

Q3 2026

BCA EUROPE Pricing Report

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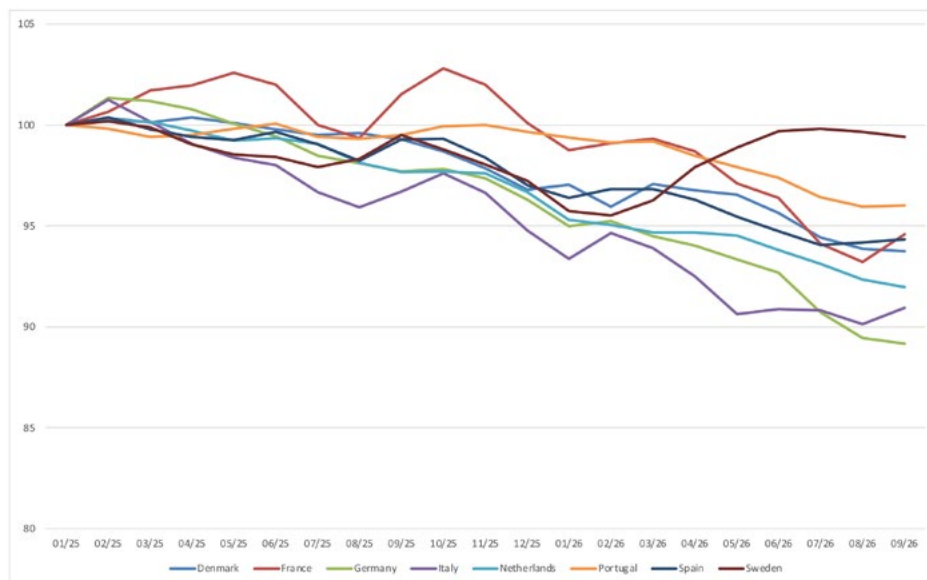
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Wholemarket

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 price decreases, generally ranging between 3.6 p.p. and 6.9 p.p., pointing to a relatively stable pricing environment over the longer-term horizon. In contrast, Germany and Italy experienced pronounced declines, with prices ending Q3 2026 approximately 8.1–10.8 p.p. lower compared with the start of 2025. Sweden experienced a negligible decline of 0.6 p.p. due to the pronounced increase in the last quarter.

In the most recent quarter (Jul-Sep 2026), pricing dynamics declined slightly across most markets, although the trend was noticeably more stable than in previous periods.

Wholemarket



Fuel type profiles

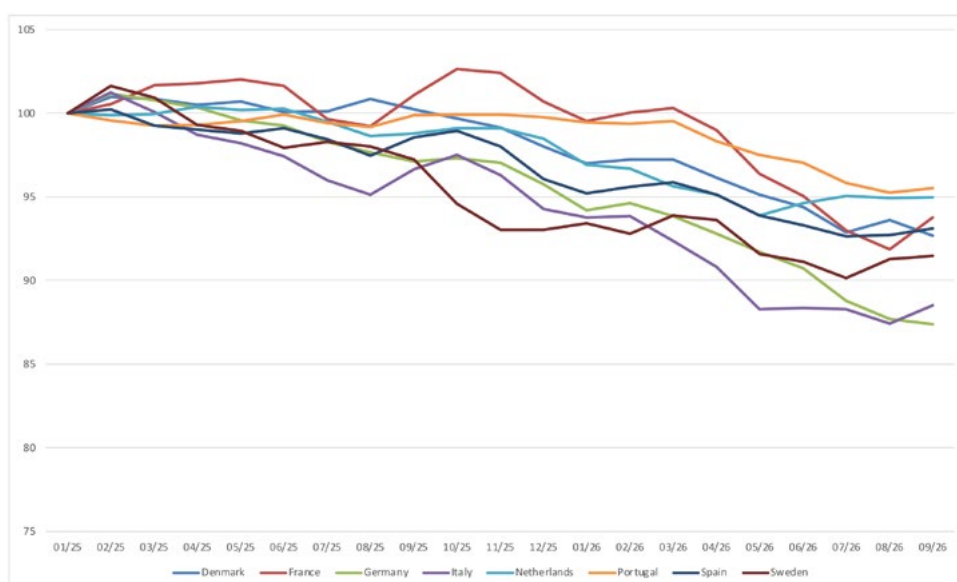
Diesel vehicle prices showed mixed but generally more stable dynamics towards the end of Q3 2026. Germany continued to record the strongest decline, while France and Denmark showed some recovery after reaching lower levels earlier in the quarter.

