



INDICATA Market Watch COVID-19

Used car market embracing a “new normal”

Edition 18 | July 2021



Executive Summary

- June 2021 online B2C used car sales rise 2.9% month-on-month (MoM).
- June 2021 used car sales up 8.5% year-on-year (YOY).
- June year-to-date used car sales up 24.5% over 2020 and 8.5% above 2019.
- Turkish June market falls 23.5% YoY but 25.8% above previous month.
- Tactical registrations up 11% versus May as manufacturers seek to plug the gap left by a shortfall in daily rental de-fleets.
- Momentum still building for BEVs and hybrids with sales up 21% and 9% MoM and 146% and 124% YoY respectively.
- Demand for the internal combustion engine increases as stock turn rises sharply YOY for used diesel (+17%) and used petrol cars (+18%).
- The best-selling used cars by volume under 4-years-old in June were the VW Golf for both petrol and diesel, the Toyota C-HR for hybrids and the Renault ZOE for BEVs.
- The fastest-selling used cars under 4-years-old in June by stock turn were the Vauxhall/Opel Zafira petrol (27x), the Vauxhall/Opel Mokka X diesel (21x), the Toyota Auris hybrid (15x) and the MG ZS BEV (15x).
- July opening stock levels 2.3% higher YoY but 5.8% lower than the previous month.
- LHD cars' stock still out of place in some countries, but the situation is generally improving.
- Our price index is based on a consistent pool of 3-year-old vehicles indexed against February 2020. This means the lifecycle impact should result in a steady downward movement in average prices MoM, but strong sales and stock challenges due to coronavirus means prices are remaining steady and even rising in several countries.

European Markets

Online B2C used car sales for June YTD up 21% YoY

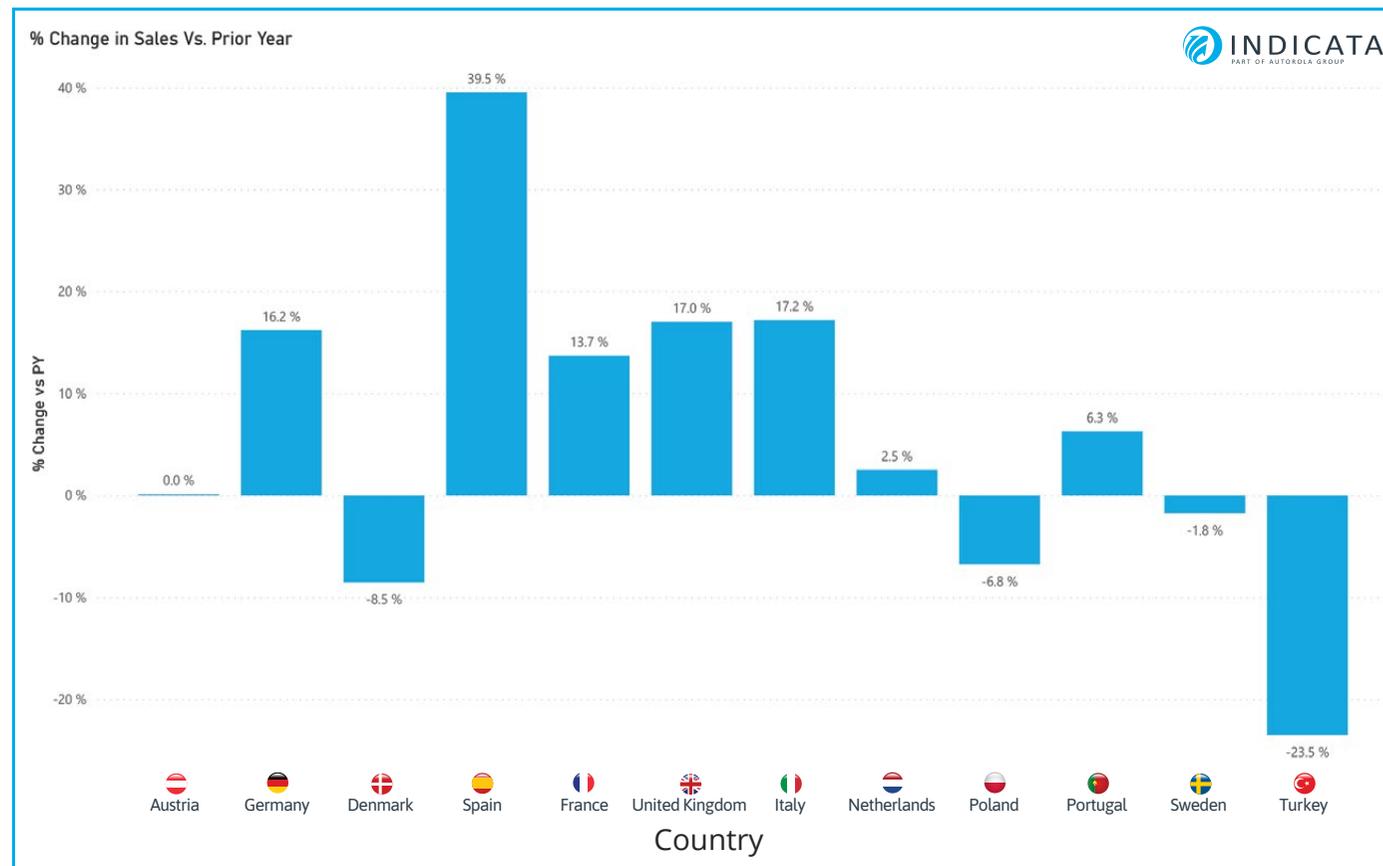
As the number of Covid-19 vaccinations rise and the region's economies start to return to more normal trading conditions we can see the automotive sector following suit with no countries showing triple digit year-on-year increases.

Online B2C used car sales in June rose 2.9% compared to the previous month which equates to an 8.5% year-on-year increase. This means total used car sales for June 2021 YTD are 21.0% higher than for the same period in 2020 and 11.0% above the first half of 2019.

Whilst Turkey stands out amongst the other countries with a 23.5% YoY fall in June it is still up 25.8% over May's results. It should also be remembered that April and May 2020 saw a significant fall in Turkish used car sales due to Covid-19 resulting in June 2020 enjoying some pent-up sales demand.

At the other end of the scale is the 39.5% YoY increase in Spain. Spain has also always enjoyed a strong used car market and even holds an annual Used and Pre-Owned Vehicle Show in Madrid. But the impact of the coronavirus on tourism has had a major impact on the Spanish economy in general and on the average Spanish household.

June 2021



This has pushed car buyers away from the new car market which in May YTD was 35.9% lower than the same period in 2019 and into the used car market.

Using the June Top Seller report, which models up to 4-years-old sold the most for each fuel type? Across the region the VW Golf was the top selling used petrol

and used diesel car with the Ford fiesta the second-best selling petrol car and the VW Passat taking second place in the diesel category. The best-selling hybrid was the Toyota C-HR followed by the Toyota Yaris whilst for BEVs the Renault Zoe took the title with the Nissan Leaf second and BMW i3 third.

What is the “new normal”?

Covid-19 has resulted in the phrase “new normal” being used about life in general, but it also applies to the automotive industry, at least for the rest of this year. But how does that new normal look?

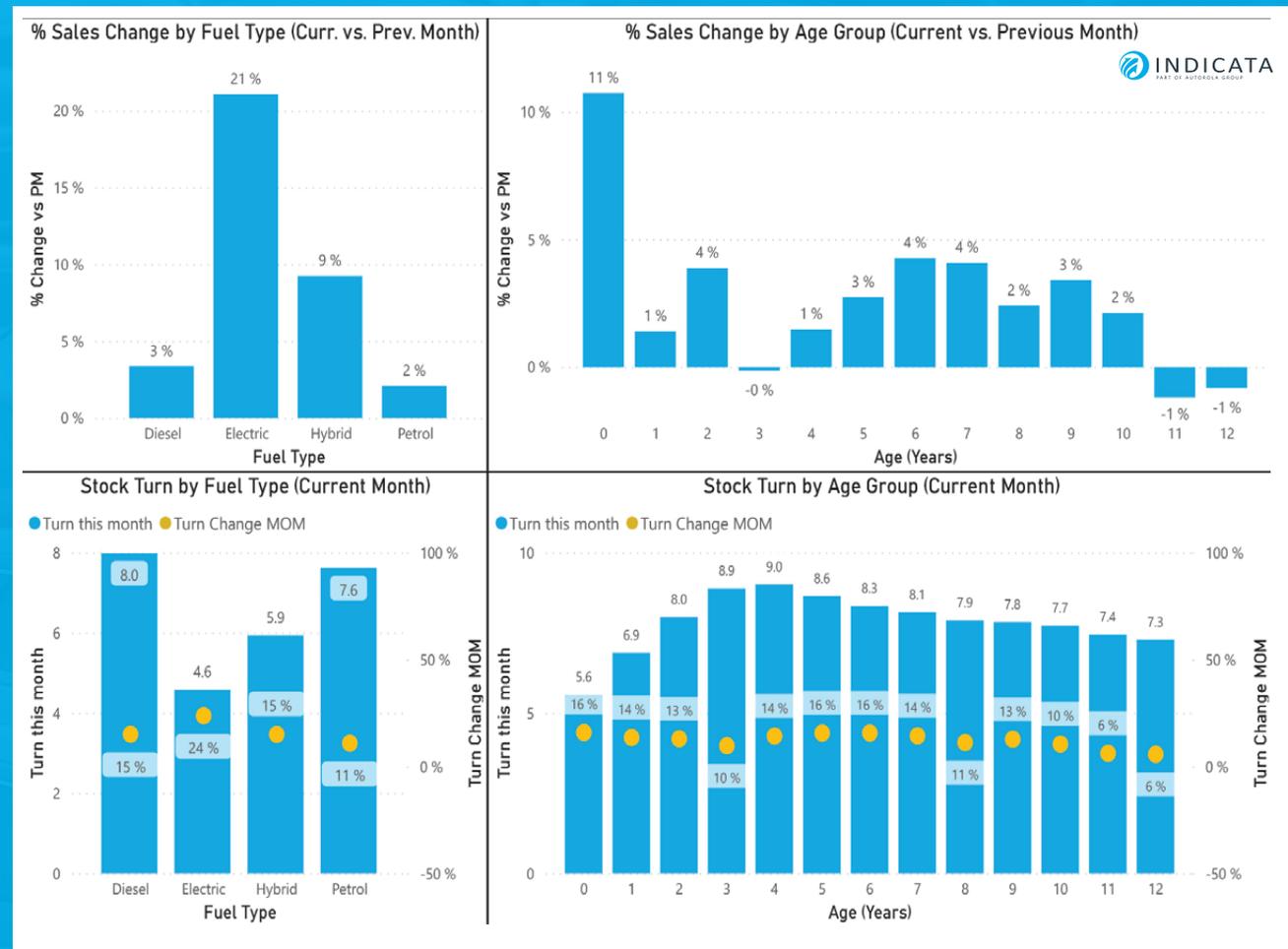
In terms of age profile of online B2C used cars being sold you can see there is a significant spike in tactical registrations with sales of very young used cars (<1-year-old) 11% up in June compared to May, whilst all other ages are pretty much reflecting a more moderate upward movement. Sales of very young used cars are 34% higher than in June 2020, whilst sales of 1-year-old cars are down 20% over the same period.

