



# INDICATA Market Watch- COVID-19

**Edition 6 - Stock shortage dominates car retail**  
**- Dealers miss pricing opportunities**  
July 2020



# Background

On the 24th March 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 updated with live data, volume and price, to keep abreast of the fast-moving environment.

As such we are pleased to announce **INDICATA Market Watch**.

# What is INDICATA Market Watch?

INDICATA Market Watch takes two forms:

1. **A regular PDF** - Regular market overviews available for all on the INDICATA country websites (this document)
2. **Free-to-access web-based reporting** - Available for senior management in all major Leasing, Rental, OEM and Dealer Groups.

**If you would like FREE access to the web-based INDICATA Market Watch tool (and are a Senior Manager within the auto industry), please contact your local INDICATA office.**

## How do we produce our data?

INDICATA analyses 9m Used Vehicle adverts across Europe every day. In order to ensure data integrity, our system goes through extensive data cleansing processes.

The Sales (deinstall data) in this report are based on advertisements of recognised automotive retailers of true used vehicles. As such, it does not include data related to private (P2P) advertisements.

Where an advert is removed from the internet, it is classified as a “Sale”.

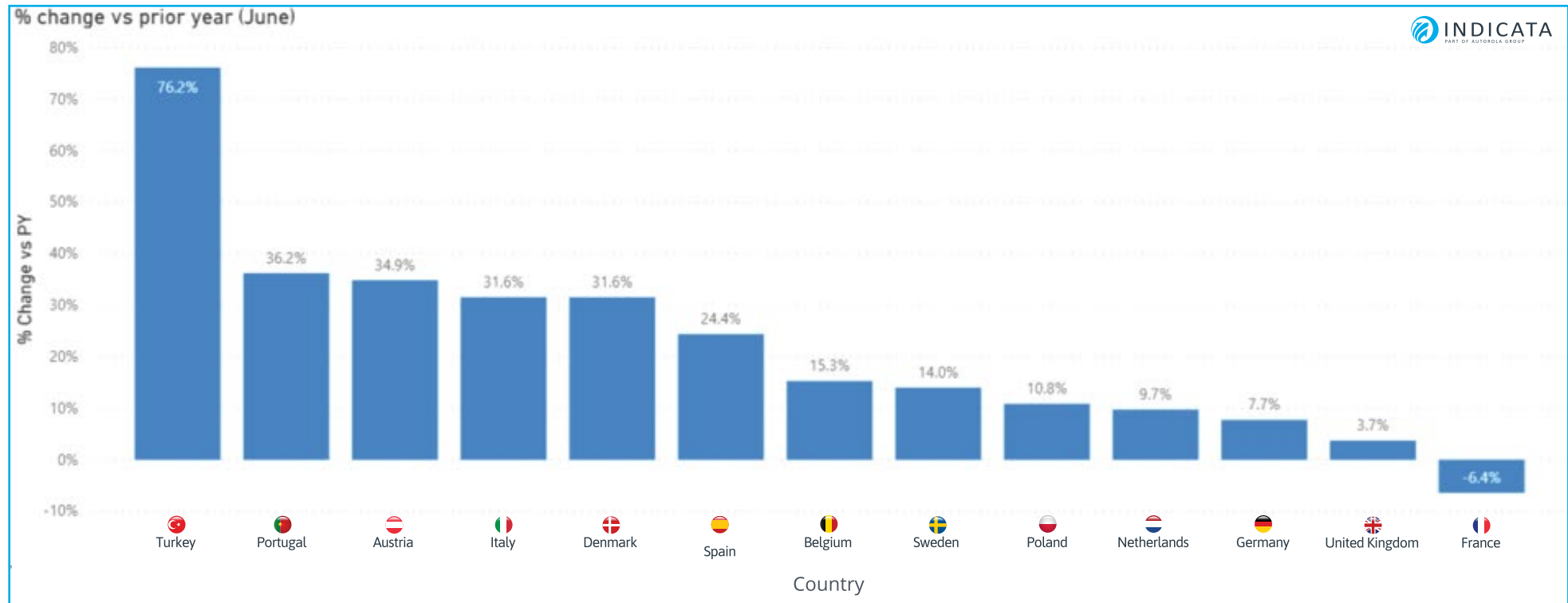
# Executive summary

- Except for France, all European markets have not only returned to pre-lockdown levels they are now running significantly above last year with the total market up 13.2%
- The environmental shift continues with (in most markets) consumers walking away from older dirtier cars in favour of younger and cleaner powertrains
- Demand is biased to SUVs, sports cars and luxury cars suggesting growing consumer confidence is driving the market as much as pent-up demand.
- Demand is outstripping supply, with dealer forecourt stocks now lower by 500,000 used cars compared to the start of April.
- This demand is reflected in trade rates and prices in our sister company (Autorola Marketplace). Sales prices and conversion rates continue to grow.
- Over lockdown most markets had drifted down on price, although the most locked down were flat as dealer where not present to change price.
- There is now some stabilisation on price, however, given the changes in the trade prices, shortage of fresh supply, and shortage in stock on dealer forecourts, dealers are missing out on opportunities to reprice and take profit opportunity.
- Dealers are being cautious, but opportunities exist for the fast-moving market aware dealer to review stock prices and increase them on fast moving stock where there is a shortage in the market.
- Dealer and vendors are right to be cautious. A resurgence in the virus could stall the market and whilst many segments and age categories of cars are in strong demand – others have significantly weakened.
- Dealers should be identifying using data to identify slow moving stock and using this market strength to ensure that it is cleared.
- Equally, now is the time to buy well. Ensure that your teams have the data to identify fast moving stock. Here it will be necessary to pay a little more (as you can charge more). But if this market is short lived, buying excess numbers of slow-moving stock at excessive prices will hurt when the downturn comes.
- Vendors too should review their remarketing stock and portfolios based on the new market rates of sale relative to levels of total market stock of any particular model. With many segments weaker as consumer preferences change, focussing on moving this weaker stock now will pay dividends.



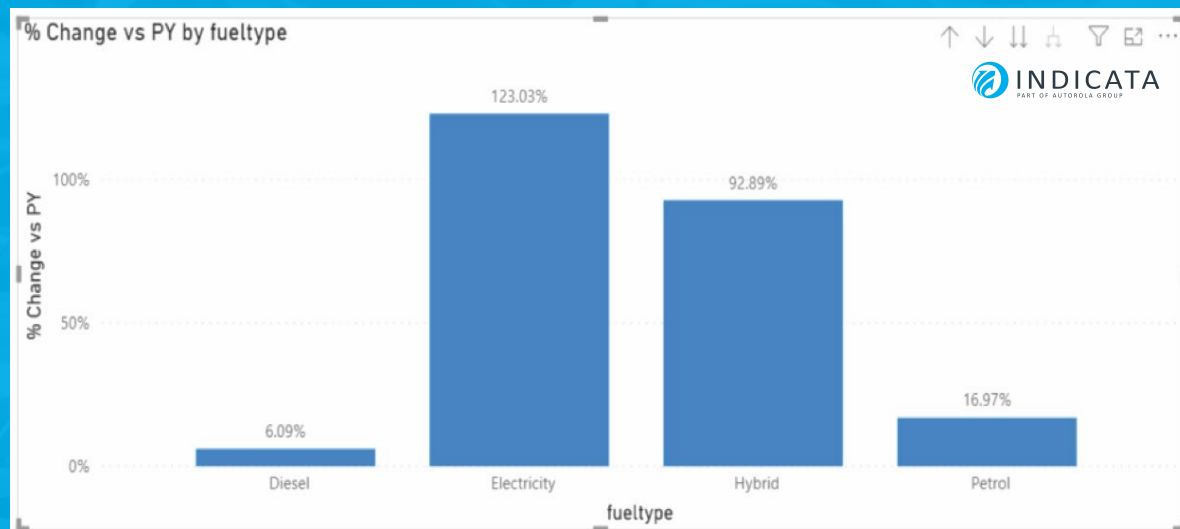
# European Markets

The recovery gathers pace – dealers miss upward price opportunities.

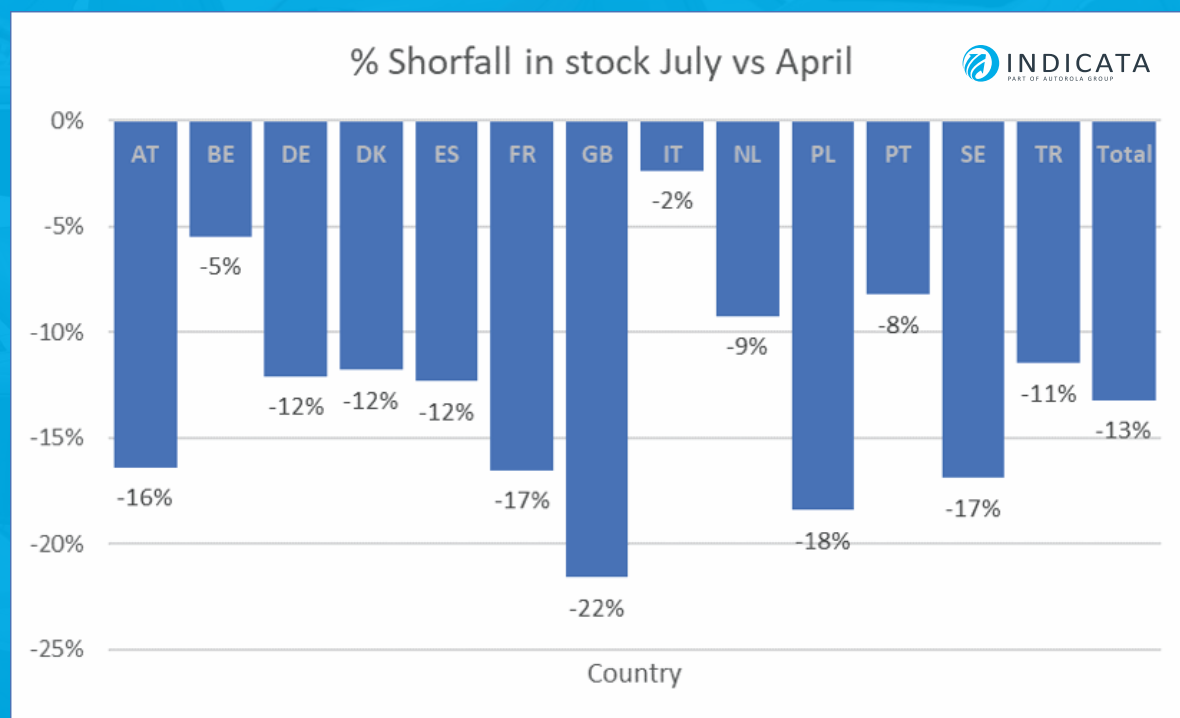


In our last report (May) we showed that, whilst recovering, the European Market was still 17.7% down year on year. All countries were on a positive trajectory. This is now reflected in our June figures that show the European used car market now 13.2% up year on year.





In addition, the progression from “dirty diesel” to cleaner powertrains continues with Electric and Hybrid vehicles up 123% and 92% respectively. Whilst diesel is now up year on year in volume at 6%, it runs behind the market with sales swapping in volume into petrol which is 17% up year on year.



However, the key factor in the market is the massive imbalance between supply and demand. In every market we see sales rates exceeding the number of fresh used cars coming on to the market. As a result, compared to levels at the start of April there is now a shortfall in European dealer stock by over 500,000 units which continues to grow alarmingly (in early June the shortfall was “only” 330,000).

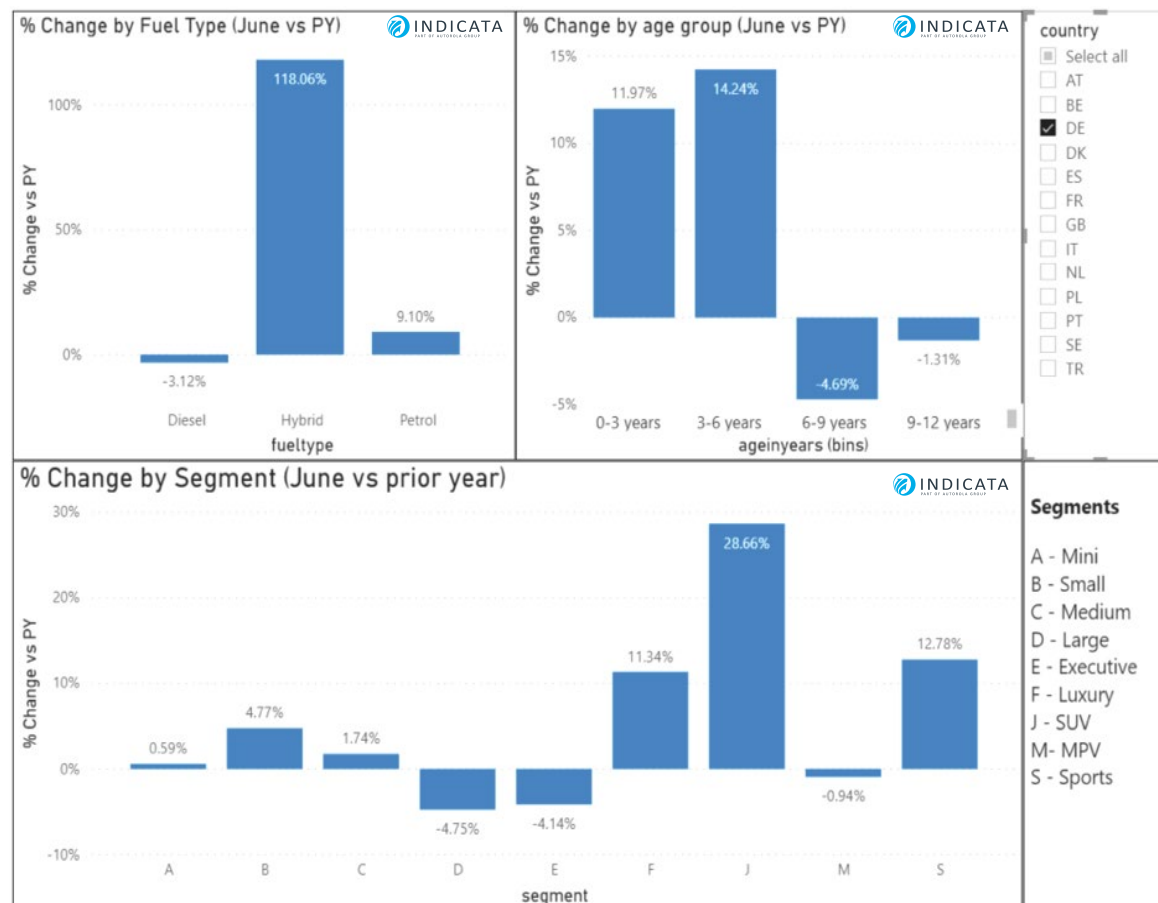
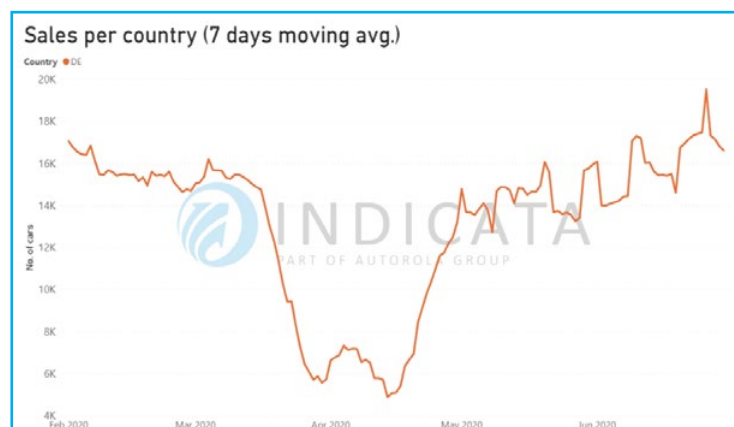
As our reports shows, what is more interesting is that whilst pricing is stabilising, dealers are not reacting to this opportunity quickly enough and increasing pricing accordingly.



