Q2 2026

BCA EUROPE Pricing Report

Content

Introduction

Dear Customers,

At BCA Europe, transparency and customer support are at the heart of how we help our customers successfully navigate the used car market and identify opportunities for business growth.

With this regularly published report, we aim to provide a clear and data-driven view of pricing developments across Europe. The report combines pricing data, market insights, trends, and expertise based on used car transactions within the BCA marketplace, both locally and across Europe.

We publish the BCA Europe Pricing Report for all our selling countries on a quarterly basis, offering customers a comprehensive overview of market and price developments across Europe.

We trust that the insights shared in this Q2 report will be valuable as you prepare for the summer period and continue to navigate the used car market with confidence.Thank you for your continued trust in BCA Europe. We wish you a successful summer season.

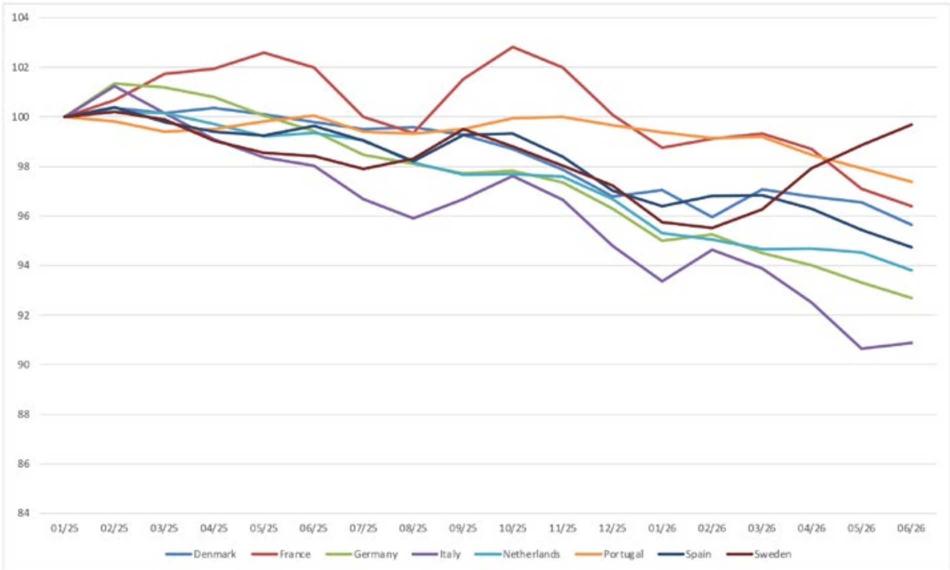
Best regards,

Tobias Münch
Chief Commercial Officer Europe &
Managing Director Germany

Since January 2025, used car prices across most European markets have followed a broadly consistent trend, characterised by a mild overall decline. Markets such as France, Portugal, Denmark and Sweden recorded modest price decreases, generally ranging between 1 p.p. and 4.3 p.p., pointing to a relatively stable pricing environment over the longer-term horizon. In contrast, Spain, the Netherlands, Germany, and Italy experienced slightly more pronounced declines, with prices ending Q2 2026 approximately 5.3 -9.1 p.p. lower compared with the start of 2025.

Looking at the most recent quarter (April–June 2026), pricing dynamics decreased across most markets, which corresponds to the seasonal patterns observed during this period of the year. Sweden stands out as the exception, showing a considerable price increase, largely due to electric vehicles.

