



August 2025 | Edition 02

# Brazil's used car market recovers, but gaps are widening



# Prices normalise as the market stabilises, but tensions persist beneath the surface

Top selling < 4-years-old by volume

Make	Model	MDS
Chevrolet	Onix	54.5
Hyundai	HB20	44.9
Volkswagen	Polo	42.6

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

Make	Model	Stock turn	MDS
BYD	Dolphin	12x	29.0
Volkswagen	Tiguan	12x	30.8
Toyota	Yaris	11x	32.4

**Brazil’s used car market continues its gradual recovery. While flex-fuel vehicles remain the undisputed backbone of the sector, the market is undergoing a subtle realignment. Prices are easing, inventories are shifting, and electrified models are struggling to gain traction. A look at a market navigating both maturity and transition.**

**Flex-fuel remains fastest in turnover despite slight MDS increase**

In August, flex-fuel vehicles maintained a clear advantage in the used market when it comes to stock turnover. Their Market Day’s Supply (MDS) stood at around 49 days, up slightly from 47 in July. Despite this small increase, the gap with petrol (54 days) and especially diesel (70 days) remains significant. Electrified powertrains continue to show much higher MDS levels, often over 60 days, confirming that flex remains the benchmark for liquidity.

Flex-fuel cars also continue to outperform all other fuel types in terms of Market Day’s Supply (MDS), a sign of sustained buyer interest and liquidity on the used market.

**Pricing correction after early-year peak**

After a sharp rise in the first half of 2025 due to limited supply, used car prices began to cool in August. This drop is not alarming — rather it marks a healthy correction, reflecting better vehicle availability and a shift in consumer demand toward affordable, efficient options.

Mid-aged vehicles (4–8 years old) are direct beneficiaries of this trend, now making up 27.8% of sales, as buyers seek value for money without sacrificing reliability.

**Diesel and electrified vehicles face headwinds**

At the other end of the spectrum, diesel vehicles continue to lose ground. Their rising MDS suggests weaker demand, driven by high running costs and lack of government incentives.

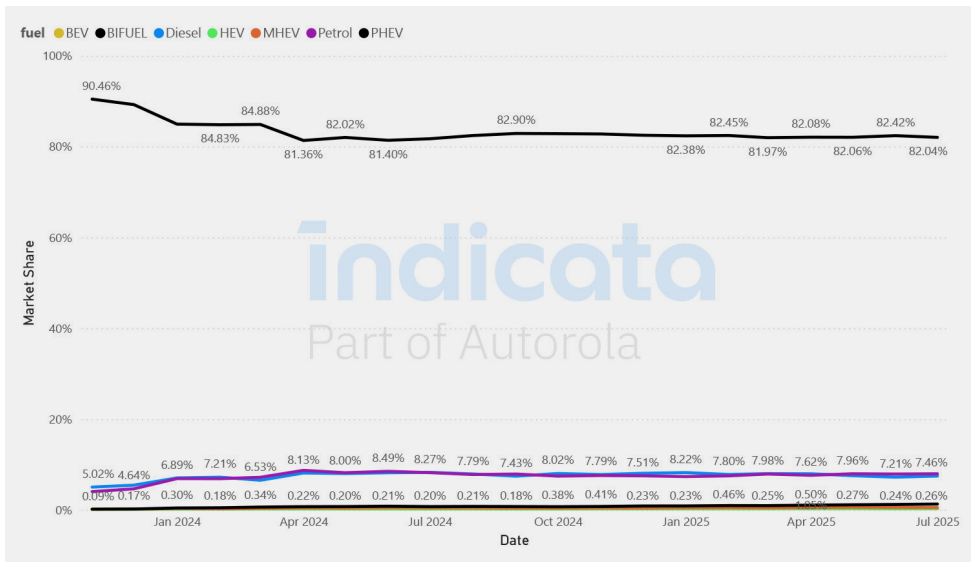
Electrified vehicles also remain stuck in low gear on the used market. BEVs represent less than 0.1% of sales, despite relatively high stock levels. Poor charging infrastructure, limited second-hand offers, and no real purchase incentives explain their sluggish performance.