Petrol vehicle prices continued to decline across several markets during Q3 2026, although movements were more moderate in some countries. The most considerable decreases were observed in Germany, The Netherlands and Denmark, which ended the quarter well below the January 2025 baseline.

Hybrid vehicle prices remained broadly stable across most markets during Q3 2026. However, moderate declines were recorded in markets such as Germany, The Netherlands and Denmark, while Italy partially recovered in September.

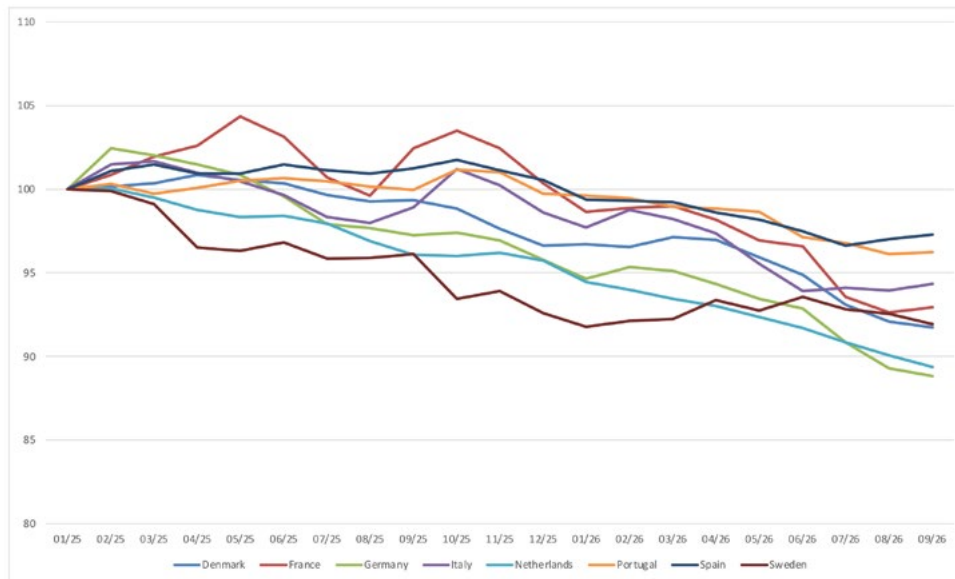
Electric vehicle price indices generally increased or remained stable during Q3 2026, with most markets finishing the quarter above the January 2025 baseline. France continued to record the strongest price growth.