Wholemarket



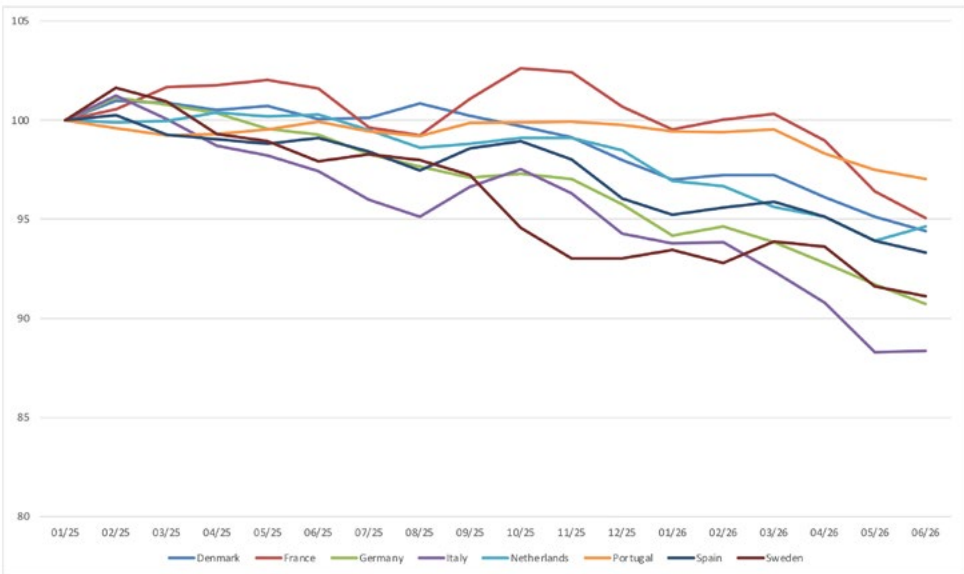
Fuel type profiles

The demand for electric vehicles grew substantially in Q2 2026, driven by the broader socioeconomic context and ongoing limitations in fossil fuel availability. As a result, vehicle price indices increased across most markets, surpassing the January 2025 baseline by a considerable margin.

While the trend was less marked than for electric vehicles, hybrid vehicles also recorded price increases in most markets during Q2 2026. Exceptions were observed in a few markets, including Italy, where prices declined before slightly stabilizing in June.

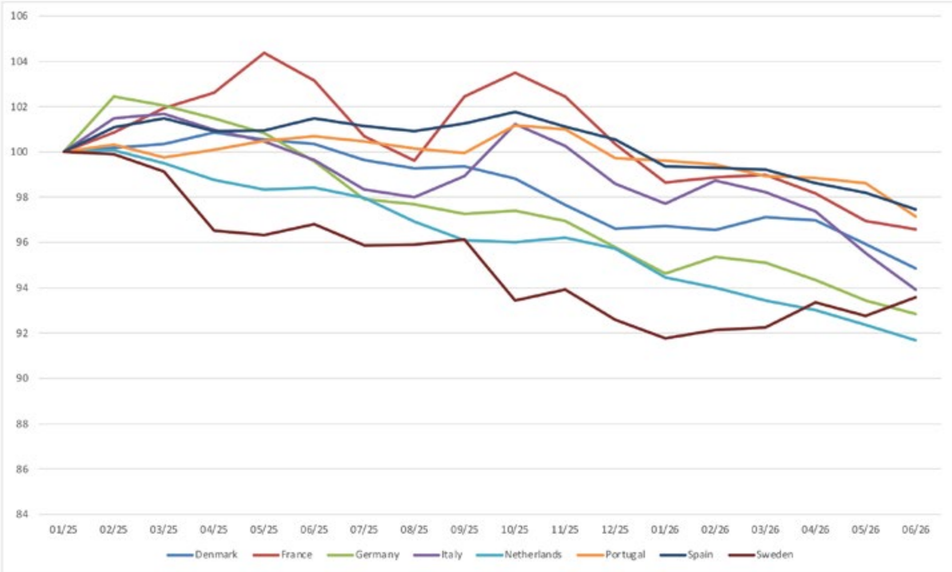
Petrol and diesel vehicles have presented greater price stability since January 2025. In some markets, such as France and Portugal, price levels at the end of Q1 2026 remained very close to those observed in January 2025. However, general decrease can be seen in Q2 2026.

