

INDICATA Market Watch COVID-19

Online selling becomes the new normal

Edition 15 | April 2021



Executive Summary

- Online sales help used car market bounce back one year on from Covid-19 outbreak.
- March 2021 used car sales volumes shoot up 24.4% over February 2021.
- Year-on-Year March 2021 used car sales up 49.1% and 5.4% higher YTD.
- Manufacturers support dealers with a large push in tactical registrations.
- Austria and Italy were amongst the first hit by the pandemic but now see the strongest sales recovery.
- All powertrains see double digit growth in month-on-month used car sales with hybrids growing by 40% and outperforming the rest.
- BEV stock turn of 4.1x makes them the slowest selling powertrain whilst Diesel (7.4x) continues to sell the fastest.
- VW T-ROC takes the honours as the fastest selling used car under 2-years old in March across the region.
- Total used car stock going into April 2021 is 1.7% lower YoY for the left-hand-drive markets .
- Stock levels vary greatly by country as Covid-19 means some markets are overstocked whilst others are heavily constrained.
- This is creating opportunities for cross border trading.
- With a consistent pool of 3-year-old vehicles, we would expect the lifecycle to show a steady downward movement in average prices month-on-month, but with excess stock in some markets and a shortage in other markets prices are quite volatile.
- Online sales are proving to be an important channel for selling used cars B2C through the Covid-19 crisis and it is becoming the new normal.