Diesel

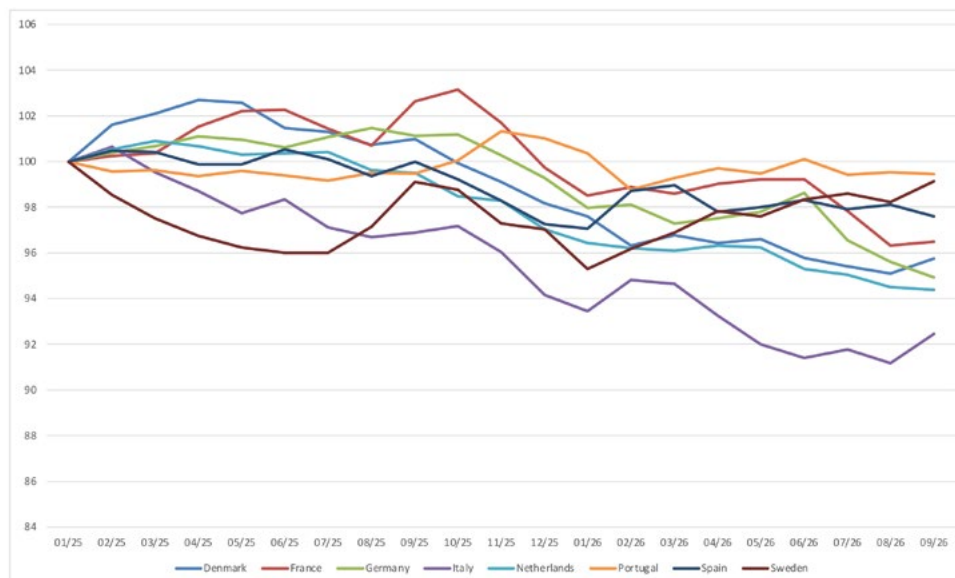


Fuel type profiles

Petrol

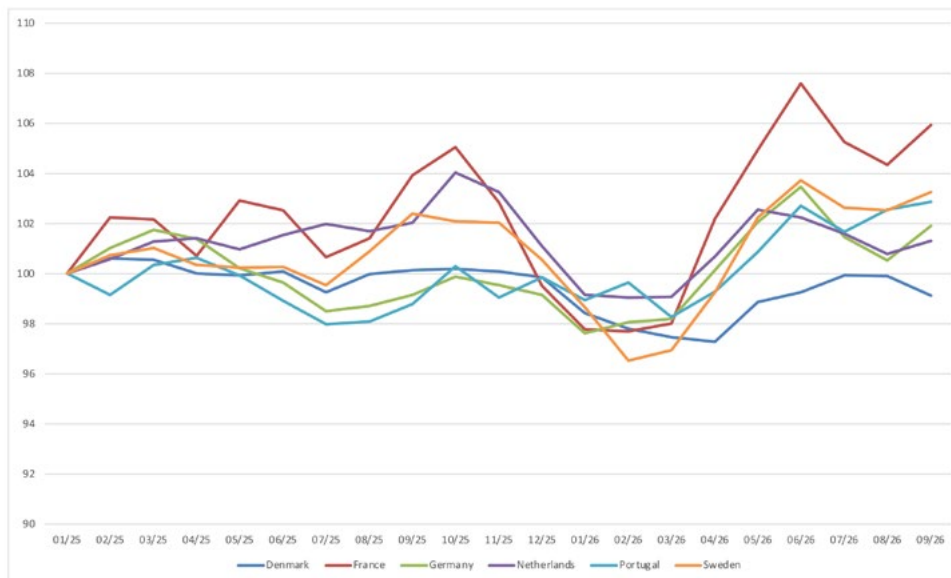


Hybrid



Fuel type profiles

Electric



Fuel Types Price Index July 2026 – September 2026

95.8

Highest for Diesel
(Portugal)

97.3

Highest for Petrol
(Spain)

99.5

Highest for Hybrid
(Portugal)

105.9

Highest for Electric
(France)