Diesel

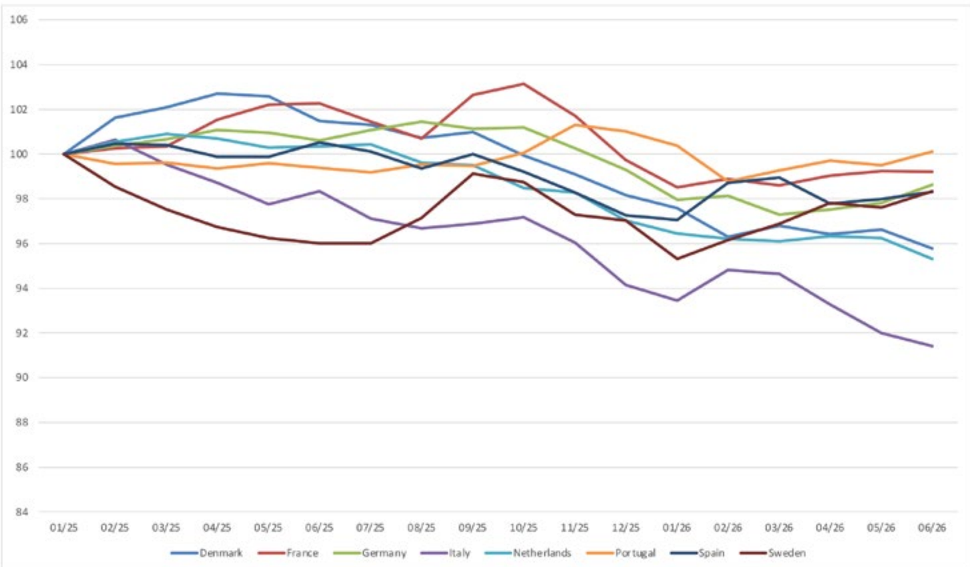


Fuel type profiles

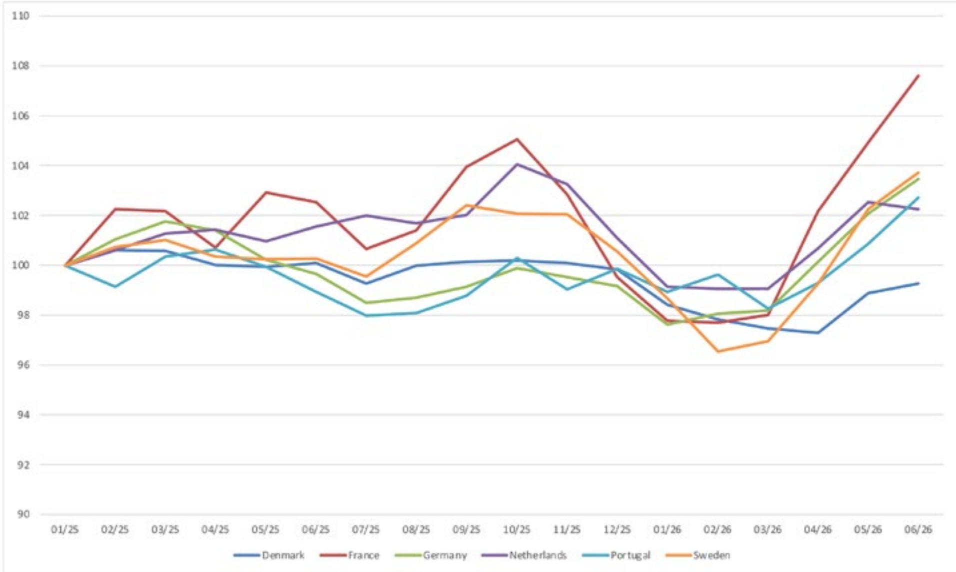
Petrol



Hybrid



Electric



Fuel Types Price Index April 2026 - June 2026

98.9
Highest for Diesel (France)

98.9
Highest for Petrol (Portugal)

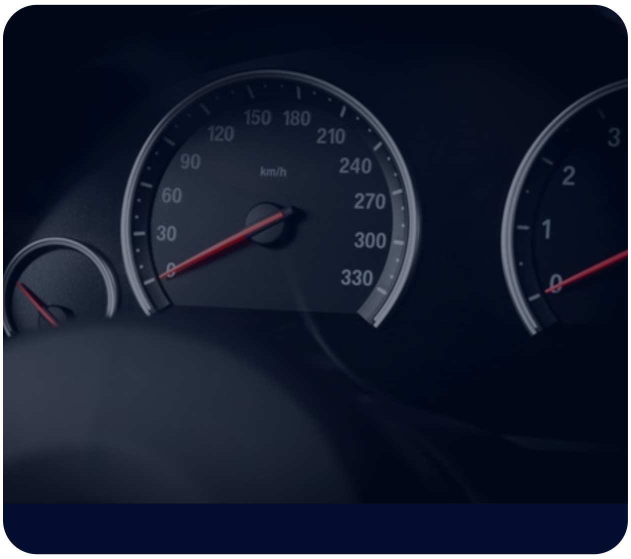
100
Highest for Hybrid (Portugal)

