla Model 3	36.3	Mini Convertible	36.8	MG ZS	49.9	Tesla Model 3	36.3
Mini Convertible	36.8	Mini 3-Door / 5-door Hatch	46.6	Volvo XC40	52.1	Polestar 2	44.9

Price stability with a local touch

Retail pricing behaviour in the markets observed has further consolidated and stabilised compared with the previous month. Only the UK shows greater amplitude in price adjustments in the price index and is currently in a pronounced recovery phase again. Apart from BEVs, all fuel types show improvements, and even PHEVs gained half a point in the index last month.

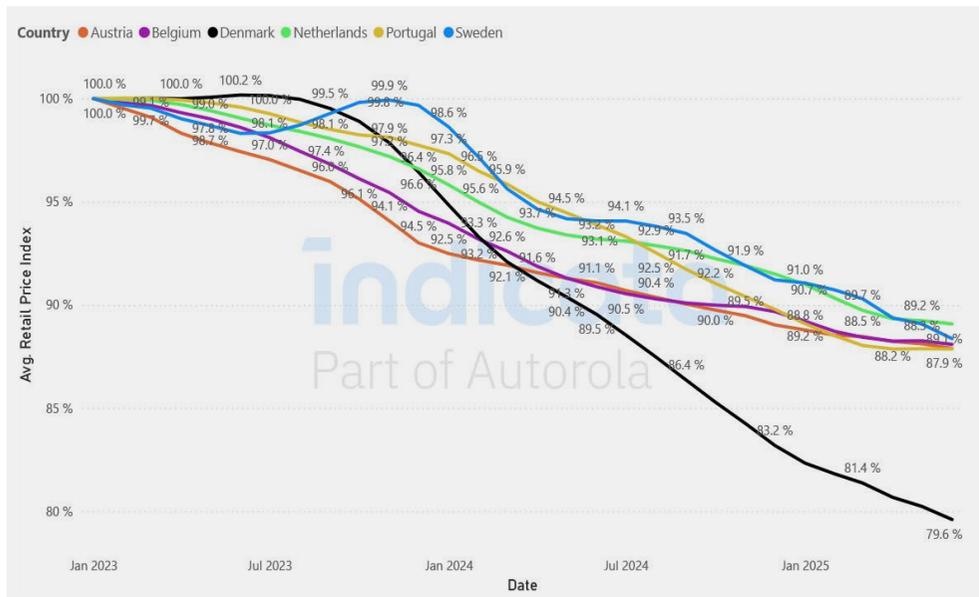
In Denmark, the price war for fully electric used cars is leading to a further decline in price levels. The comparatively high share of electric vehicles therefore accounts for an average loss of 0.6 index points in the overall price index last month due to its volume weighting, further distancing the Danes from the rest of

the field. However, in a direct comparison with the smaller markets, they still perform significantly better in the BEV price index.

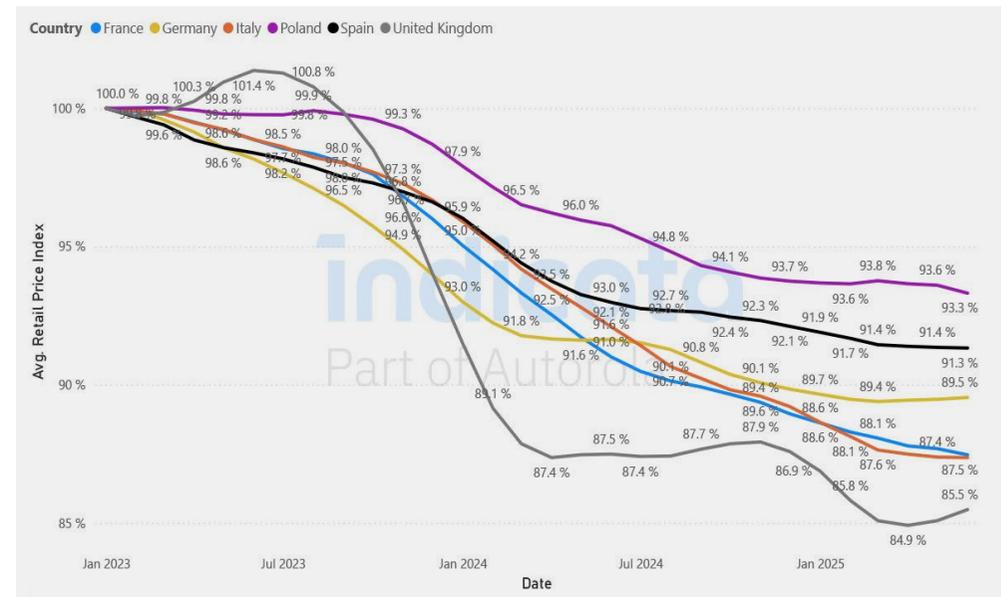
Diesel cars are catching up with combustion engines in terms of price in Denmark, and diesels are also exceptionally stable in price in the Netherlands and Sweden because they are becoming increasingly rare. In France, full hybrids stand out from the general price trend and are showing an upward tendency. Kia Full Hybrid models, with an index increase of 2.5 points, have contributed particularly strongly to this. However, Renault, Toyota and Hyundai hybrids were also able to maintain and expand their price positions.

Convertibles are worth highlighting among the body styles. Seasonal demand is not only accompanied by increased sales figures but also gives sellers more flexibility and is accompanied by less competition for pricing due to limited quantities. This is particularly true in the case of cross-border sales. Spain, which has shown little inclination towards electrification to date, has surprisingly experienced a phase of price stabilisation for BEVs for several months now, mainly driven by mainstream brands such as VW, Opel and Peugeot, but also Tesla. German premium brands, on the other hand, are less resilient.

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

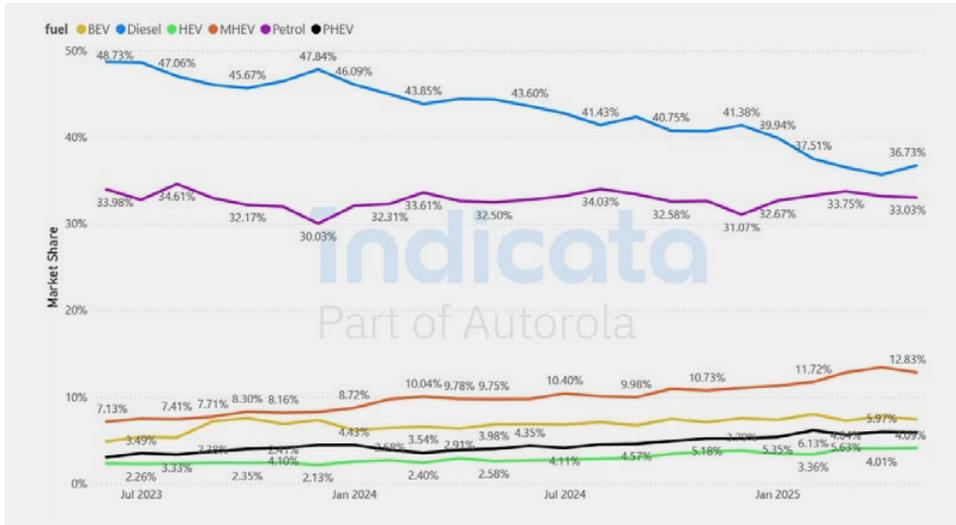


Retail Price (weighted. avg.) Index 100 = Jan - FR,DE,IT,PL, ES, GB

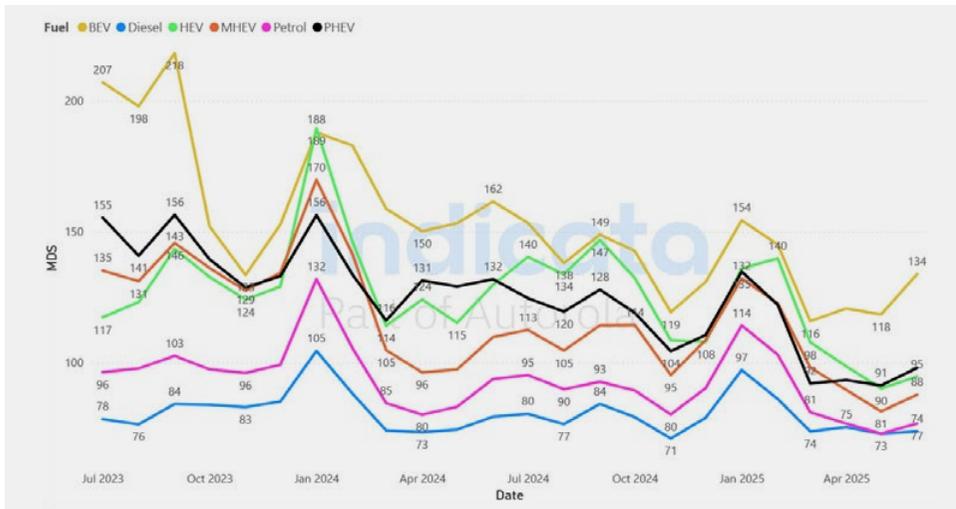


Please note that Indicata is currently in the process of enhancing the Marketwatch Retail Price Index. As a result, there may be variations compared to the versions available in previous months. We appreciate your understanding as we strive to deliver a better experience.

Sales Market Share by Month and Fuel Type - Austria

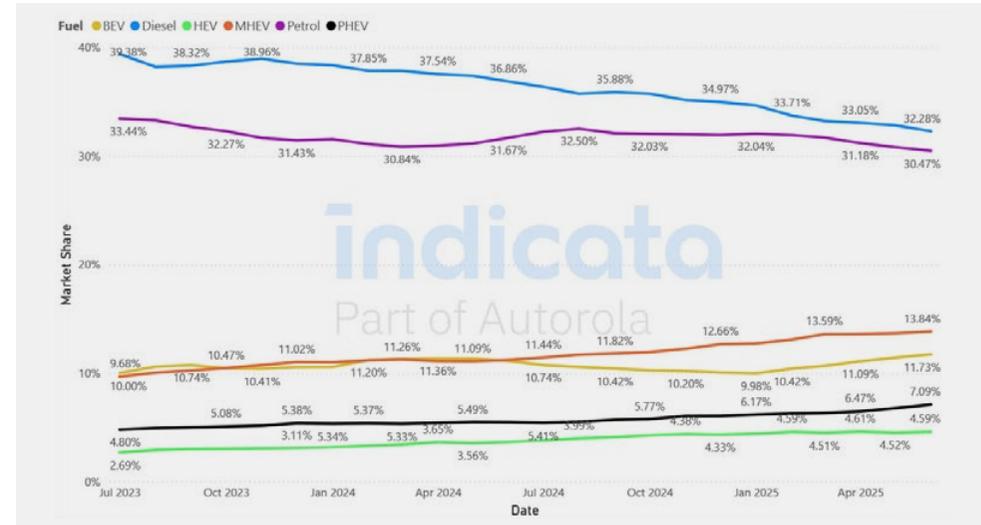


MDS by Fuel Type - Austria

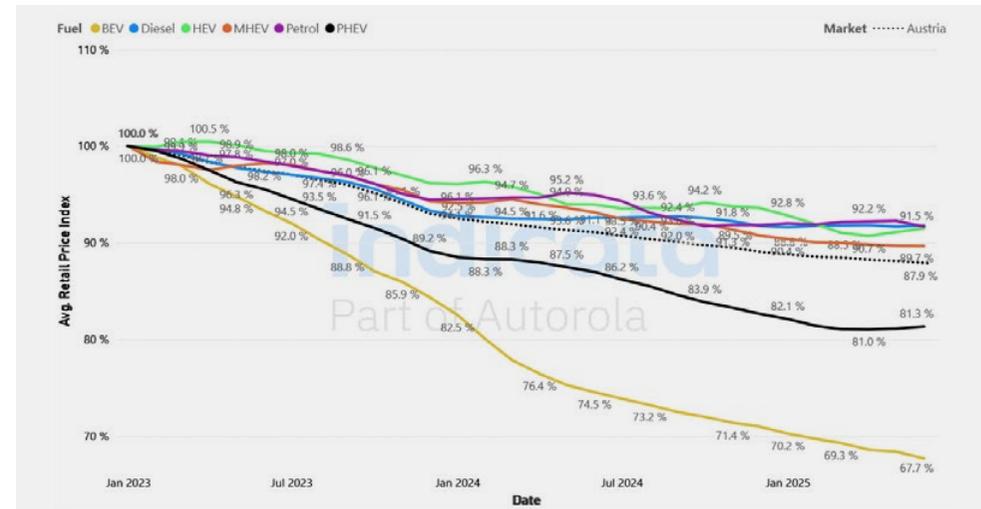


Top selling < 4-years-old by volume		
Make	Model	MDS
Škoda	Octavia	47.7
Volkswagen	Golf	63.4
BMW	3 Series	74.1