European Markets

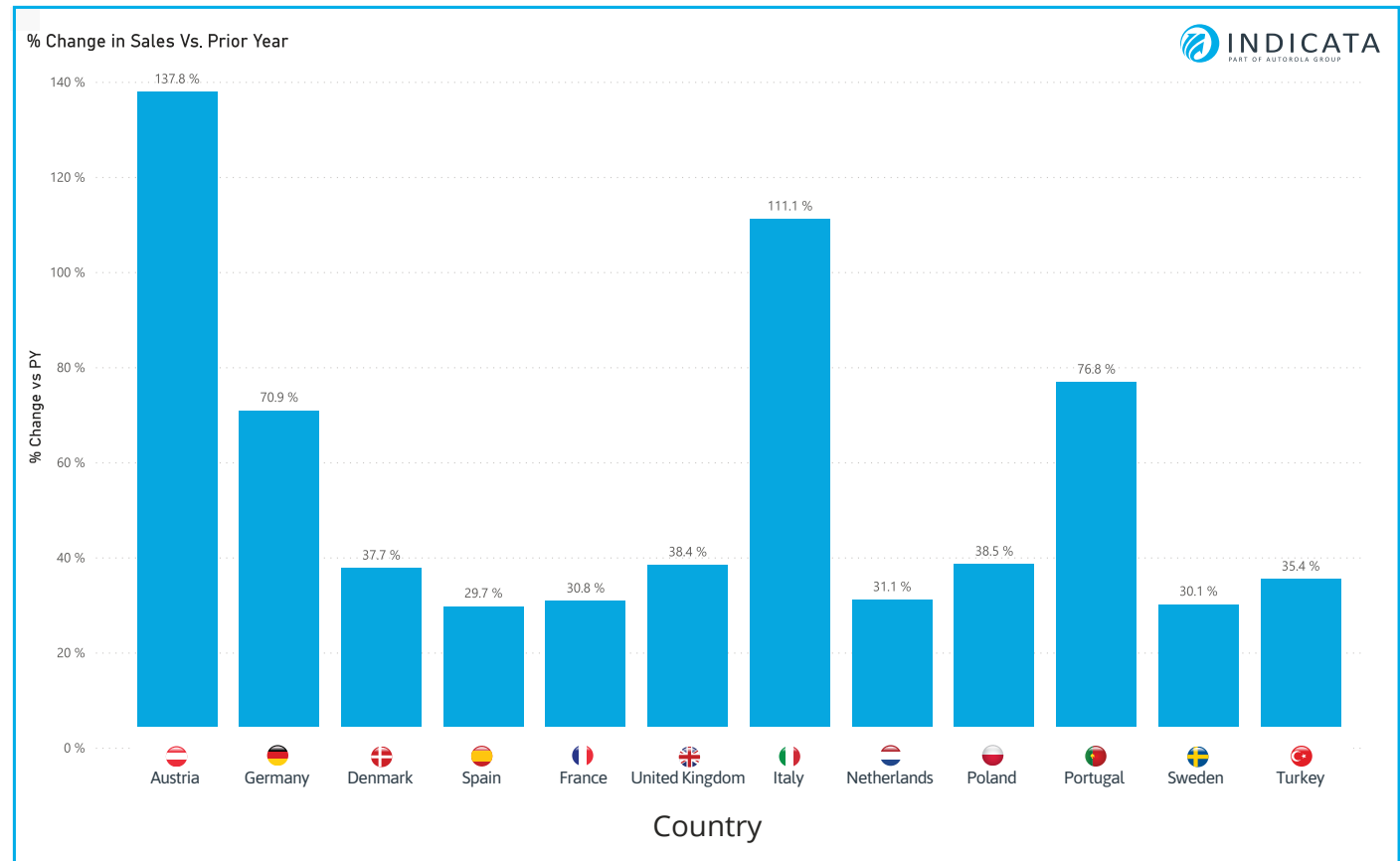
Used car sales storm back in March 2021

March 2020 saw the majority of Europe plunge into the Covid-19 pandemic with restrictions shutting down car factories, dealerships etc. The impact on used car sales was dramatic with sales down 23.7% in March 2020 even though restrictions only came in part way through the month in some countries.

Whilst most of the countries we cover are still under some form of lockdown or restrictions the last 12 months have enabled dealers to ramp up their online processes and consumers to become more confident of digital transactions. Therefore the 49.1% Year-on-Year increase for the whole region we cover is to be expected to a degree however, what may surprise some is that this also means online B2C used car sales for March 2021 are 13.8% higher than the pre-Covid-19 March 2019.