107.6
Highest for Electric (France)

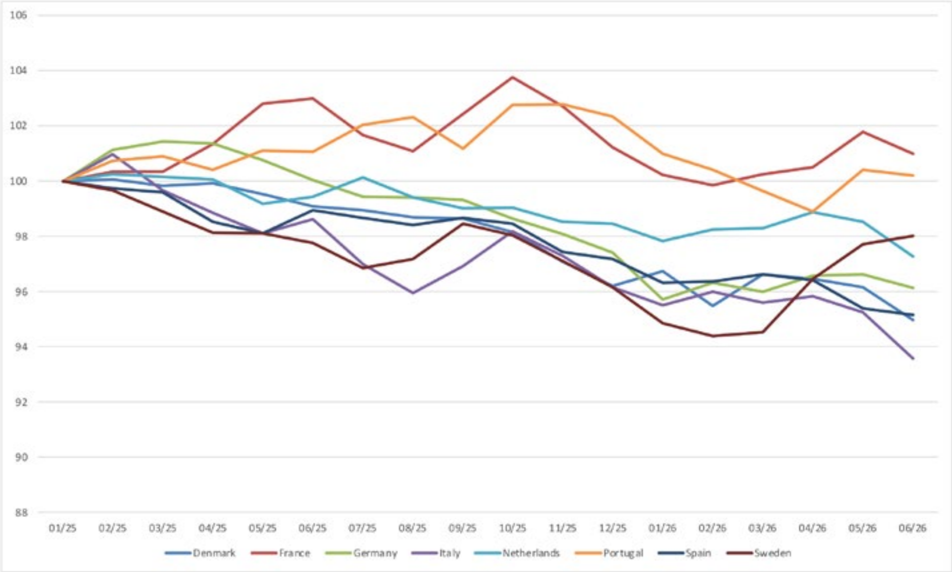
Mileage profiles

Higher-mileage vehicles have experienced the most significant price declines in recent months, while lower-mileage vehicles have remained comparatively resilient and, in some markets, returned to growth during Q2 2026.

In the 0–50k km segment, France and Portugal recorded positive price momentum throughout Q2 2026, while Sweden showed a similar trend in the 50–100k km segment, with prices rising by approximately 5 index points from their early-2026 lows. Italy stands out as the market with the most pronounced price declines among lower-mileage vehicles, contrasting with the generally stronger performance observed in other countries.