Stock Market Share by Month and Fuel Type - Austria

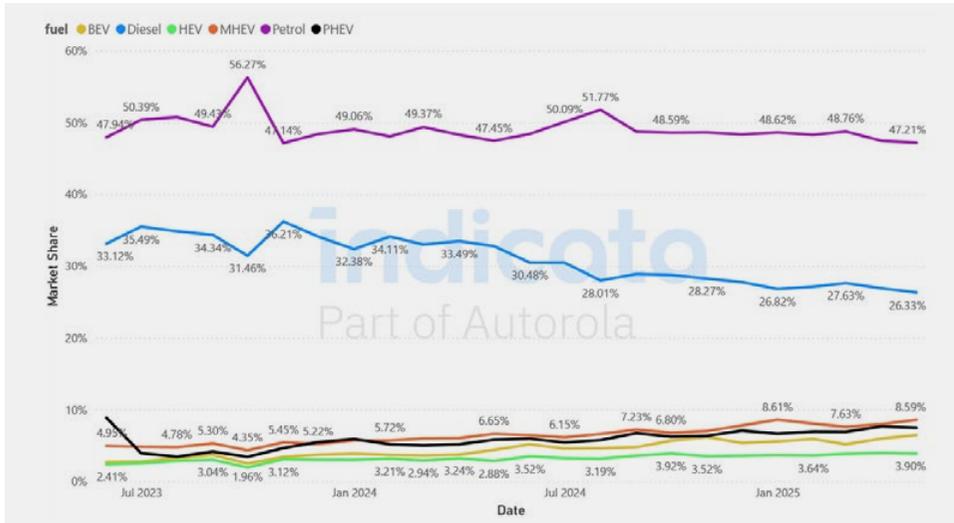


Retail Price (Weighted Avg.) Index 100 = Jan - Austria

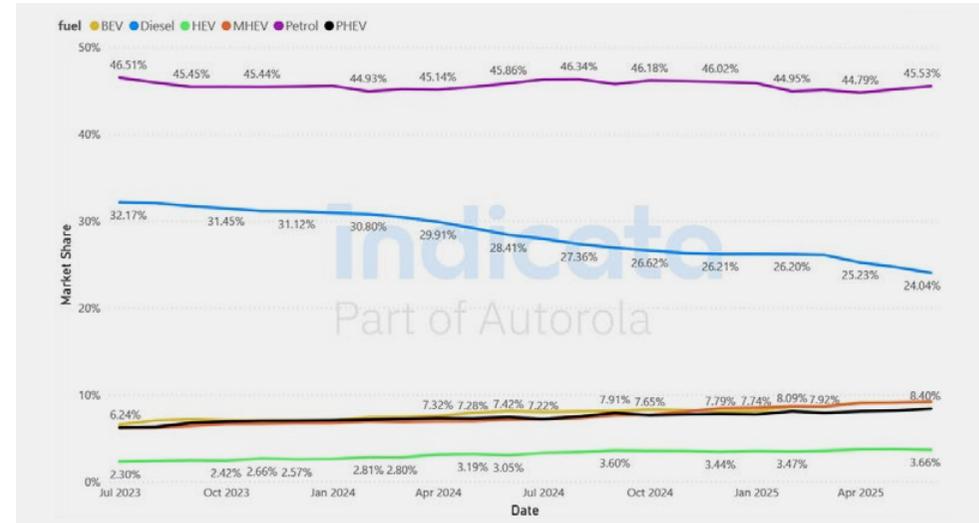


Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
MG	ZS	8x	46.1
Škoda	Octavia	8x	47.7
Mercedes-Benz	GLA-Class	8x	47.9

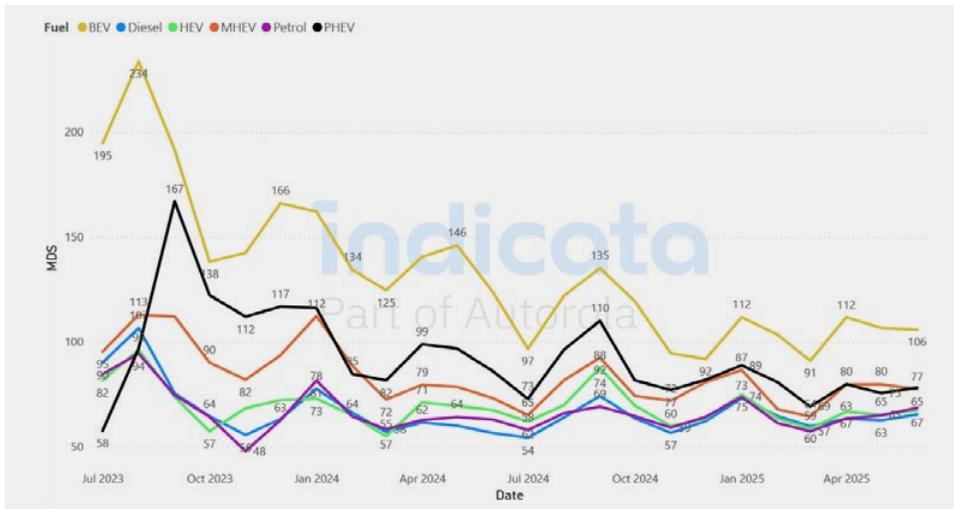
Sales Market Share by Month and Fuel Type - Belgium



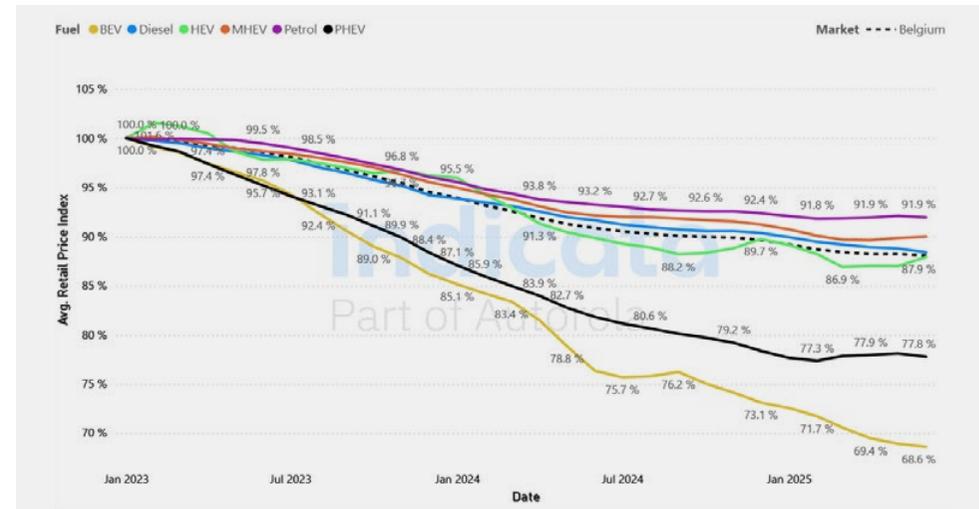
Stock Market Share by Month and Fuel Type - Belgium



MDS by Fuel Type - Belgium



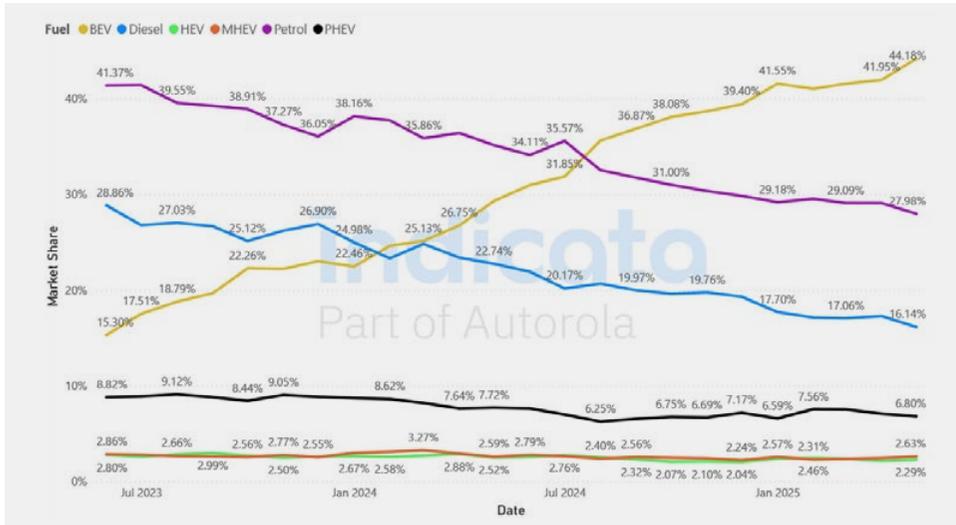
Retail Price (Weighted Avg.) Index 100 = Jan - Belgium



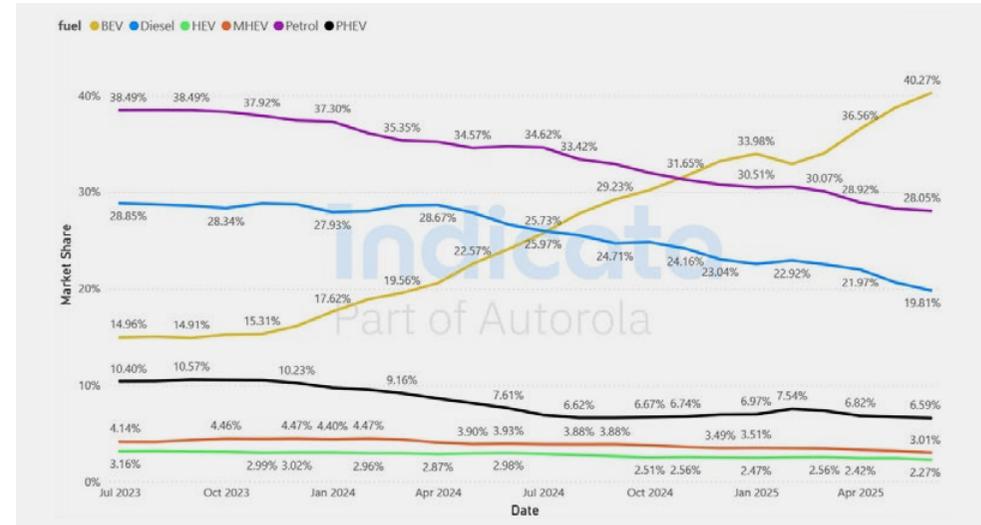
Top selling < 4-years-old by volume		
Make	Model	MDS
BMW	1 Series	53.3
BMW	3 Series	74.0
Volkswagen	Golf	74.1

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Dacia	Jogger	13x	27.0
Tesla	Model 3	11x	33.1
Nissan	X-Trail	10x	36.9

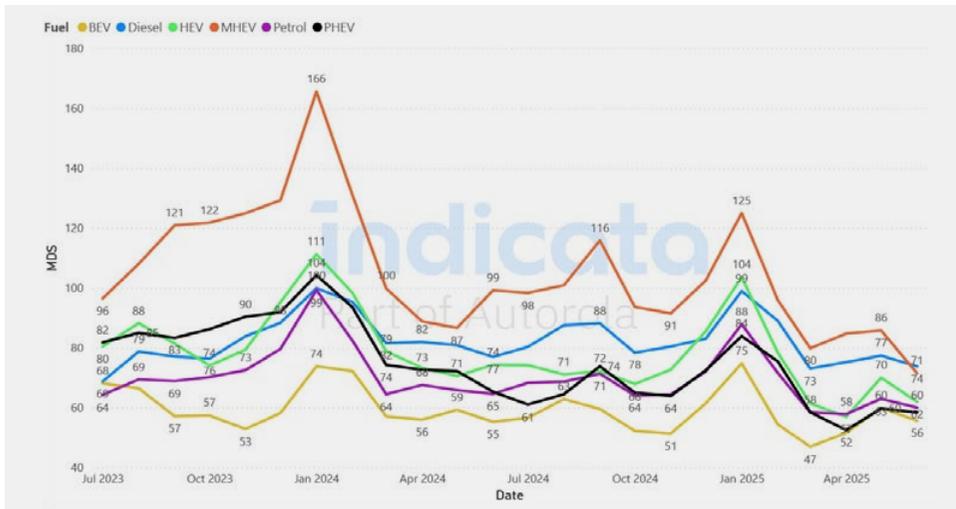
Sales Market Share by Month and Fuel Type - Denmark