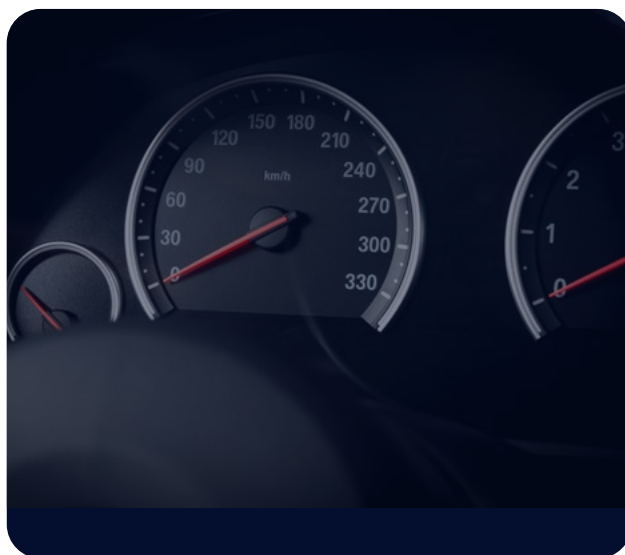


Mileage profiles

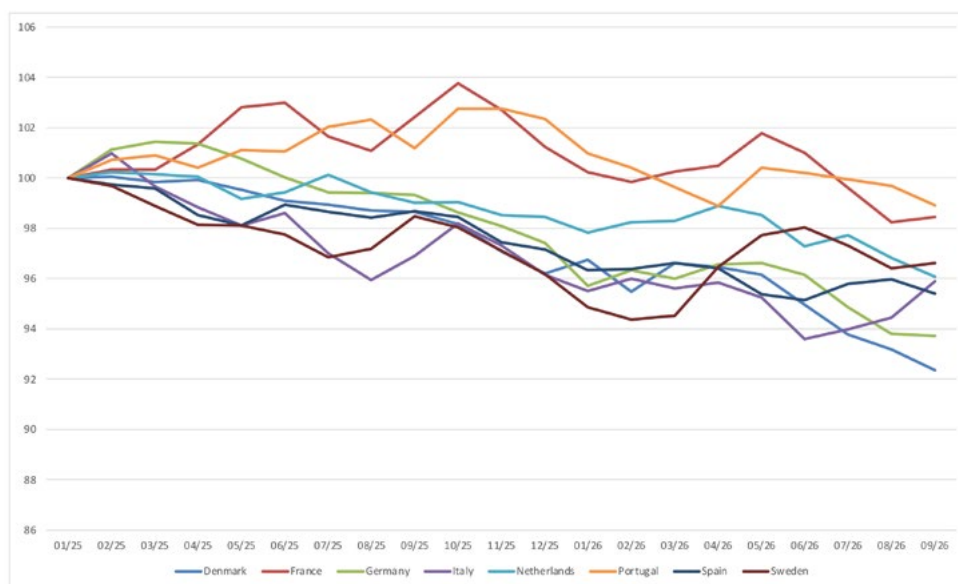
Higher-mileage vehicles showed greater price stability in Q3 2026, while lower-mileage vehicles declined across most markets. In the 0–50k km segment, Italy recorded positive momentum, contrasting with decreases elsewhere.

The 50–100k km segment showed mixed dynamics, with Sweden remaining stable at a comparatively high level.

Among higher-mileage vehicles, Sweden stood out with strong price growth in the 150k+ km segment, while most other markets remained broadly stable or continued to decline.

