arstdata

MARKET REPORT
NOVEMBER 2026



EUROPE · Q3 2026

EVs and Chinese brands in Europe’s used-car market.

Nine countries, 1 August to 30 September 2026.

9
countries covered

2.0%–43.2%
EV share of used cars, from Italy to Norway

0.6%–5.3%
Chinese brands’ share of used cars

arstdata.com



Nine markets, one view of EVs and Chinese brands.

EVs range from 2.0% of used cars on the market in Italy to 43.2% in Norway. Chinese brands are still a small slice of the used market, and in most countries their EVs are priced below European ones and Tesla.

CONTENTS

	Executive summary	03
01	EVs in the used market, country by country	04
02	Chinese brands in the used market	05
03	Top 20 Chinese-brand models	06
04	Chinese EVs vs European EVs vs Tesla, with Toyota and Lexus	07

COUNTRIES COVERED

AT Austria · **DE** Germany · **ES** Spain · **FI** Finland · **FR** France · **IT** Italy · **NL** Netherlands · **NO** Norway · **PT** Portugal

DATA

ARST Data's own market data, aggregated and validated.

PERIOD

1 August to 30 September 2026 (Q3 2026); model ranking on 31 October 2026.

WHAT IT IS

A description of the market, not a forecast or a valuation of a specific car.

PRICES

Indicative market prices, each in the country's own currency.



The used EV market at a glance.

EVs range from 2.0% of used cars on the market in Italy to 43.2% in Norway. Chinese brands are still a small slice of the used market, and in most countries their EVs are priced below European ones and Tesla.

EV SHARE OF USED CARS ON THE MARKET, 30 SEP

2.0%–43.2%

From Italy to Norway. Germany 6.7%

CHINESE BRANDS, SHARE OF USED CARS, 30 SEP

0.6%–5.3%

Highest: Norway. Germany 0.6%

CHINESE-BRAND EVS PRICED BELOW EUROPEAN-BRAND EVS

8 of 9 countries

Model years 2023–24, 30 Sep. Germany −13.3%; below Tesla in 9 of 9

NORMAL YEARLY DEPRECIATION, EVS

−10.4%

Chinese brands. European brands −10.2% · Tesla −8.9%

KEY POINTS

01 EV penetration of the used market varies more than twentyfold: 43.2% of used cars on the market in Norway, 17.9% in Finland, 6.7% in Germany and 2.0% in Italy.

02 EV prices held up better than normal ageing in August–September in 8 of the 9 countries; in Portugal the change was too small to call. This is not appreciation: the same EV was still priced lower at the end of September in 6 of the 9 countries, and only slightly higher in the rest.

03 Chinese brands remain small in the used market: between 0.6% and 5.3% of cars on the market, led by MG and BYD; many of their used cars are plug-in hybrids or petrol, not EVs.

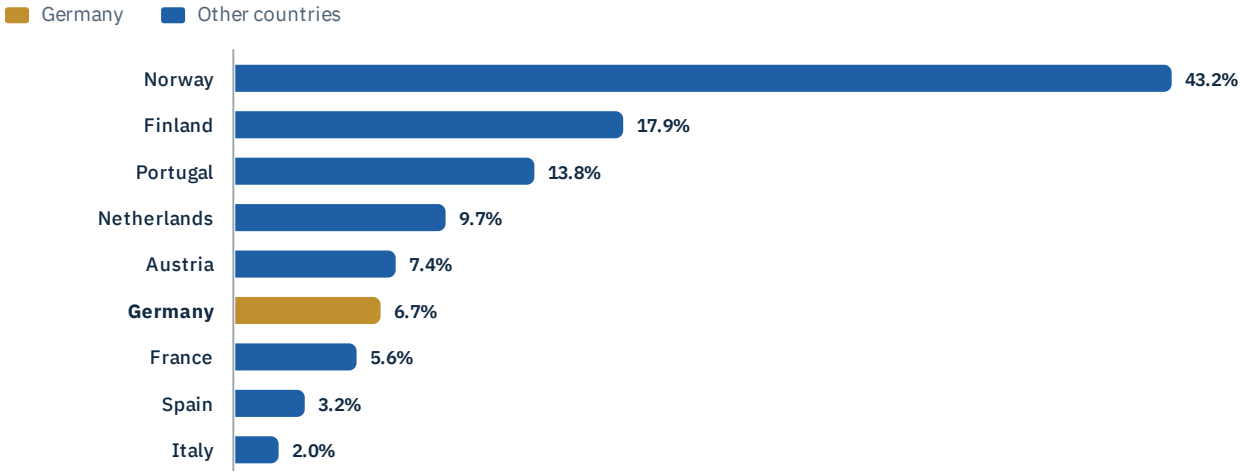
04 Chinese-brand EVs of model years 2023–24 are priced below European-brand EVs in 8 of the 9 countries (−13.3% in Germany) and below Tesla in all nine, and lose value a little faster (−10.4% a year against −8.9% for Tesla).