Stock Market Share by Month and Fuel Type - Denmark



MDS by Fuel Type - Denmark



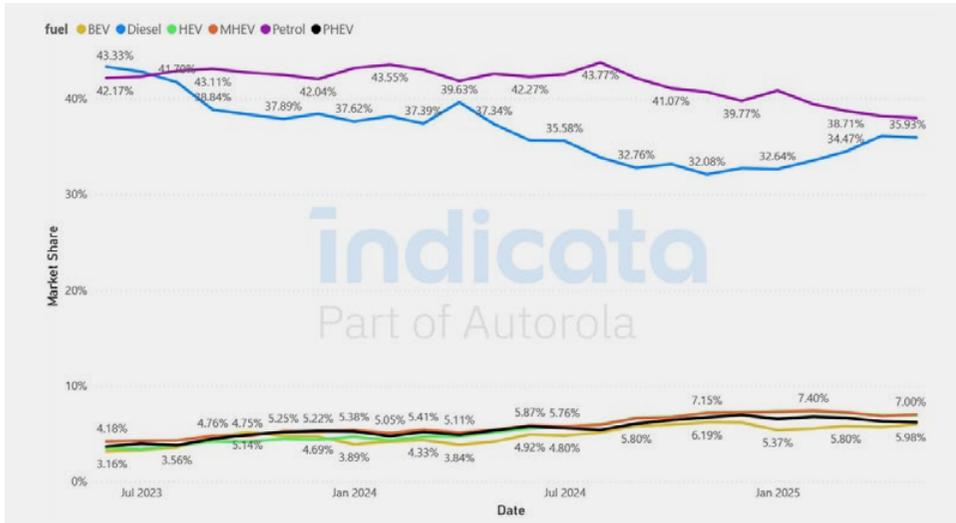
Retail Price (Weighted Avg.) Index 100 = Jan - Denmark



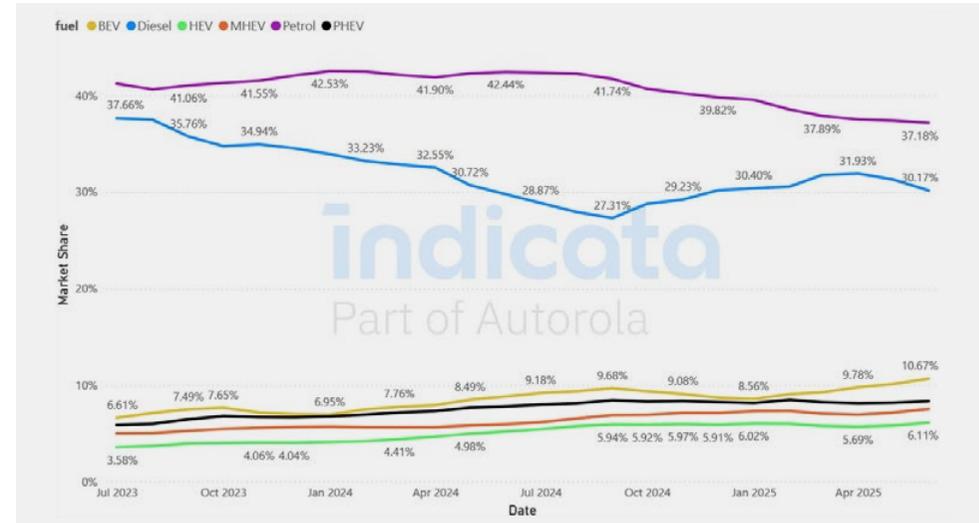
Top selling < 4-years-old by volume		
Make	Model	MDS
Volkswagen	ID.4	44.2
Volkswagen	ID.3	44.4
Škoda	Enyaq	37.5

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Škoda	Elroq	18x	20.0
Tesla	Model 3	14x	26.0
Polestar	2	11x	32.6

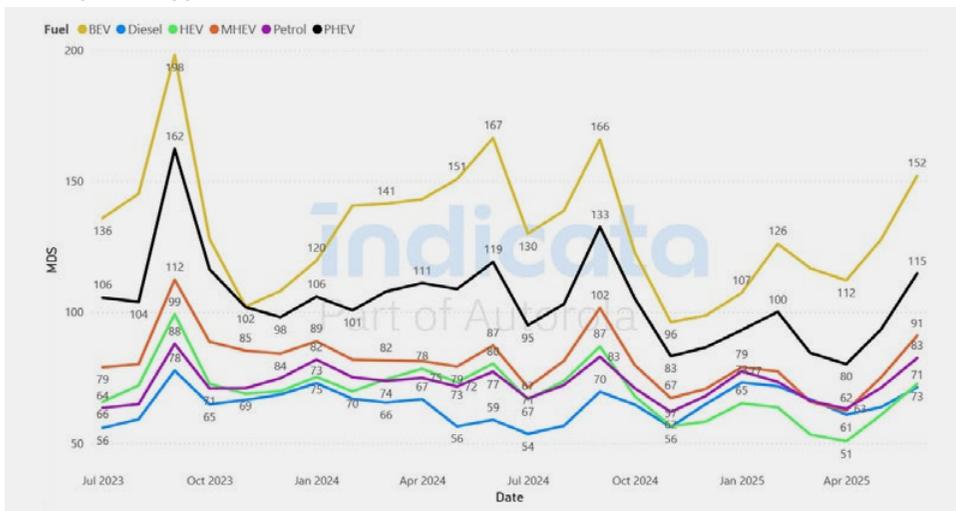
Sales Market Share by Month and Fuel Type - France



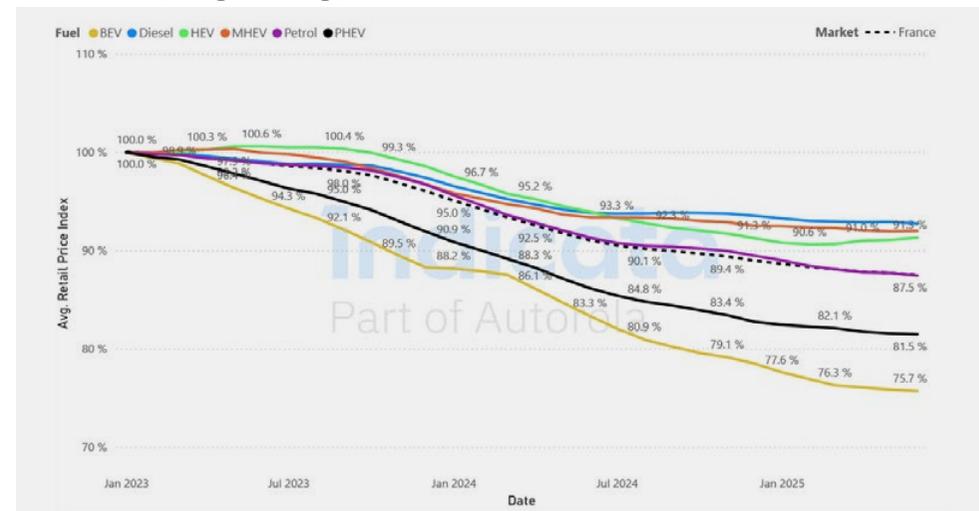
Stock Market Share by Month and Fuel Type - France



MDS by Fuel Type - France



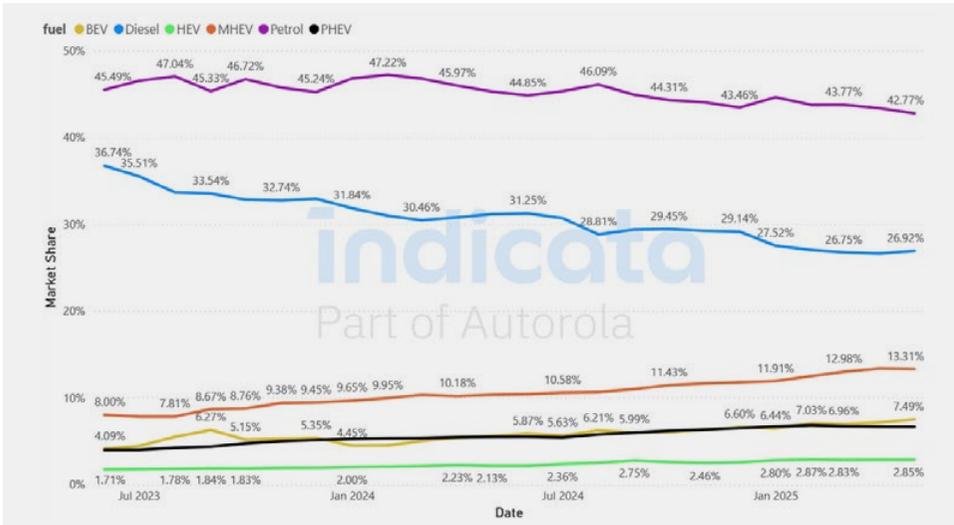
Retail Price (Weighted Avg.) Index 100 = Jan - France



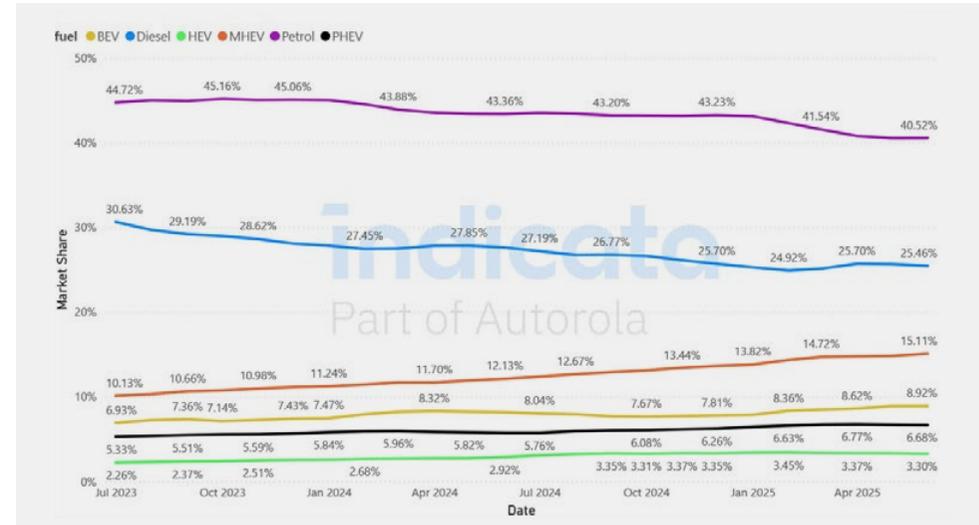
Top selling < 4-years-old by volume		
Make	Model	MDS
Peugeot	208	93.5
Renault	Clio	58.2
Peugeot	2008	92.8

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Tesla	Model Y	9x	41.8
Toyota	RAV 4	8x	43.1
Dacia	Duster	8x	46.1

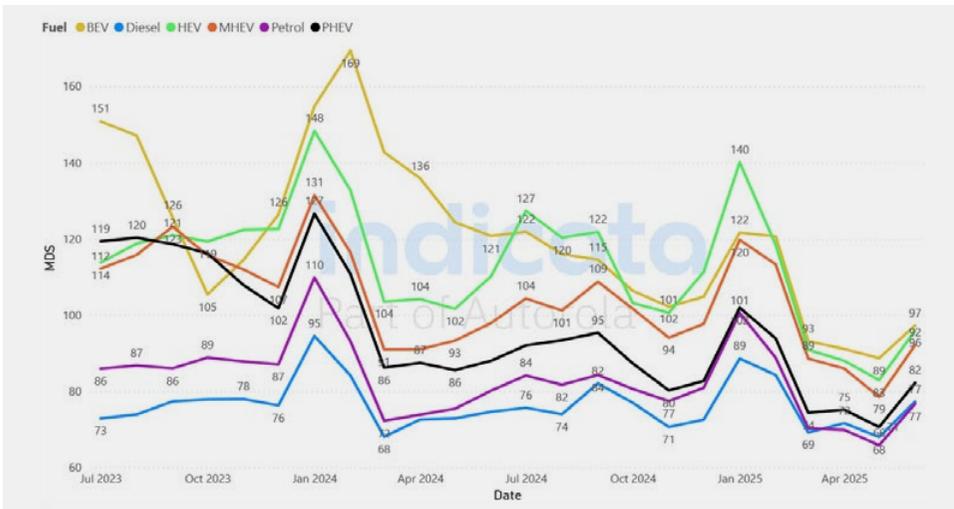
Sales Market Share by Month and Fuel Type - Germany