# Germany Dealers miss out on profit opportunities.

4% down in May, Germany is now 8% up year on year showing that German dealers and consumers are growing in confidence yet maintaining their environmental stance that they had in May. There is a continued swap from Diesel into Petrol and environmental powertrains.

One expected trend in the post lockdown world was that new non-car owning consumers would flock to smaller older cars for first-time purchases to avoid the risk of infection from public transport. Whilst there is evidence for this in Italy and UK, the Germany environmental consumer is shunning older cars and focussing on newer sub 6-year old vehicles. In addition, rather than buying small cars, SUVs, Luxury and sports cars are the most popular.





# Germany

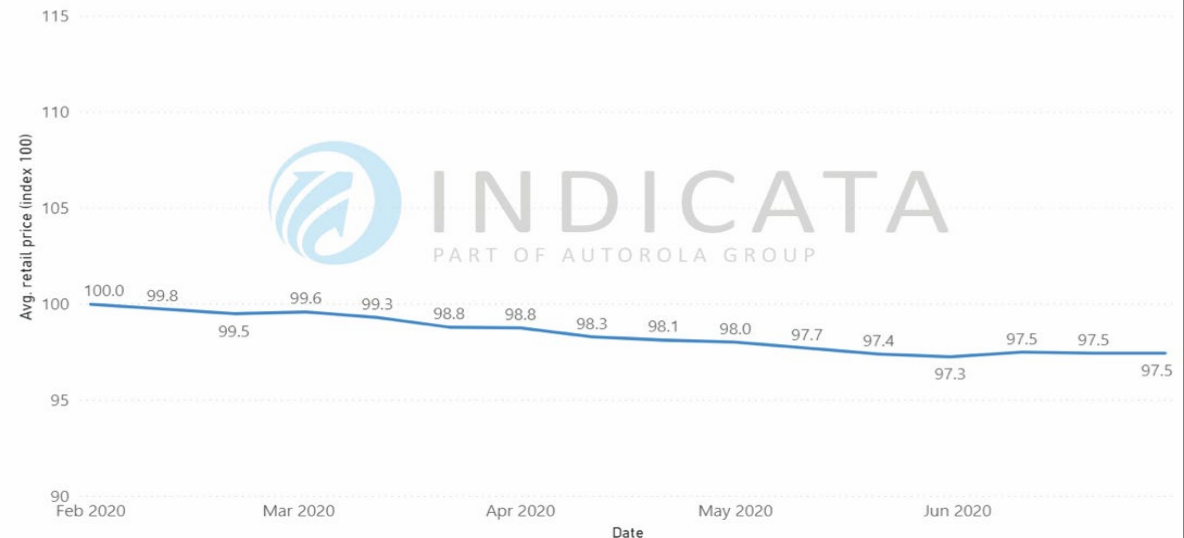
Whilst dealers were closed there was a general drift down in used car prices. However, since the main lockdown has been lifted, we are seeing that prices have now stabilised. That said, dealer pricing strategies are failing to react to the opportunities that the new market presents.

Sales at c16,000 a day are far exceeding supply of fresh stock c13,500 per day and the dealer's stock is short of c160,000 used cars compared to the start of April.

In the wholesale market we are seeing our sister auction company Autorola Marketplace's major vendors increase sales price by between 5-10% in the last few months. Conversion rates are increasing.

In a market where there is a shortage of stock, demand outstripping supply and rising wholesale prices, to only see flat retail prices suggests many dealers are missing out on significant profit opportunities

Retail price (weighted avg.) (index 100 = 2020-02-01)



Incoming cars per country (7 days moving avg.)





# Austria

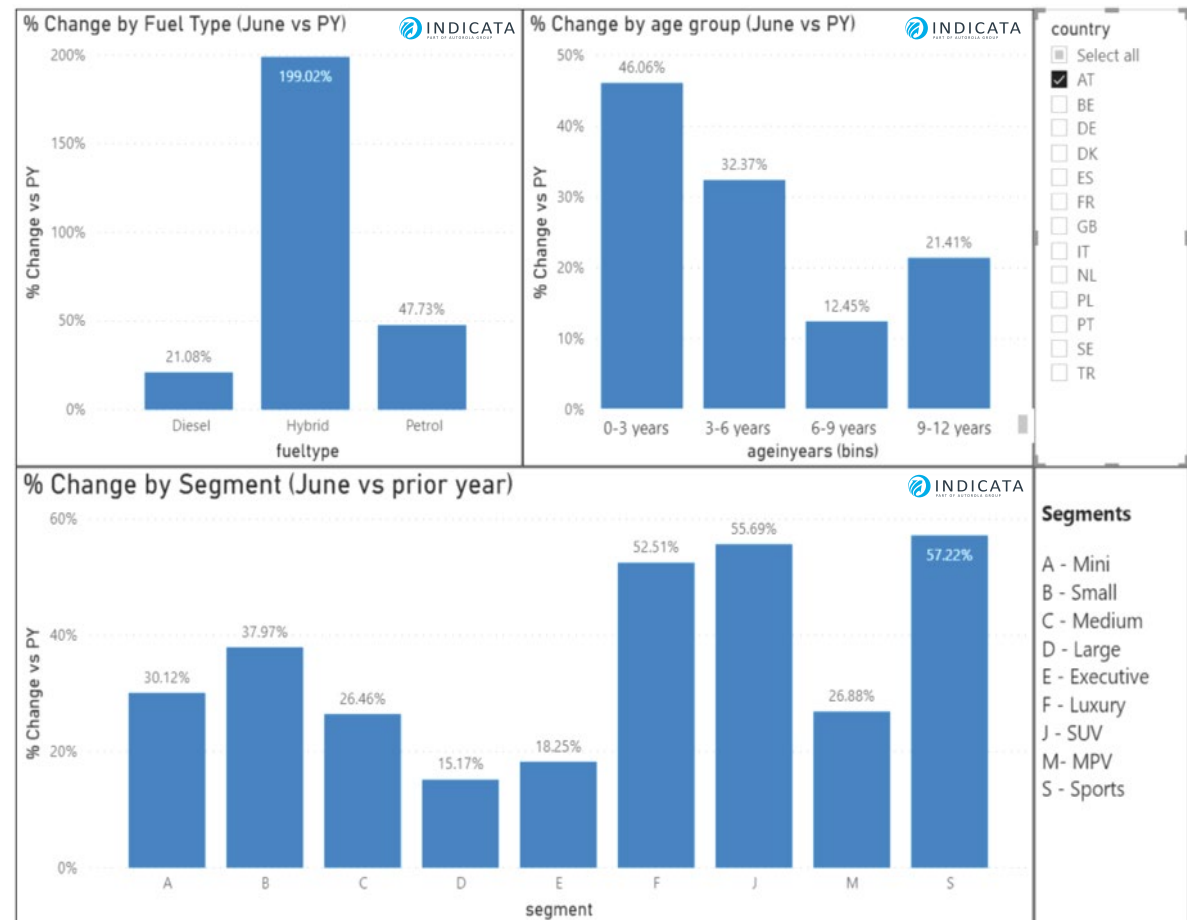
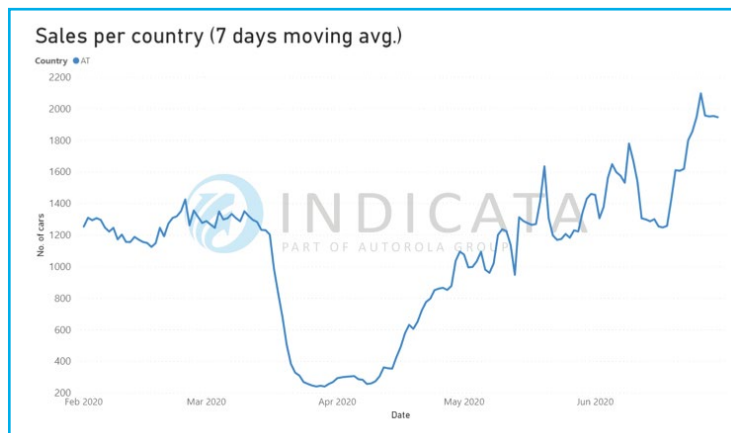
Dealers react too slowly to re-pricing opportunities.

Sales in Austria continue to grow very strongly since lockdown was lifted. Hitting the heights of 2,000 sales per day, the market is now up 35% year on year. There is no sign that this pace is slowing as pent-up demand is satisfied. Quite the opposite, the Austrian consumer appears to be gaining in confidence.

Equally that confidence is environmentally biased, with Hybrid sales increasing the strongest of any Western European country at 200% growth year on year.

Like Germany there is also a bias towards younger cars although this is not as pronounced.

Whilst all segments are up, Luxury, SUV and sports cars remain strongest.





# Austria

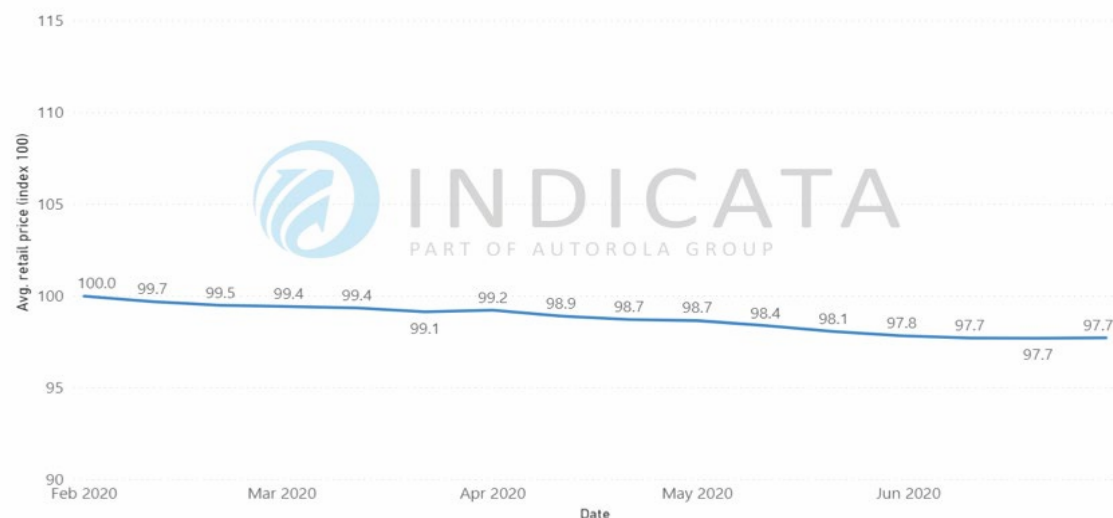
Whilst dealers were closed there was a general drift down in used car prices. However, since lockdown has been lifted, we are seeing that prices have now stabilised due to demand. That said, dealer pricing strategies are failing to react to the opportunities that the new market presents.

Sales at c2,000 a day are far exceeding supply of fresh stock c1,350 per day and Austrian dealer stock is down 16% since the start of April. This means that Austria is one of the most stock starved countries in Europe.

In the wholesale market we are seeing our sister company Autorola Marketplace's major vendors increase sales price by between 5-15% in the last few months.

In a market where there is a shortage of stock, demand outstripping supply significantly and rising wholesale prices to only see flat retail prices, suggest many dealers are missing out on significant profit opportunities.

Retail price (weighted avg.) (index 100 = 2020-02-01)



Incoming cars per country (7 days moving avg.)





# Italy

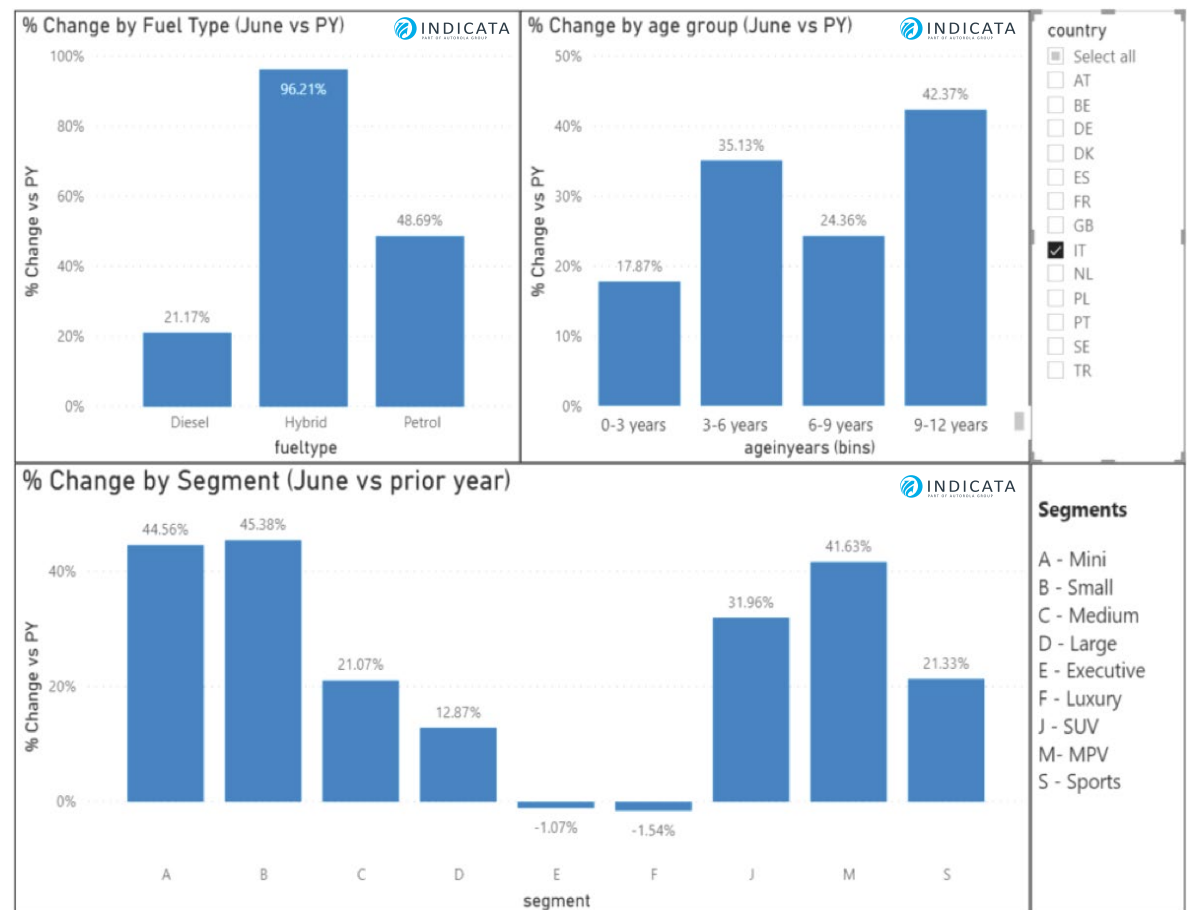
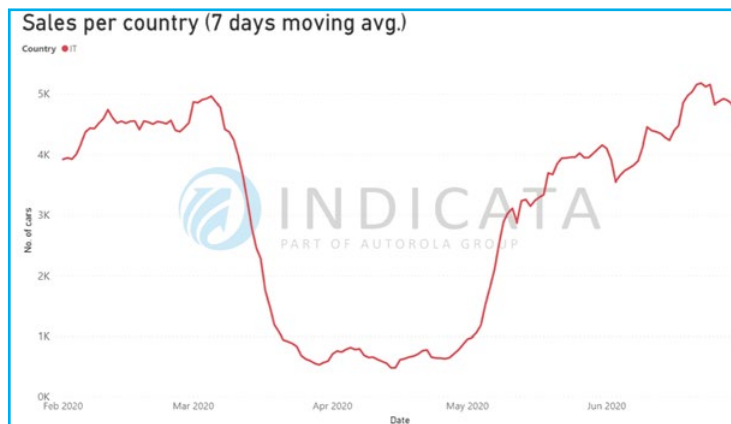
A staggered recovery with many upward re-pricing opportunities missed.