Manufacturers are clearly using tactical registrations to fill the vacuum left by so few cars coming back from the daily rental industry due to the low new registrations in 2020.

The other new normal is the take up of BEVs and hybrids. Sales of used diesel and petrol cars grew by a modest 3% and 2% MoM respectively whereas BEVs (+21%) and hybrids (+9%) grew significantly. Compared to June last year BEV sales were up 146% whilst hybrids were close behind (+124%).

But the internal combustion engine remains the best-selling in terms of volume and speed of sale with a June stock turn of 8.0x for diesel, 17% up over June 2020 and petrol stock turn of 7.6x, an 18% YoY increase. At the other end of the scale the 4.6x turn for BEVs is only 14% higher over the same period last year.

Month-on-Month Changes (This Month vs. Last month):

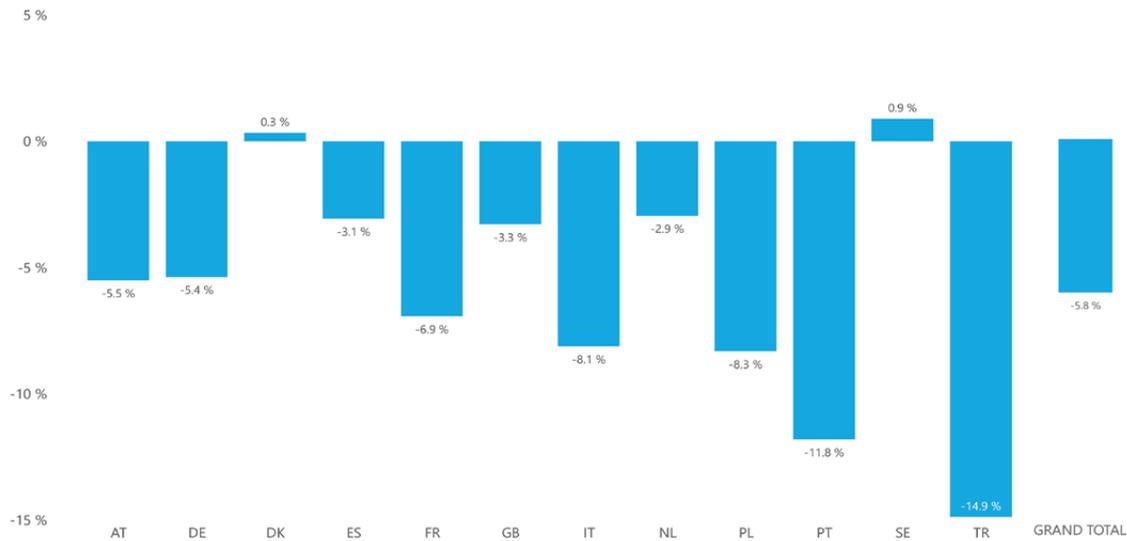


A review of our June Top Seller report shows the fastest selling cars for each fuel type by stock turn. The fastest-selling volume diesel vehicle under 4-years-old was the Vauxhall/Opel Mokka X with a 21x stock turn. For the used petrol vehicle

sold in volume it is another win for Vauxhall/Opel with the Zafira (27x). The fastest turning hybrid in June was the Toyota Auris with a 15x turn rate whilst the crown for the quickest selling BEV goes to the MG ZS with a 15x stock turn.

Online B2C used car stock levels fall 5.8% in a month

% Change in dealer stock levels (July 2021 vs. June 2021)



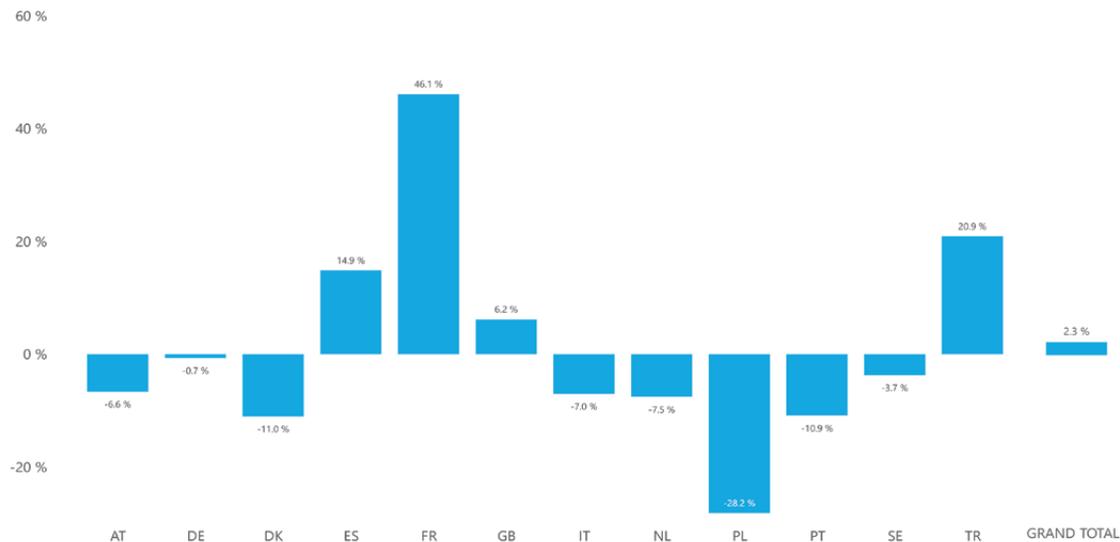
As the region continues to remove Covid-19 related restrictions and vaccinations continue to rise normality seeps back into the used car market. Despite online B2C used car stock levels going into July being 2.3% higher than in July 2020 the 5.8% fall in stock levels over June 2021 means stock levels are now 2.5% below the same month in 2019.

In previous months, and excluding Turkey due to import and export challenges, we have noted that whilst the stock position has been improving overall the situation for the left-hand-drive markets was more challenging. Stock of LHD cars at the start of June 2021 were 4.4% above 2019 levels. One month later and thanks to some strong used car sales, particularly in Europe's four biggest car markets, the LHD used stock is now 2.6% below 2019 levels and with limited volume of ex-daily rental/rent-a-car returns expected this year this should help manufacturers and dealers in balancing the regional stock position.

Where challenges still exist is in the location of that stock and as reported previously, we still see significant levels of stock in France compared to last year whereas countries like Poland, to a lesser degree Portugal and some other countries are struggling to get the right used stock which continues to have a negative impact on sales.

The upside to this stock shortfall can be seen with used car prices remaining stable or even becoming inflationary in many countries and whilst this creates some short-term benefits there is a risk around how sustainable this level of pricing will be going forward.

% Change in dealer stock levels Year-on-Year (July 2021 vs July 2020)





Austria June YTD online used car sales up 20.8% over pre-Covid-19 2019



After a rollercoaster of ups and downs over the last 15 months it is beginning to look like the Austrian online B2C used car market may be settling into a more normal pattern or given the higher sales volumes should that be a new normal? Sales in June were 5.1% down compared to May but flat at 0.0% compared to June 2020.

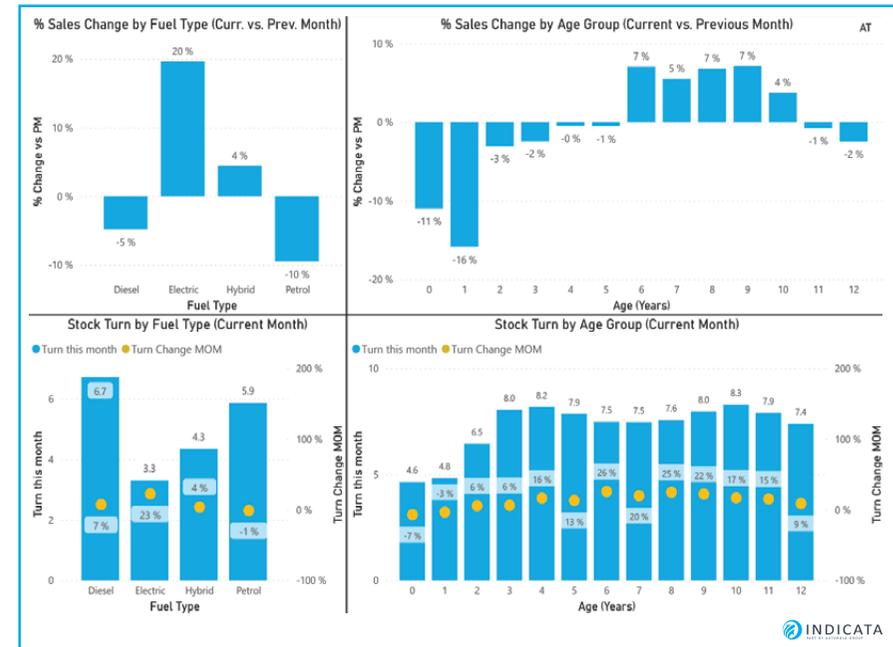
For the first six months of 2021 used car sales are 32.4% above the first half of 2020 and 20.8% above the same period in 2019.

Stock levels fell 5.5% month-on-month going into July and are now 6.6% lower than at the start of July 2020. Stock turn over the last 12 months has increased by 26% for diesel cars, 9% for BEVs and 3% for hybrids and petrol, indicating some potential supply constraints.