Austria and Italy saw the highest increases in YoY sales, hitting triple digit rates of growth, but they also saw the highest rate of decline in March 2020 with drops of 43% in Italy YoY and 41.6% in Austria over the same period.

March 2021



This pattern of certain countries outperforming others in terms of growth will continue for another month or two as the timing of lockdowns last year varied by country resulting in an uneven decline in used car sales across the region.

Our focus remains on both volumes and market stock turns for Market Watch but as you will see we are also now considering speed of sale at a more granular level as dealer start to look for ways to restore their balance sheets.

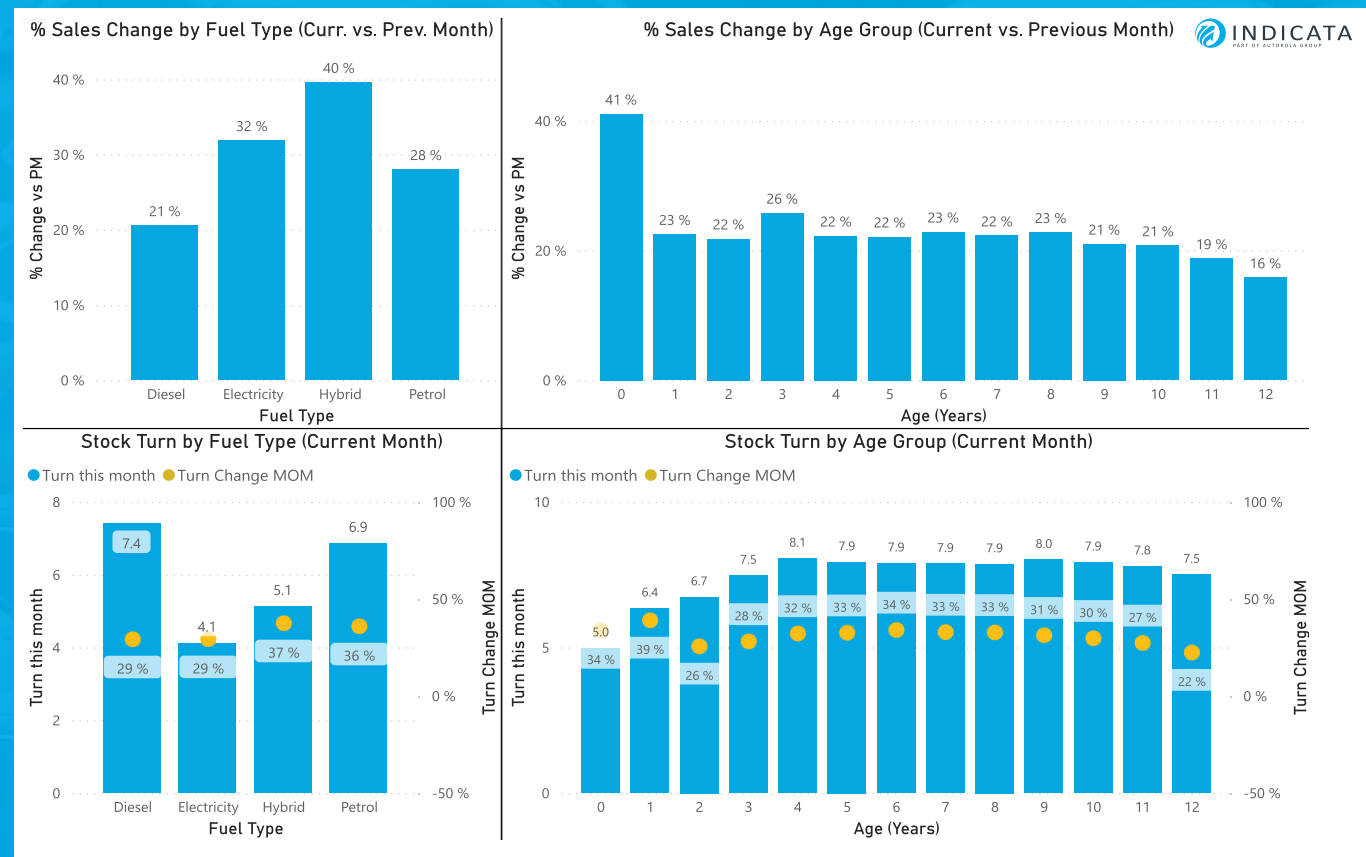
Tactical registrations driving the used car market