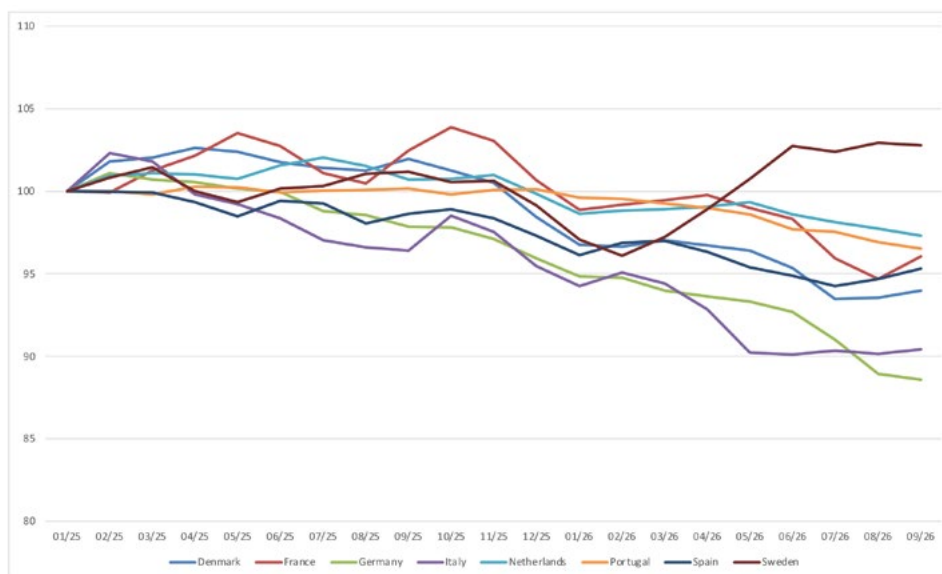


0–50k km

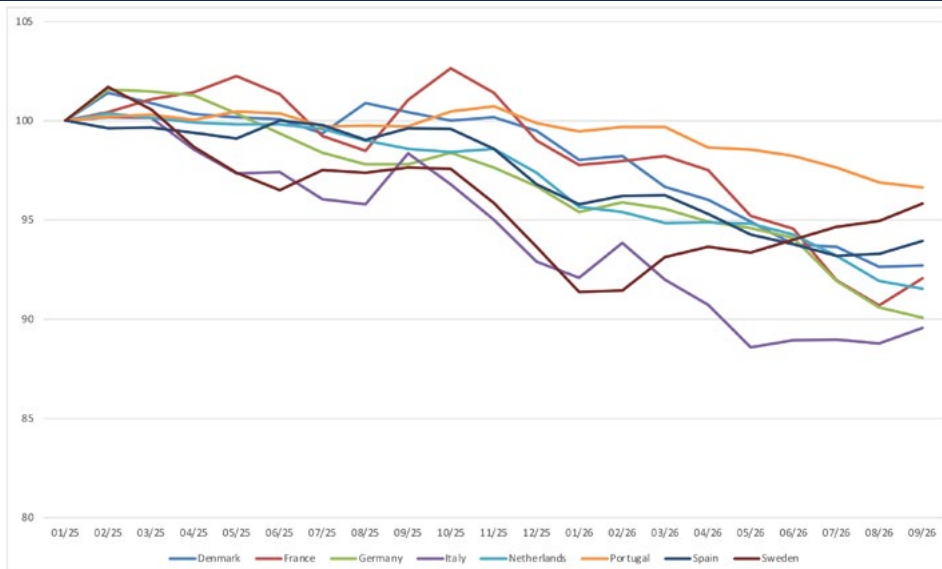


Mileage profiles

50–100k km

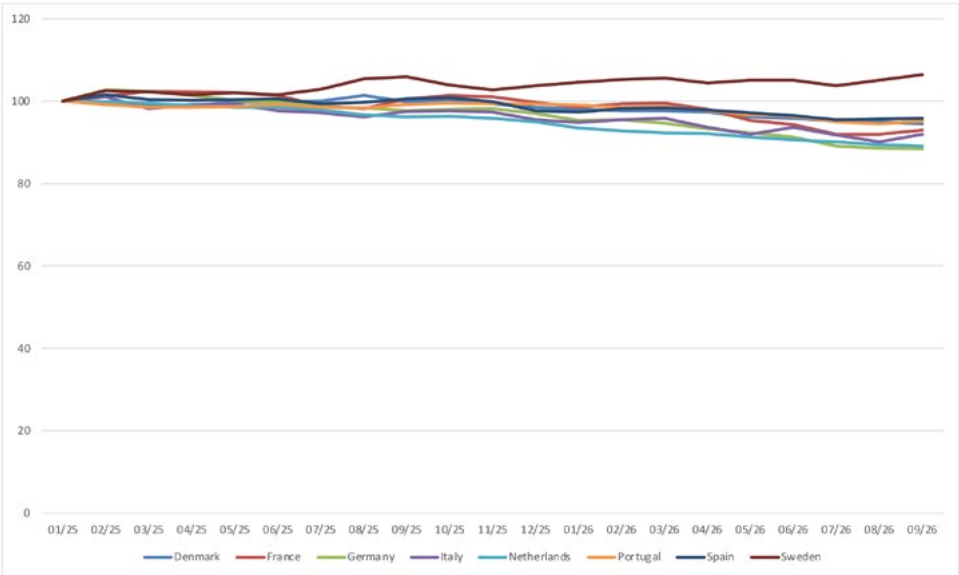


100–150k km



Mileage profiles

+150k km



Mileage Profile Price Index July 2026 – September 2026

99.9

Highest for 0–50k km
(Portugal)

102.9

Highest for 50–100k km
(Sweden)

97.6

Highest for 100–150k km
(Portugal)

106.5

Highest for +150k km
(Sweden)