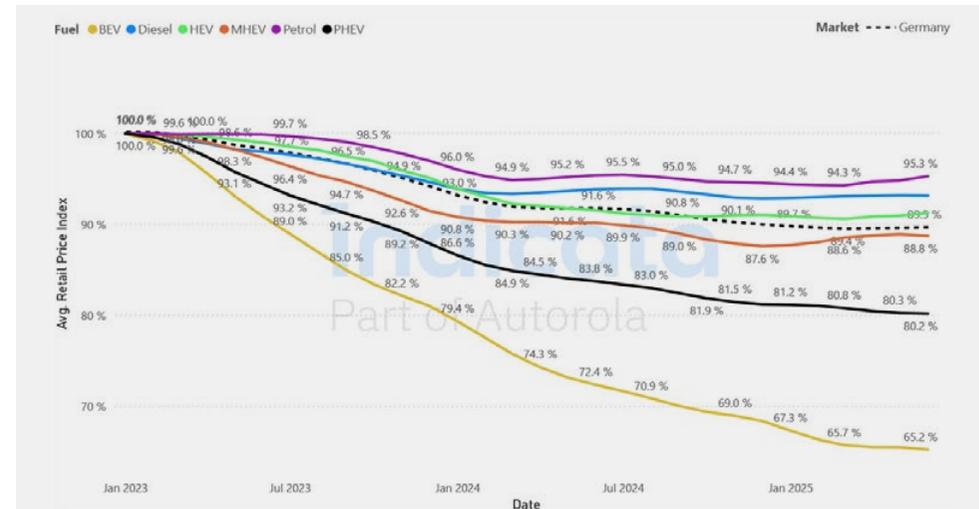
Stock Market Share by Month and Fuel Type - Germany



MDS by Fuel Type - Germany

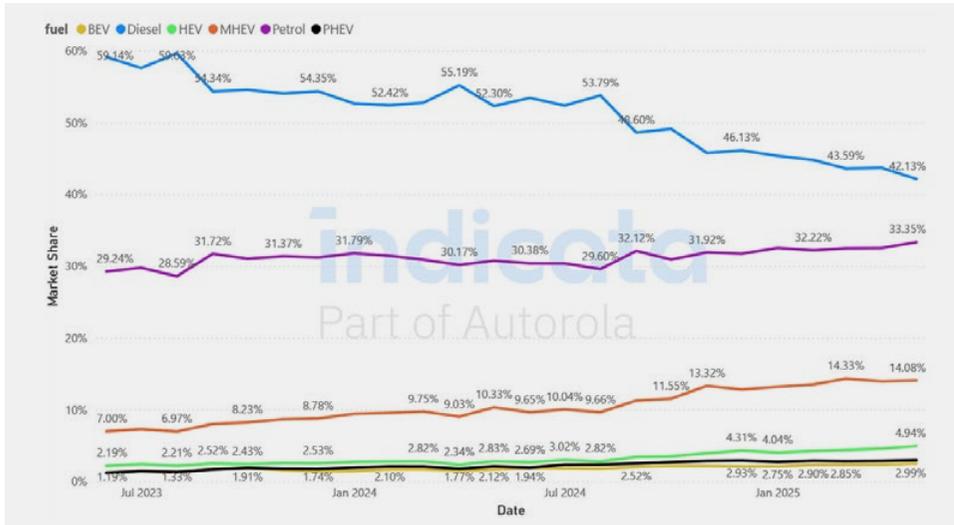
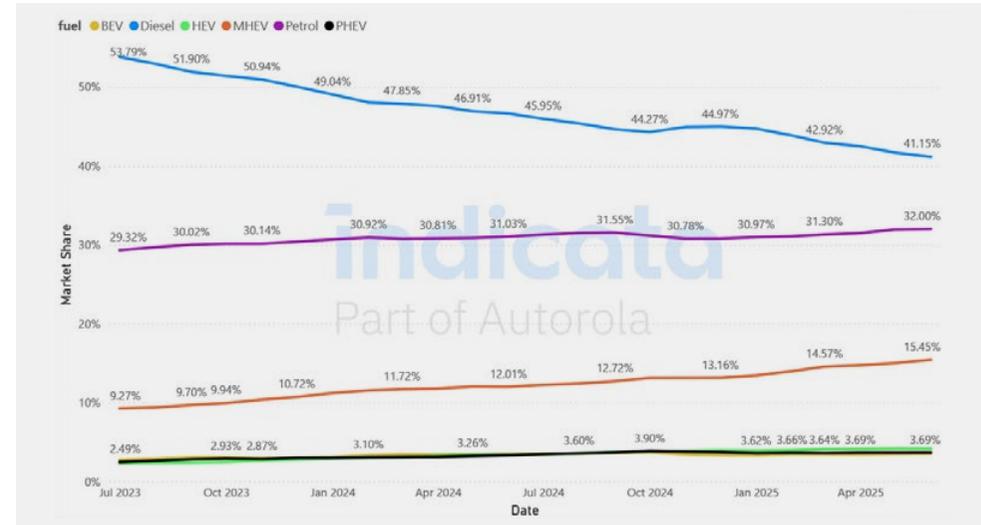
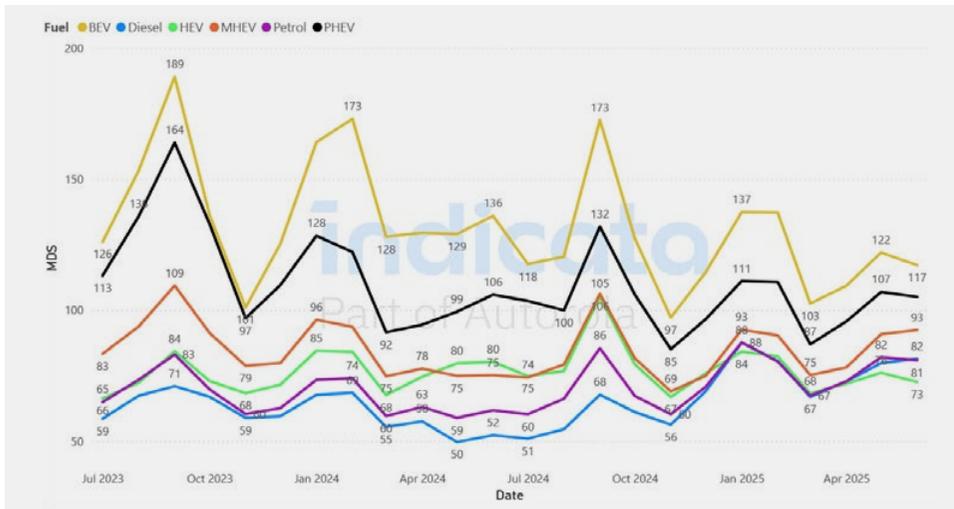
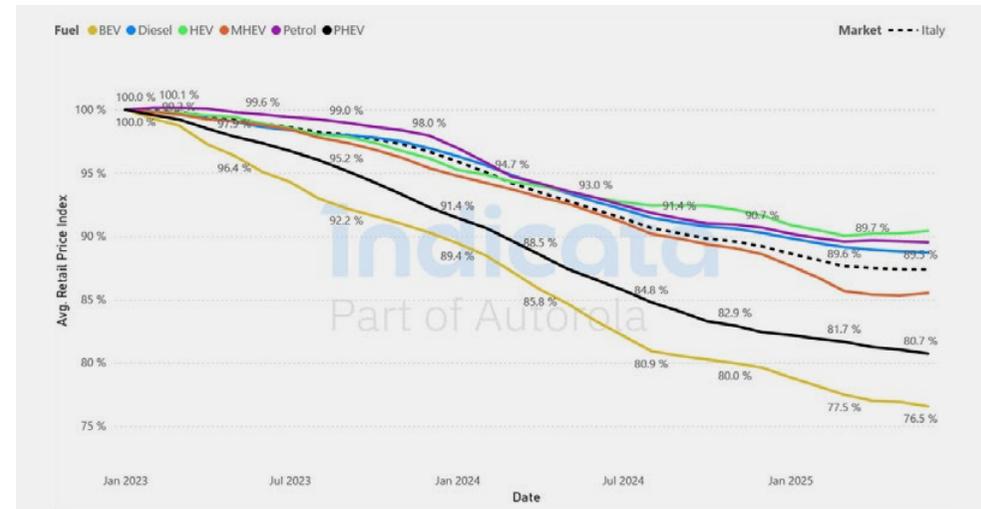


Retail Price (Weighted Avg.) Index 100 = Jan - Germany



Top selling < 4-years-old by volume		
Make	Model	MDS
Volkswagen	Golf	84.8
Volkswagen	T-ROC	59.2
Opel	Corsa	71.5

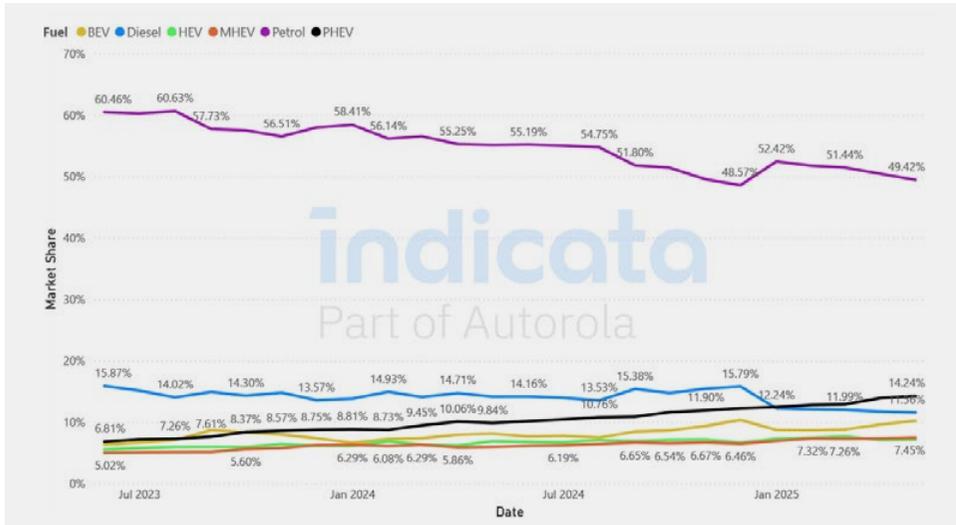
Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Mini	Aceman	20x	18.2
Tesla	Model 3	14x	25.9
Mini	Convertible	13x	28.5

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


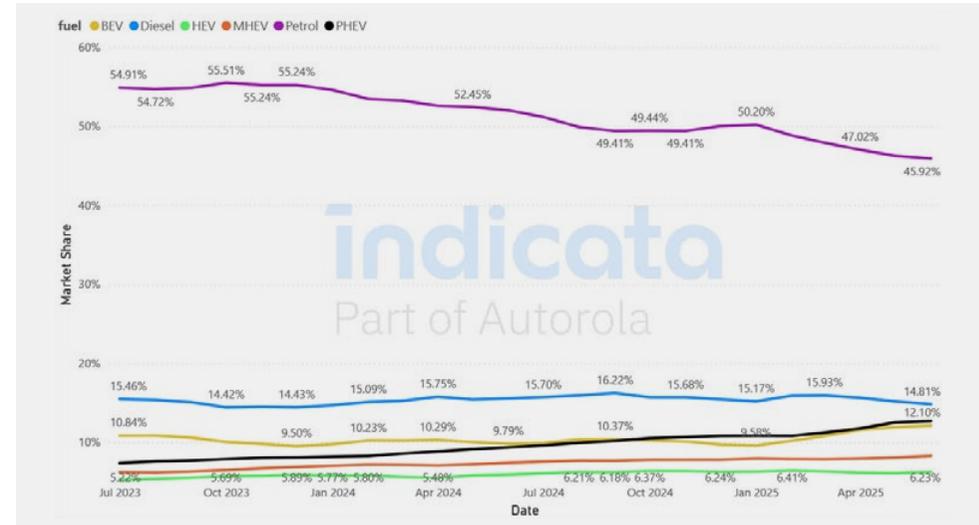
Top selling < 4-years-old by volume		
Make	Model	MDS
Fiat	Panda	73.5
Fiat	500	80.9
Volkswagen	T-ROC	90.2