Italy had an initial bounce back in sales volumes, but not to pre-lockdown levels. Since then the consumer has grown in confidence with a strong upward trajectory over that last two months.

Italy's used car market was strong before lockdown, but now it is registering a 32% growth year-on-year.

One expected trend in the post lockdown world was that the non-car owning consumers would flock to older smaller cars as first-time purchases to avoid the risk of infection from public transport. Whilst the German environmental consumer is shunning older cars and focussing on newer sub 6-year-old vehicles, the Italian consumer is following this expected trend of smaller older cars.

That said, there is still demand in 3-year cars and the MPV, sports and SUV segments





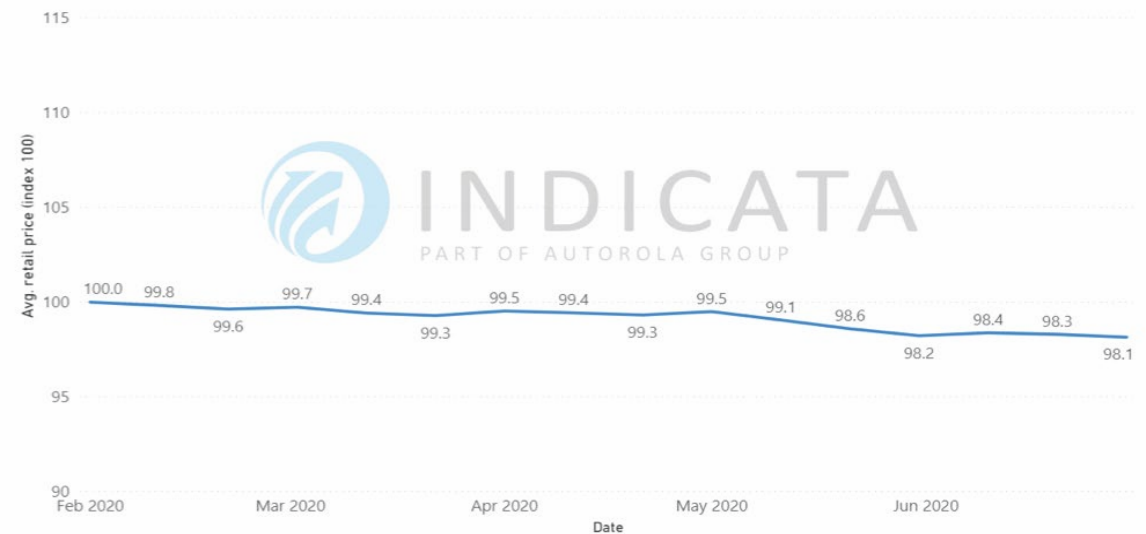
Whilst dealers were closed there was a general fall in used car prices. However, since lockdown have been lifted, we are seeing that prices have slowed but not completely stopped. It may seem surprising that pricing is failing to react to the opportunities that the new demand the market presents.

The issue is the balance of supply and demand. Sales at c4,500 a day are relatively well balanced against fresh supply per day and Italian dealer stock down is only down 2% since the start of April compared to a European market down 13%.

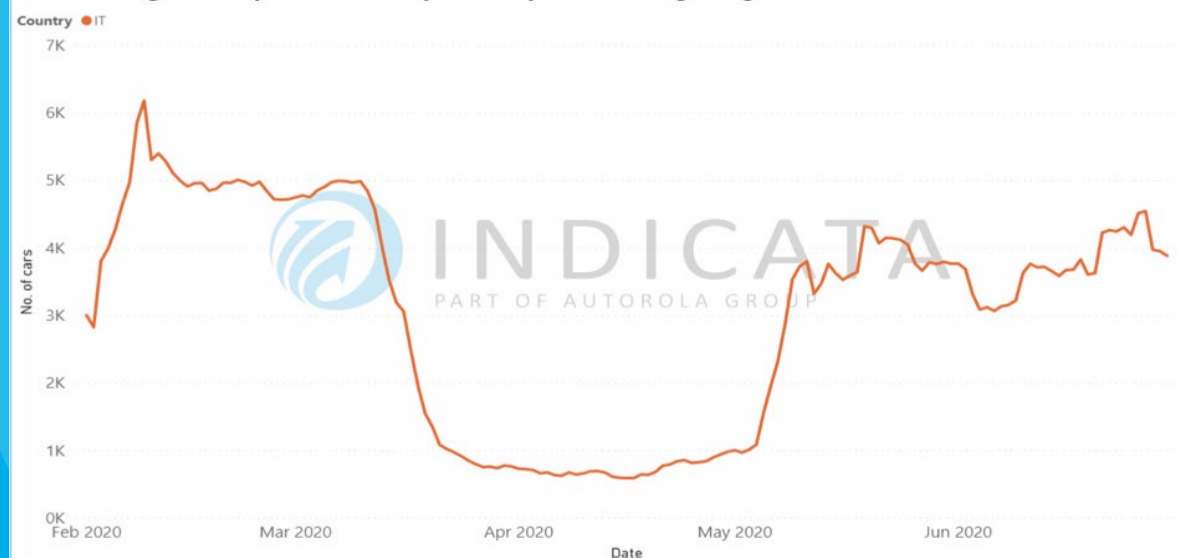
That said, in the wholesale market we are seeing our Autorola major vendors increase sales price by between 5-15% in the last few months.

With strong demand and rising wholesale prices, to only see a slowing of retail price declines suggests many dealers are missing out on significant opportunities to increase price on fast moving stock.

Retail price (weighted avg.) (index 100 = 2020-02-01)



Incoming cars per country (7 days moving avg.)







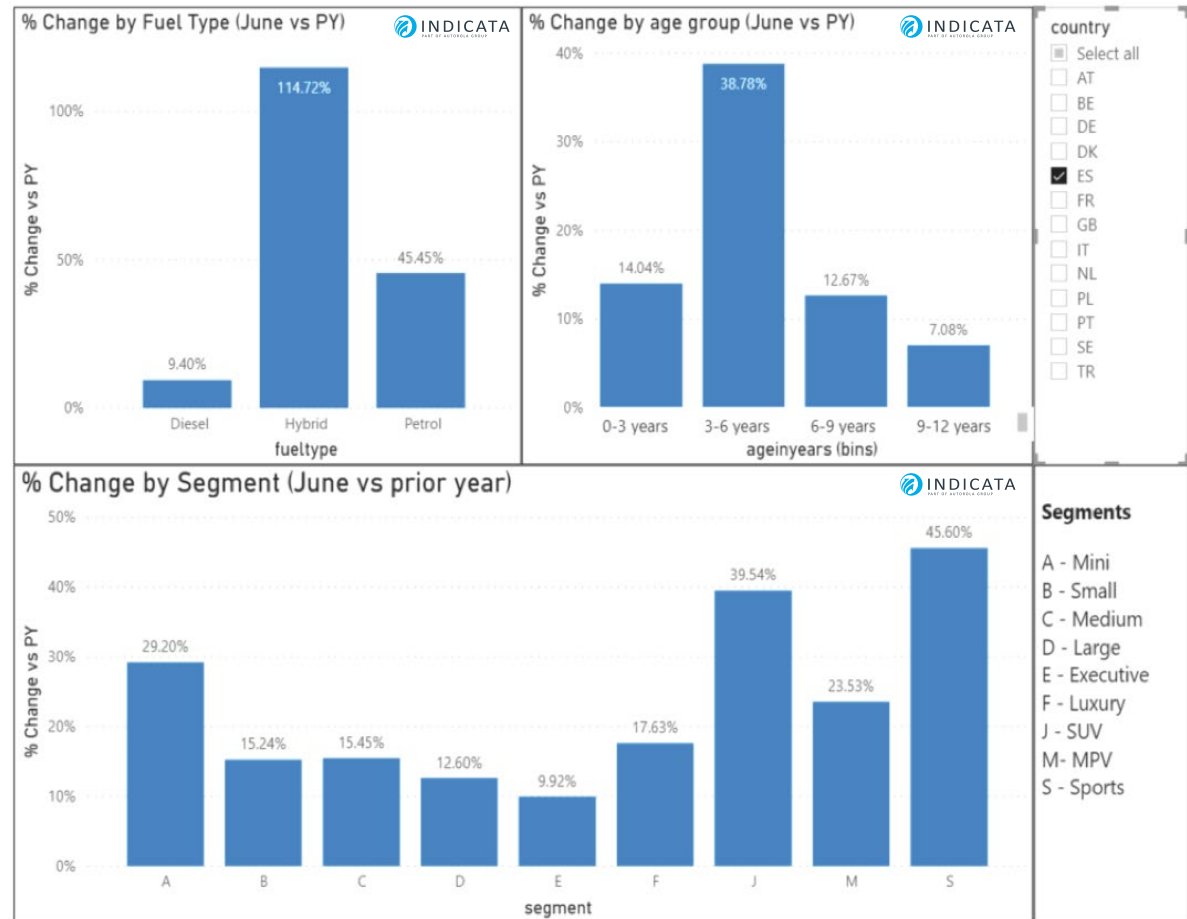
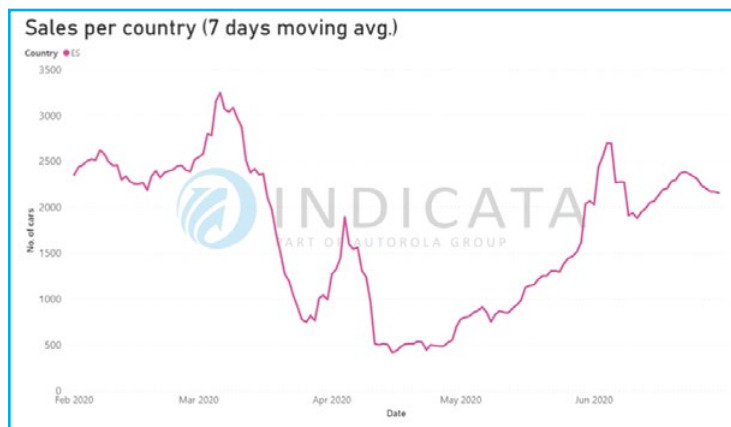
# Spain

**An initially slow recovery gains momentum, but dealers miss out on price increases.**

Running up to lockdown, Spain was enjoying a resurgent used car market. Given the severity of the impact of the virus on Spain, coupled with depth of the lockdown measures, it is unsurprising that Spain's recovery against pre-lockdown levels has looked slow.

However, that is comparing it to a strong base, and whilst still weaker than pre-lockdown levels, Spain's used car market is now c24% up against prior year.

The market is experiencing a significant shift away from Diesel product with Hybrid up 115% and Petrol up 45%. The 3-6-year segment is remarkably strong at 39% up with older cars showing a particular weakness in comparison. Strength resides in the A-Mini segment as well as the SUV, MPV and sports segments.



# Spain

Whilst dealers were closed there was a general drift down in used car prices. However, at the start of June it appeared that prices were stabilising due to demand. Worryingly, there are signs that this is not the case and prices are beginning to move down again.

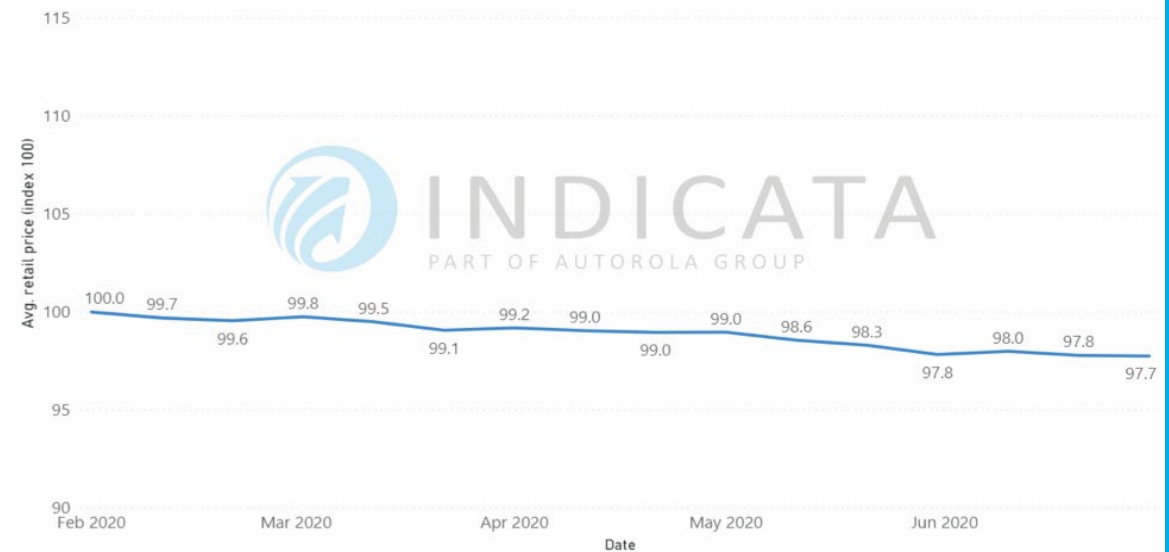
Dealer pricing strategies appear to be failing to react to the opportunities that the new market presents.

Sales at c2,000 a day are far exceeding supply of fresh stock at c1,600 per day and total Spanish dealer stock down 12% since the start of April. The forecourts are now short of c20,000 used cars.

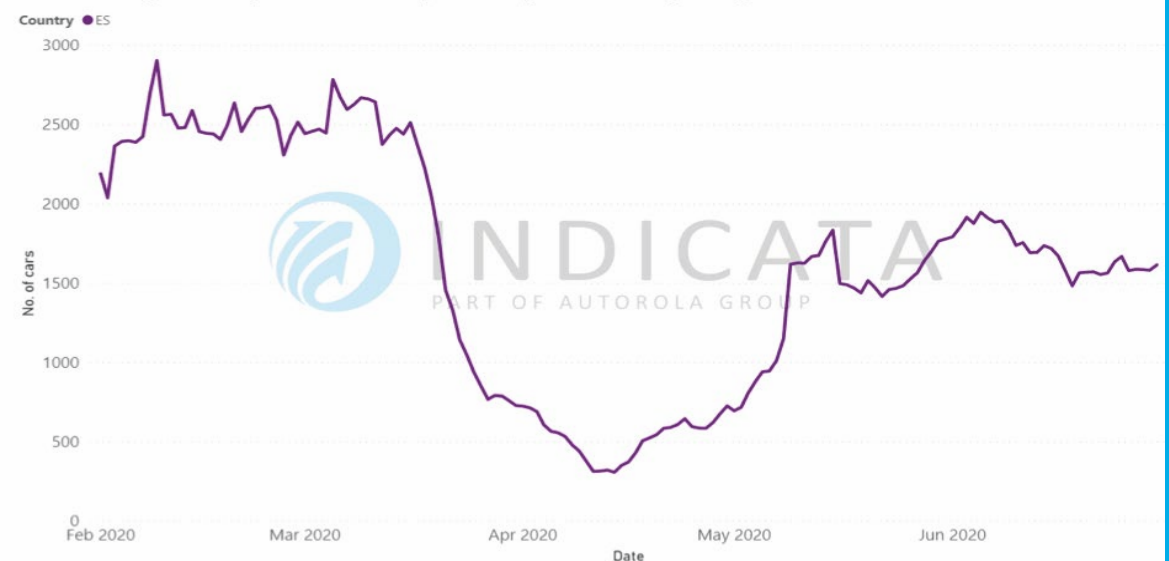
In the wholesale market we are seeing our sister company Autorola Marketplace's major vendors increase sales price by between 5-15% in the last few months.