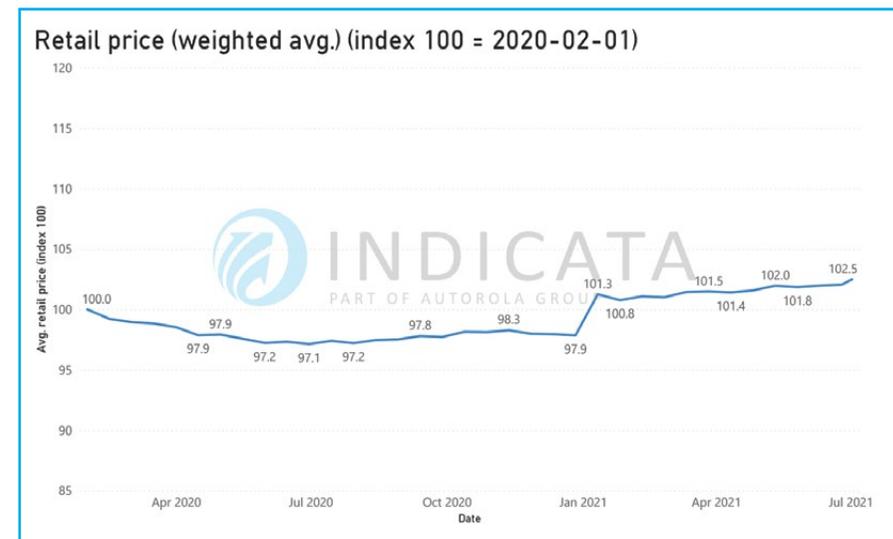
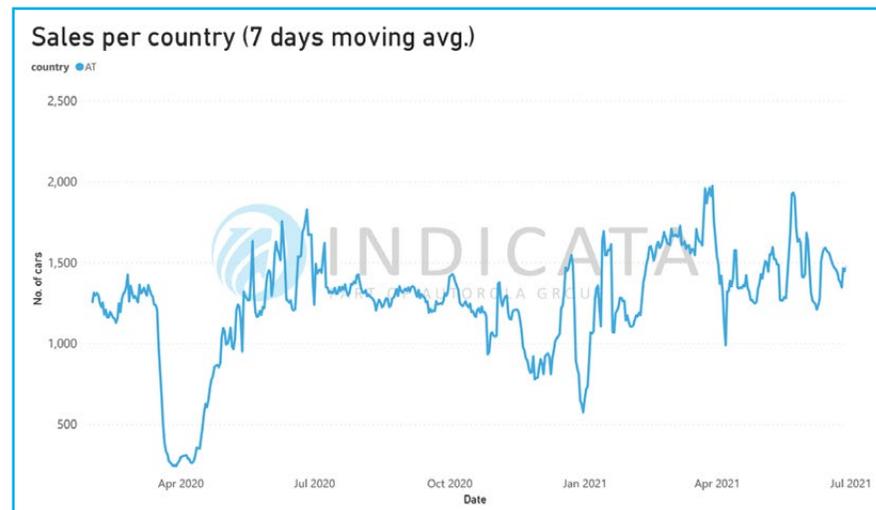
With typical franchise dealer sales of cars less than 5-years-old seeing falls in sales whilst the older cars fared much better there may be a need for some further manufacturer-backed tactical sales last seen in May.

Our Top Seller report for June shows the highest selling cars under 4-years-old by volume were the VW Golf, followed by the VW Passat with the Škoda Octavia taking third place. But within the same age criteria for volume sellers the Seat Alhambra with a stock turn of 21x sells the quickest with the VW Touran (19x) second and the Škoda Fabia third (16x).

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices, but with sales remaining steady and stock levels falling used car values are remaining steady and even inching up a little.



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Denmark Normality returns to the Danish used car market



Normality appears to have returned to the Danish online B2C used car market with a small increase in sales month-on-month in May being followed by a 4.5% MoM fall in June, equivalent to an 8.5% year-on-year decline. That means the June YTD sales volumes are 1.4% above where they were in June 2020 and 7.8% above the same period in 2019.

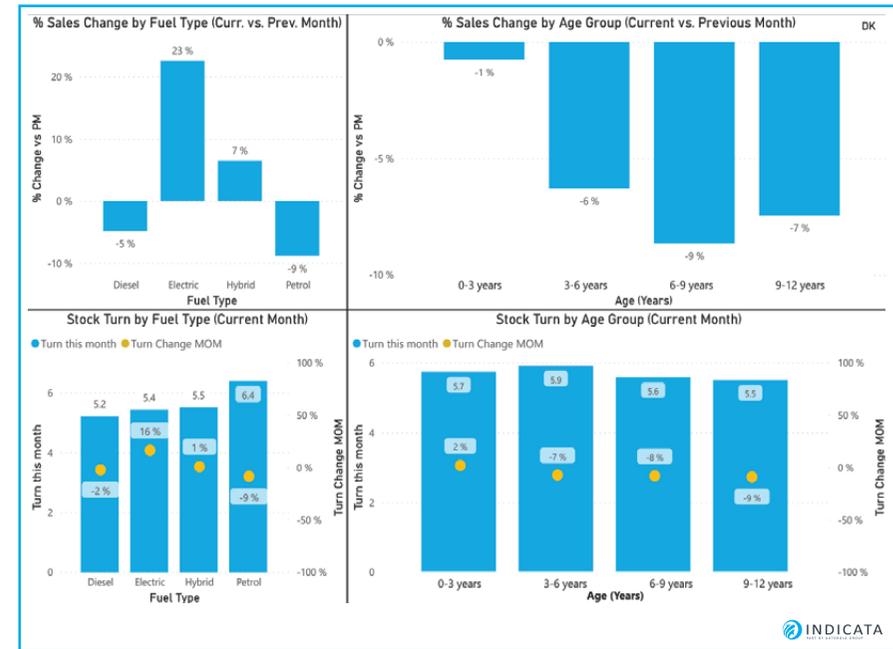
Stock levels are also remaining relatively stable with stock consistently around 11% below where they were a year earlier for the last nine months and stock going into July just 0.3% above where they were a month earlier.

With little evidence of any manufacturer supported tactical registrations for cars less than 1-year-old the marketplace appears to be performing in a natural dynamic way.

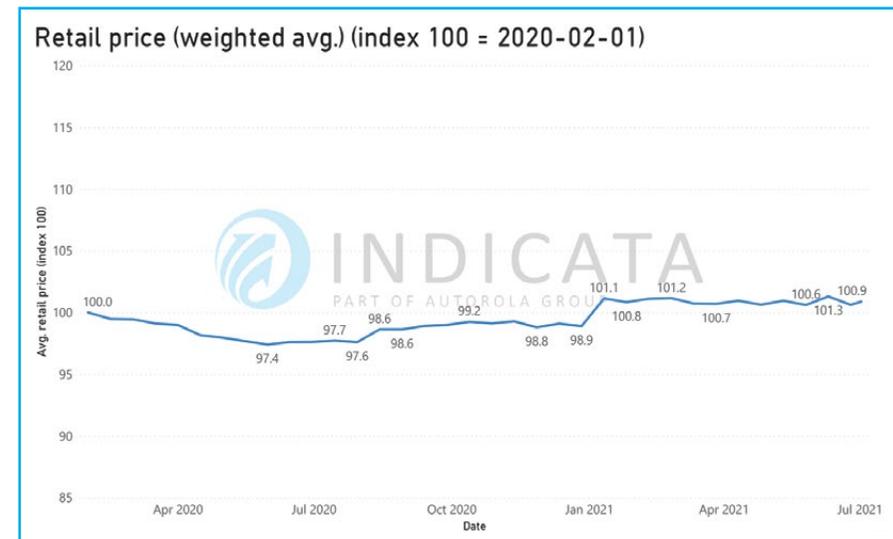
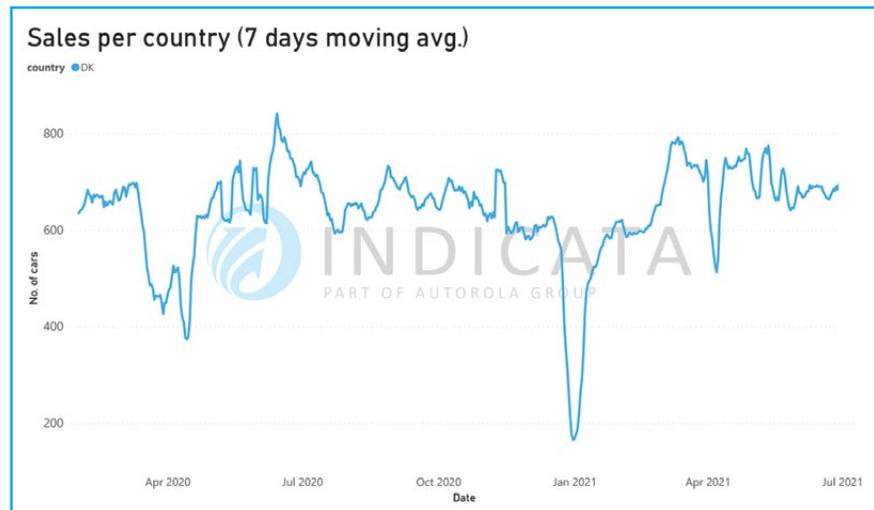
Whilst used petrol cars are still selling the fastest with a stock turn of 6.4x there is little between any of the powertrains in terms of speed of sale and with BEVs and hybrids seeing stock turn improve as petrol and diesel stock turn slows the newer powertrains may soon see the quickest way to turnover used cars.

Our June Top Seller report shows the best-selling used cars by volume under 4-years-old are all Volkswagen with the Polo in third place, the Passat taking second place and the Golf in first place. But with a stock turn of 25x the Mazda 2 was the fastest-selling used car closely followed by the Hyundai i20 in second place (21x).

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices, but whilst sales and stock levels have eased back MoM used car values are remaining steady.



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The French online B2C used car market continues to go from strength to strength. After a 13.5% month-on-month increase in May sales, June delivered an even more impressive 17.3% monthly increase, equivalent to a 13.6% year-on-year increase. This puts June YTD sales 27.3% above the first half of last year and 12.6% above the same period in 2019.

May saw manufacturers starting to support tactical sales with the sale of very young used cars (<1-year-old) increasing by 37% MoM and June saw that trend continuing with a further 30% increase over May.