Top common models

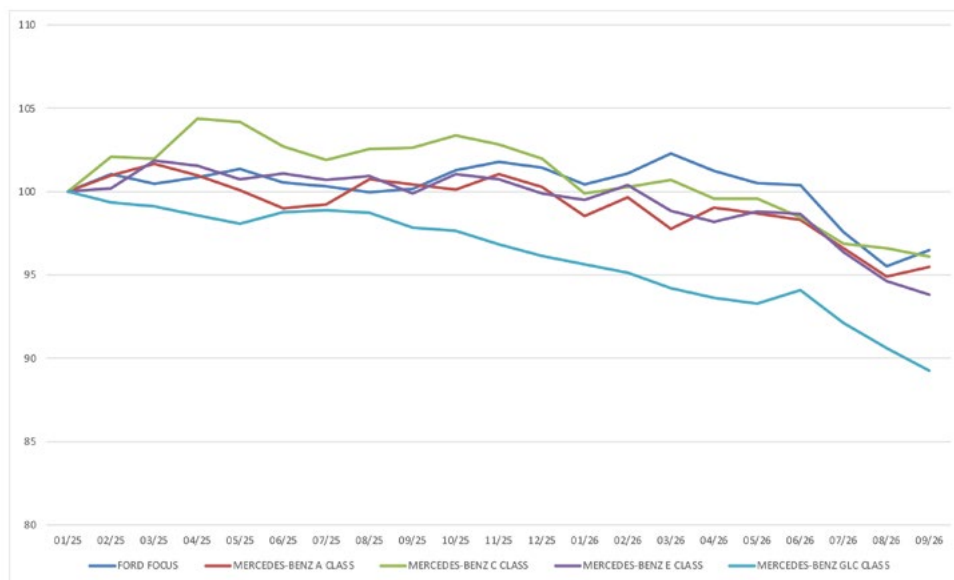
The report includes the price index for the top 5 models for markets with more representative data.

Germany

In Germany, Mercedes-Benz GLC and E-Class had a strong decline in the last quarter falling to record low values since the January 2025 baseline. The same behaviour, with smaller magnitude, is exhibited for Ford Focus, Mercedes A-Class and C-Class.



Germany



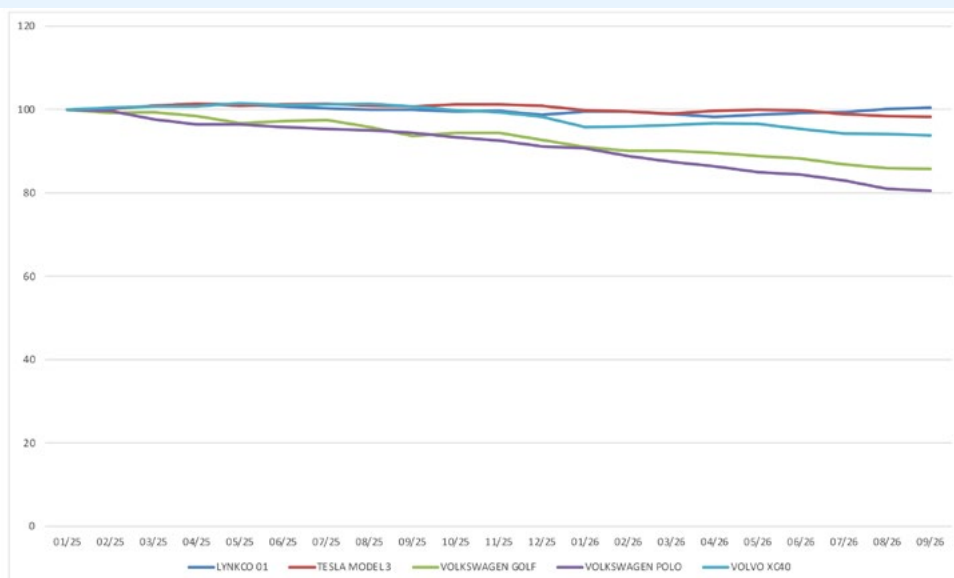
Top common models

The Netherlands

In The Netherlands, the Volkswagen Polo and Golf experienced a continuous downward price trend since January 2025, although in a lower rate in Q3. 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 in the previous quarter, which appears to have stabilised in Q3 2026.