In a market where there is a shortage of stock, demand outstripping supply significantly and rising wholesale prices to see just a flattening or indeed a resumption of downward drifting retail prices suggests many dealers are missing out on significant profit opportunities.

Retail price (weighted avg.) (index 100 = 2020-02-01)



Incoming cars per country (7 days moving avg.)



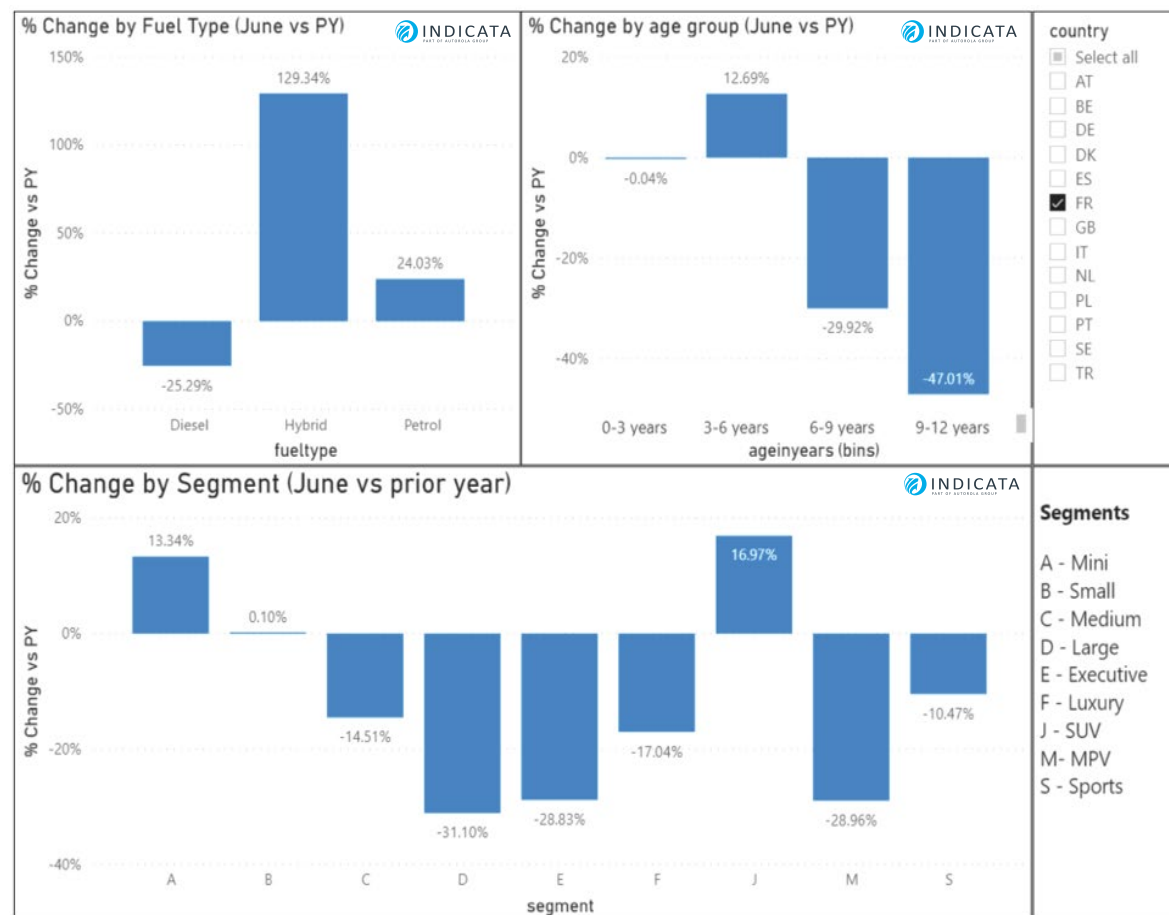
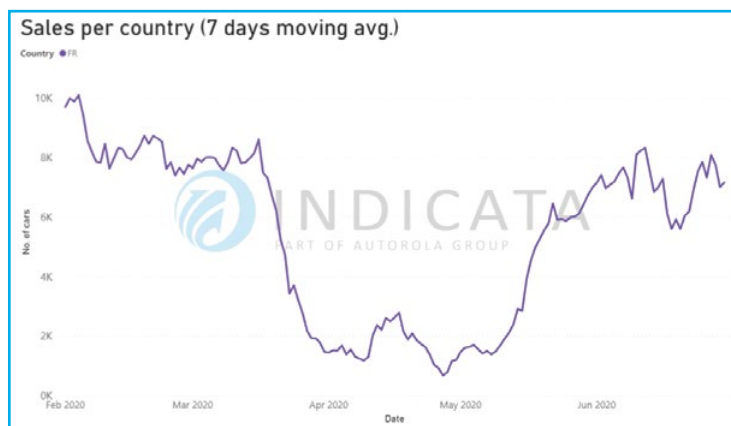
# France

## Late out of lockdown and slowest to recover – Opportunities to increase prices exist.

The French dealer was later than most to open and volumes have not fully recovered to pre-lockdown levels. That said, the pre-lockdown market was strong so in June the market is only c6% down year on year.

Diesel is the major loser in the French market, down a massive 25%, whilst Hybrid gains ground at 129% up.

The French love-affair with small cars continues, only surpassed by SUV's market strength. There is a concerning weakness in the Large and Executive segments.





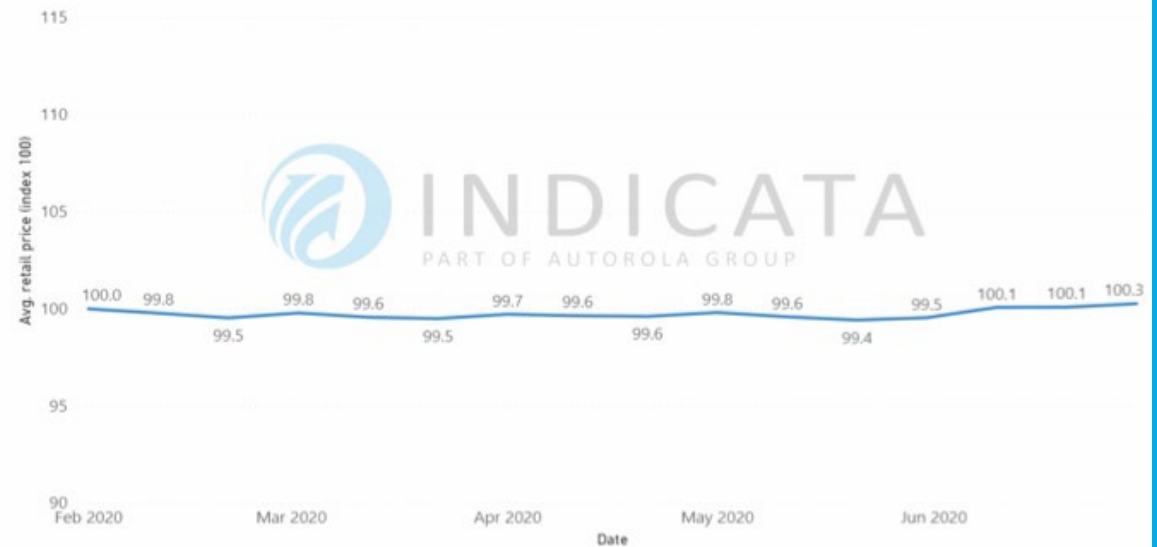
# France

Pricing has remained stable over the crisis and indeed there are some very small signs of increases, particularly in Petrol.

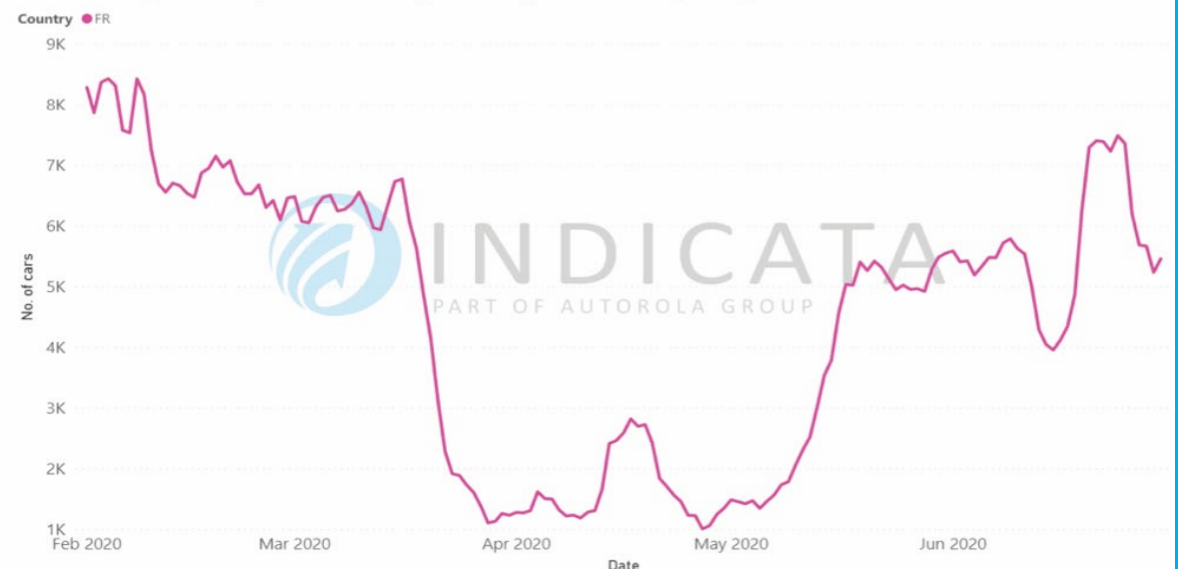
However, the volume of fresh incoming stock at c5,100 per day is well below the c 7,000 per day sales run rate and this imbalance has now caused a c55,000 shortfall in forecourt stock since the start of April.

So, whilst the French dealer is holding prices, such an imbalance between supply and demand coupled with a shortfall of stock suggests that opportunities to increase price are being missed.

Retail price (weighted avg.) (index 100 = 2020-02-01)



Incoming cars per country (7 days moving avg.)



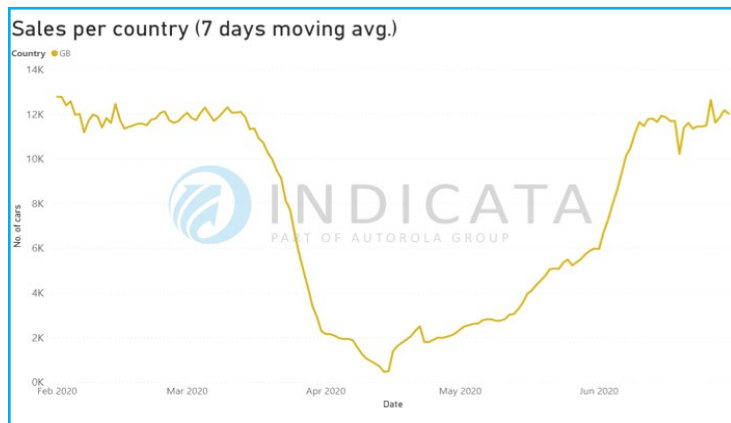


# United Kingdom

## Why is price not responding faster?

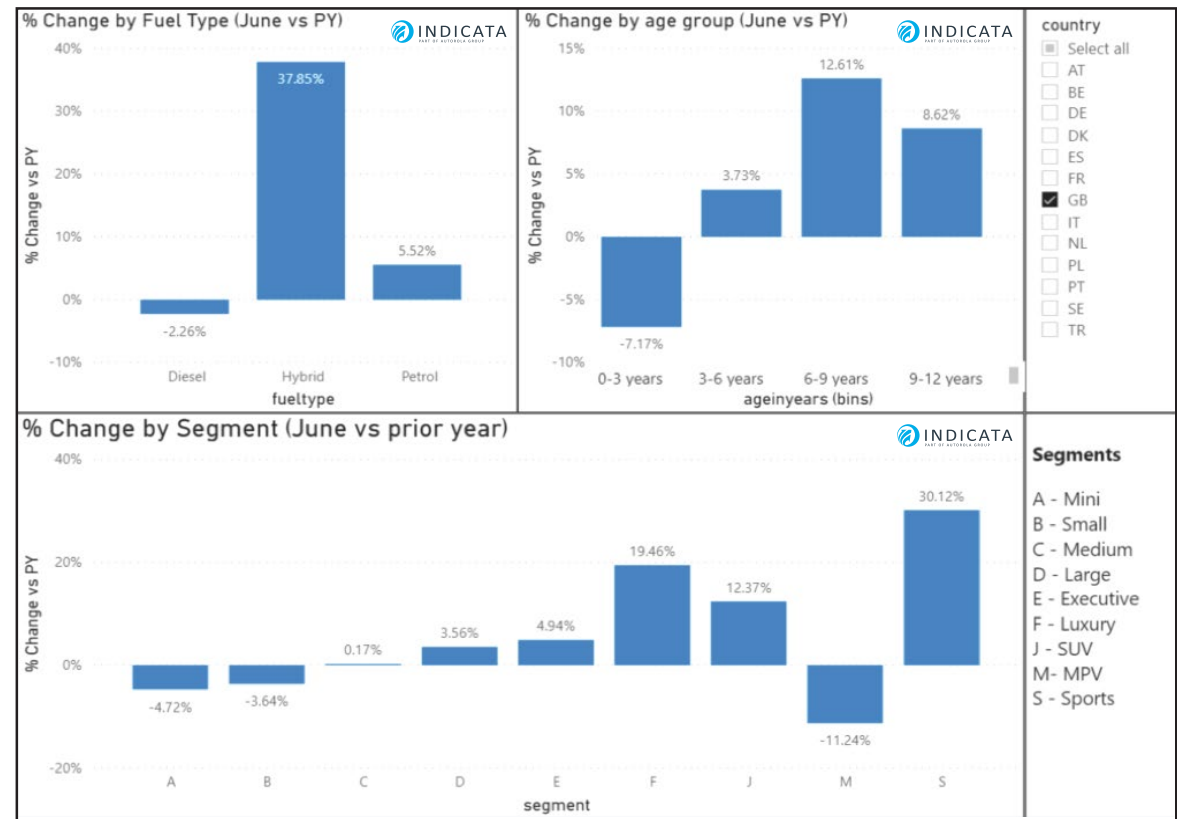
The governments in UK has staggered the opening of its dealer networks, England on 1st June, Northern Ireland on the 8th June, Wales on 22th June and Scotland waiting until the 28th June. Thus, the immediate recovery of the UK market, back to both pre-lockdown levels and up 3.7% for the whole of June vs prior year, is remarkable.

One expected trend in the post lockdown world was that new non-car owning consumers would flock to smaller older cars as first-time purchases to avoid the risk of infection from public transport. Whilst the German environmental consumer is shunning older cars and focussing on newer sub 6-year-old vehicles, the UK consumer is partially following and looking to buy older cars. That said, it's not the smaller segments that are strong, it is Luxury, SUV and Sports cars that lead the way. Mini and Small cars are down 4.7% and 3.6% respectively.



The 7% reduction in the 0-3-year-old sector is primarily driven by the sub 1-year old market (down 22%). We believe this reduction is supply (not demand) driven with a lack of OEM pre-registrations, slowing of demo cycles and logistical challenges for OEM's and rentals companies to bring buyback and risk cars to market.