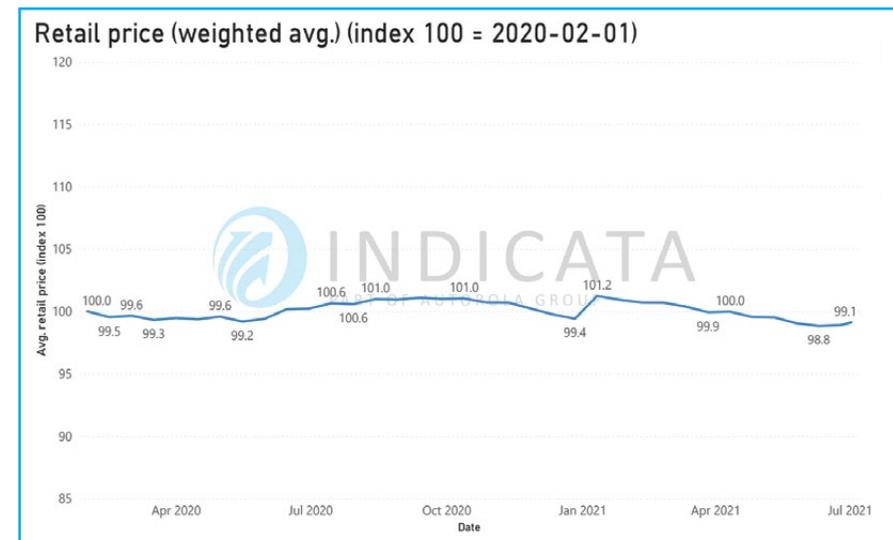
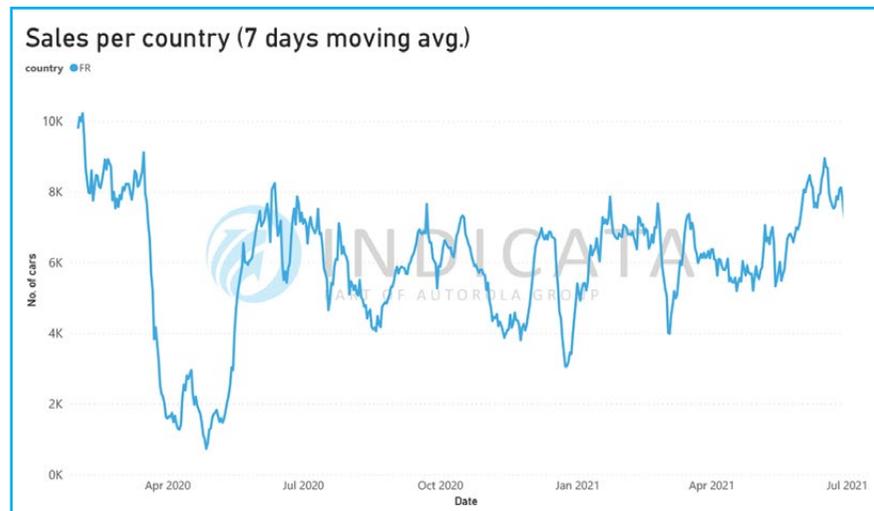
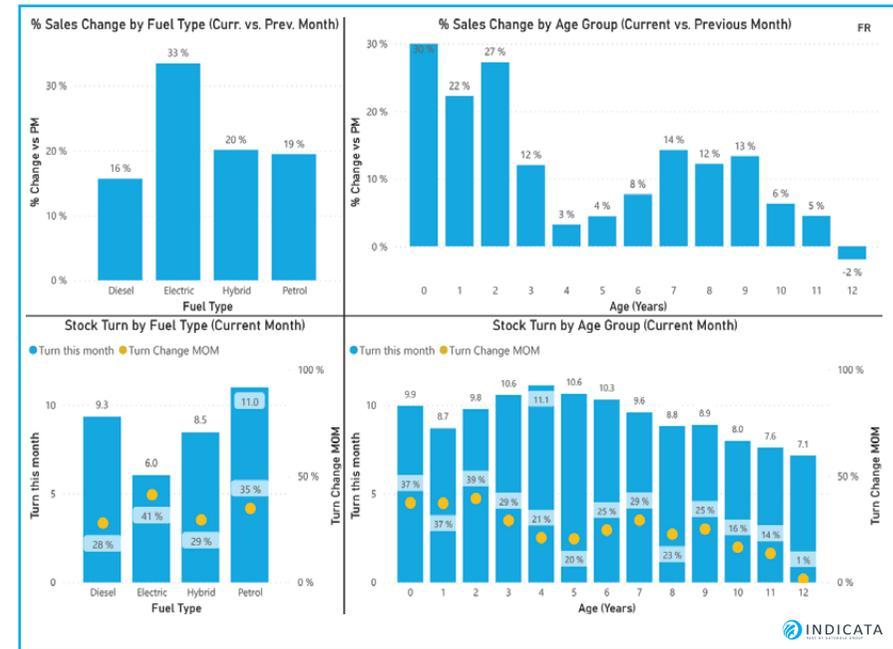
Stock levels going into July remain well above the same period last year (+46.1%) but the pressure on dealers did ease a little with a 6.9% fall in levels over the previous month.

The French market's love affair with diesel goes back many years so it is interesting to see a 35% increase in stock turn MoM for used petrol cars and that they are selling much quicker than diesel.

The top 3 selling used cars under 4-years old by volume in June were all French with the Renault Clio first, followed by the Peugeot 208 and then the 3008. But which are the fastest-selling volume used cars over the same age criteria by powertrain? The Peugeot 5008 with a stock turn of 28x takes the honours for petrol with the Citroën Berlingo at 22x being the fastest selling diesel. The Renault Zoe (8x) is the quickest selling BEV but amongst hybrids the Toyota Rav 4 is number one with a stock turn of 16x.

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices and with plenty of stock around and reasonable demand we are seeing that trend continuing.

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Germany Stock levels fall 5.4% MoM as supply fails to keep up with demand

After a modest 2.1% month-on-month increase in online B2C used car sales in May, June saw a healthier 7.8% increase over the previous month, equivalent to a 16.2% increase year-on-year. This means the online B2C used car market for the first half of 2021 is 19.6% above the first six months of 2020 and 11.0% above the same period in 2019.

The German market saw another month of manufacturer backed tactical registrations in June, up 19% over the previous month with the rest of the growth in sales spread evenly across the other age ranges.

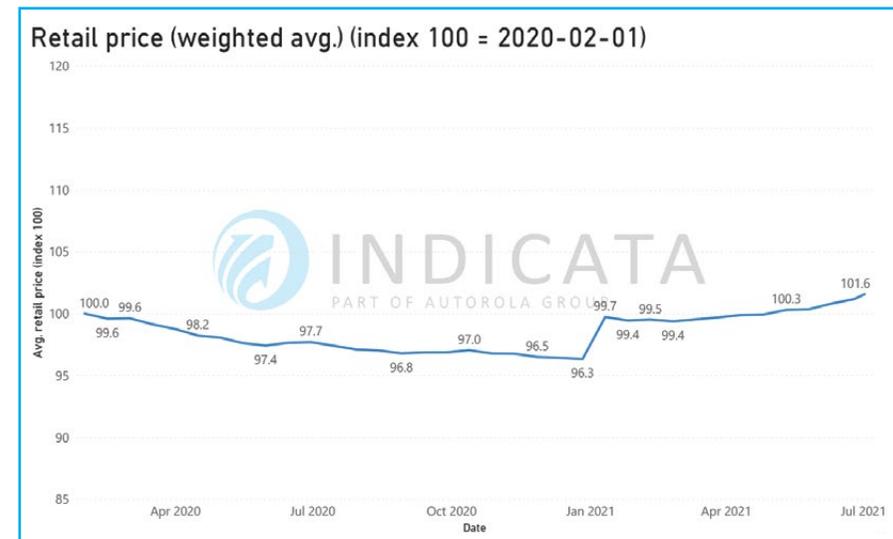
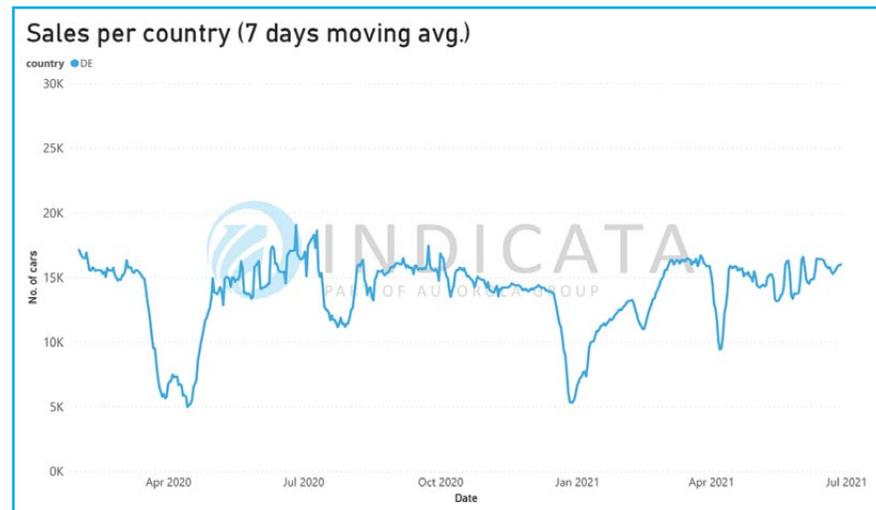
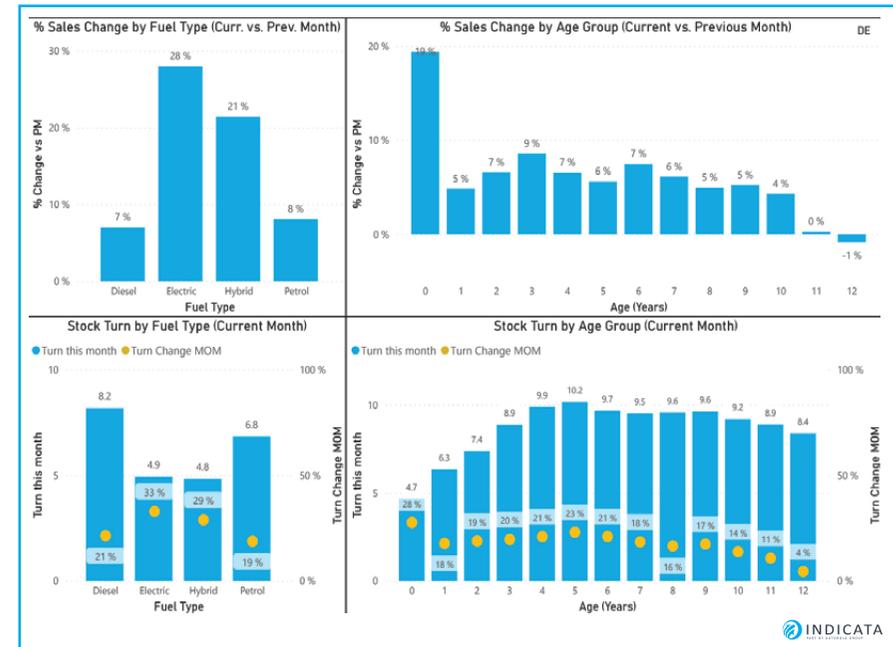
Whilst stock levels going into July remained almost flat year-on-year (-0.7%), they are 5.4% lower than the previous month as supply seems to be struggling to meet demand.

BEVs saw the fastest rate of growth in June (+28% MoM), closely followed by hybrids (+21%) but both powertrains are taking much longer to sell than the traditional petrol and diesel cars.

According to our June Top Seller report the top three best-selling used cars by volume in Germany were all from Volkswagen with the Golf in first place, Tiguan in second place and Passat take the third spot. But the honours for being the fastest-selling volume models went to Mercedes-Benz with the GLE-Class seeing stock turn at 20x, closely followed by the GLC-Class (19x) and the GLA-Class at 18x.

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices, but dealers have resisted this and with sales demand increasing in June prices rose again.

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Italy Online B2C used car sales up 50.5% for first half of 2021

A 16.9% increase in online used car sales in June pushed year-to-date volumes to 50.5% above the same period in 2020. This is good news for used car dealers and traders, but it is worth noting that June's sales were 6.8% lower than a month earlier.

Stock levels have also fallen with stock going into July 8.1% lower than a month earlier and 7.0% below the start of July 2020.