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Tesla	Model Y	9x	40.3
Toyota	RAV 4	9x	40.6
Dacia	Sandero	7x	48.8

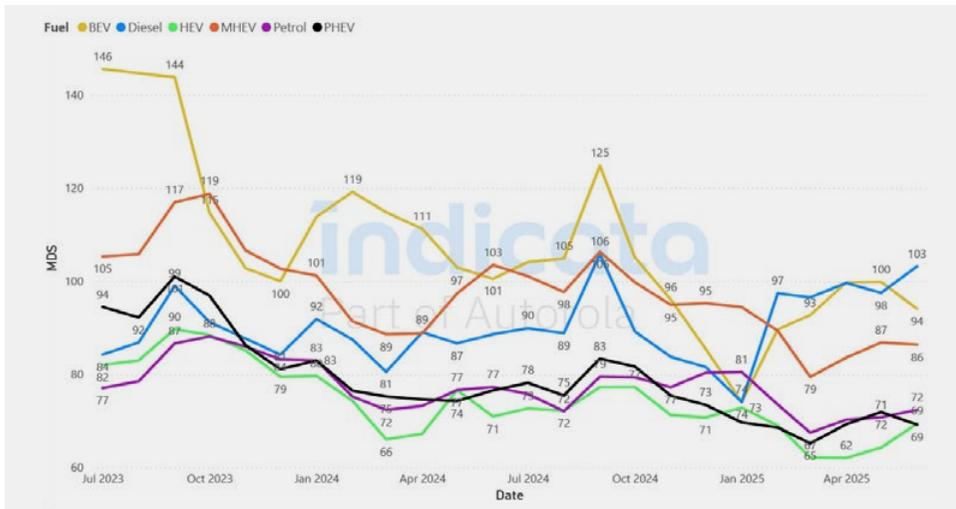
Sales Market Share by Month and Fuel Type - Netherlands



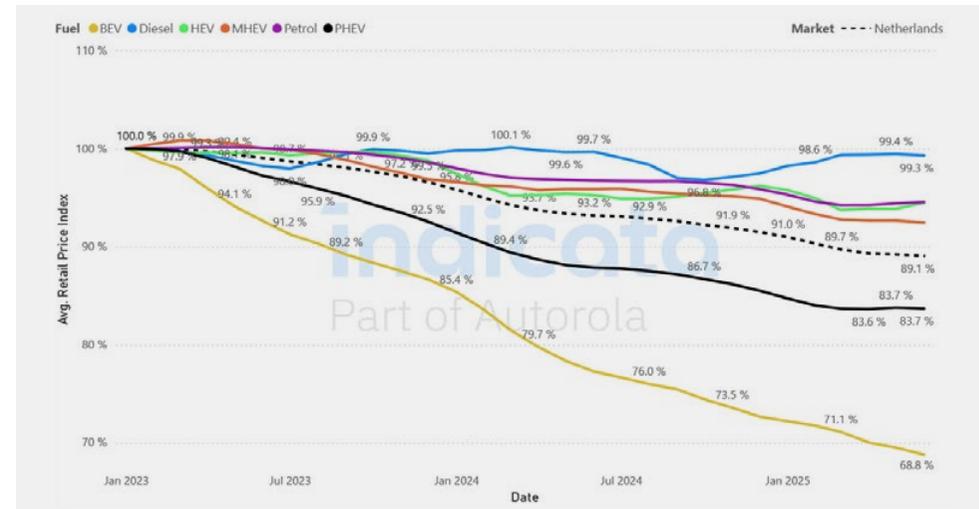
Stock Market Share by Month and Fuel Type - Netherlands



MDS by Fuel Type - Netherlands



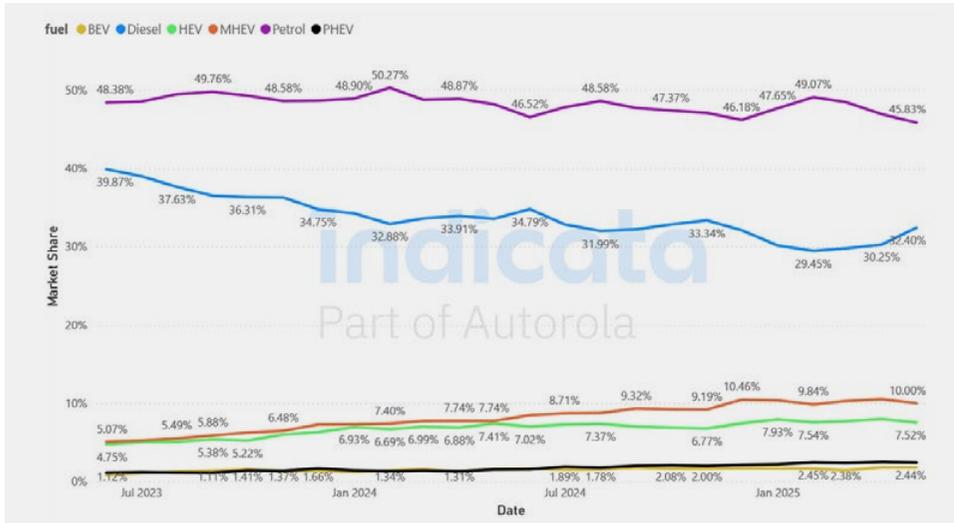
Retail Price (Weighted Avg.) Index 100 = Jan - Netherlands



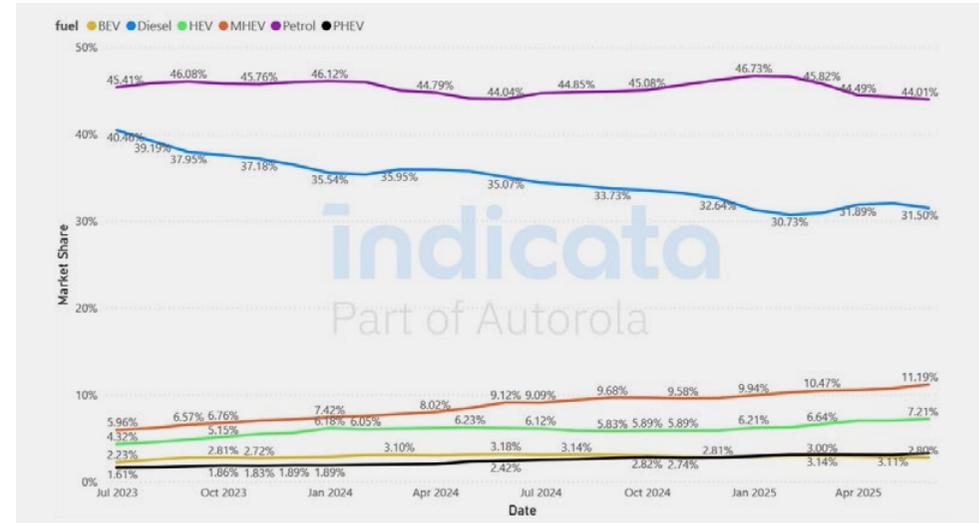
Top selling < 4-years-old by volume		
Make	Model	MDS
Volkswagen	Golf	77.3
Lynk & Co	01	39.3
Volvo	XC40	55.8

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Cupra	Tavascan	29x	12.5
Cupra	Terramar	17x	21.0
Fiat	Grande Panda	10x	36.1

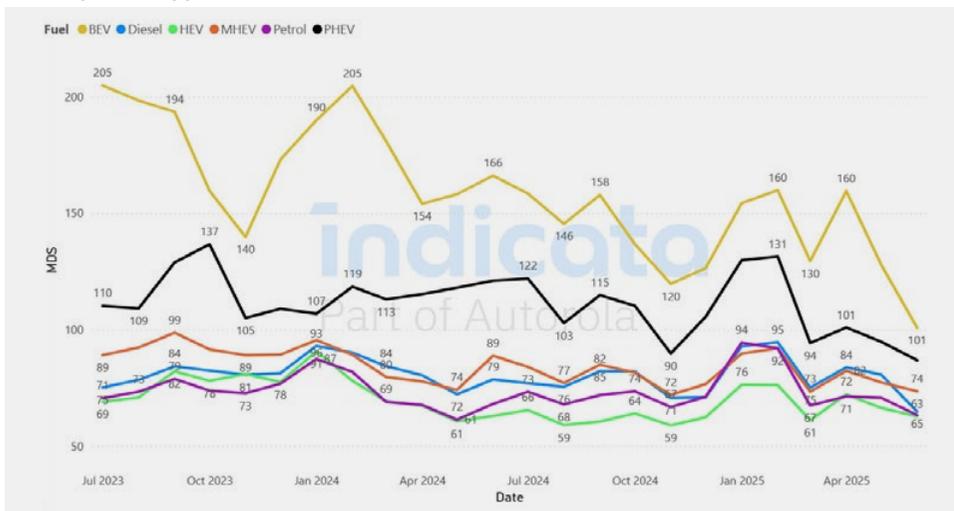
Sales Market Share by Month and Fuel Type - Poland



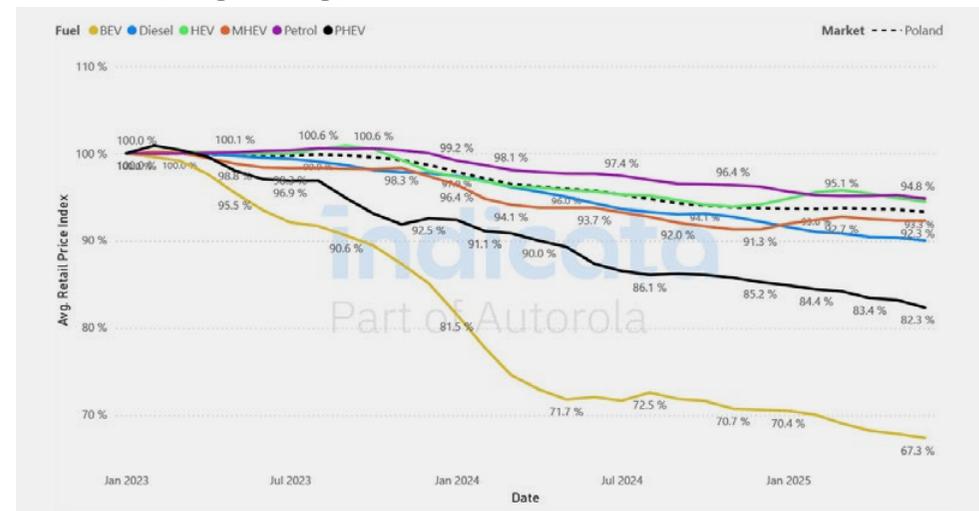
Stock Market Share by Month and Fuel Type - Poland



MDS by Fuel Type - Poland



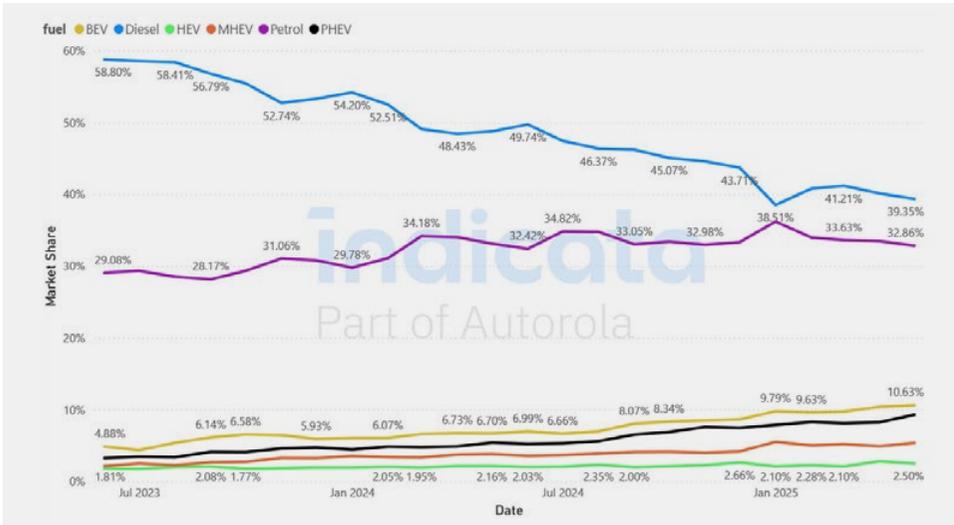
Retail Price (Weighted Avg.) Index 100 = Jan - Poland