The supply/demand equation is a key element when reviewing the automotive industry. With Europe in the first grips of the Covid-19 pandemic new car sales in March 2020 dropped 51.8%.

By the end of May 2020 Year-to-Date new car sales in the Left-Hand-Drive “LHD” countries were down 41.3% over the previous year, equivalent to 2.4m cars, with many of those sales lost from the short-cycle channel of daily rental and dealer demonstrators. This leaves dealers in March 2021 with far fewer younger used cars available via manufacturers approved used car schemes. To fill this void there appears to have been some significant manufacturer backed tactical registrations which is why the YoY increase in the very young used car sales (<1 year old) is almost double the growth in other age ranges.

As March 2020 was far from being a normal month, we have changed our table, so it shows a Month-on-Month comparison. All powertrains saw strong sales growth in March compared to a month earlier but used diesel (7.4x) and used petrol (6.9x) are still selling much faster than the alternative powertrains.

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



This month we are paying particular attention to the speed of sale. In some of the country reports we include some of the fastest selling cars by volume or fuel type. Looking at all markets for used cars up to 2-years-old, aggregating at a model level and excluding low sales volume cars, the fastest selling car for all powertrains is the VW

T-ROC with a stock turn of 7.6x and it is also the fastest selling petrol car at 7.9x. For the other powertrains, the Mercedes-Benz GLC-Class at 8.3x is the fastest selling diesel, the Toyota RAV 4 (5.8x) takes the hybrid top slot with the Porsche Taycan the fastest selling BEV.