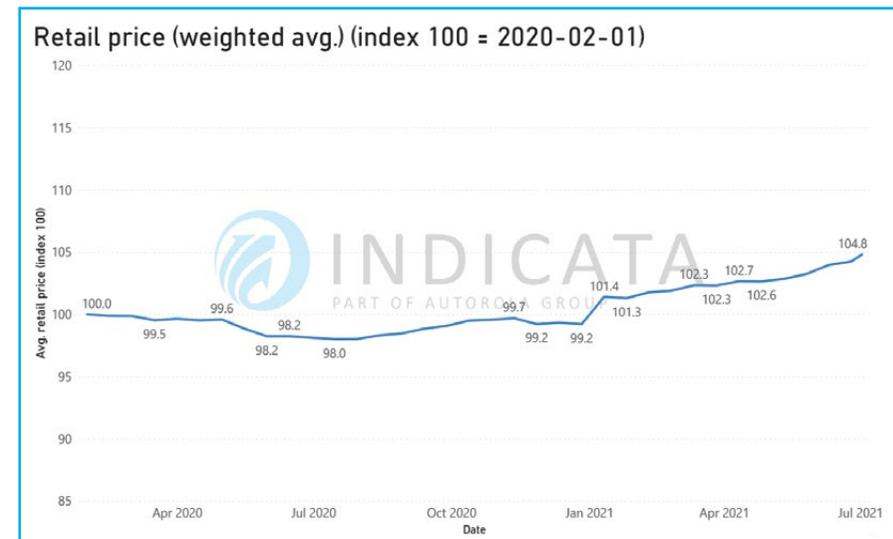
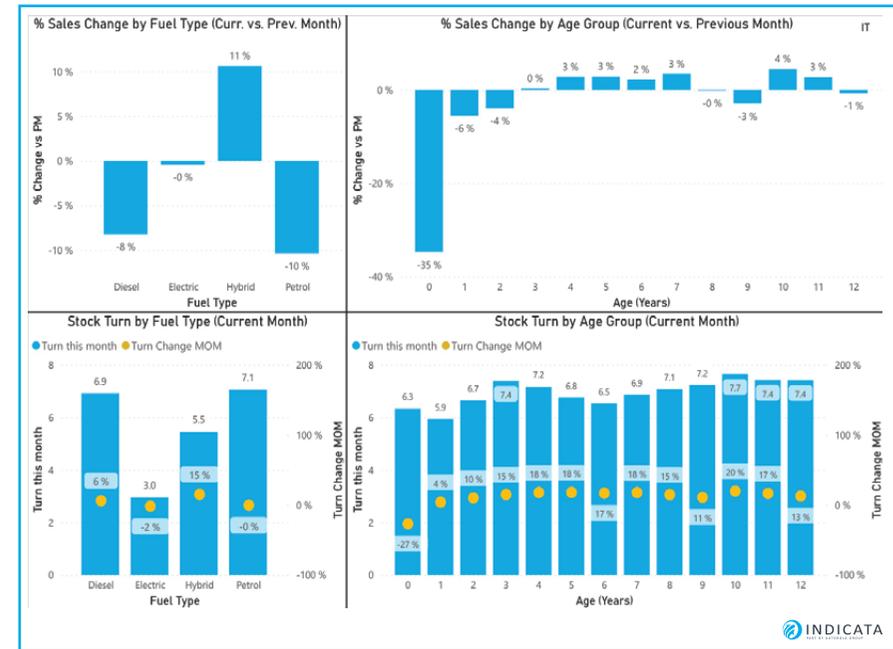
After a significant push of manufacturer backed tactical sales in May it is unsurprising to see the 35% drop in sales of cars less than 1-year-old in June.

Hybrids are doing particularly well with sales up 11% in a month and stock turn rising 15% over the same period. However, it is the traditional petrol and diesel cars which remain the fastest-selling in the Italian market with stock turns of 7.1x and 6.9x respectively. Sales of BEVs are up 165% YoY, but a stock turn of 3.0x shows they are taking much longer to sell suggesting demand is much weaker than supply.

Our Top Seller report by volume shows a clean sweep for Fiat in terms of the top selling used cars under 4-years-old in June with the 500x first followed by the Tipo and then the Panda. But the fastest-selling volume cars with the same age range puts the Peugeot 5008 in first place with a stock turn of 21x, followed by the Dacia Duster (19x) and the Ford Ka+ taking third (18x).

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices but falling stock levels and healthy demand continues to push used car values up.

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The Netherlands BEVs sales growth outperforms all other powertrains



Online B2C used car sales are 9.8% up year-to-date compared with the first half of 2020 and 11.4% above the same period in 2019. Whilst June used car sales fell 4.5% against a month earlier, they were 2.5% above the same period last year.

Tactical sales supported by manufacturers clearly played an important part in June's sales with cars less than 1-year-old up 12% as all other age ranges saw sales fall month-on-month. Looking over a longer period it is the 1-year-old cars seeing the biggest year-on-year decline in sales (-18%) due to the significantly reduced sales of new daily rental cars last year.

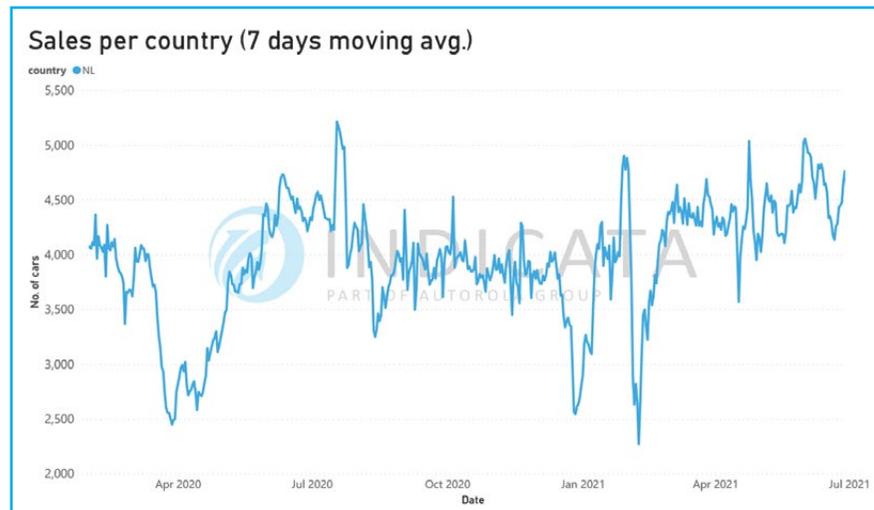
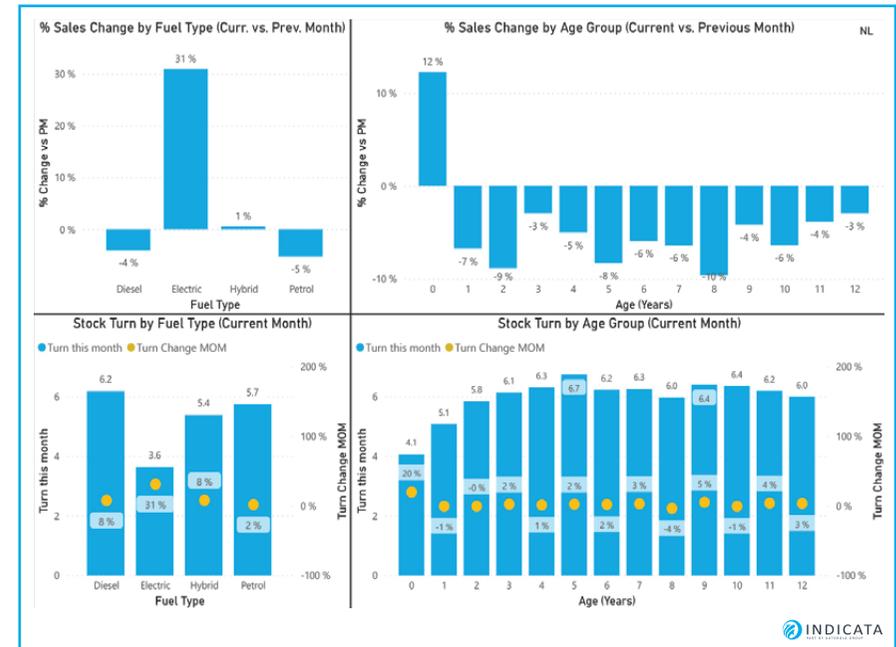
Stock levels fell a further 2.9% MoM and are now 7.5% lower going into July 2021 than a year earlier. The Dutch move to low and zero emission motoring can be clearly seen with BEV sales increasing by 31% MoM compared to the other powertrains which remained flat or even slightly negative over the same period.

The traditional internal combustion engine cars are still selling the quickest with used diesel cars stock turn of 6.2x selling the fastest with used BEVs at 3.6x staying in stock significantly longer despite the growth in sales.

In volume terms the VW Golf was the highest-selling used car under 4-years-old, followed by the VW Polo according to our Top Seller report for June. Looking at the volume models for the same age criteria the Volvo XC90 was the fastest selling with a stock turn of 16x, with Toyota Auris second (14x) and Seat Ateca tied with VW Passat in third (13x).

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices, but with stock levels still falling and healthy demand used car values are still edging upwards.

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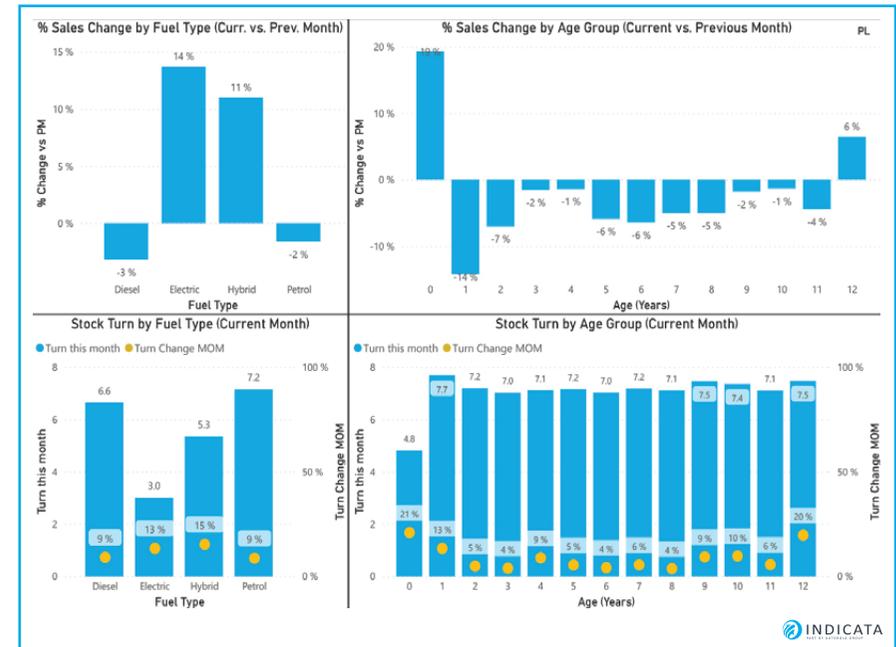
Availability of stock continues to be a dominant factor in the Polish market. Online B2C used car stock fell a further 8.3% going into July 2021 compared to just a month earlier. This means July stock levels are now 28.2% lower than the same time last year making 13 consecutive months of reductions in year-on-year comparisons.