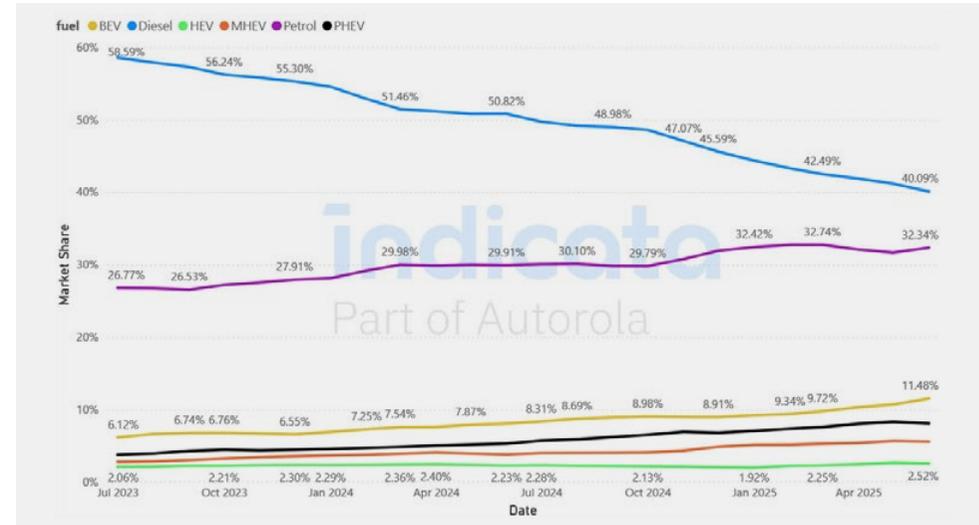
Top selling < 4-years-old by volume		
Make	Model	MDS
Toyota	Corolla	61.9
Škoda	Octavia	58.7
Toyota	CH-R	62.7

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Volkswagen	T-Cross	9x	33.8
Toyota	Aygo Aygo X	9x	40.6
Hyundai	i20	8x	44.7

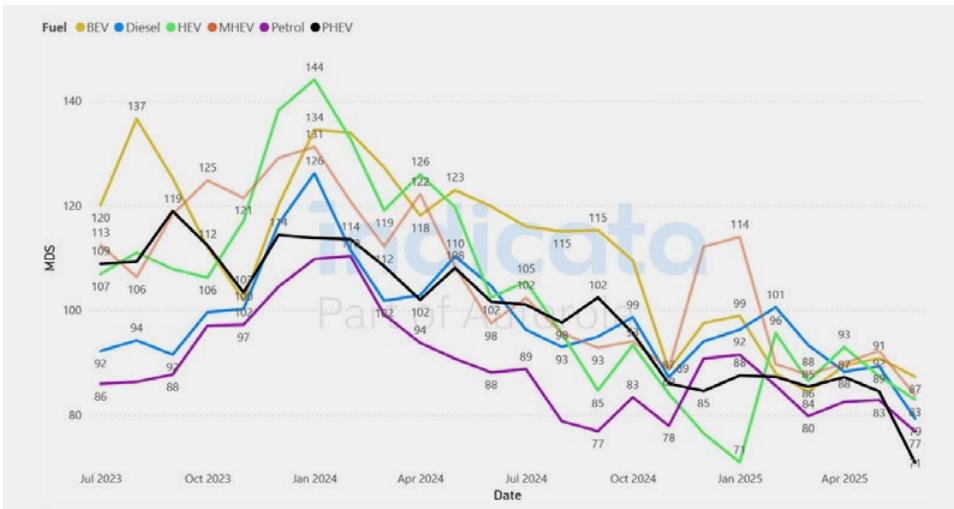
Sales Market Share by Month and Fuel Type - Portugal



Stock Market Share by Month and Fuel Type - Portugal



MDS by Fuel Type - Portugal



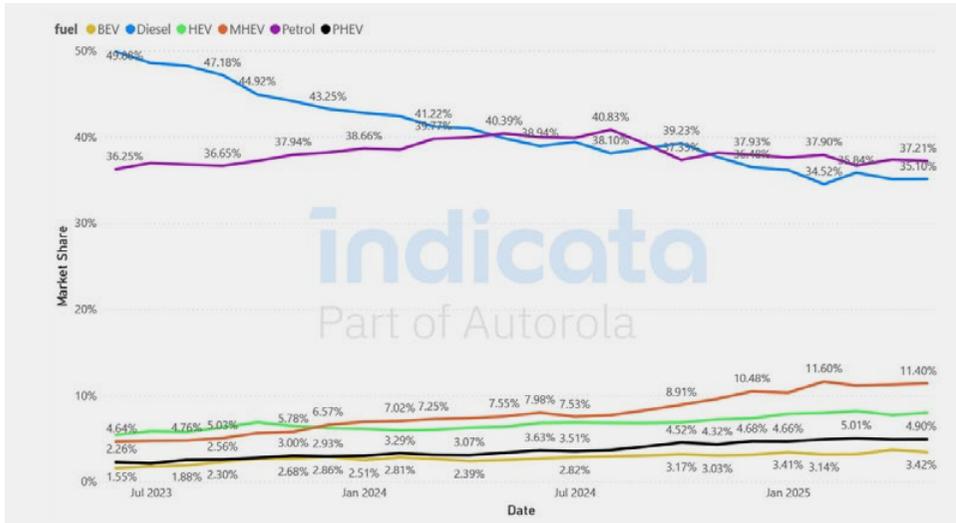
Retail Price (Weighted Avg.) Index 100 = Jan - Portugal



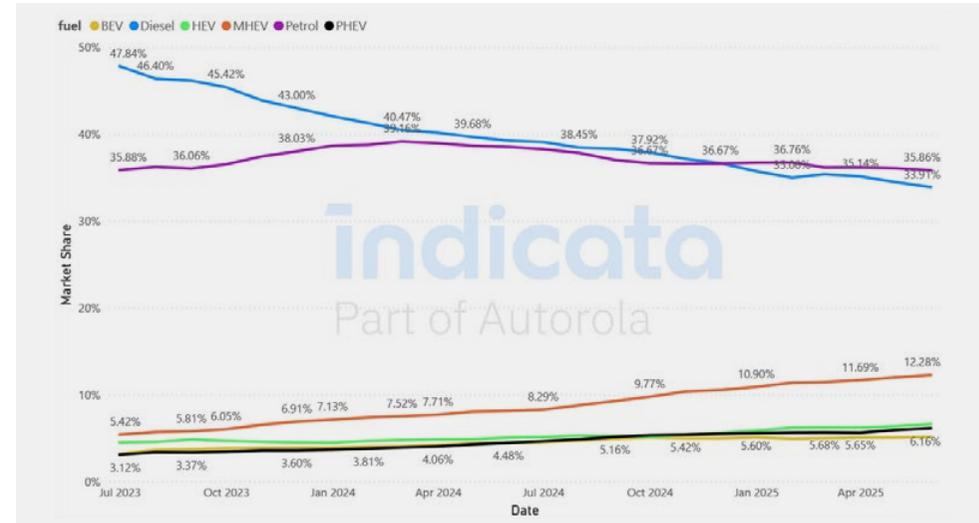
Top selling < 4-years-old by volume		
Make	Model	MDS
Mercedes-Benz	A-Class	46.3
Peugeot	2008	66.7
Peugeot	208	69.2

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
BMW	X1	8x	43.3
Mitsubishi	Space Star	8x	43.5
Mercedes-Benz	A-Class	8x	46.3

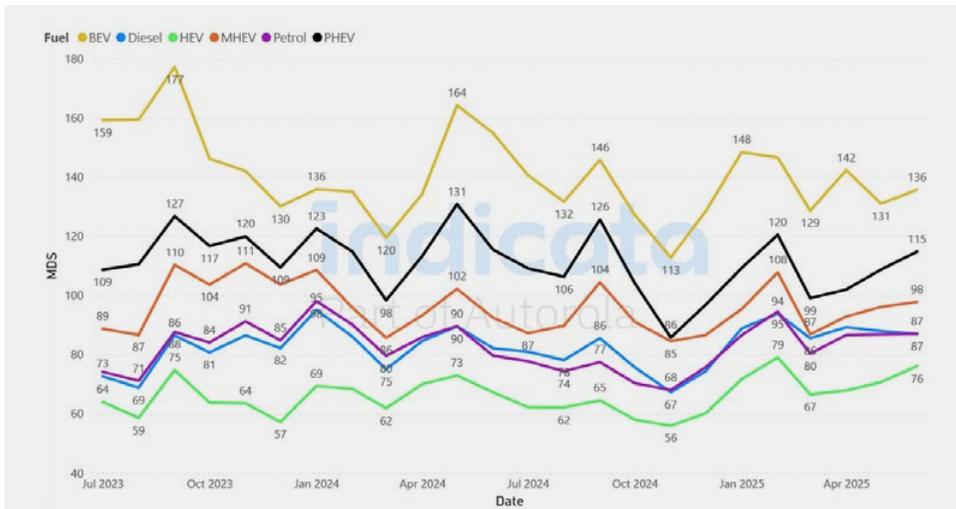
Sales Market Share by Month and Fuel Type - Spain



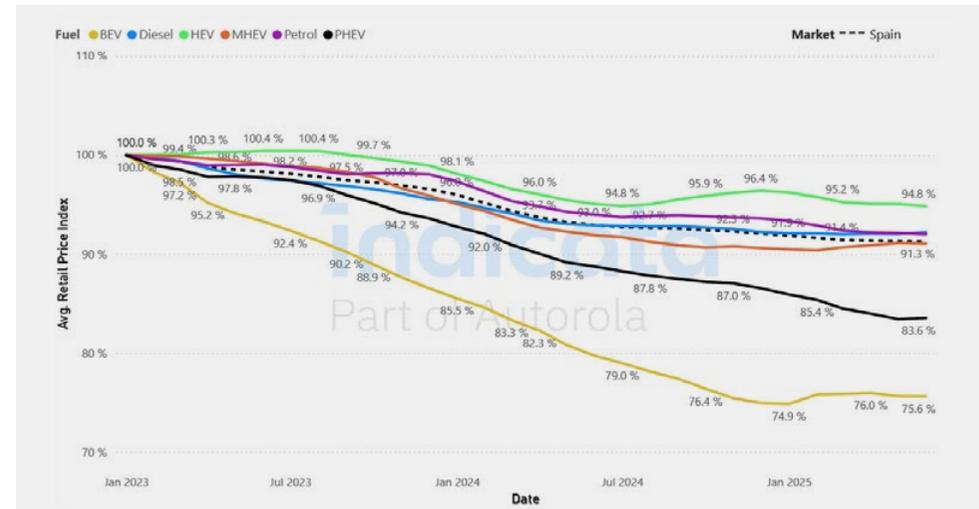
Stock Market Share by Month and Fuel Type - Spain



MDS by Fuel Type - Spain



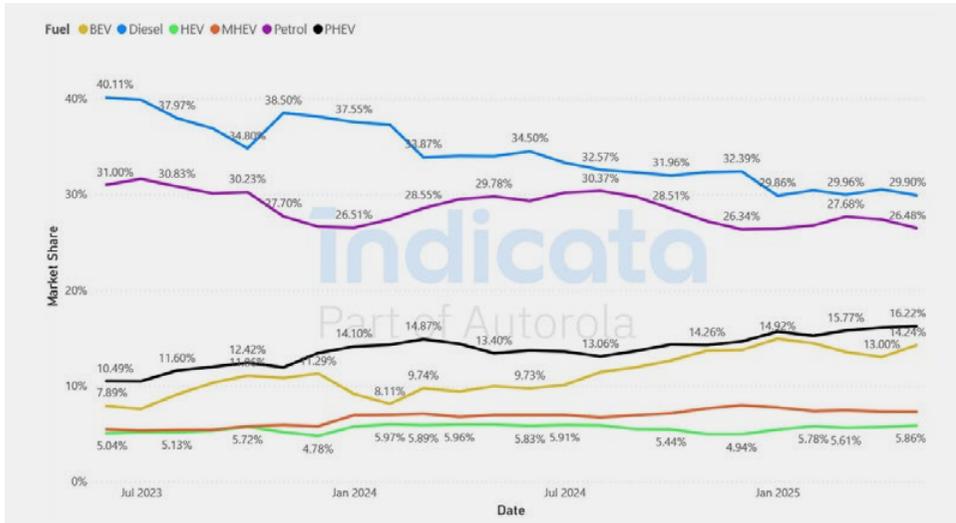
Retail Price (Weighted Avg.) Index 100 = Jan - Spain