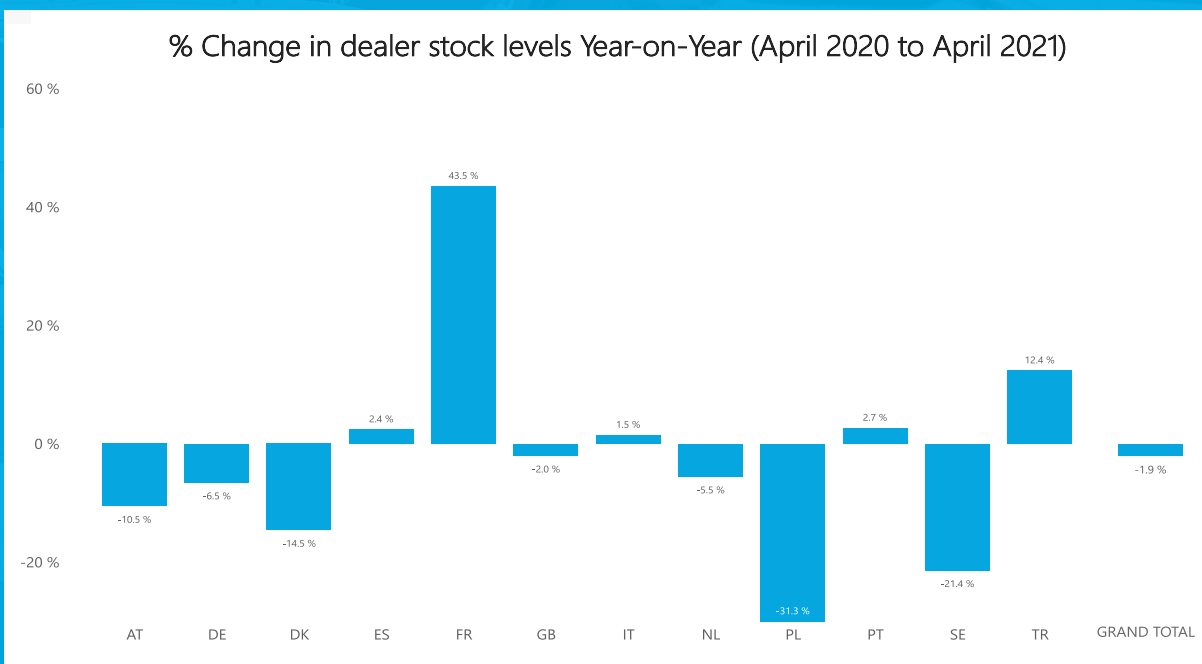
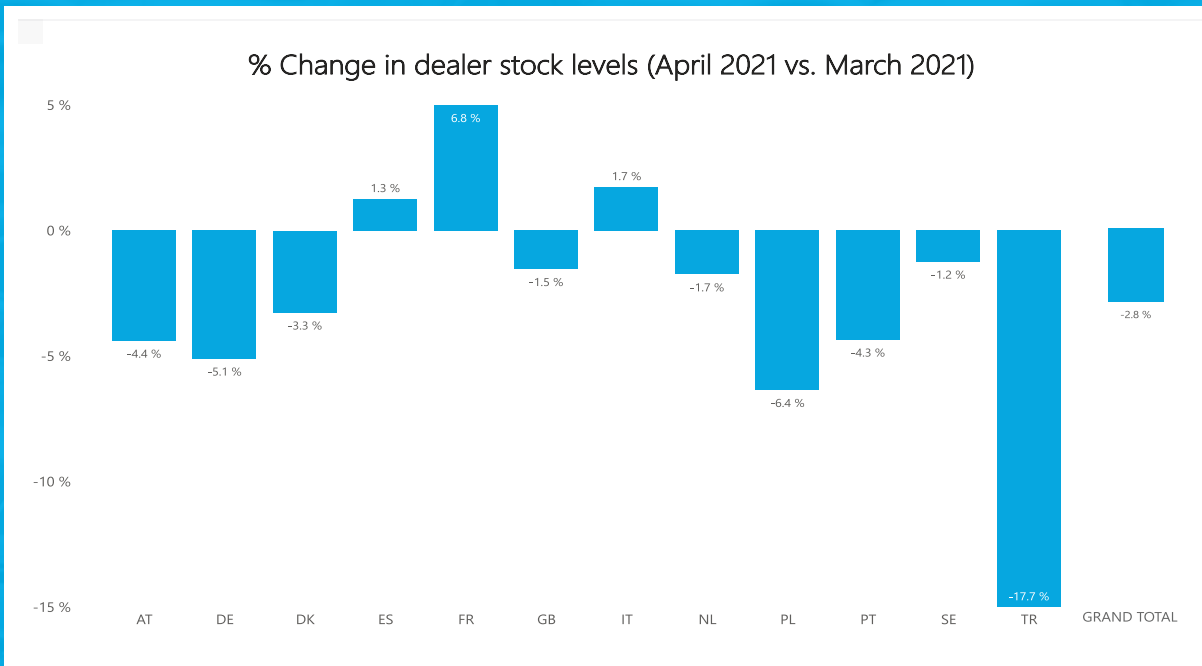
Stock levels marginally down year-on-year and in the wrong locations

Managing stock levels during the coronavirus pandemic has been a challenge for most dealers and on an almost monthly basis we have seen peaks and troughs in different countries. The rise in online used car sales is also seeing an increase in advertised used stock whilst used car prices in several markets are rising.