EVs in the used market, country by country.

Battery-electric cars only; plug-in hybrids are counted apart. Share of the used cars on the market on each date, and price trend from 31 July to 30 September 2026.

EXHIBIT 1

EV share of used cars on the market, 30 September 2026



Source: ARST Data.

COUNTRY	EV SHARE, 31 JUL → 30 SEP	EV MEDIAN PRICE, 2–3 YEARS OLD	EV TREND, AGE-ADJUSTED	EV, SAME CAR	COMBUSTION, AGE-ADJUSTED
Norway	45.9% → 43.2%	NOK 389,000	+1.7%	−0.3%	−0.5%
Finland	18.1% → 17.9%	€36,890	+1.6%	−0.2%	−0.1%
Portugal	13.5% → 13.8%	€30,950	+0.4%	−0.8%	−0.3%
Netherlands	9.1% → 9.7%	€31,900	+0.8%	−1.0%	−0.4%
Austria	7.5% → 7.4%	€37,440	+0.8%	−1.1%	−0.2%
Germany	**7.3% → 6.7%**	**€31,900**	**+1.2%**	**−0.6%**	**−0.6%**
France	6.2% → 5.6%	€26,800	+1.8%	+0.7%	−0.5%
Spain	3.4% → 3.2%	€29,480	+1.9%	+0.5%	+0.9%
Italy	2.2% → 2.0%	€28,900	+1.8%	+0.4%	±0.0%

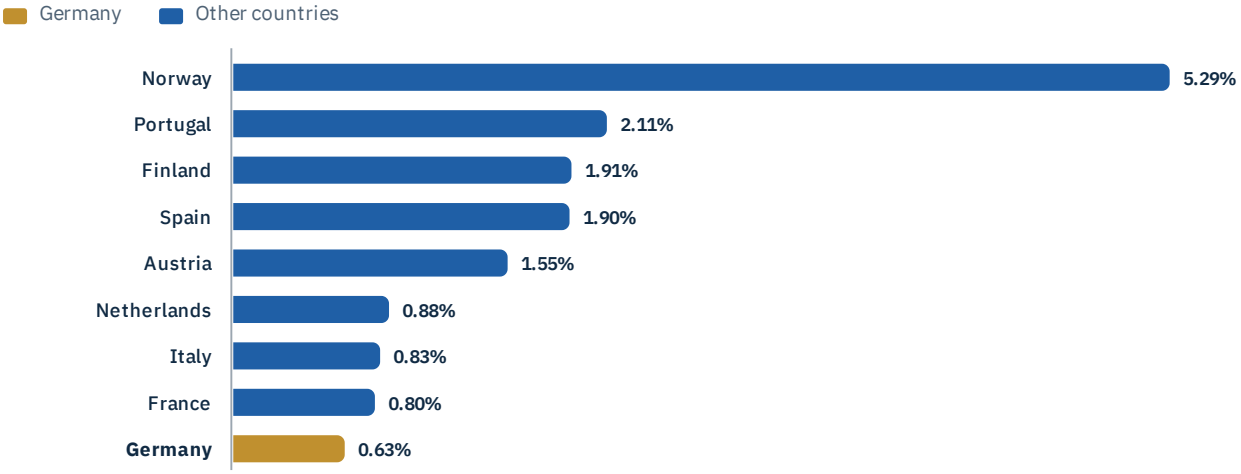
Trends from 31 July to 30 September 2026. Age-adjusted: against the normal loss of value from getting older; same car: what a car you own lost. Prices in each country's own currency.

Chinese brands in the used market.