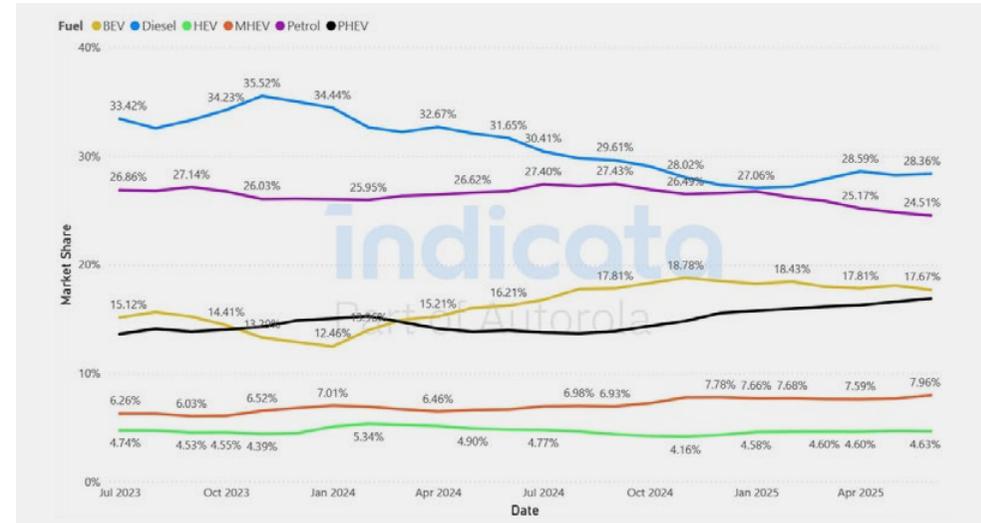
Top selling < 4-years-old by volume		
Make	Model	MDS
Toyota	CH-R	58.0
Nissan	Qashqai	100.1
Peugeot	2008	75.7

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Toyota	Yaris Cross	8x	46.6
Toyota	RAV 4	7x	48.4
MG	ZS	7x	48.7

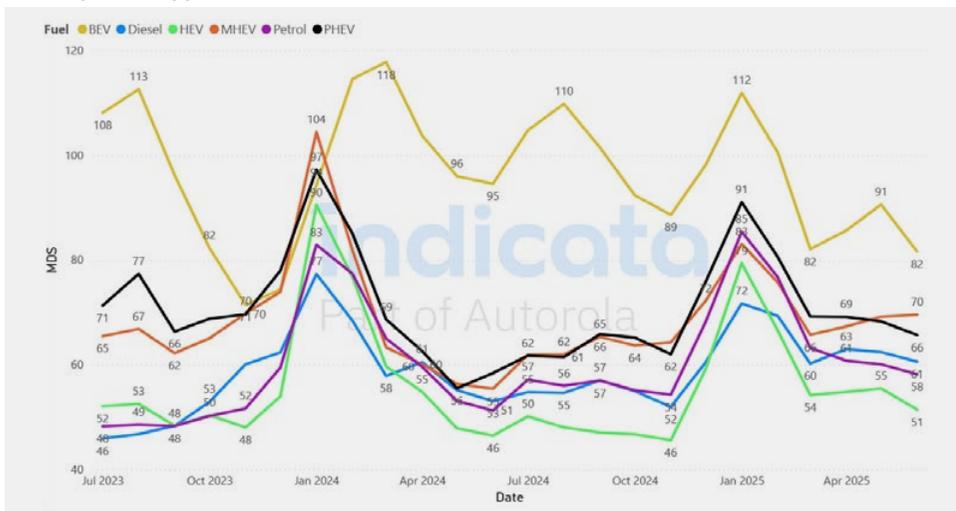
Sales Market Share by Month and Fuel Type - Sweden



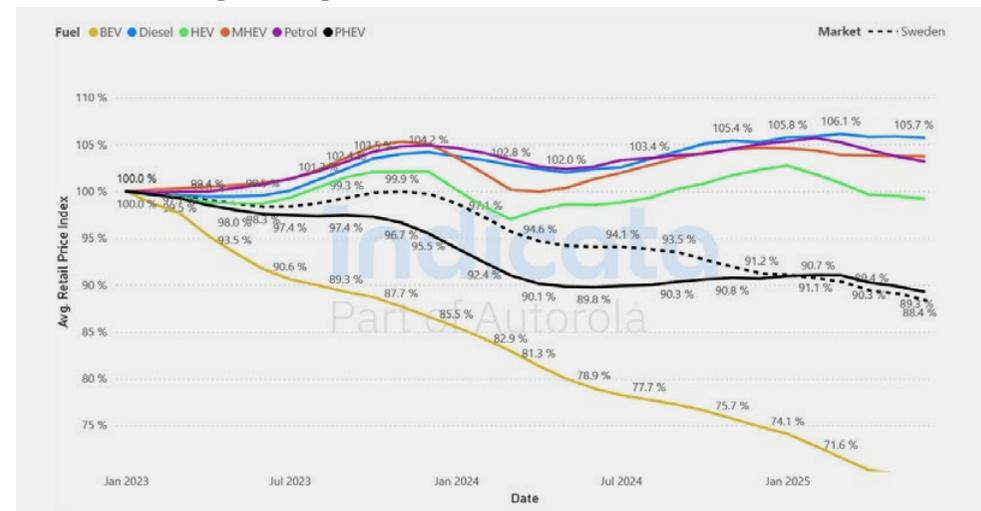
Stock Market Share by Month and Fuel Type - Sweden



MDS by Fuel Type - Sweden



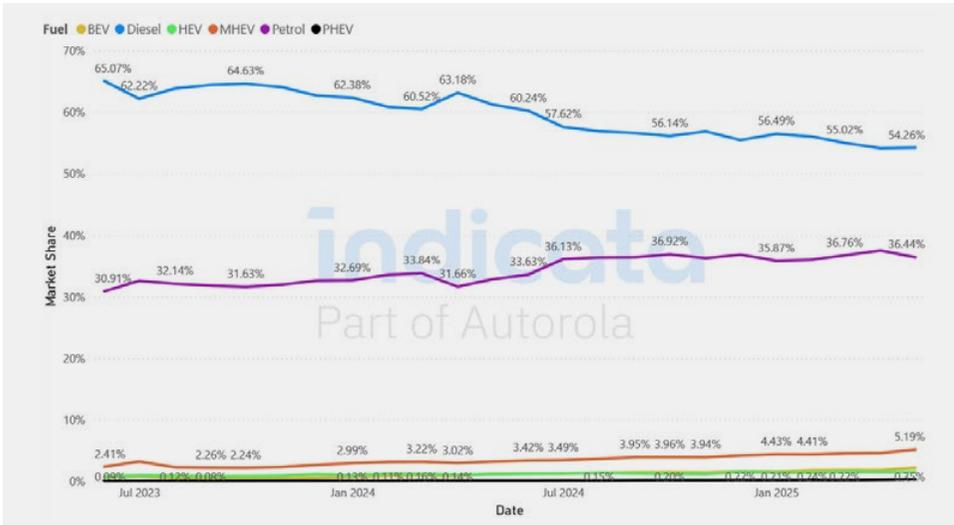
Retail Price (Weighted Avg.) Index 100 = Jan - Sweden



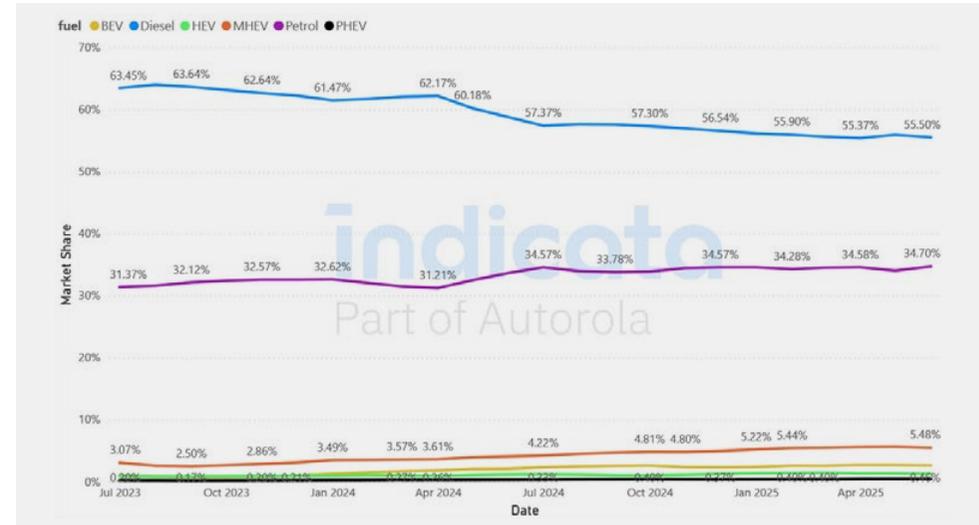
Top selling < 4-years-old by volume		
Make	Model	MDS
Volvo	XC60	47.0
Volvo	V60	46.8
Volvo	XC40	48.6

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Mini	3-door / 5-door Hatch	13x	27.3
Lynk & Co	01	12x	30.0
Tesla	Model Y	11x	31.4

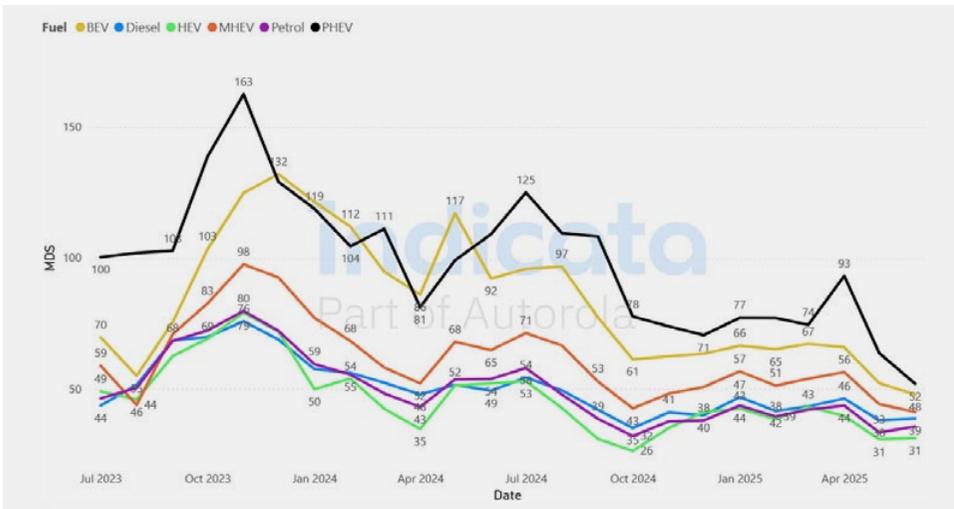
Sales Market Share by Month and Fuel Type - Türkiye