France is a good example where online stock levels have been creeping up for 9 of the last 10 months resulting in the 43.5% Year-on-Year increase shown above. Conversely some markets like Poland are still enduring supply constraints which is acting as a brake on sales and pushing up used car values.

Across the left-hand-drive markets the amount of stock going into April 2021 is only 1.7% lower than a year earlier indicating that stock is available but not necessarily in the right places which will have a negative impact on bottom line profitability. This confirms our view last month of definite cross border trading opportunities as some markets sales are clearly being hampered by supply constraints.

With the right-hand-drive Great Britain market similarly down by 2.0% YoY it does suggest the overall position across all markets are aligned it is just that the movement of stock across mainland Europe is not happening as much during the pandemic as it would normally causing some local market issues.





Austria Tactical registrations support a surge in demand

A Year-on-Year increase of 137.8% in online used car sales would normally be headline news but with March 2020 being the start of Covid-19 restrictions across most of Europe such a bounce back is to be expected. We have therefore revised our table to show how sales and stock performed in March 2021 versus February 2021 where the Month-on-Month increase was still a significant 29.0%.

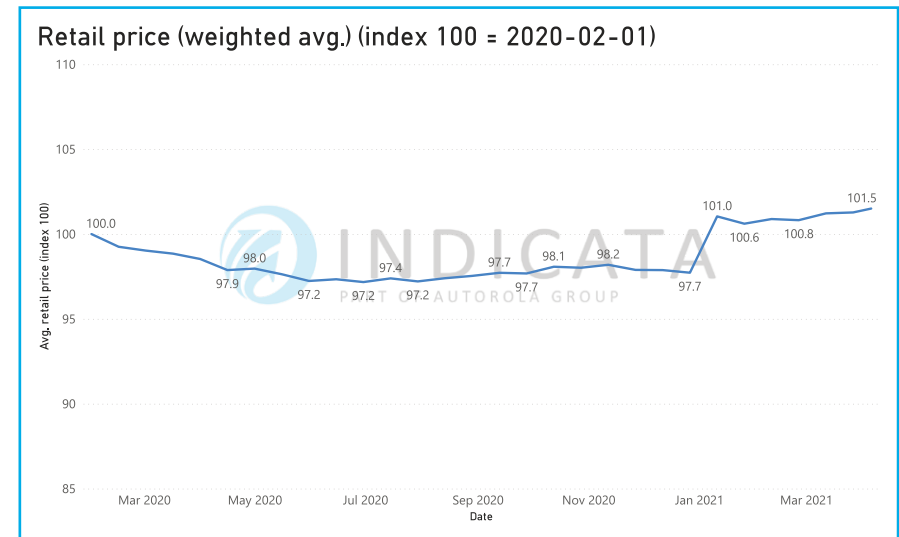
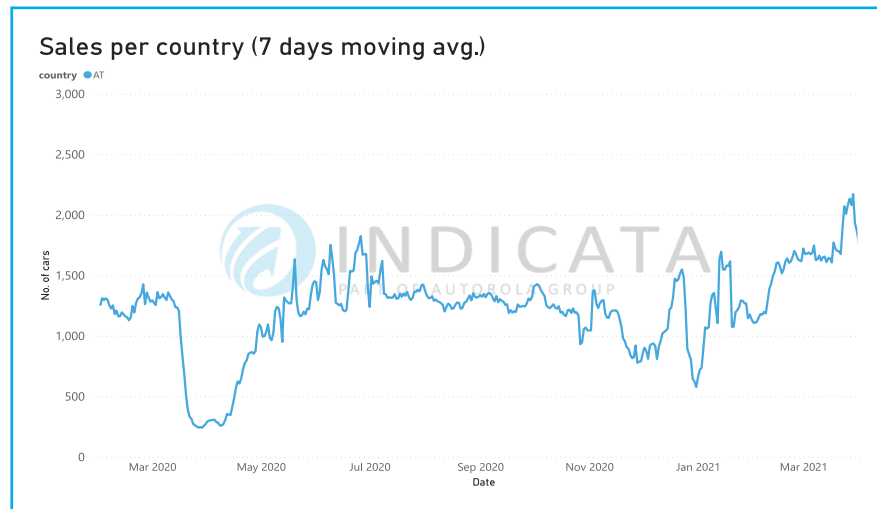
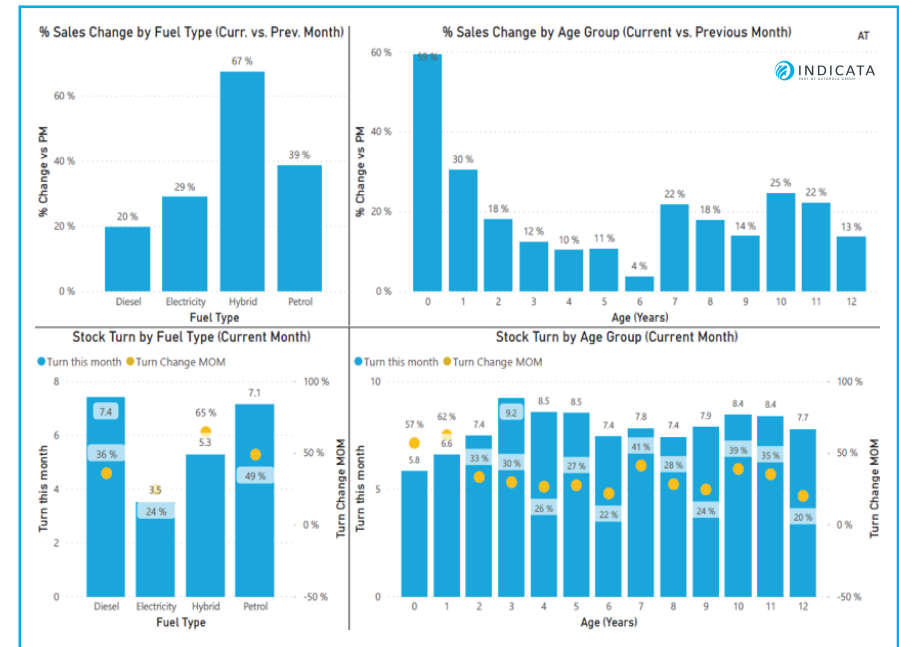
In a trend repeated across many countries manufacturer backed tactical registrations have played a key part in driving used car sales with very young used car sales in March up 59% over the previous month.