MG, BYD, Polestar, Lynk & Co, Leapmotor, Xpeng, Nio, Omoda, Jaecoo, GWM, Smart (#1, #3, #5), Dongfeng and other Chinese-owned or Chinese-built brands.

EXHIBIT 2

Chinese brands, share of used cars on the market, 30 September 2026



Source: ARST Data.

COUNTRY	SHARE OF USED CARS, 31 JUL → 30 SEP	USED STOCK, 30 SEP	OF WHICH EV	MEDIAN PRICE, 30 SEP
Norway	5.49% → 5.29%	1,975	99%	NOK 379,000
Portugal	1.98% → 2.11%	795	76%	€28,900
Finland	2.40% → 1.91%	714	94%	€36,990
Spain	1.56% → 1.90%	2,328	7%	€18,490
Austria	1.42% → 1.55%	2,238	50%	€33,490
Netherlands	0.88% → 0.88%	1,689	52%	€30,880
Italy	0.84% → 0.83%	2,206	9%	€17,600
France	0.67% → 0.80%	586	35%	€27,380
Germany	**0.60% → 0.63%**	**3,417**	**40%**	**€26,490**

Older Smart fortwo and forfour models are not counted as Chinese. Prices in each country's own currency.



The 20 most common Chinese-brand models.

Used cars on the market on 31 October 2026 in the nine countries, all fuels: 24,378 Chinese-brand used cars in total.

#	MODEL	STOCK	COUNTRIES WITH 30+ CARS	EV SHARE	MEDIAN AGE (YRS)	MEDIAN KM
1	Lynk & Co 01	2,534	4	0%	3	57,400
2	MG ZS	2,513	7	10%	1	24,700
3	MG HS	1,661	5	0%	1	23,100
4	MG3	1,452	6	0%	1	14,100
5	BYD Seal U	1,209	7	9%	0	7,700
6	Polestar 2	1,073	6	100%	3	61,000
7	MG4	609	7	100%	2	28,000
8	Jaecoo 7	494	3	0%	0	7,900
9	BYD Atto 3	469	5	100%	3	30,000
10	BYD Atto 2	448	4	28%	0	100
11	Polestar 4	428	5	100%	1	10,500
12	MG EHS	397	6	0%	4	61,000
13	Omoda 5	395	4	7%	1	9,000
14	BYD Seal 6	364	3	0%	0	4,500
15	Ebro S700	360	1	0%	1	13,200
16	Geely Starray EM-i	333	2	3%	0	0
17	BYD Seal	313	3	100%	1	9,500
18	Leapmotor C10	291	3	98%	0	5,000
19	Smart #1	281	1	100%	2	19,000
20	BYD Sealion 7	279	3	100%	0	9,000

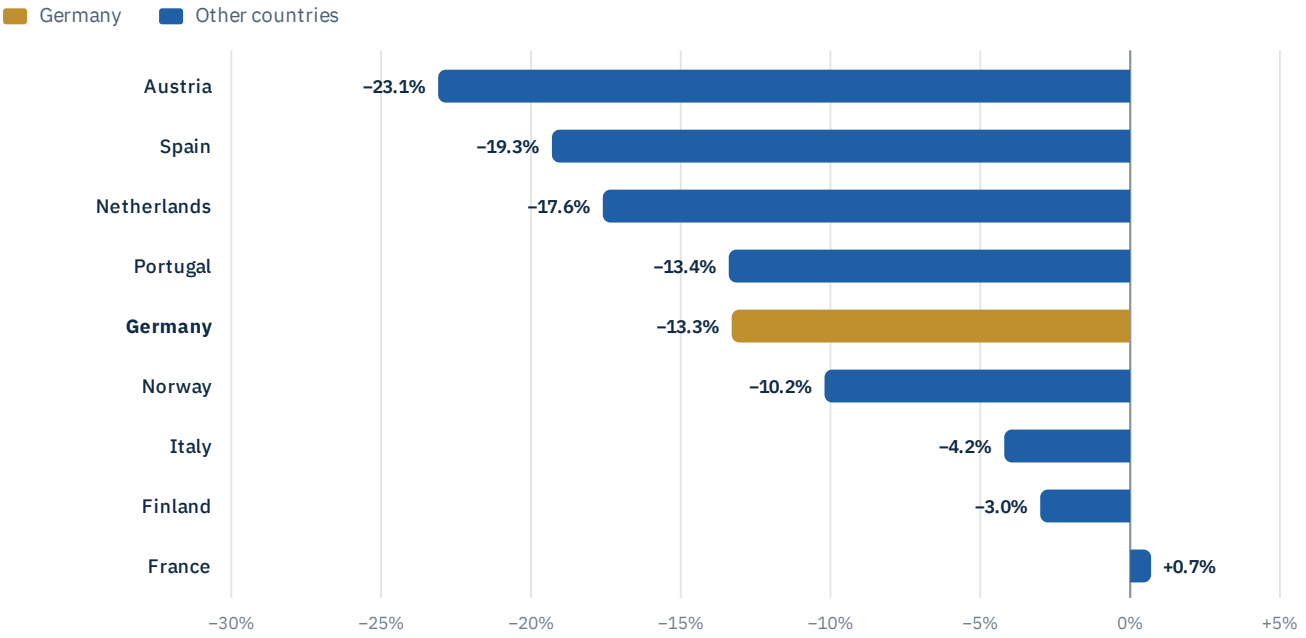
EV share 0% means the model is sold as petrol, hybrid or plug-in hybrid (for example Lynk & Co 01, MG HS, Jaecoo 7). Median age 0 = model year 2026, often nearly-new cars.