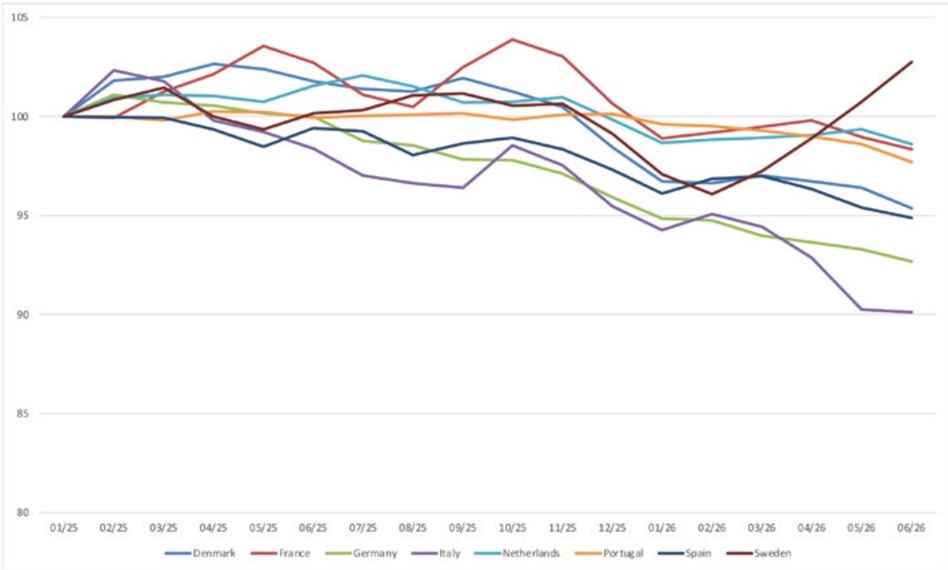


0–50k km

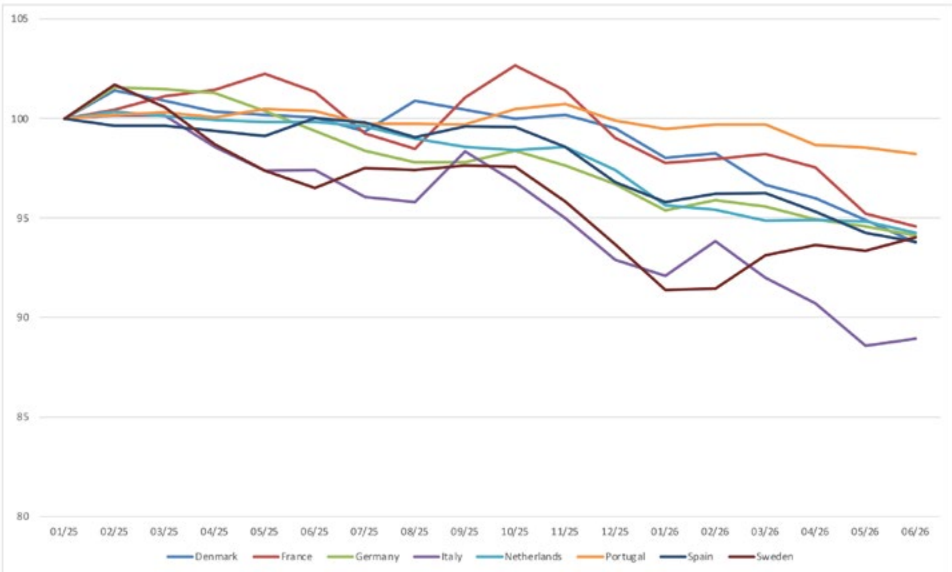


Mileage profiles

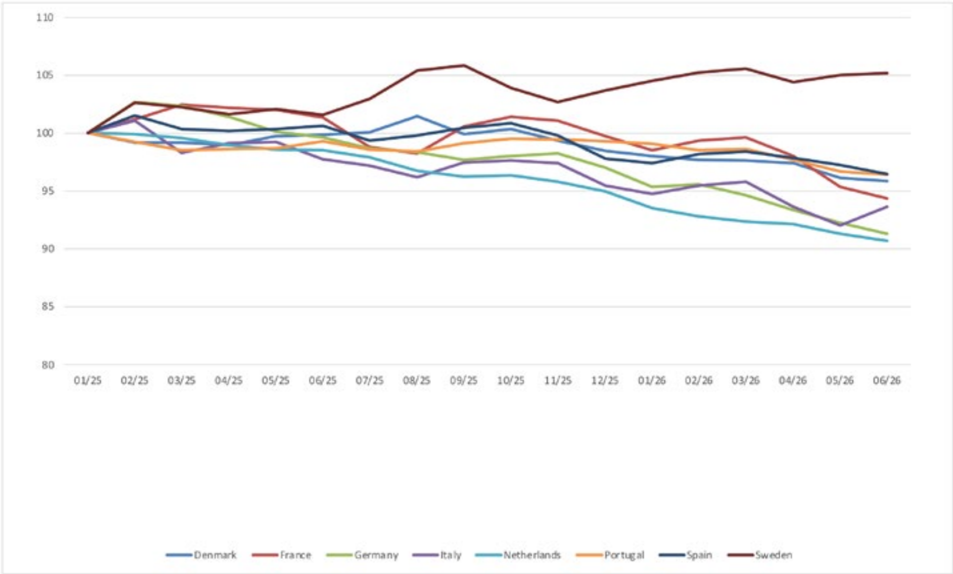
50–100k km



100–150k km



+150k km



Mileage Profile Price Index April 2026 - June 2026

101.7
Highest for 0–50k km (France)

102.7
Highest for 50–100k km (Sweden)

98.6
Highest for 100–150k km (Portugal)

105.1
Highest for +150k km (Sweden)

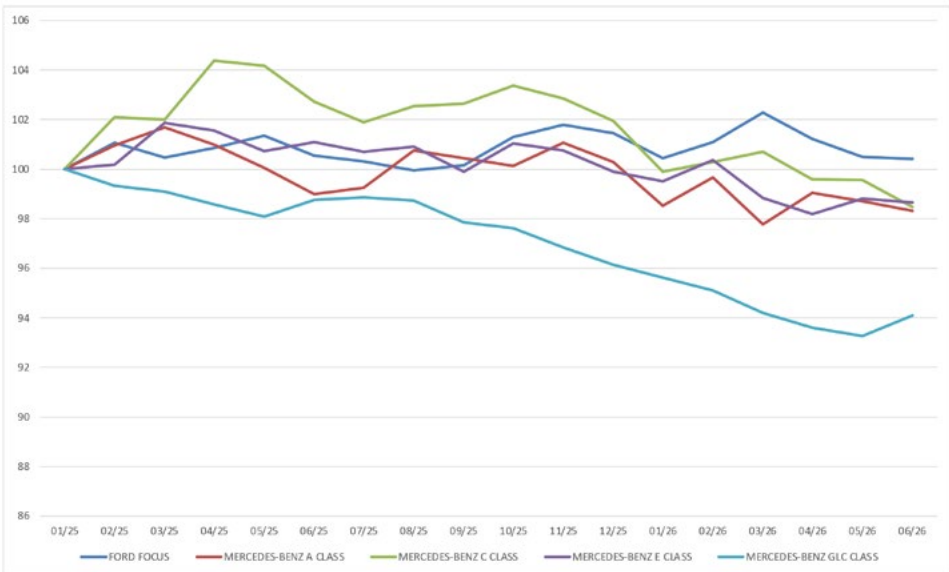
Top common models

The report includes the price index for the top 5 models for markets with more representative data.

Germany

In Germany, the Ford Focus has presented a decline in prices in comparison to Q12026, but still consistently above the January 2025 baseline. The Mercedes C-Class, E-Class, and A-Class have