The Netherlands



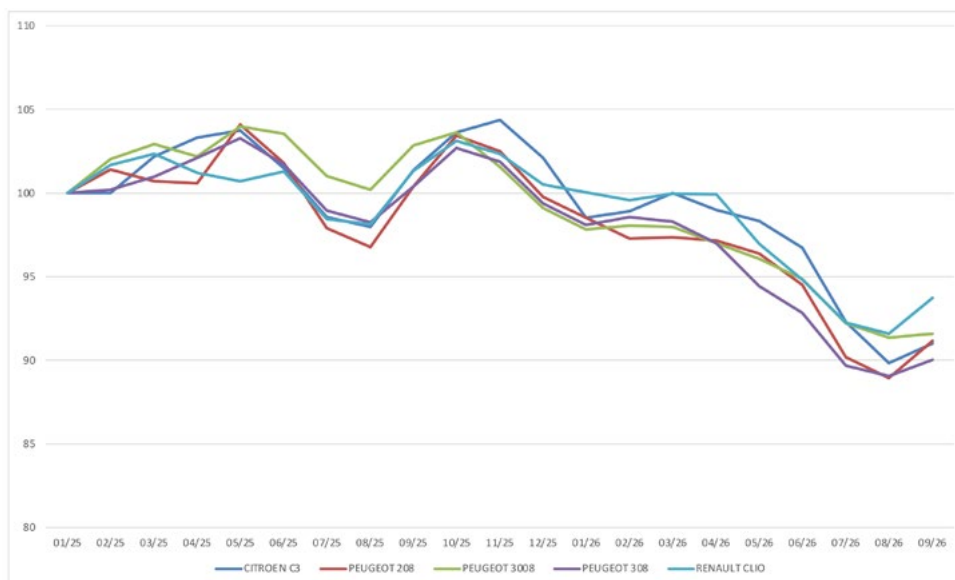
Top common models

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 a declining trend until the end of Q2 2026. Since Q3 2026, price evolution has showed signs of stabilisation, followed by a generalised increase in September.



France



Top common models

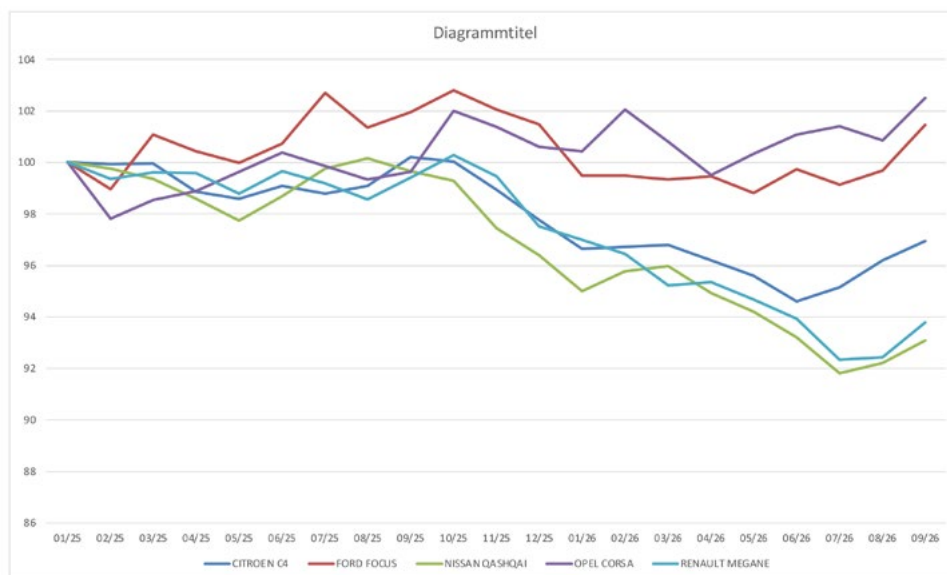
Spain



In Spain, the top-selling Opel Corsa and Ford Focus have maintained strong and relatively stable pricing since the beginning of 2025, showing a positive price trend in Q3 2026. Although Citroen C4, Renault Megane, and Nissan Qashqai have followed a downward pricing trend since around October 2025 until Q2 2026, these models inverted this trend and exhibited a strong positive increase in Q3 2026.