**Selective stability with policy impact**

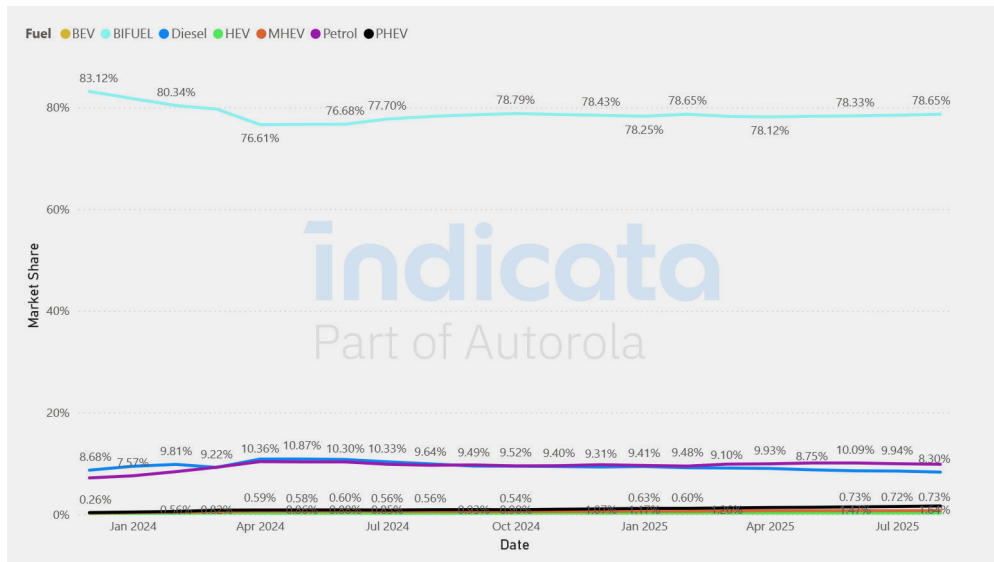
Brazil’s used car market is stabilising, but divergence is growing. Flex-fuel vehicles ensure baseline liquidity, while alternatives struggle to scale. In the absence of a proactive electrification strategy, policy inertia is shaping demand, reinforcing the legacy of internal combustion models.

For market players, the message is clear: success lies in dynamic stock management, focused on high-rotation, affordable models and minimal exposure to slow-moving inventory.

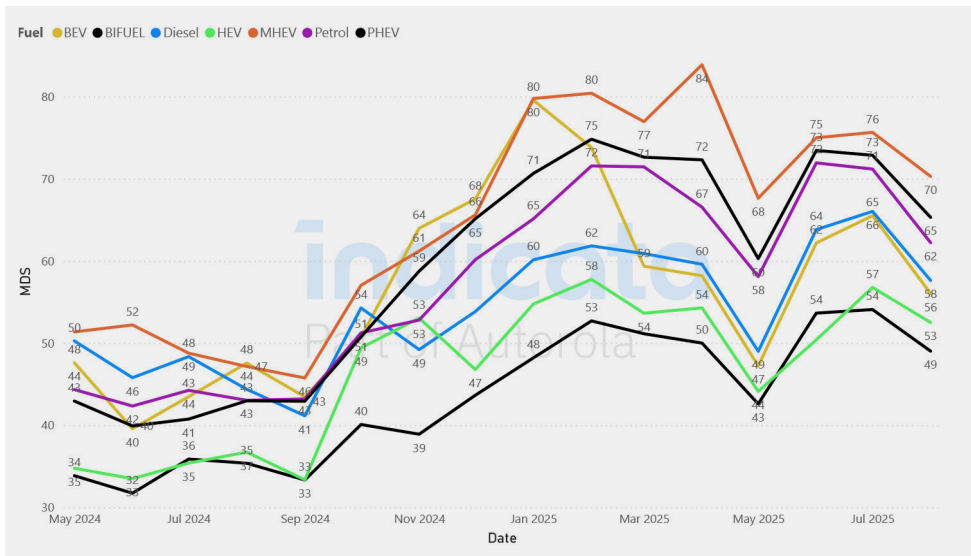
## Sales Market Share by Month and Fuel Type - Brazil



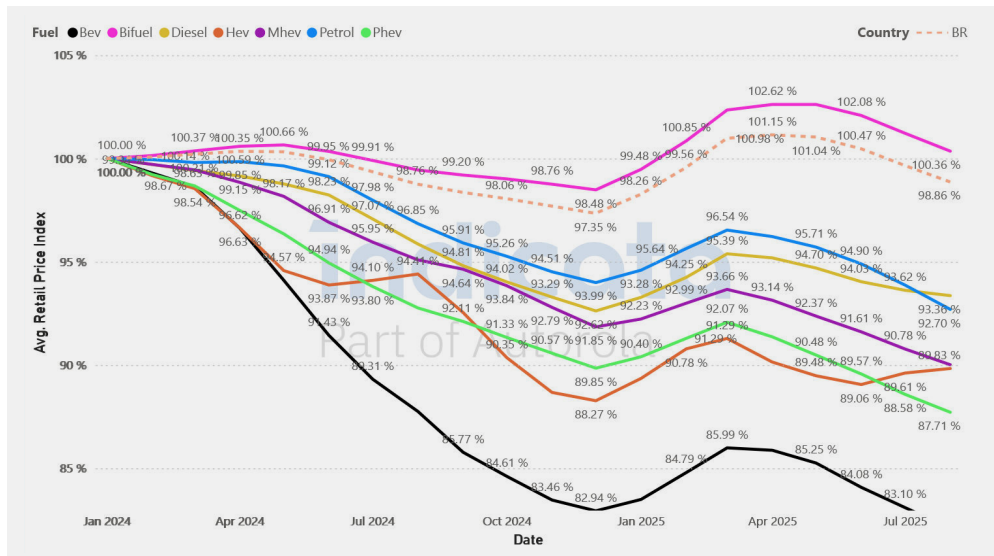
## Stock Market Share by Month and Fuel Type - Brazil