It suggests an opportunity for dealers and vendors to hold nerve and price upwardly even though volumes are down.





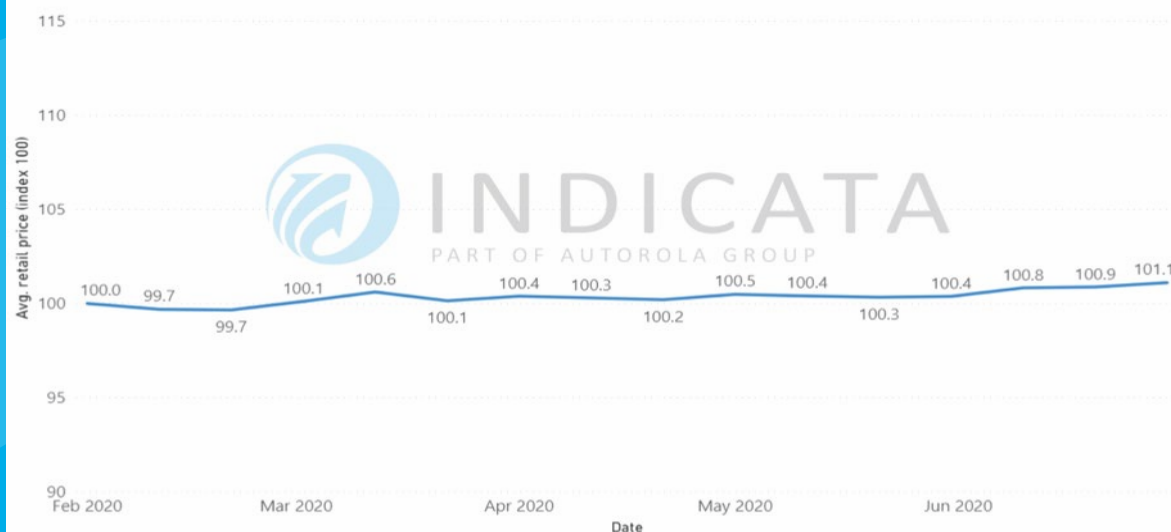
# United Kingdom

UK pricing, which had remained stable over lockdown, is showing some signs of recovery. However, given the state of the market these increases are surprisingly slow. Yes, the strong demand in Luxury cars has given a 2.2% price boost over June (the fastest growing sector), but this is now at just 99.7% of February levels. Petrol has also increased to 102% of February levels, but at just 1% up since 1st June there has not been a material step change, despite the demand.

The supply demand imbalance should be driving price upwards far faster than it is.

Since dealers opened, sales at just under 12,000 per day are materially in excess of the 10,000 per day restocking rate. And this imbalance has been prevalent all the way through lockdown, where dealers sold online with no opportunities to replenish stock. The UK dealer market is down some 125,000 advertised units against April levels. The market is 70,000 down against 1st March levels when dealers had cleared their forecourts ready for the new car part-exchanges to arrive.

Retail price (weighted avg.) (index 100 = 2020-02-01)



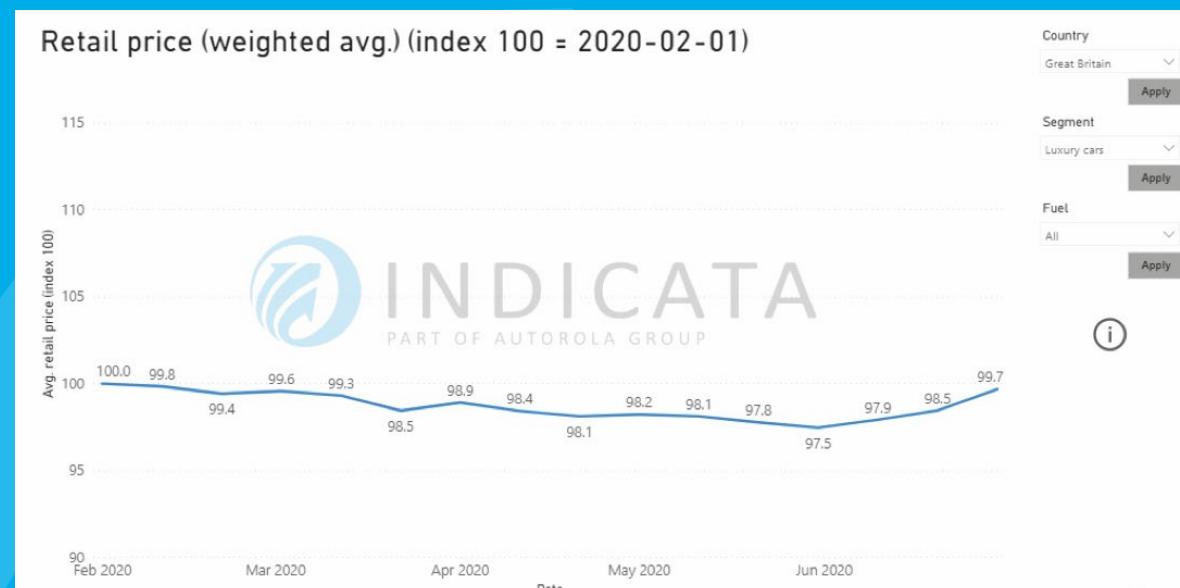
Incoming cars per country (7 days moving avg.)







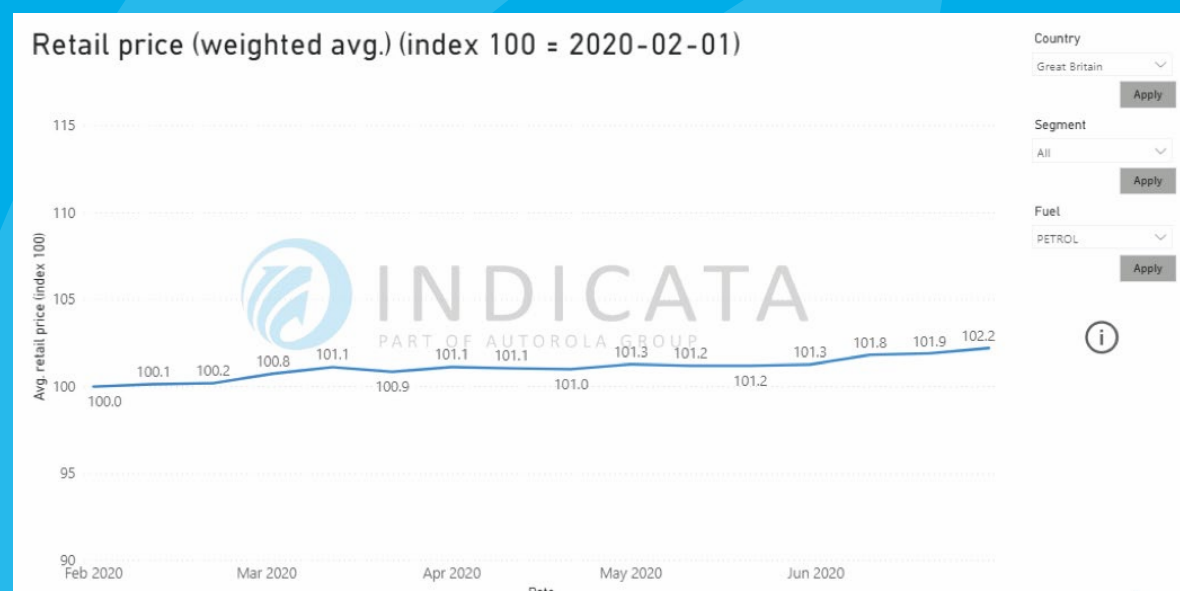
# United Kingdom



In the wholesale market, supply is weak as the traditional physical auction companies struggle. With physical actions closed and auction sites only able to hold a few days stock, much stock resides at compounds and airfields. Whilst these traditional players attempt to transition to a 100% online strategy, the overflow compounds are not set up logistically to allow a strong flow of fresh stock to hit the market.

In a market where there is a shortage of stock, demand outstripping supply significantly and rising wholesale prices to only see a resumption of downward drifting retail prices suggests many dealers are missing out on significant profit opportunities and not being brave in their repricing actions.

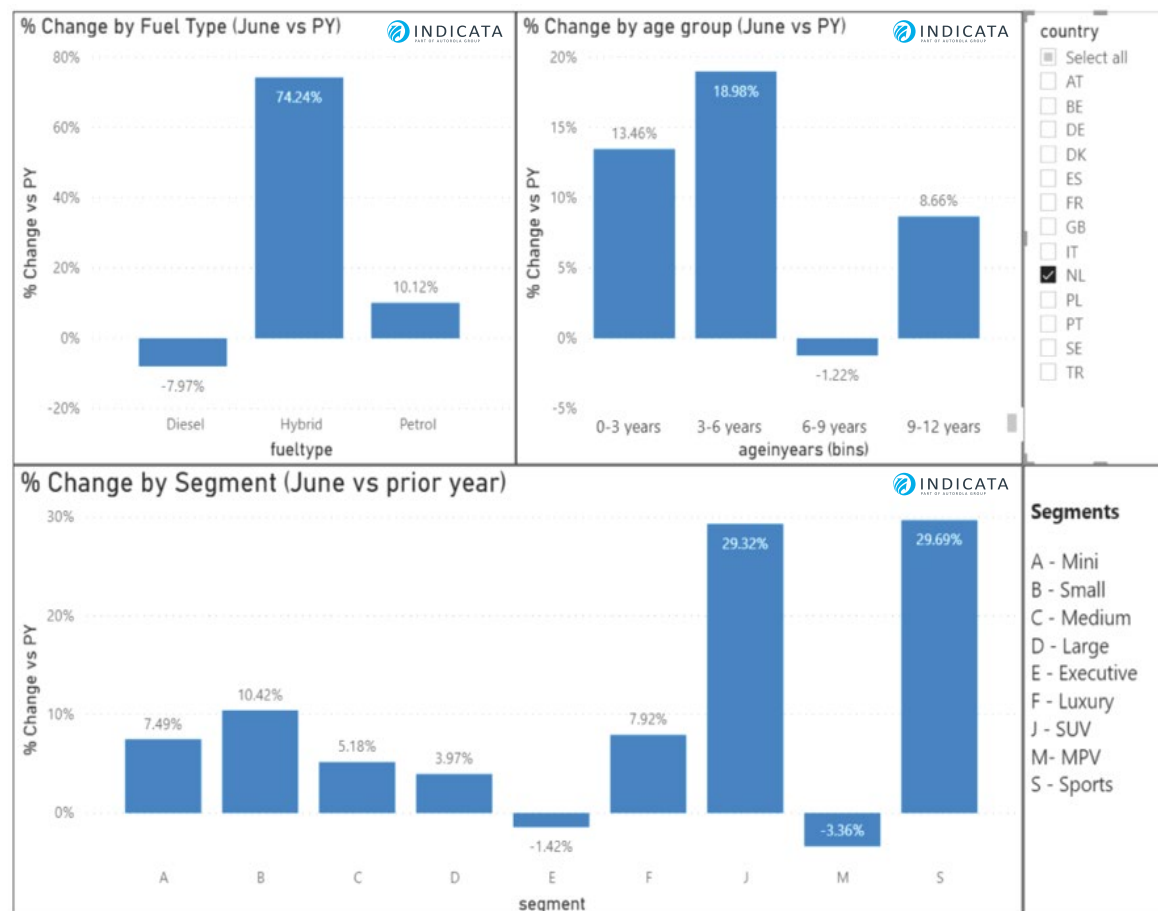
Once the demand of Scotland and Wales comes fully online, the supply demand ratio will worsen with stock becoming even more scarce. The evidence from Europe, where dealers opened up to 40 days before England (and 70 days before Scotland), is that post lockdown demand keeps strengthening, supply tightens and wholesale price continues to increase.



The Dutch market was one of the least affected by Covid-19 only dropping to 60% of pre-lockdown levels. Since then not only has it recovered, it is now 9.6% above prior year levels.

The diesel weakness continues with a significant shift into Hybrid and Petrol. Overall strength resides in younger cars (sub 6-years old).

Whilst there is strength in smaller cars, it is the SUV and sports car sectors that shows the most growth.





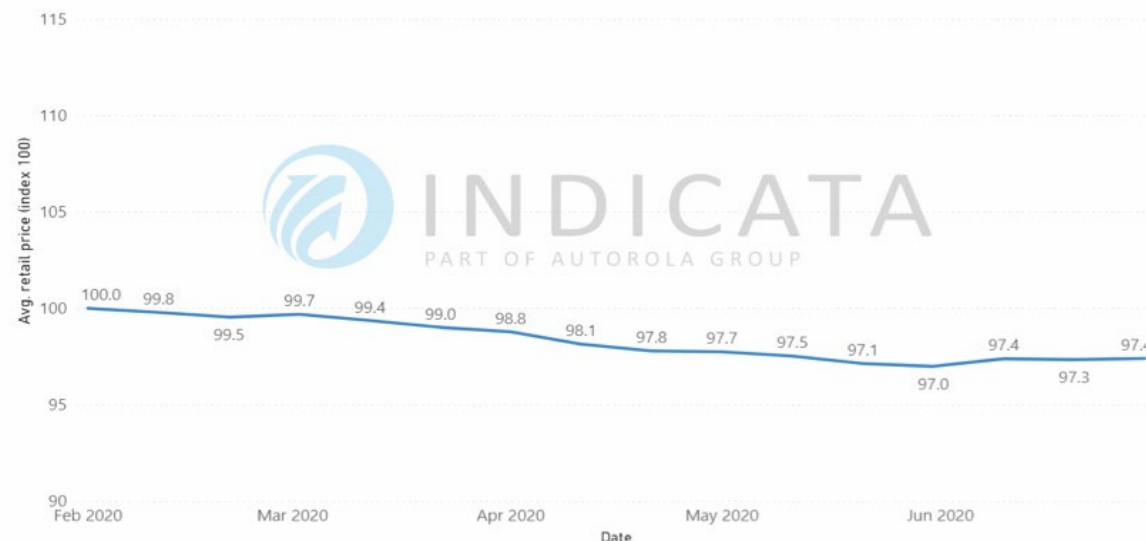
# Netherlands

Market pricing had been on a constant drift downwards since COVID-19 impacted the market, but now that we see the market exceed pre lockdown levels and up year-on-year, there is a sign that stability is returning to pricing.

That said, it is surprising that there are no material price increases coming into the market, despite the imbalance between supply and demand. Sales have peaked at 4,500 per day, yet fresh stock has only arrived at c3,600 – 3,800 per day. The market stock is now 9% below April levels and short some 33,000 units.

In a market where there is a shortage of stock, demand outstripping supply significantly and rising wholesale prices to only see a flattening of prices, suggest many dealers are missing out on significant profit opportunities and not being brave in their repricing actions.

Retail price (weighted avg.) (index 100 = 2020-02-01)



Incoming cars per country (7 days moving avg.)