Chinese-brand EVs are priced below European ones in eight of the nine markets.

Battery-electric cars of model years 2023–24, so that age stays out of the comparison, on 30 September 2026. European brands: the Volkswagen group, BMW and Mini, Mercedes-Benz, Renault and Dacia, Stellantis European brands, Volvo, Jaguar Land Rover.

EXHIBIT 3

Median price of Chinese-brand EVs against European-brand EVs, by country



Source: ARST Data. Each country compared in its own currency.

8 of 9

countries where Chinese-brand EVs are priced below European-brand EVs

9 of 9

countries where they are priced below Tesla

−10.4%

normal yearly depreciation of Chinese-brand EVs; Tesla −8.9%



Prices by country, each in its own currency.

Median price of EVs of model years 2023–24, 30 September 2026

COUNTRY	CHINESE BRANDS	EUROPEAN BRANDS	TESLA	TOYOTA AND LEXUS	CHINESE VS EUROPEAN	CHINESE VS TESLA
Norway	NOK 359,000	NOK 399,900	NOK 389,900	NOK 379,000	−10.2%	−7.9%
Finland	€35,790	€36,900	€38,290	€33,800	−3.0%	−6.5%
Portugal	€25,990	€30,000	€35,900	n/a	−13.4%	−27.6%
Netherlands	€25,900	€31,450	€35,830	€35,390	−17.6%	−27.7%
Austria	€29,900	€38,900	€36,500	n/a	−23.1%	−18.1%
Germany	**€28,100**	**€32,410**	**€35,850**	**€33,500**	**−13.3%**	**−21.6%**
France	€25,990	€25,800	€33,290	n/a	+0.7%	−21.9%
Spain	€24,600	€30,490	€33,000	€28,740	−19.3%	−25.5%
Italy	€25,400	€26,500	€35,750	n/a	−4.2%	−29.0%

n/a: too few cars to show a price.

Size and value, nine countries together

EVS BY BRAND ORIGIN	STOCK, 30 SEP	SHARE OF ALL EVS	MEDIAN KM	NORMAL YEARLY DEPRECIATION
Chinese brands	7,144	6.8%	36,500	−10.4%
European brands	68,893	65.9%	35,500	−10.2%
Tesla	6,461	6.2%	60,900	−8.9%
Toyota and Lexus	2,622	2.5%	33,800	n/a

n/a: too few comparable cars. The groups differ in size and segment: European brands range from small city cars to large premium cars.



arstdata

Market value and residual value of used vehicles across Europe.

Valuations, residual-value curves and market reports for every country we cover, each in its own currency. Create your account at arstdata.com: 5 free valuations once you verify your email.

EMAIL **info@arstdata.com**

WEB **arstdata.com**

arstdata.com

ARSTDATA LABS SL · NIF B88701362. A description of the market, not a forecast and not a valuation of any specific car. November 2026.