## MDS by Fuel Type - Brazil

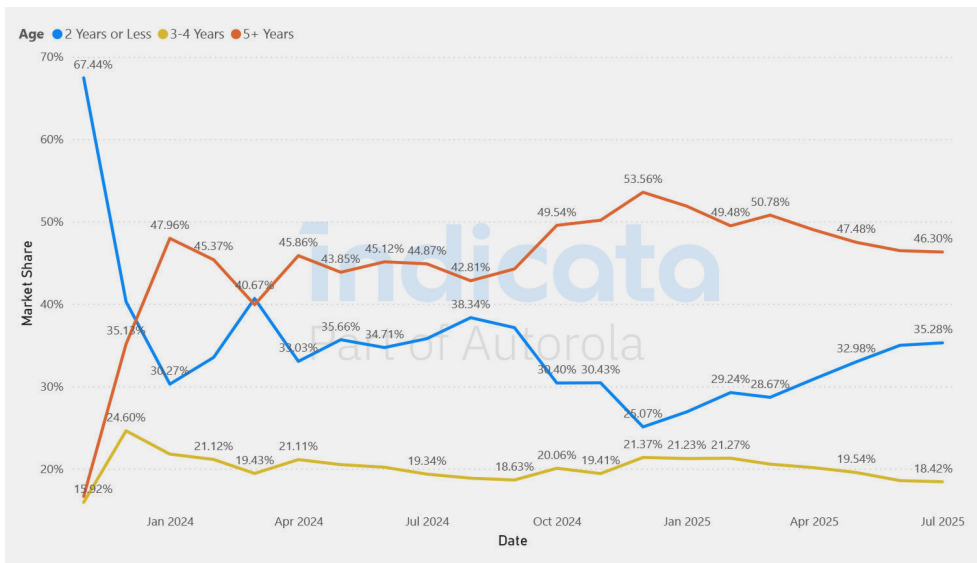


## Retail Price (Weighted Avg.) Index 100 = Jan - Brazil

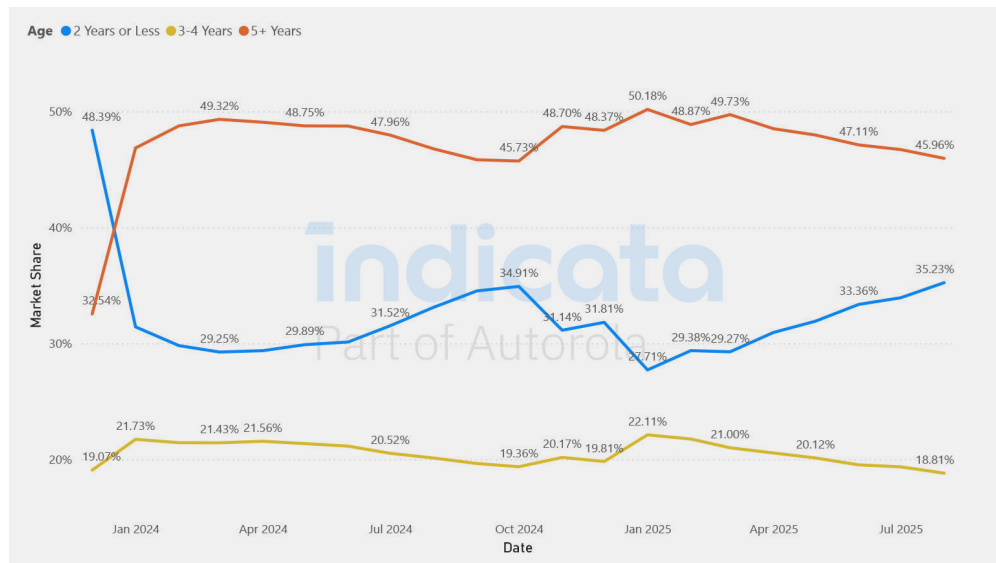




## Sales Market Share by Month and Age Group - Brazil



## Stock Market Share by Month and Age Group - Brazil



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

All powertrains	MDS	Bifuel	MDS	ICE	MDS	BEV	MDS
Chevrolet Onix	54.4	Chevrolet Onix	54.4	Jeep Compass	56.5	BYD Song Plus	53.0
Hyundai HB20	44.9	Hyundai HB20	44.9	Chery/CAOA Chery Tiggo 8	45.1	GWM Haval H6	46.8
Volkswagen Polo	42.6	Volkswagen Polo	42.6	Jeep Commander	54.5	Jeep Compass	58.5

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

All powertrains	MDS	Bifuel	MDS	ICE	MDS	BEV	MDS
Toyota Yaris	32.4	Toyota Yaris	32.4	Chery/CAOA Chery Tiggo 7	33.6	GWM Haval H6	46.8
Peugeot 208	32.6	BMX X1	32.5	Mitsubishi Eclipse Cross	38.7	Volvo XC60	48.4
BMX X1	32.9	Peugeot 208	32.6	Chery/CAOA Chery Tiggo 8	45.1	BYD Song Plus	53.0

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



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