Spain



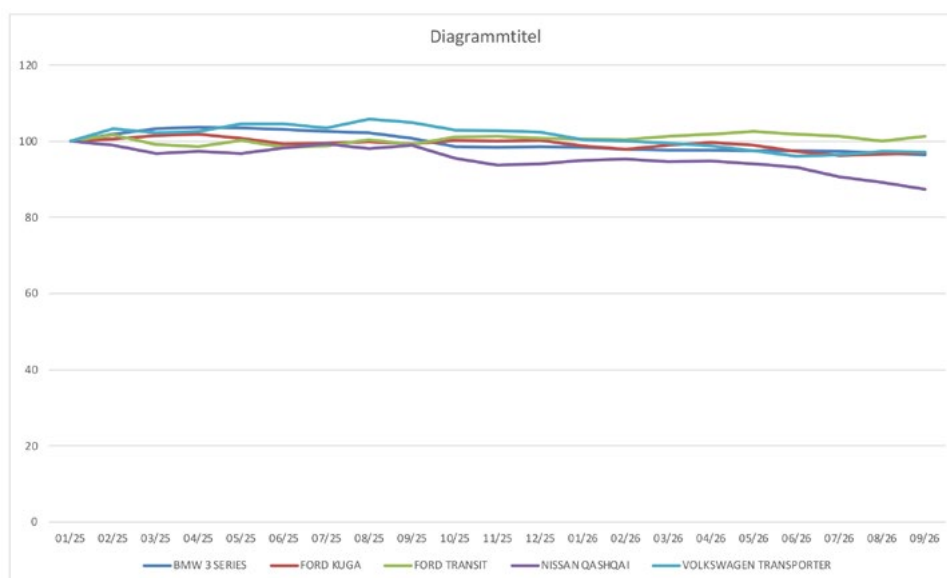
Top common models

Denmark

In Denmark, most of the top-selling models have displayed a stable pricing trend over the past six months, presenting minimal price variation in Q3 2026. The Volkswagen Transporter is a notable exception, having experienced a more pronounced decline until Q3 2026 where it showed a price stabilisation. In contrast, the Nissan Qashqai has shown a negative pricing trajectory in Q3 2026, reaching a record low since the January 2025 baseline.



Denmark



Ex-Leasing Profile

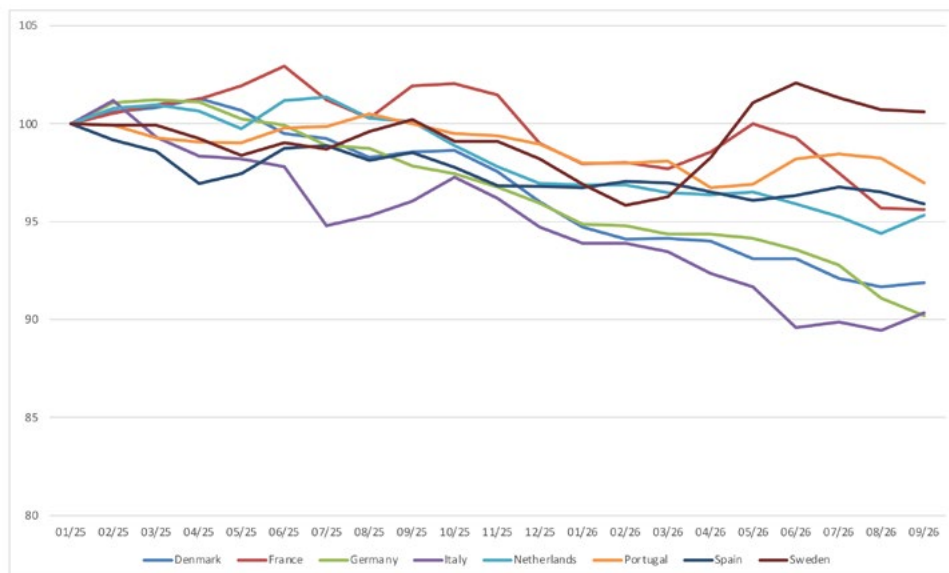
Ex-Leasing Profile

Focusing on the ex-leasing segment, a key market for BCA Europe, prices were broadly stable for most of 2025 before declining towards year-end. This downward trend eased during the first half of 2026, with positive developments in France and Sweden.

However, price levels declined again across most markets in Q3 2026, while Sweden continued to outperform and remained above the January 2025 baseline.



Ex-Leasing Profile



About BCA Europe

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.