All powertrains and ages have seen stock turn increase in the last month with petrol (7.2x) and diesel (6.6x) selling quickly. By comparison to a year earlier the rate of turn for diesel has risen by 41% with petrol up by 34% and hybrids up 42%. The exception is BEVs where the 3.0x stock turn is 21% lower than this time last year.

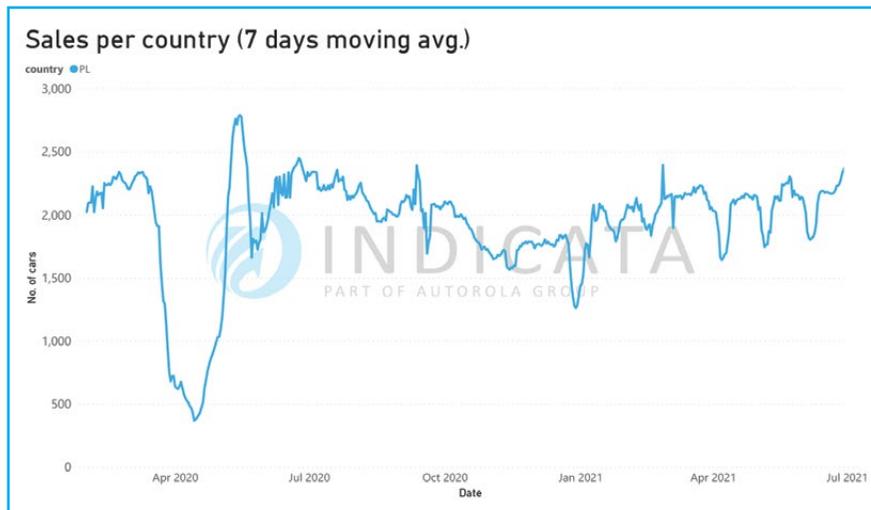
The supply constraints are impacting sales which eased back 1.0% in June compared to the previous month and down 6.8% year-on-year. This means seven of the last nine months have seen a fall in YoY sales, with the exceptions being March and April 2021 due to the impact of Covid-19 restrictions for the same months last year.

Our Top Seller report shows the top three used cars less than 4-years-old sold by volume are in order the Škoda Octavia, Opel Astra and VW Passat. Of the models selling in volume the Nissan Qashqai and Toyota Avensis are tied as the fastest-selling with a stock turn of 20x closely followed by the Toyota Yaris in third with 19x.

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices, but constrained supply and healthy levels of demand are continuing to push them up.



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Stock levels of online B2C used cars have been falling since a spike in May 2021 with a further 11.8% month-on-month decline at the start of July. This puts the level of online stock now 10.9% lower than the same month last year.

Online B2C used car sales are also following a similar MoM pattern with June sales down 19.3% against May but unlike stock they are up 6.3% compared to June 2020.

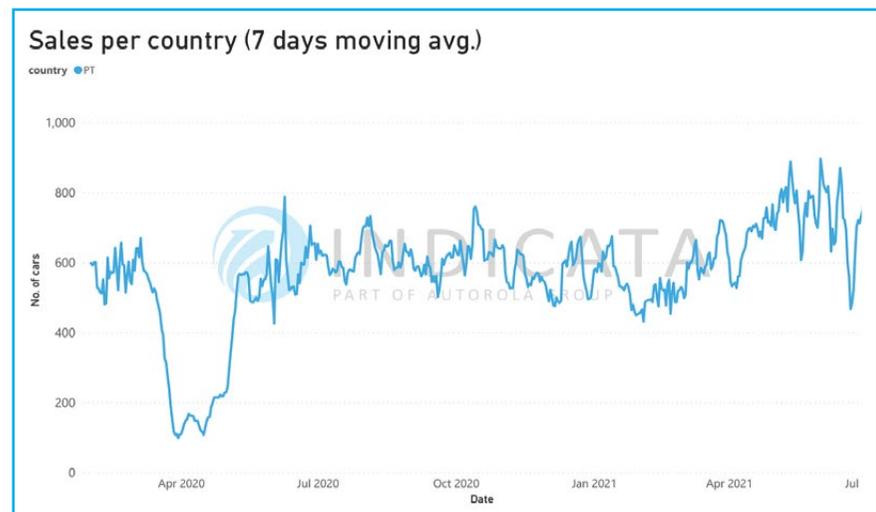
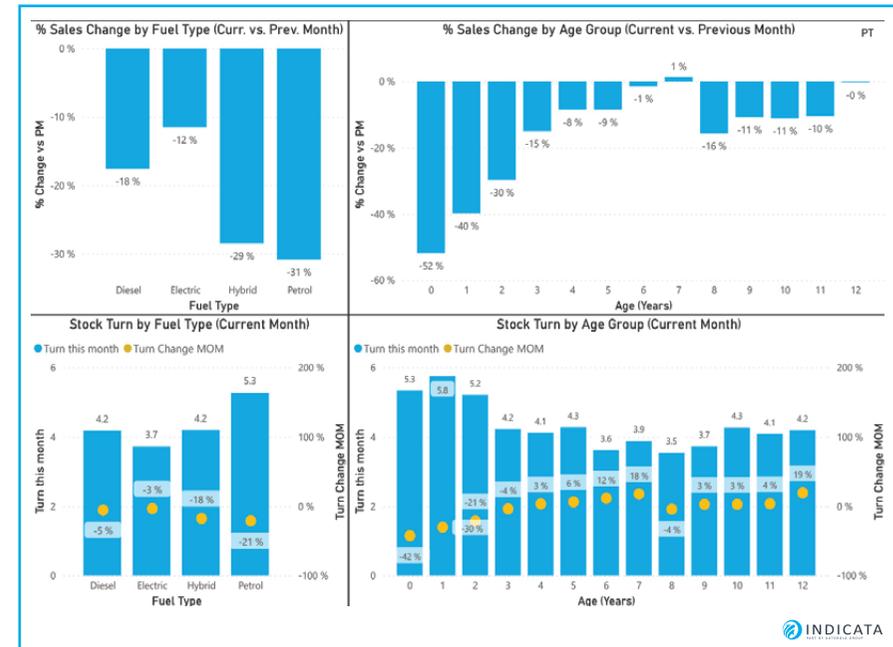
Is stock supply constrained and impacting sales? There is limited stock of 1-year-old cars due to the significant reduction in rent-a-car vehicles registered in 2020. Manufacturers also seemed reluctant to support tactical registrations following the 15% increase seen in May. It also ties in with the reductions in typical franchise dealer sales of cars aged up to 4-5-years-old.

Before getting too worried though it is worth noting that May 2021 was one of the strongest months for online used car sales we have seen and taking that into consideration June looks like an average month. Stock turn is also not moving excessively MoM across most ages and powertrains.

From our Top Seller report Renault took the top three spots in terms of volume for used cars sold in June up to 4-years-old with the Clio, followed by the Mégane and then the Captur. Whilst low in volume the Mitsubishi Space Star with a 32x stock turn was the fastest selling with the Renault Kadjar(15x) in second place and Renault Captur (14x) third.

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices, but falling stock levels and healthy levels of demand are continuing to push up prices.

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Spain Online B2C used car sales up 32.3% YTD

Online B2C used car sales saw another month of significant growth in June 2021 with sales up 39.5% over the same month last year and 20.6% above May 2021. This means the June 2021 year-to-date volume is up 32.3% against the first half of 2020. The strongest demand is in the ex-fleet age range of 3-5-year-old cars although the shortage of available 1-year-old cars is also impacting sales at this age range.

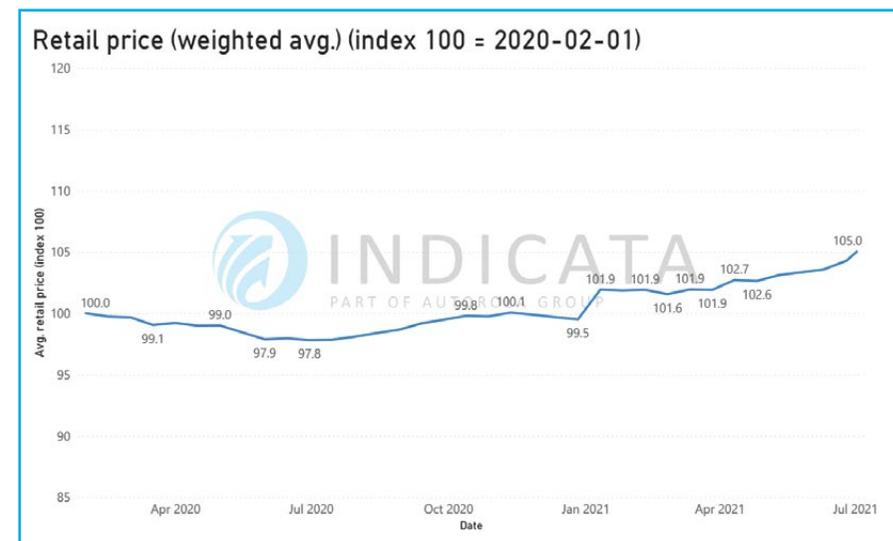
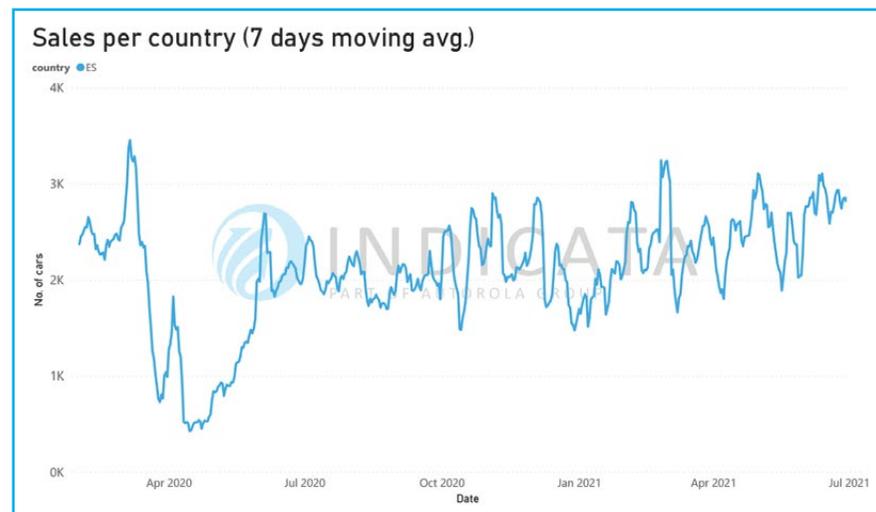
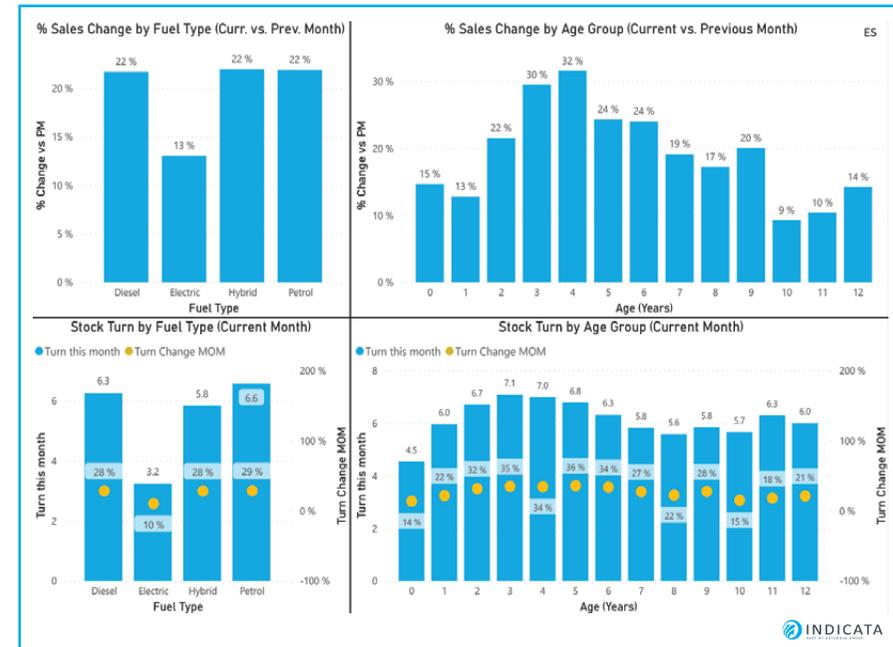
All powertrains saw significant growth compared to June 2020 with hybrids up 196% and BEVs up 182% whilst the traditional fuels were up 42% for petrol and 31% for diesel. It is worth noting that compared to last month however, BEVs saw the weakest rate of increase (+13%) whilst the other powertrains all increased by 22% month-on-month and BEVs are also taking around twice as long to sell with a stock turn of just 3.2x.