remained relatively stable over the past six months, although a slight softening in prices has been observed. In contrast, the Mercedes GLC-Class has experienced a more pronounced decline since September 2025. This downward trend continued throughout the first half of 2026 before showing signs of stabilization by June 2026.

Germany

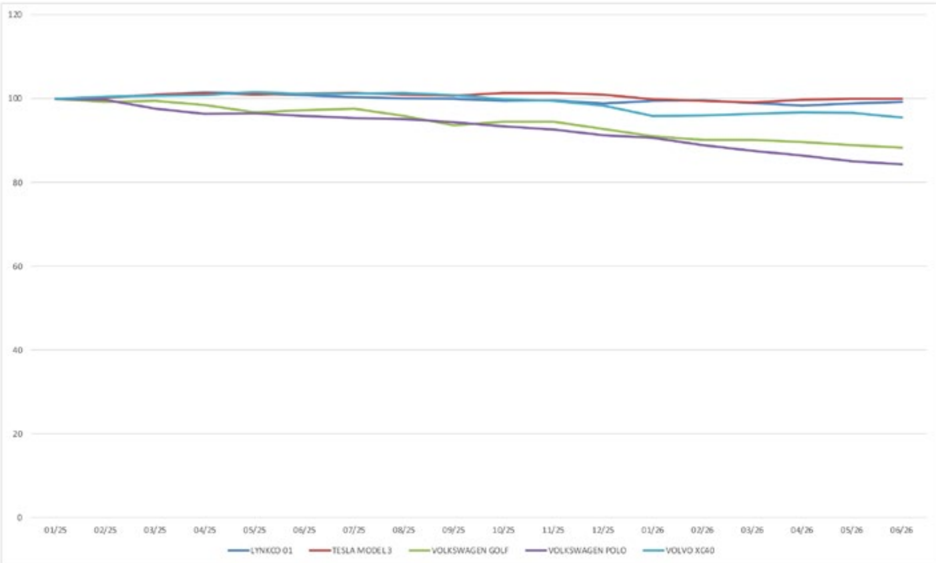


Top common models

The Netherlands

In the Netherlands, the Volkswagen Polo and Golf experienced a continuous downward price trend over the past 18 months. Other leading models, such as Lynk & Co, the Tesla Model 3, and the Volvo XC40, showed more stable price movements overall. However, the Volvo XC40 saw a decline toward the end of 2025, which appears to have stabilised in 2026.