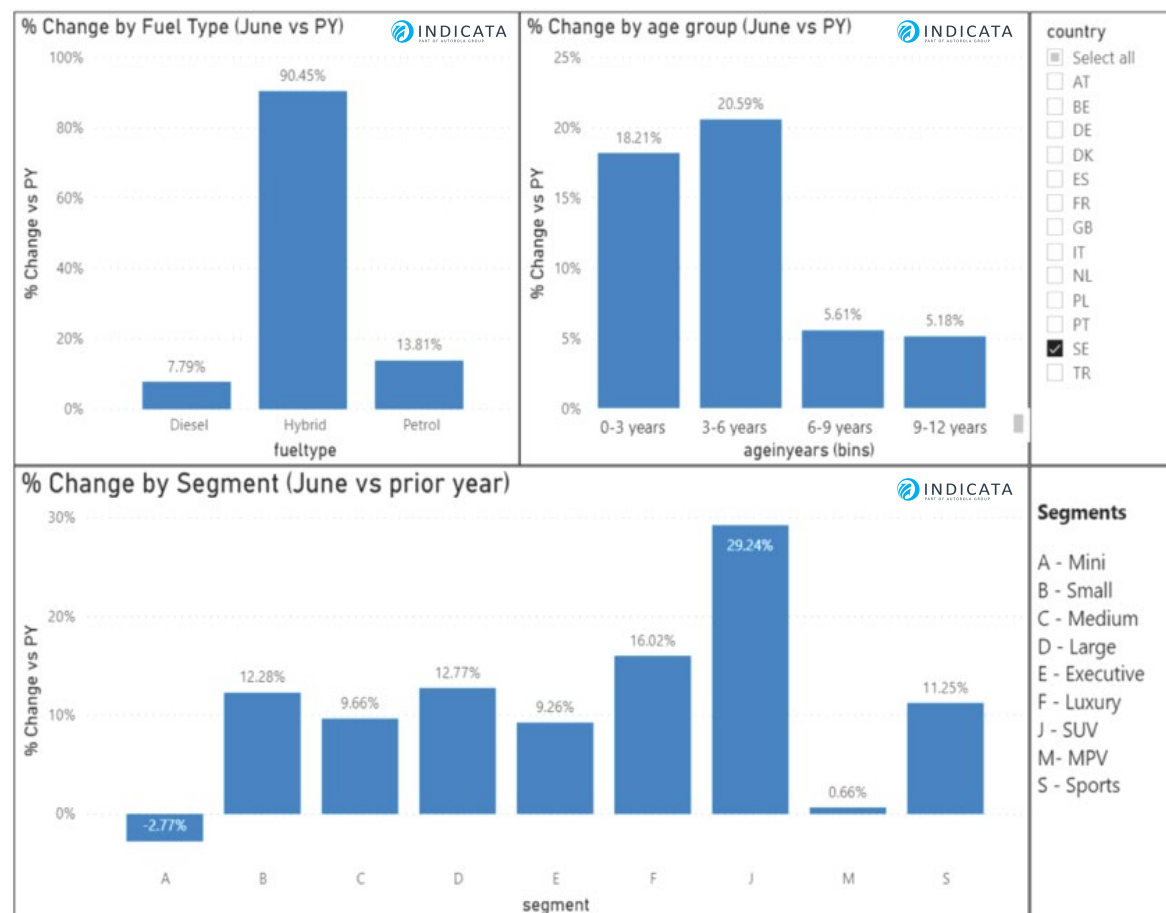
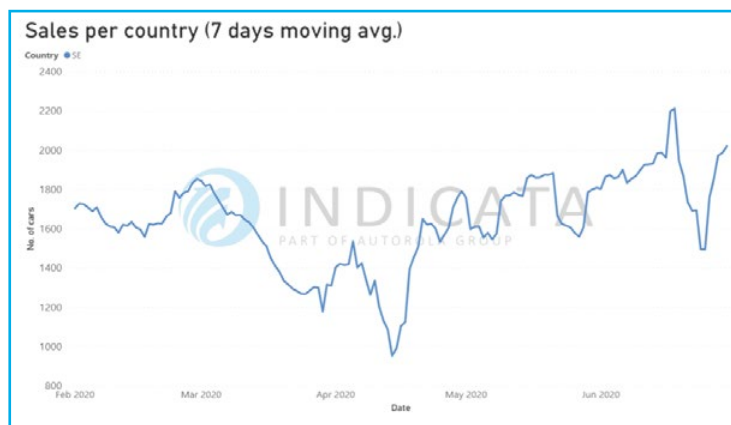


The Swedish market was one of the least affected markets over the March and April periods only going to 80% of pre COVID-19 levels.

Since then, and despite ongoing growth in virus cases, the market has not only recovered, but is now 16% up year on year.

With a strong switch to Petrol and Hybrid powertrains, the Swedish consumer is demanding younger more environmental used cars.

The small car and MPV sectors are surprisingly weak, however there is demand in almost all the other car segments particularly SUV.





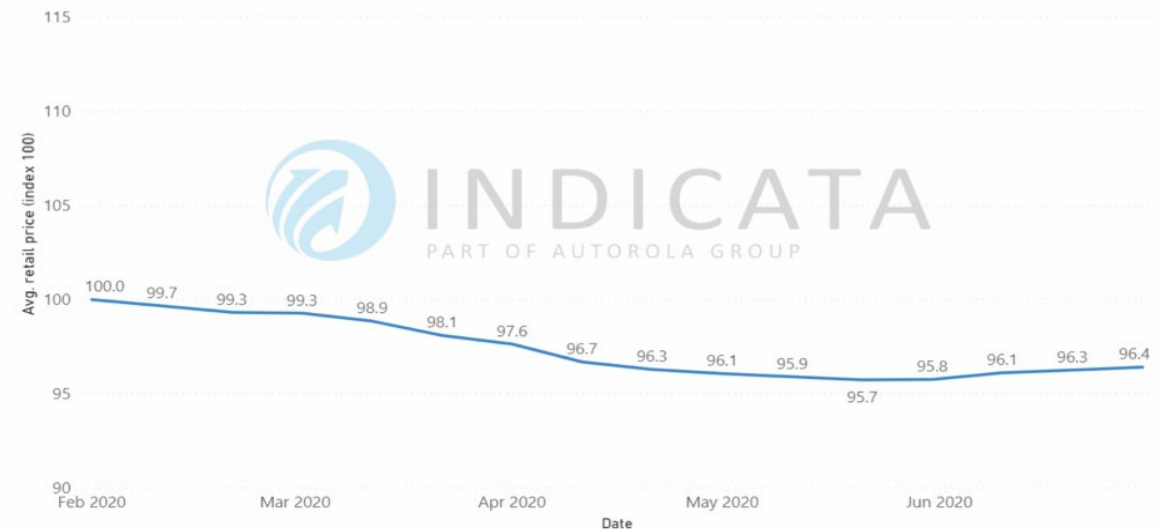
Relative to other markets, Sweden's pricing had been significantly weak, dropping down by 4.3% since February. This was surprising given as whilst there was consumer uncertainty, the market had the strongest demand of all markets in Europe.

Since June we see stabilisation and indeed small increases, yet the market has significant imbalances that mean that pricing should in no way be so low.

Current demand levels at 1,900 sales per day way exceed the rate that stock is being replenished (averaging c1,500 per day).

The net result is the market now has 17% less cars being advertised than at the start of April.

In a market where there is a shortage of stock, demand outstripping supply significantly and rising wholesale prices, to see prices materially lower than February levels means that many dealers are missing out on significant profit opportunities and not being brave in their repricing actions.

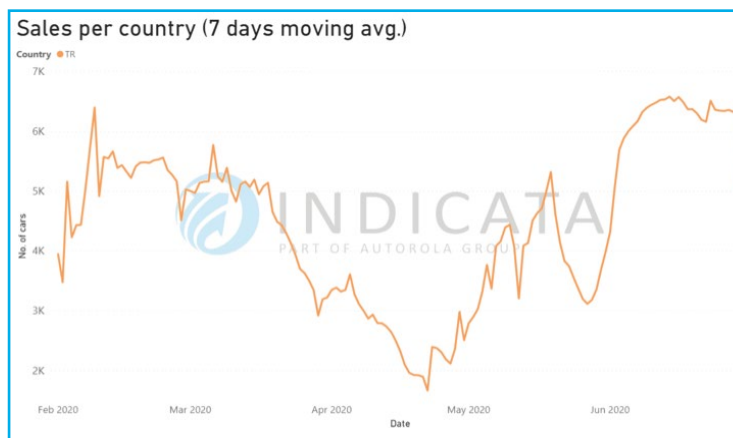


Turkey's remarkable used car journey continues. Dropping to 60% of pre-lockdown levels over April and May, Turkey's volumes have bounced back not only to above pre-lockdown levels but are 76% above prior year, as pent up demand sucks cars out of the market.

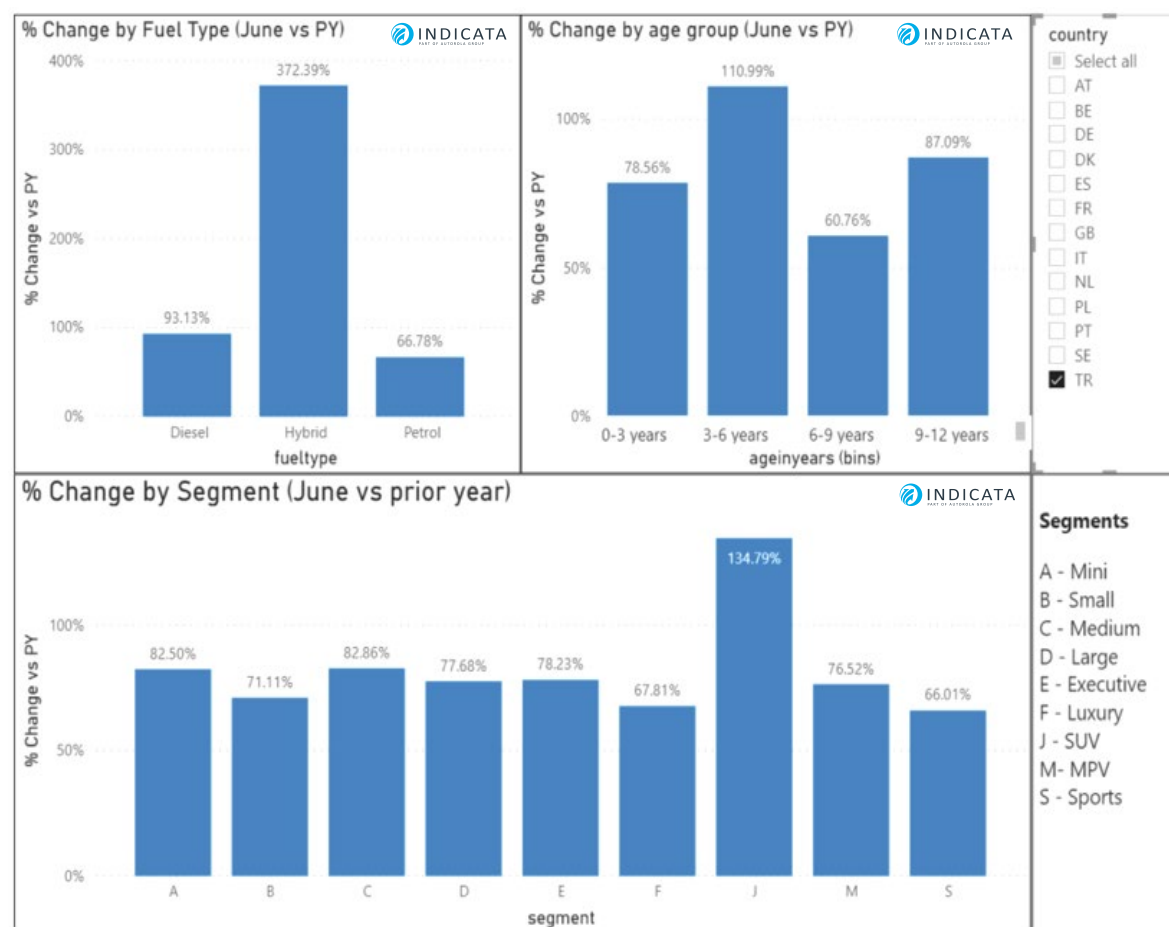
Whilst the Hybrid market is 372% up, this is of a very low base of c200 units. It is in the Diesel sector that Turkey does not follow the current European norm. By far the largest fuel type in Turkey (more than twice the size of Petrol), the Diesel market is some 93% up compared to a Petrol car market only 66% up.

The Turkish consumer is not fully following the European environmental shift. This is potentially a supply issue, however, not a demand one.

Equally, it looks like the consumer is also not choosy over which model or age category to buy with all sectors and ages strong.

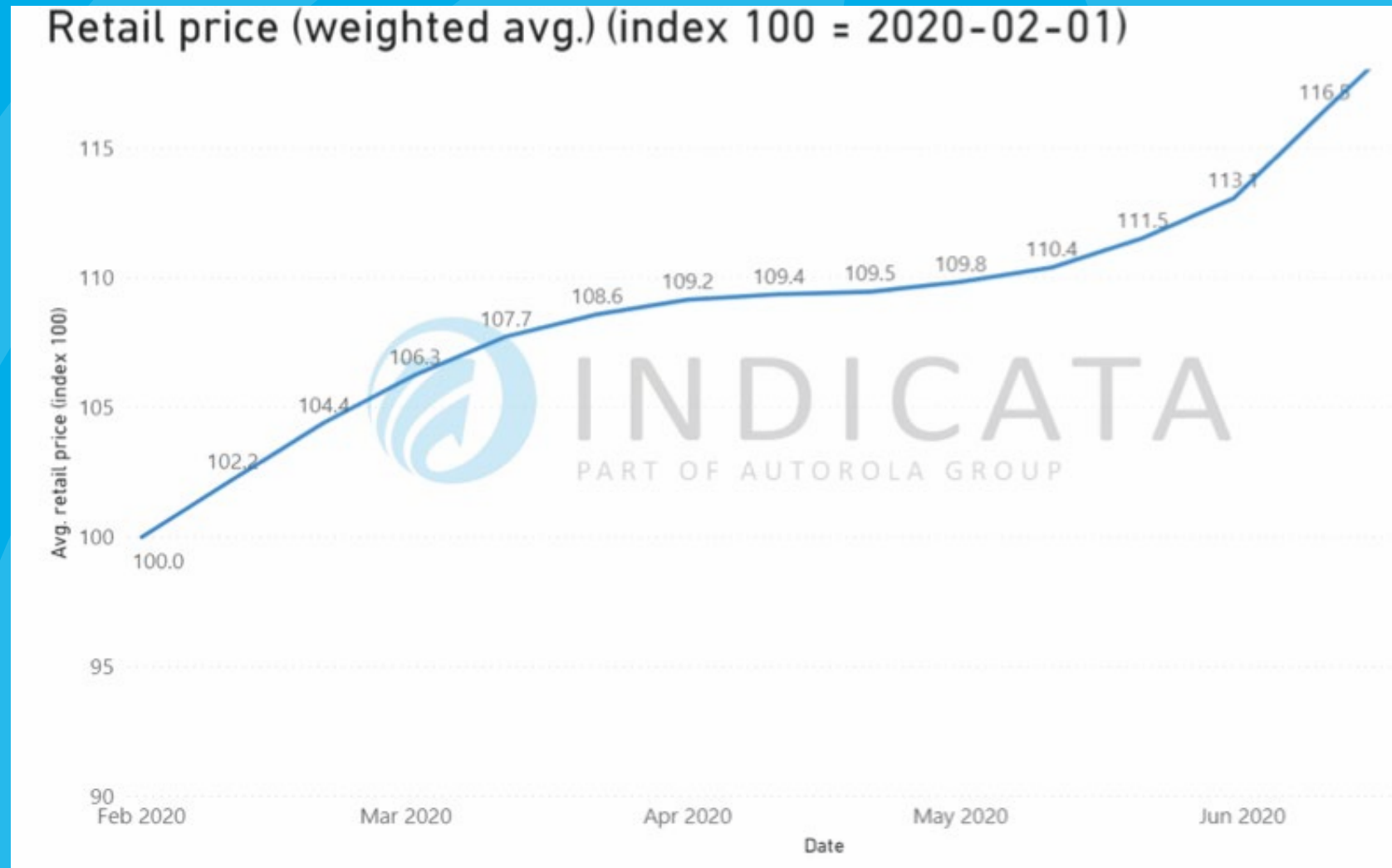


Fundamentally this is a market which is back to being 100% being driven by lack of supply of new cars (which collapsed with exchange rate issues). Starved of new cars, buyers see used cars as a safe asset with prices now back on a growth track following a short plateau at the depth of the lockdowns.