Online B2C stock levels are 3.1% lower going into July compared to the start of June but they are still 14.9% above this time last year.

Looking at our Top Seller report and specifically cars up to 4-years-old the winner in terms of sales volume in June was the Nissan Qashqai which just edged the Seat Leon into second place. Seat also missed out on the top spot for speed of sales with the Peugeot 2008 the fastest-selling car last month with a stock turn of 16x compared to the second place Leon at 13x.

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices, but the strong demand combined with a decline in MoM stock is putting inflationary pressure on prices again.

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After four consecutive months of year-on-year increases in online B2C used car sales June 2021 saw them ease back (-1.8%) and drop 6.9% compared to May 2021. Whilst stock levels have stabilised, being 0.9% higher going into July compared to June 2021, they are still 3.7% below 2020 levels.

Halfway through the year and sales are up 9% YTD compared to this time last year and 9.2% higher than the same period in the pre-covid 2019.

BEVs are the only powertrain to see sales rise (+6% month-on-month) but comparing the results to June 2020 sees BEVs up 132% and hybrids also rising 61%, whilst diesel sales dropped 7% and petrol fell 14% over that period.

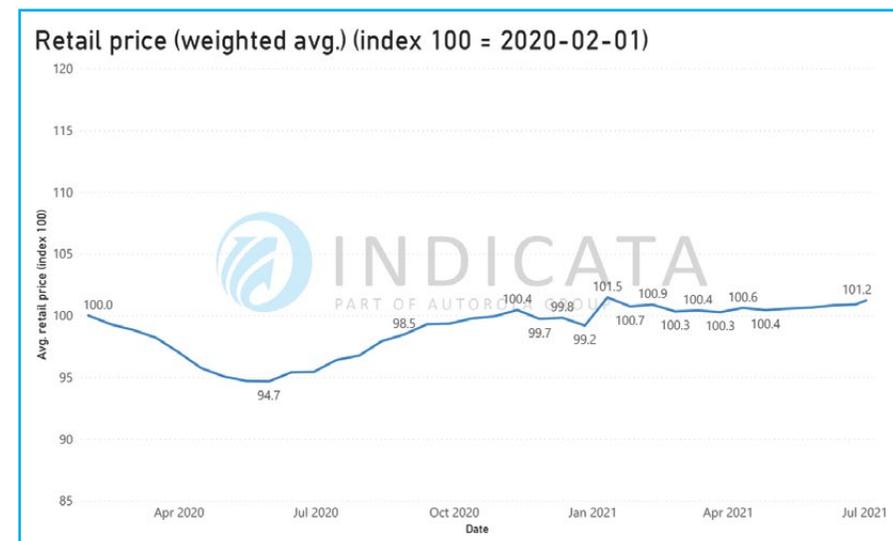
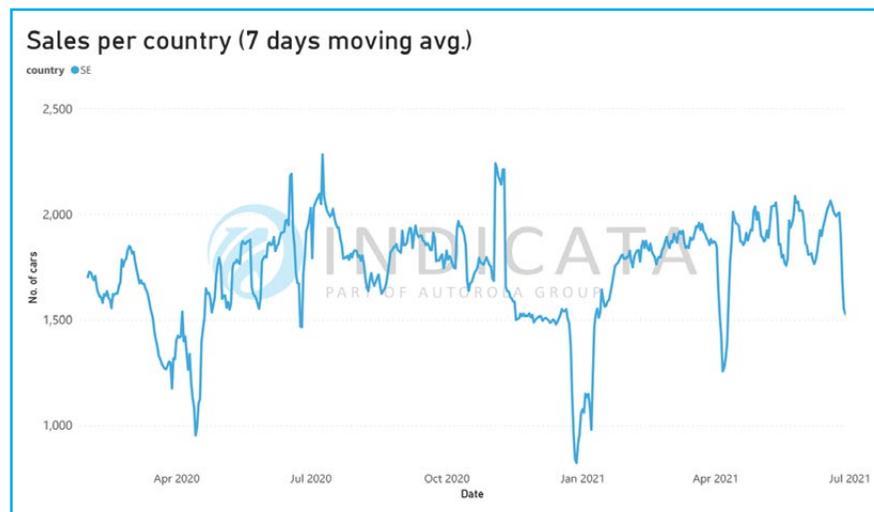
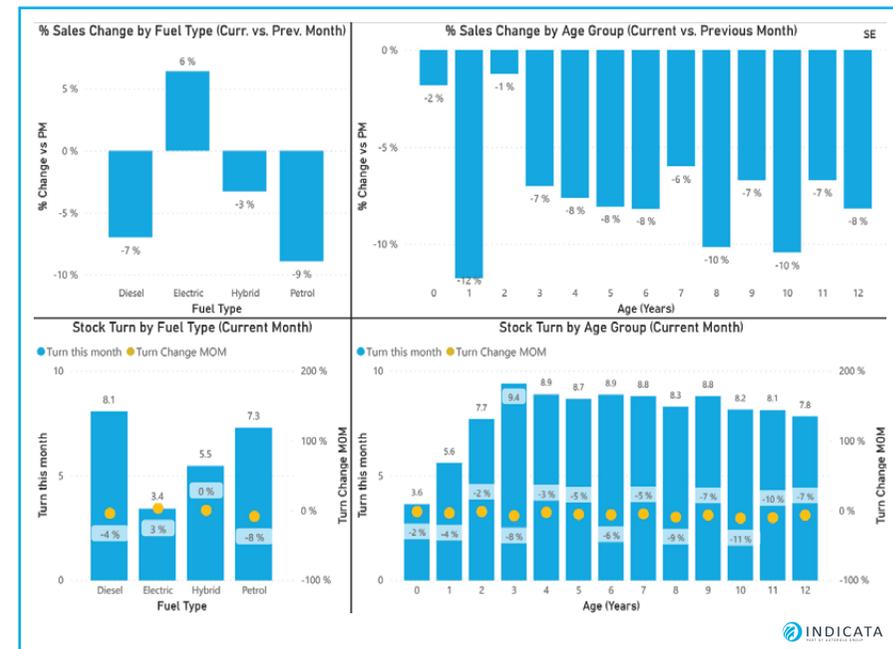
Sales of 1-year-old cars are particularly badly hit due to the limited number of short-term rental vehicles and demonstrators registered during the worst of the Covid-19 pandemic and now available as used cars.

Despite sales of the traditional powertrains being the worst hit in percentage terms, they remain the fastest-selling with used diesel stock turn of 8.1x and used petrol 7.3x. Looking at sales at a model level in our Top Seller report and Volvo take the top three places in terms of volume of cars up to 4-years-old with the V90 first followed by the V60 and the XC60.

Volvo also claimed the top spot for the fastest selling model in June with the V40 seeing stock turn of 17x with second place going to the VW Tiguan (15x) and the Volvo XC60 taking third place (14x).

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices but the strong demand earlier in the year is enabling dealers to hold prices relatively stable.

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Turkey **First half year sales 14.1% down on last year**

After a weak May, June 2021 saw sales bounce back as online B2C used car sales rose 25.8% month-on-month. Even though sales were 23.5% lower than June 2020 it is worth remembering that much of the June 2020 volume was because of pent-up demand due to the impact of Covid on sales in April and May last year. Whilst used car sales for the first half of the year are 14.1% lower than this time last year, they are still 3.2% above the same period in 2019.

The growth in sales also impacted stock levels which fell 14.9% going into July although they are 20.9% higher than a year ago.