The Netherlands

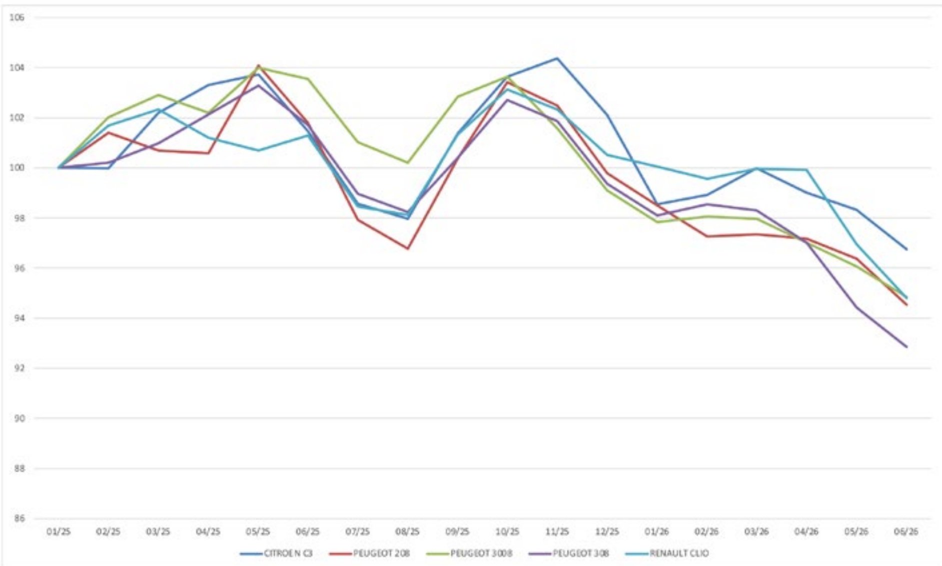


Top common models

France

In France, top models reflect the broader market pattern, with price increases at the beginning of 2025 followed by a decline between July and September 2025. Prices then recovered briefly before declining again toward the end of the year. By the end of Q1 2026, price evolution appeared relatively stable, followed by a considerable decrease in Q2 with values remaining up to 7.1 p.p. below the January 2025 baseline.

France

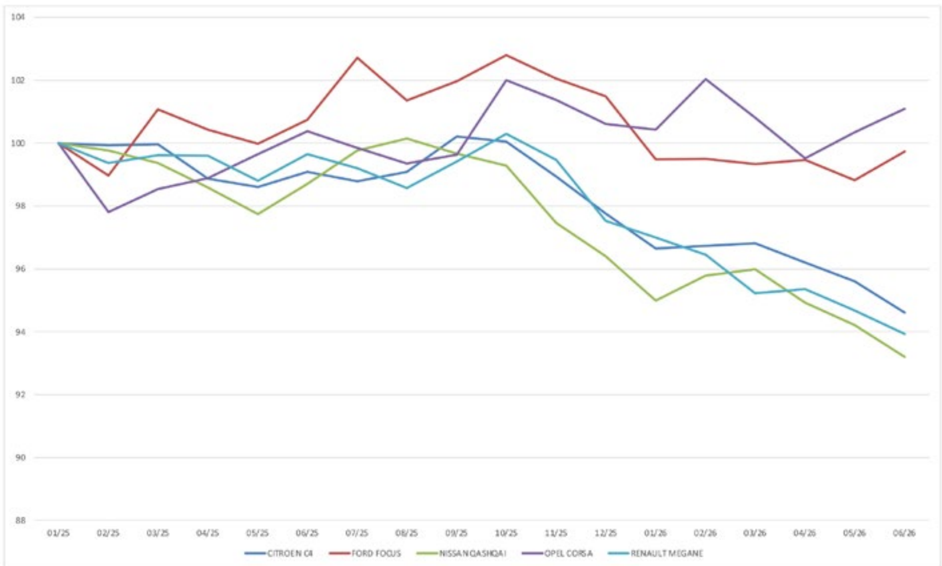


Top common models

Spain

In Spain, the top-selling Opel Corsa and Ford Focus have maintained strong and relatively stable pricing since the beginning of 2025, ending Q2 2026 at levels in line with or above the January 2025 baseline. By contrast, the Citroen C4, Renault Megane, and Nissan Qashqai have followed a downward pricing trend since around October 2025. The decline has accelerated slightly during Q2 2026 when compared to the beginning of the year.