# Turkey

Fundamentally this is a market which is back to being 100% being driven by lack of supply of new cars (which collapsed with exchange rate issues). Buyers see used cars as a safe asset with rising prices now back on a growth track following a short plateau at the depth of the lockdowns.







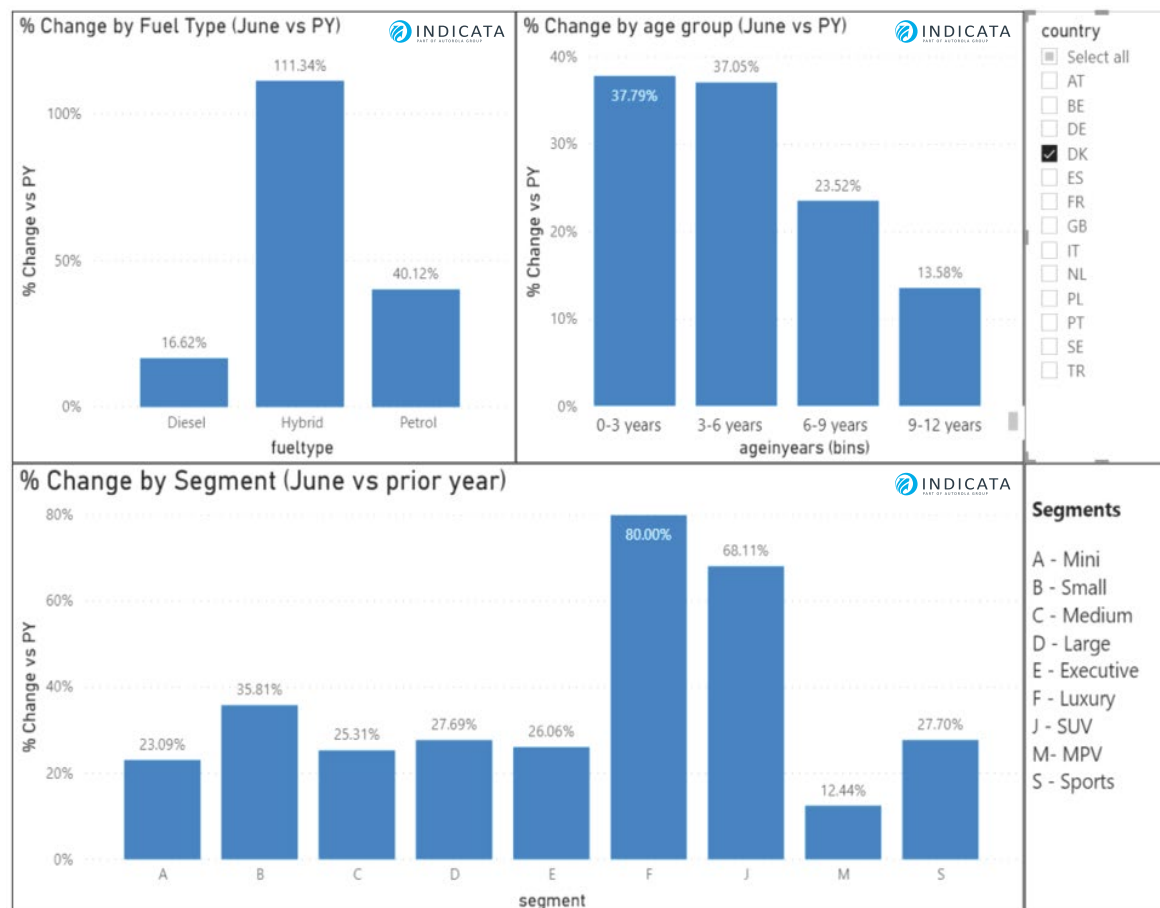
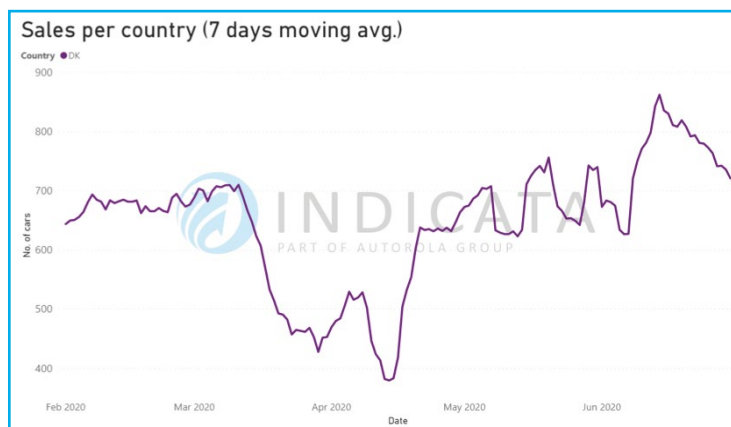
# Denmark

**Strong demand yet dealers miss repricing and profit opportunities.**

The Danish market, like the Swedish and Dutch markets, had also remained strong over the lockdown period. When lockdown was raised, it also made a swift recovery. This recovery now continues with June 31.6% ahead of last year.

As with many countries, there is a significant switch to environmental cars at the expense of Diesel, and the consumer opting for younger not older product.

All segments are up, but the Luxury and SUV markets are the strongest.



# Denmark

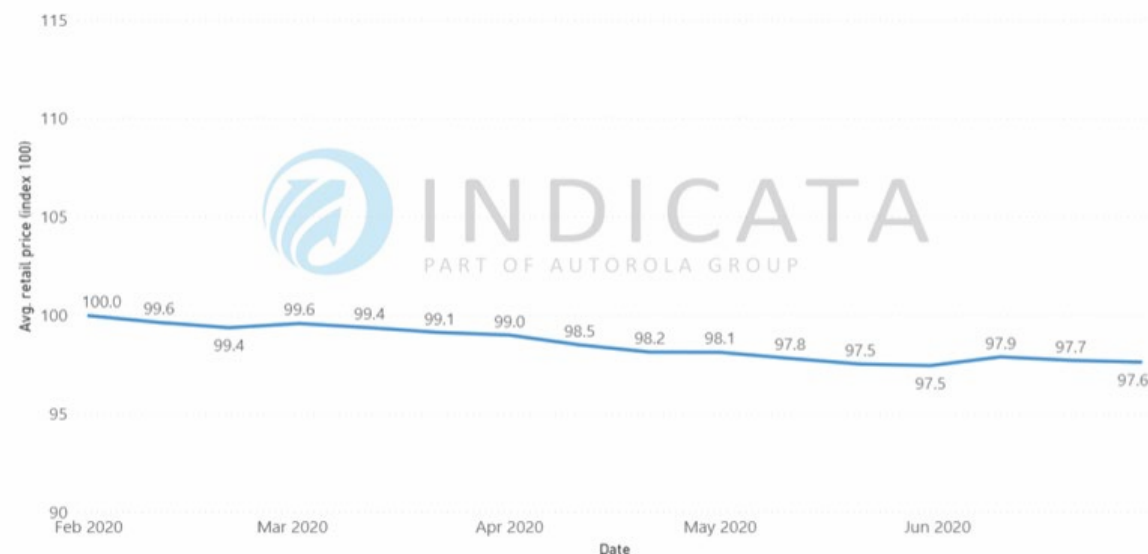
Despite the strength of the market over lockdown, prices did drift downwards. More surprising is that since lockdown has lifted and demand has exceeded last year, prices have only plateaued.

Indeed, demand has outstripped supply with dealer stocks dropping some 12% since April.

Equally since the depths of the lockdown our sister auction company has seen auction prices increase by 10% and conversion rates strengthen, yet there has been minimal response in retail pricing.

Overall, dealers are missing out on many incremental profit opportunities by not reacting on price in a market that is rapidly becoming a seller market.

Retail price (weighted avg.) (index 100 = 2020-02-01)



Incoming cars per country (7 days moving avg.)





# Portugal

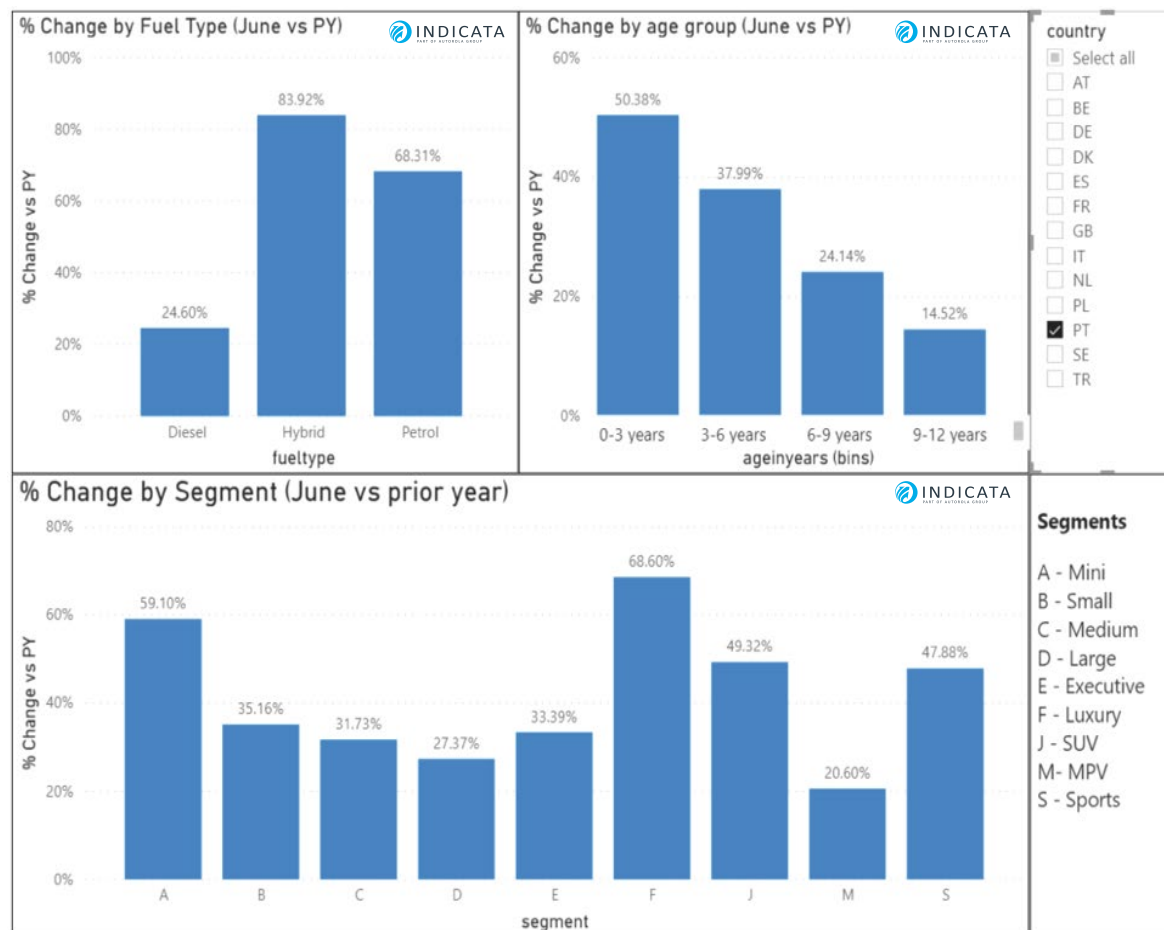
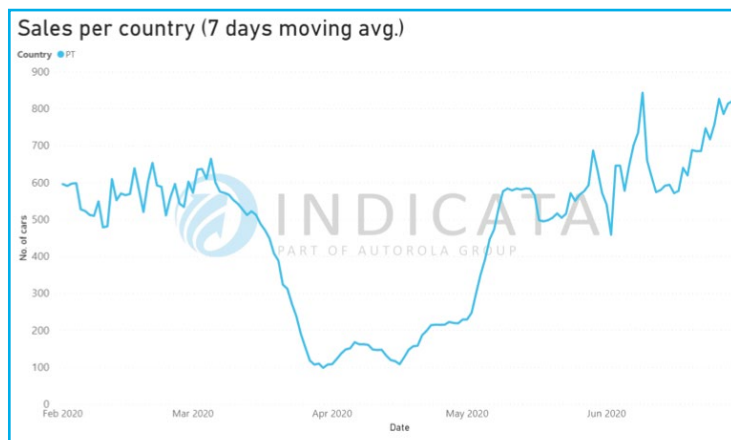
**New lockdown measures - a strong used market with opportunity to price higher.**

Portugal has become the strongest used car market in Europe with year on year growth on 36.2%.

There are no signs of this slowing despite the recent re-imposition of lockdown measures in the Lisbon area on the 26th June.

The all too common switch from Diesel to more environmental powertrains, which we also see across Europe, is matched with a strength in younger sales.

All segments remain strong, however, most strength resides in the mini, luxury, SUV and sports segments.



# Portugal

Price, which was drifting down over the lockdown period, has now plateaued.

Whilst positive, this still means that price is now 2.4% below February levels. This is surprising given the radical imbalances between supply and demand that exist in the market.

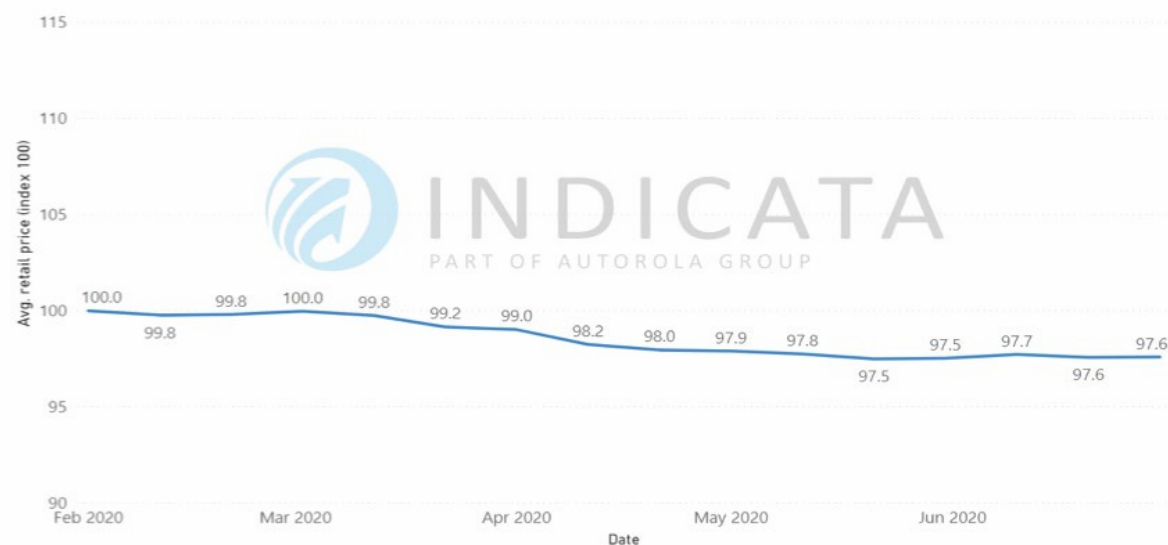
Sales are now peaking at 800 per day yet fresh stock entering the market has averaged 400 units per day.

Indeed, demand has outstripped supply so much that dealer stocks have dropped some 8% since April.