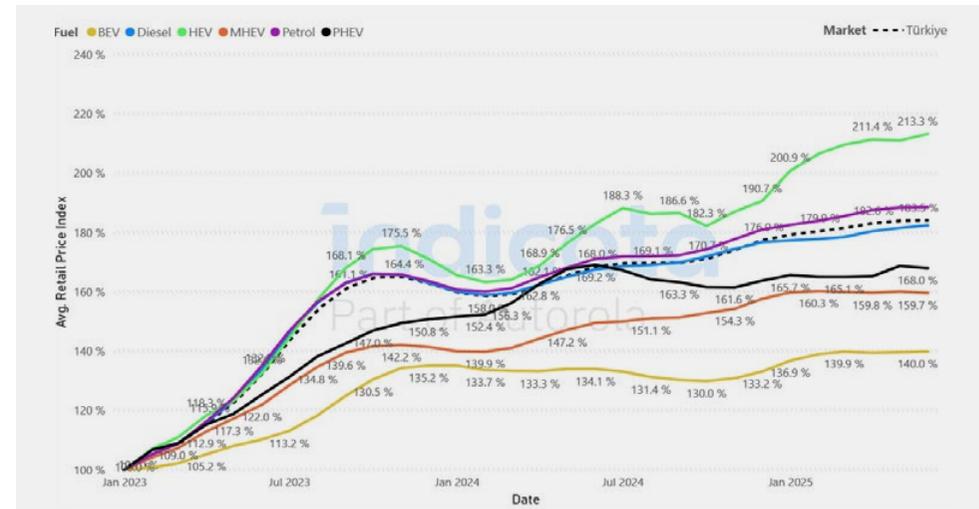
Stock Market Share by Month and Fuel Type - Türkiye



MDS by Fuel Type - Türkiye



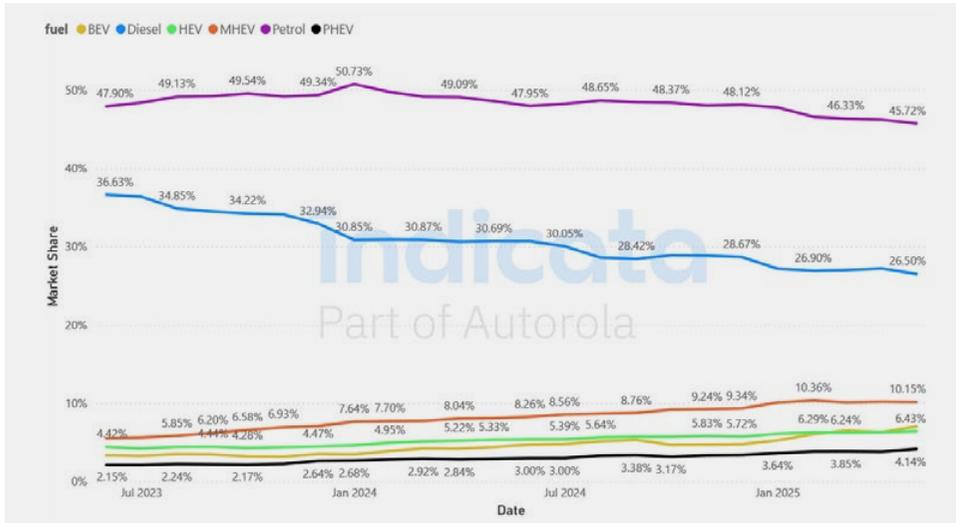
Retail Price (Weighted Avg.) Index 100 = Jan - Türkiye



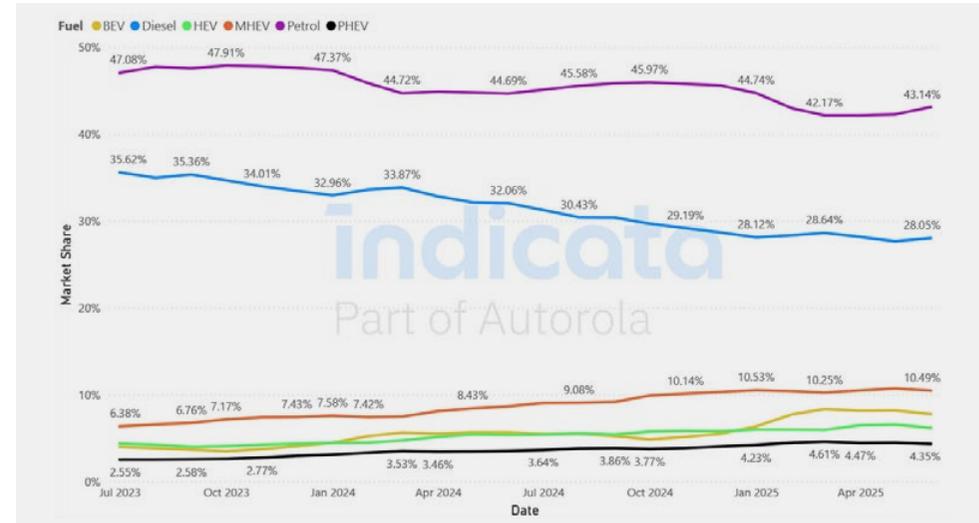
Top selling < 4-years-old by volume		
Make	Model	MDS
Fiat	Egea	30.8
Renault	Clio	28.7
Renault	Mégane	34.6

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Suzuki	SX4 S-Cross	28x	12.9
Suzuki	Vitara / e Vitara	24x	15.1
Cupra	Formentor	20x	18.0

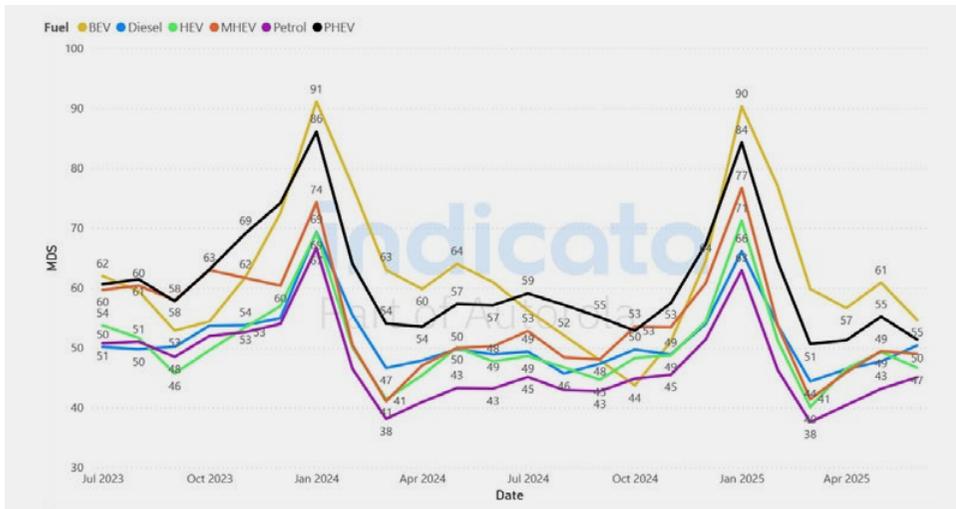
Sales Market Share by Month and Fuel Type - United Kingdom



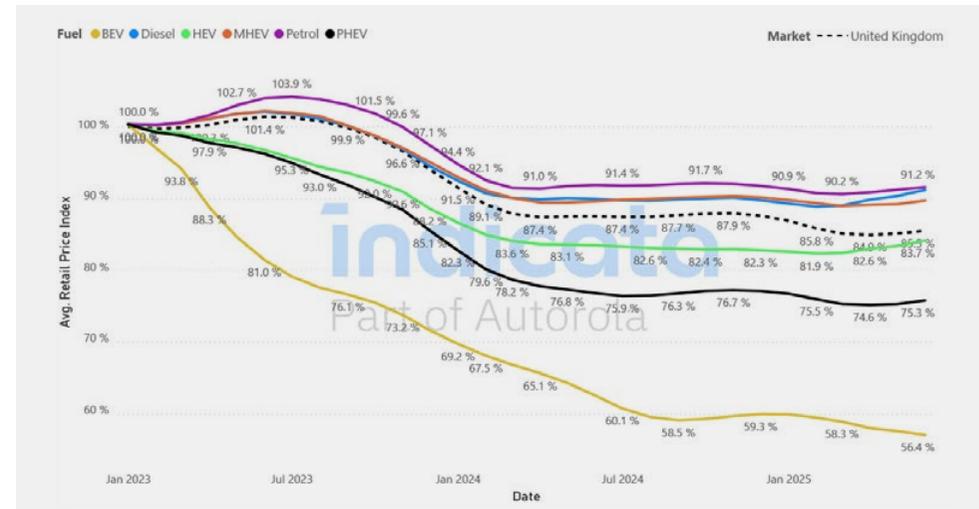
Stock Market Share by Month and Fuel Type - United Kingdom



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
Vauxhall	Corsa	41.7
Ford	Puma	45.4
Kia	Sportage	47.2

Fastest selling < 4-years-old by Market Days Supply			
Make	Model	Stock turn	MDS
Volkswagen	Sharan	15x	23.5
Mini	Convertible	13x	27.5
MG	HS / EHS	13x	27.7

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 13 European countries. 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

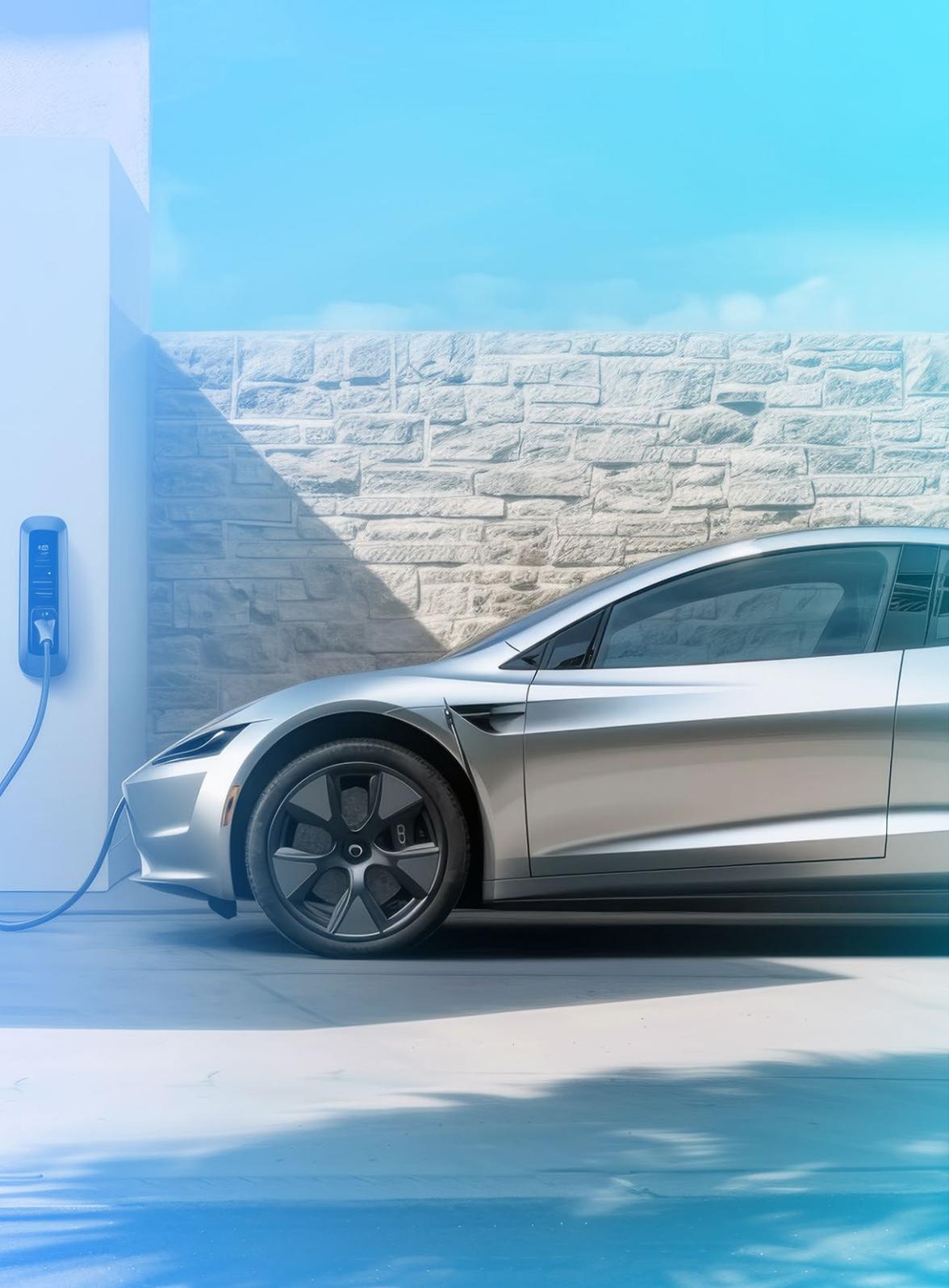
Meanwhile, Lite versions of the report will be published for the other eight months of the year which include an overall European summary and country graphs and tables.

How do we produce our data?

Indicata analyses 14m 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