Spain

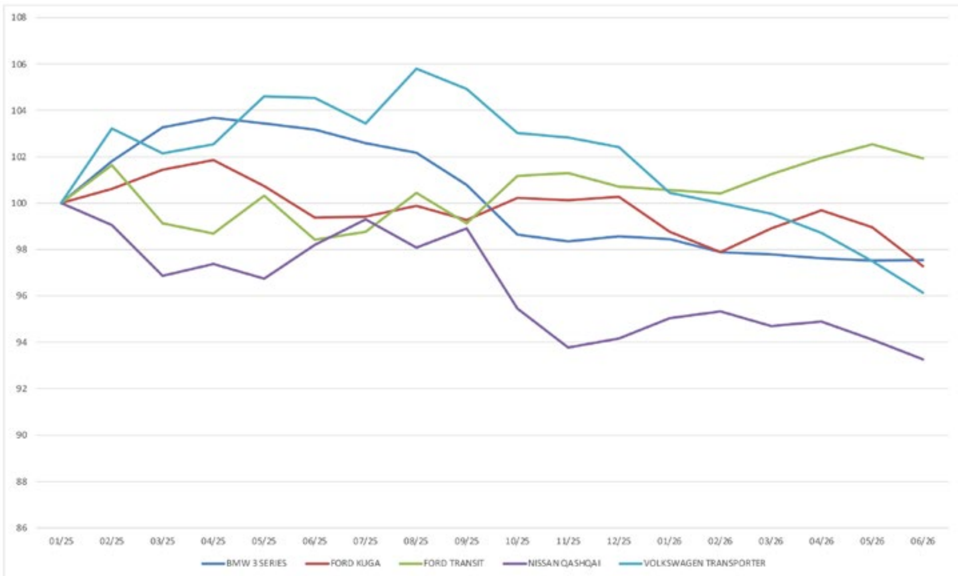


Top common models

Denmark

In Denmark, most of the top-selling models have displayed a stable pricing trend over the past six months, with price indices remaining relatively close to the beginning or the year. The Volkswagen Transporter is a notable exception, having experienced a more pronounced decline during this period. In contrast, the Ford Transit has shown a positive pricing trajectory, steadily gaining value and ending Q2 2026 above its January 2025 baseline.

Denmark

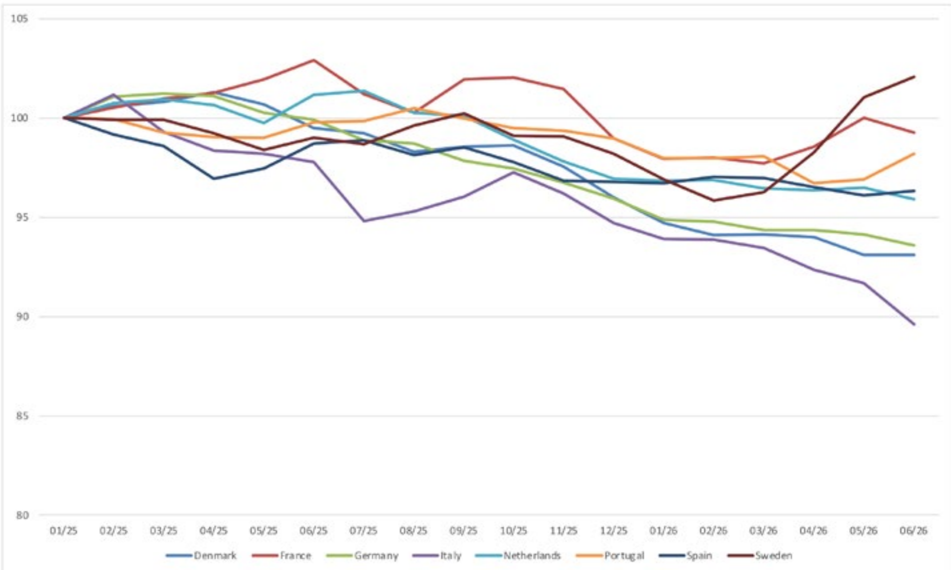


Ex-Leasing Profile

Focusing on the ex-leasing segment, a key market for BCA, used car price indices across European markets have followed a broadly similar trajectory. Prices remained relatively stable between January and September 2025, although Italy experienced a more pronounced decline, while France showed comparatively stronger price growth.

From September 2025 through year-end, prices generally trended downward across most markets, despite some temporary local increases. This decline stabilized during 2026, with prices remaining broadly flat throughout Q1 and Q2. Notable exceptions were France and Sweden, which recorded price increases during Q2, while Italy continued to experience further price declines.

Ex-Leasing Profile



Appendix

About BCA

BCA stands out as a frontrunner in European remarketing, bolstering the used car supply chain. By offering a wide array of services, including remarketing, vehicle purchasing, transportation, customer assistance, and customizable platforms, BCA caters to the needs of OEMs, lease companies, financial institutions, and dealers, facilitating their buying and selling processes.

Information

Please acknowledge that certain market trends might not be captured in the Price Index profiles of this report, as some categories may have insufficient representation in their respective profiles.

Methodology

The Price Index uses BCA sales data from various EU markets to assess price trends and quickly identify changes. It compares predictions from BCA's pricing models with actual sale prices: if sale prices exceed predictions, the index rises; if they fall short, the index drops. This method isn't affected by changes in the mix of vehicles offered on the BCA platform.

Additional information

For further information, please contact the Commercial Team Europe (commercial.eu@bca.com) or your local BCA team.

www.bca.com