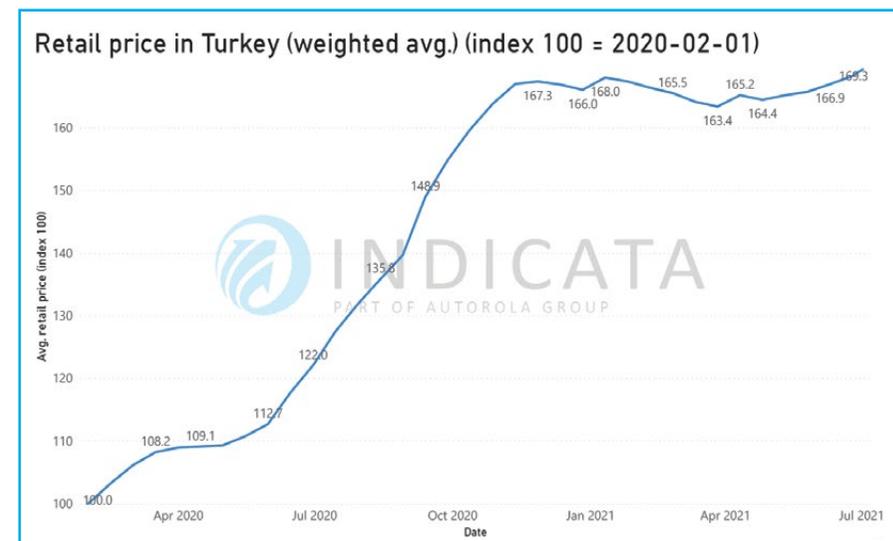
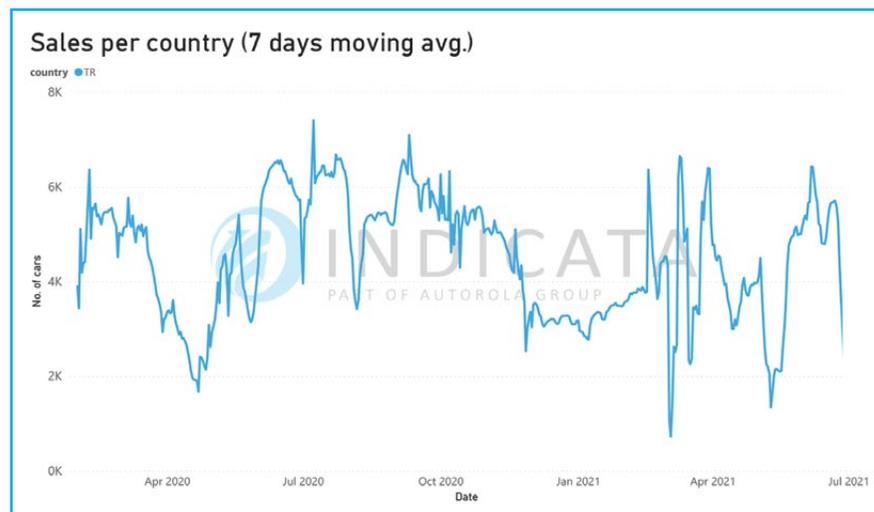
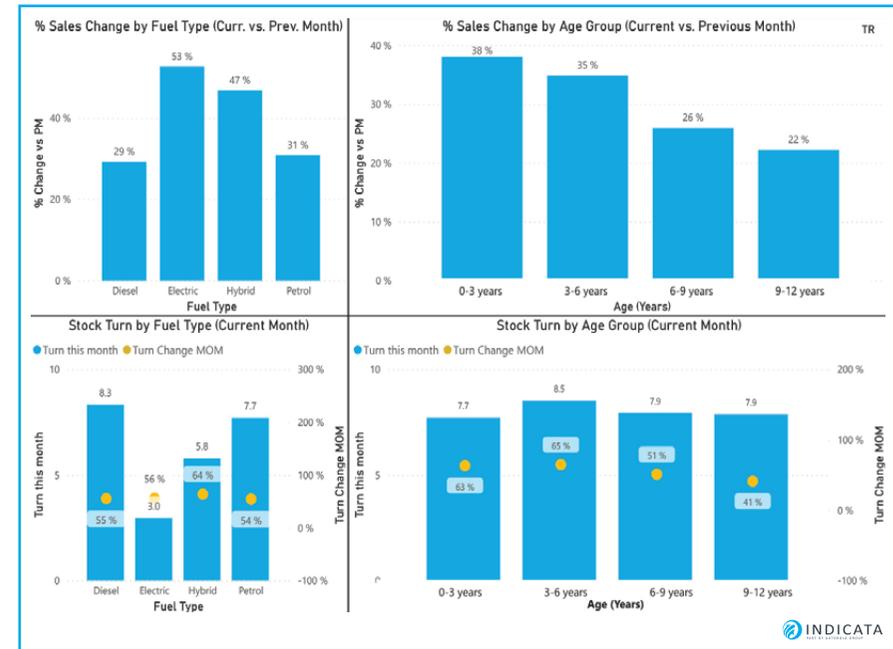
All powertrains saw a month-on-month increase in sales but compared to June 2020 only BEVs/Hybrids saw sales increase (+47% year-on-year) with diesel sales down 26% and petrol falling 18%.

But the speed of used car sales has slowed compared to June 2020 with used petrol and diesel cars seeing a June 2021 stock turn 35% lower at 7.7x and 8.3x respectively and used BEVs/hybrids turning 48% slower than the previous year.

Looking at our Top Seller report for used cars up to 4-years-old and the Renault Clio sold the most cars, just pushing the Fiat Tipo and Renault Mégane to second and third place respectively. When it comes to speed of sale though the Ford Tourneo Courier is the fastest selling with a stock turn of 21x, edging the Peugeot 301 into second place (20x).

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices but with sales up MoM and stock levels down used car prices are continuing to move upwards.

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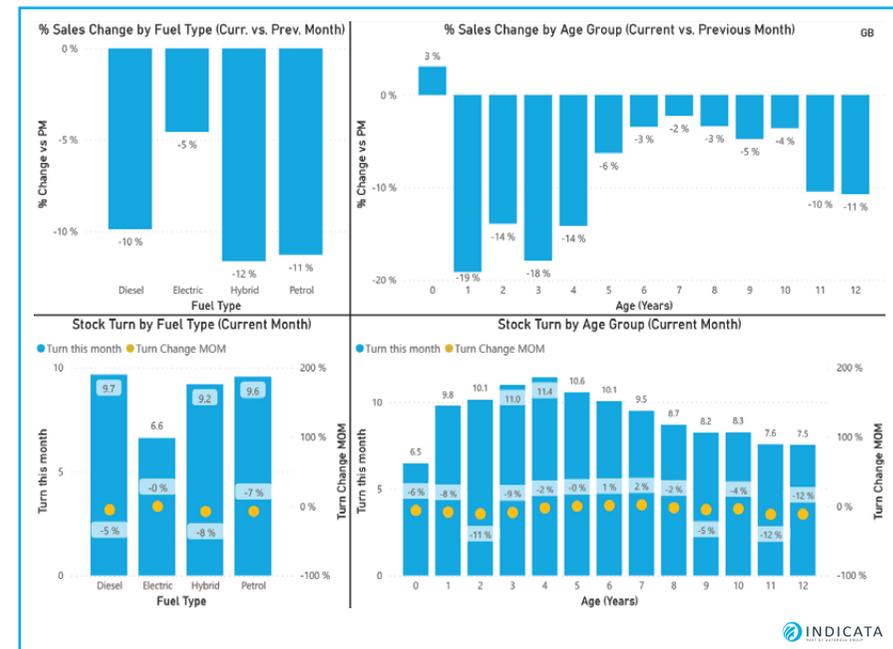
Used car sales in June 2021 fell 10.9% compared to the strong previous month but they are still 17% higher than June 2020. The first half of 2021 is now 37.0% above the first half of 2020 and 4.4% above the same period in 2019.

There was some evidence of manufacturer backed tactical registrations resulting in a small increase in sales of these very young used cars (<1-year-old) month-on-month, but the supply constraints highlighted last month are impacting sales, particularly for vehicles up to 4-years-old. Sales and stock turn were lower in June versus May, but stock turn of between 10.1x and 11.4x for cars aged 2-4-years-old are circa 30% above where they were a year ago.

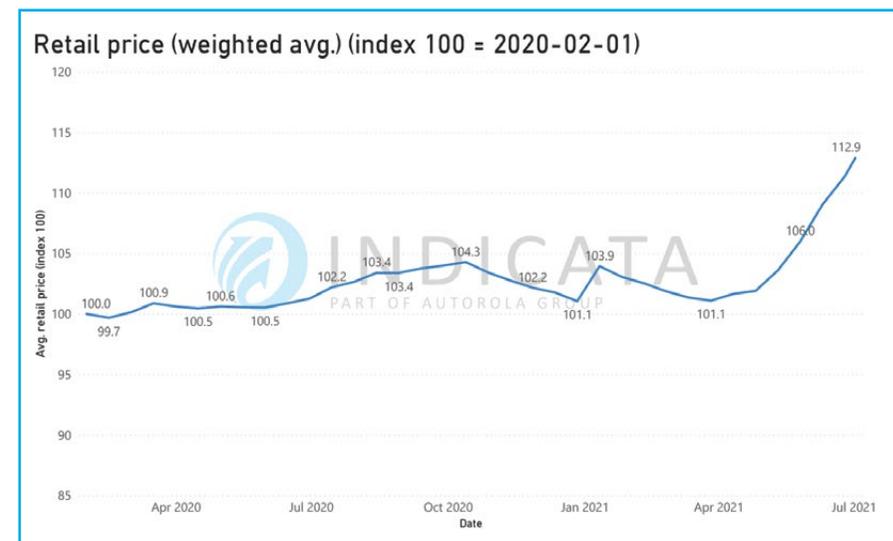
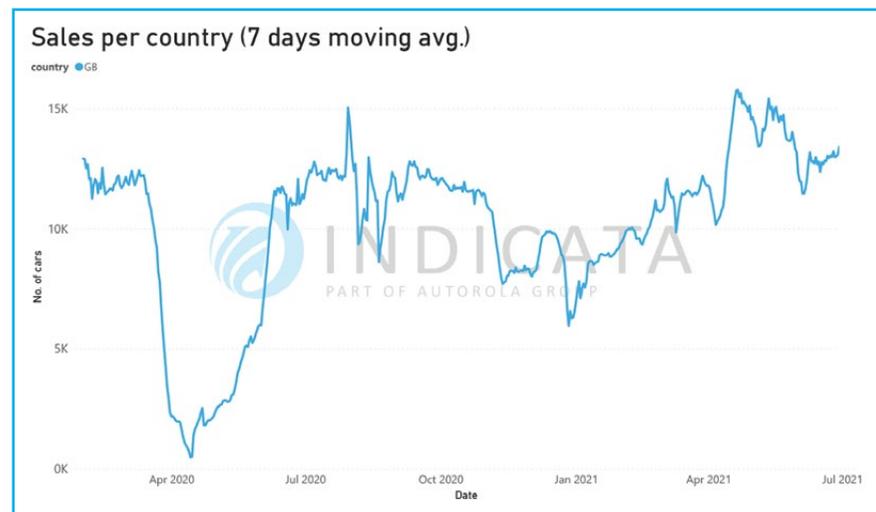
It is a similar story at a powertrain level with sales of all fuel types down compared to last month but up against June 2020 levels with BEVs up 196%, hybrids (+123%), petrol (+17%) and diesel (+11%). Stock turn is also well above 2020 levels with ICE vehicles 13% higher than in 2020, BEVs up 45% and hybrid stock turn 92% higher than this time last year.

Using our Top Seller report we can see the fastest selling used BEV up to 4-years-old is a draw between the Renault Zoe and the Audi e-tron with a stock turn of 19x. ICE vehicles also saw a tie for the fastest-selling used cars of the same age with Kia Sportage and Nissan Qashqai both selling typically within 15.2 days in stock, a stock turn of 24x.

Our price index is based on a consistent pool of vehicles indexed against February 2020, which would normally create a lifecycle driven steady downward movement in average prices but with supply constrained used car prices are continuing to rise sharply.



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Background

On the 24th 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 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”.



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