Equally since the depths of the lockdown we have seen our sister auction company's (Autorola Marketplace) prices increase by up to 10% for some vendors, yet there has been minimal upward response in retail pricing.

Overall, dealers are missing out on many incremental profit opportunities by not reacting on price in a market that is rapidly becoming a seller market.

Retail price (weighted avg.) (index 100 = 2020-02-01)



Incoming cars per country (7 days moving avg.)







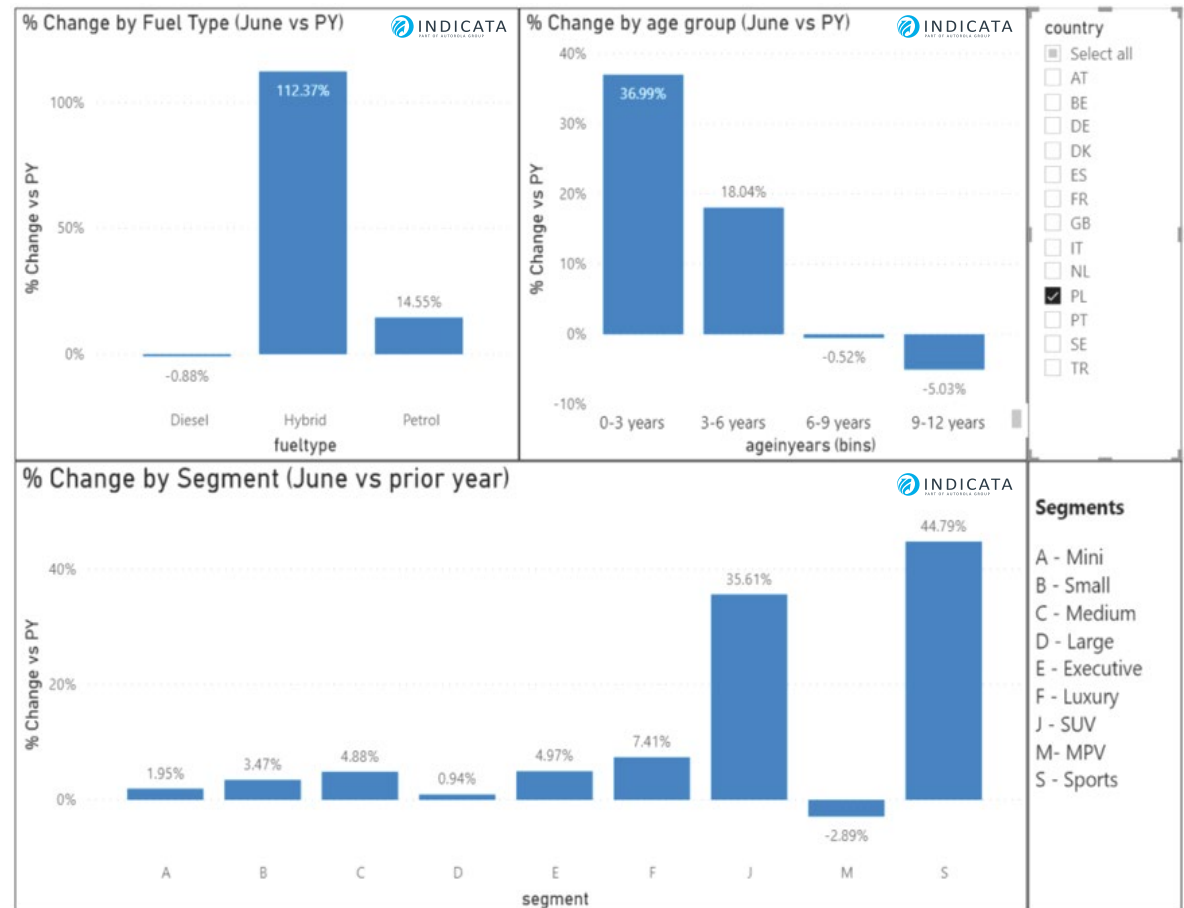
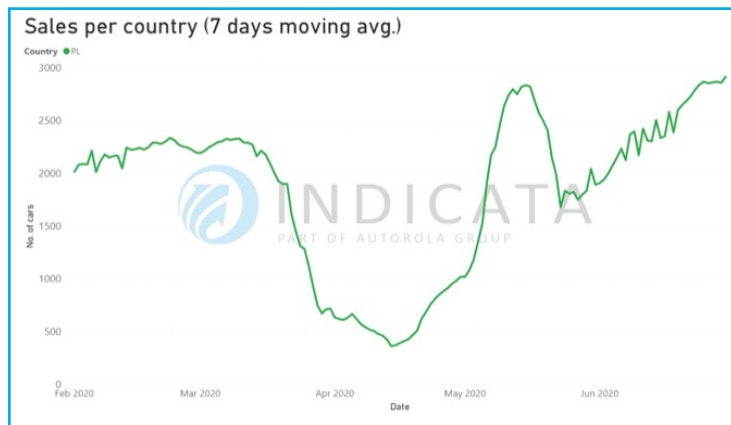
# Poland **Strong Demand, stock shortage – price increases will go further.**

The Polish market initially rebounded quickly, and after a bump in progress now continues forward strongly.

Like many markets it has followed the environmental shift away from Diesel (June down 1% year on year) over to more environmental power trains (Petrol up 14.5% and Hybrid by 112%).

Equally there is a strength in younger cars (0-3 year sector up 37%) whilst older cars are down (9-12 sector down 5.3%).

Demand is very strong in the SUV and Sports cars segments.



# Poland

Poland's pricing had suffered over the lockdown period, but we are now seeing signs of recovery.

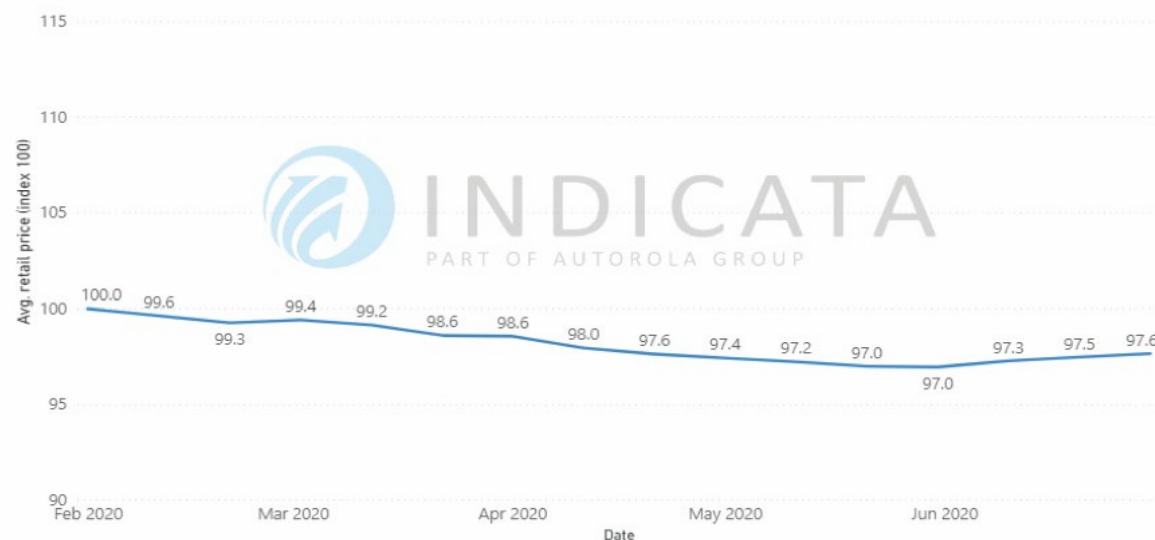
That said, the scale of the recovery is far smaller than we would expect given the imbalance between supply and demand.

Sales are peaking at c 3,000 per day, yet the run rate of fresh cars into the market is down at c 1,400 per day with little sign of growth. Reviewing our auction activity, bidders are constantly being out bid and conversion rates are sky high as dealer scramble for stock.

The market is now 18% down on stock vs April and this means that there are c35,000 cars needing to be replaced just to bring dealer back to a normal stock levels.

Overall, dealers are missing out on many incremental profit opportunities by not reacting on price in a market that is rapidly becoming a seller market.

Retail price (weighted avg.) (index 100 = 2020-02-01)



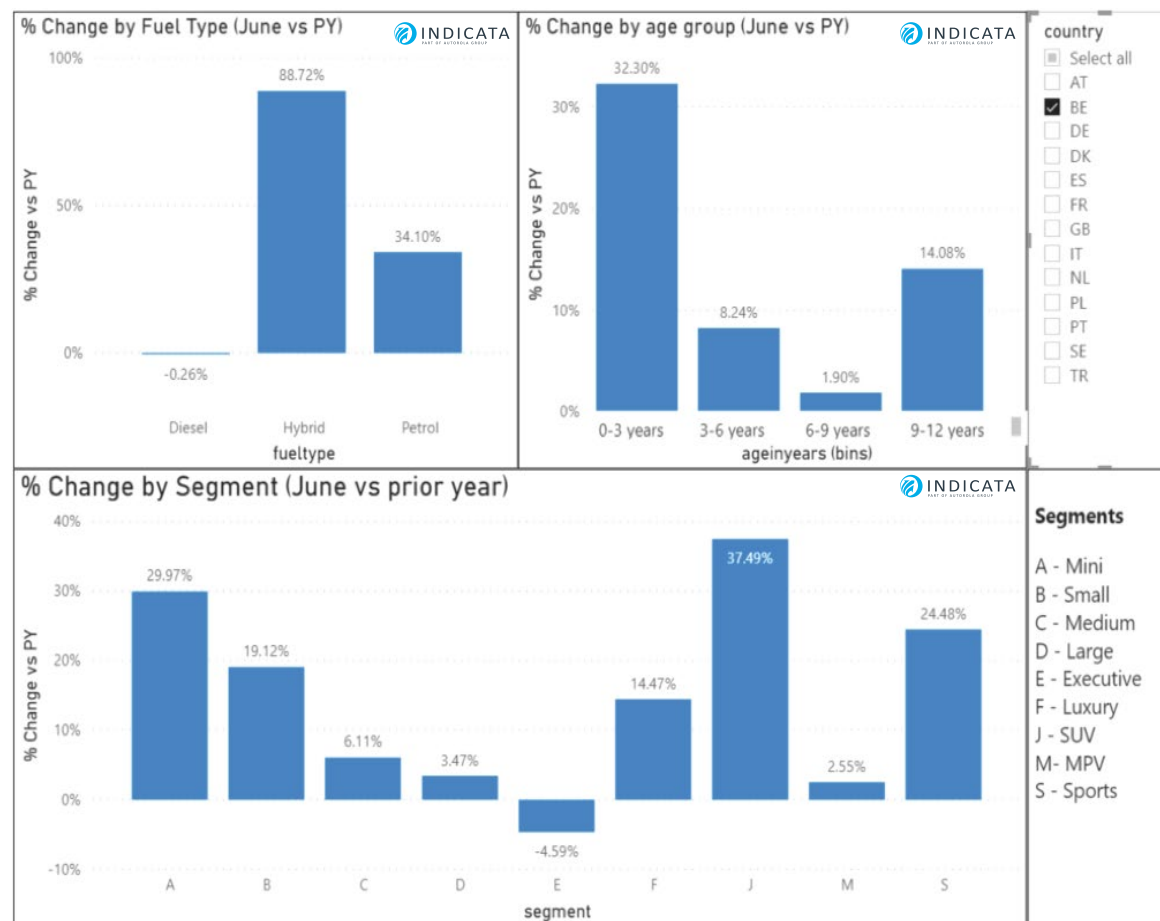
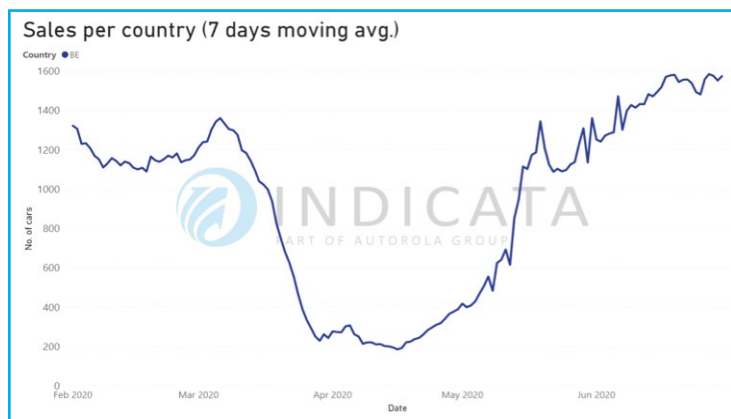
Incoming cars per country (7 days moving avg.)



The Belgian market is one that was hard hit by COVID-19. That said, volumes are back to well over pre-lockdown levels and volumes are 15% up year on year.

With a strong environmental move out of diesels into Petrol and Hybrid, the Belgian consumer is moving towards younger cars as the market improves.

Against this backdrop there is a lack of demand on Medium, Large and Executive cars, that is more than offset by small, SUV and sports car sales.



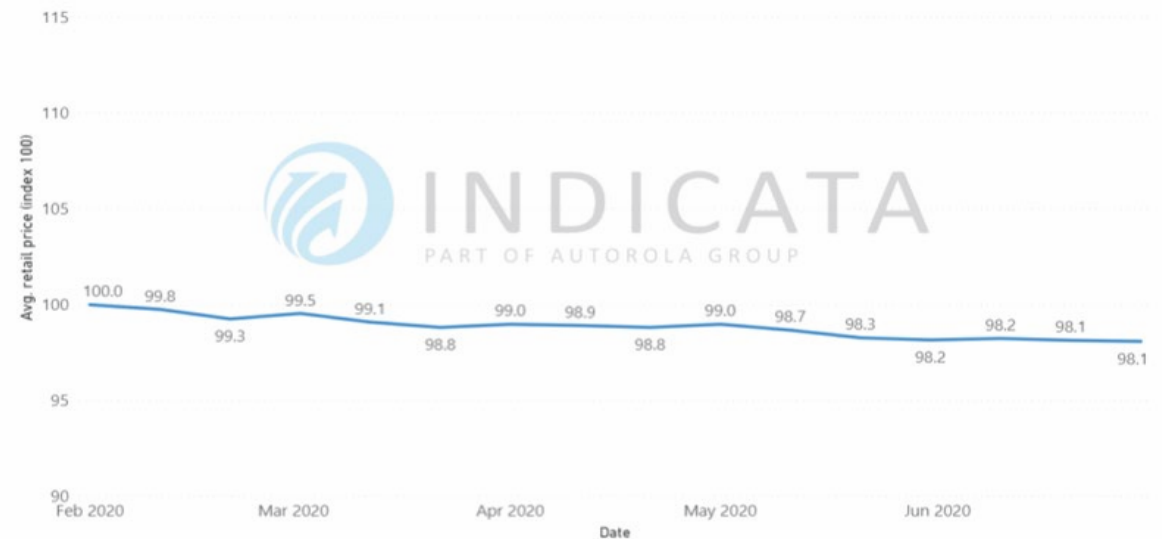
# Belgium

Pricing continues to decline, which is surprising given the imbalance between supply and demand.

Sales are peaking at c 1,550 per day yet the run rate of fresh cars into the market is down at c 1,300 per day with little sign of growth. With auction activity strong, both on a domestic and export front, wholesale prices are rising. The market is now 5% down on stock vs April and whilst this is less than many countries, the imbalance between sales and supply means that this situation will worsen.

Overall, dealers are missing out on many incremental profit opportunities by not reacting on price in a market that is rapidly becoming a seller market.

Retail price (weighted avg.) (index 100 = 2020-02-01)



Incoming cars per country (7 days moving avg.)





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