Hybrid used cars are still leading the way in growth terms with March sales up 67% in a month and the speed of sales increasing by 65% resulting in stock now turning at 5.3x. But with used petrol stock turn at 7.1x and used diesel marginally faster at 7.4x the traditional internal combustion engine "ICE" is still the fastest way to turn metal to cash. The rise in ICE stock turn could also indicate some shortages of supply creeping in.

Looking at the stock turn for used cars up to 4-years' old selling in volume the hybrid BMW X5 at 10.4x is the fastest selling, with the petrol Mercedes-Benz A-Class second (8.9x) and the petrol VW Polo third at 8.8x.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. With used car demand continuing to rise and signs of supply constraints, used car prices are still resisting the normal trend and continue to edge upwards.

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The online used car market in Denmark rose 37.7% in March 2021 Year-on-Year and was 35.5% higher than February 2021. However, March 2020 saw the first significant impact of Covid-19 making it far from an average month and so we have revised our usual Year-On-Year table to show how sales and stock performed in March 2021 versus February 2021.

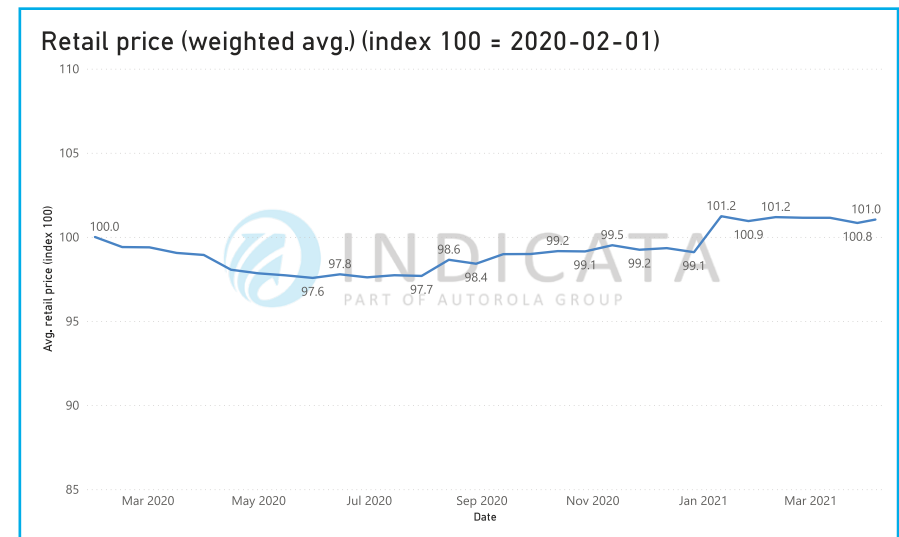
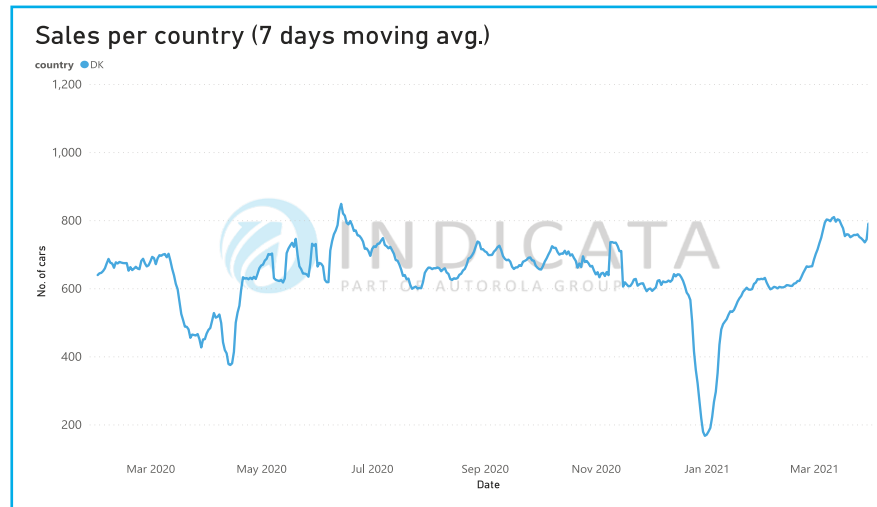
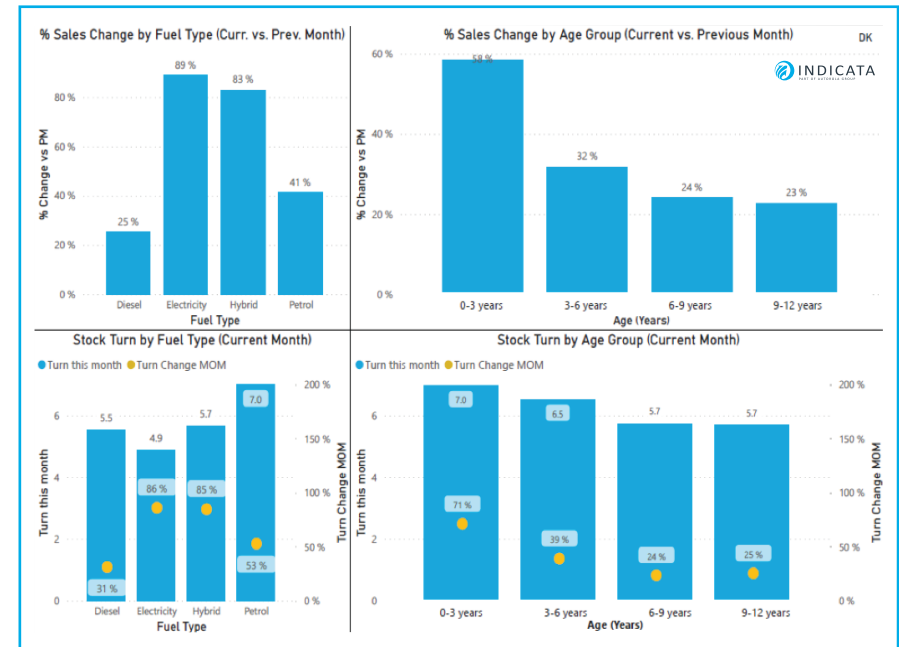
After a weak start to the year due to Covid-19 restrictions, March has seen the release of some pent-up demand helped by manufacturer backed tactical registrations (cars < 1-year-old). Sales of the younger used cars up to 3 years old jumped 58% in March over the previous month with all powertrains benefitting from the growth in sales.

Denmark has been one of the European countries leading the way with often treble-digit YoY growth in sales for BEVs and hybrids. Even just comparing March 2021 with February 2021 sees BEV sales up 89% in one month with hybrids close behind (+83%) as the market continues down its road to cleaner motoring.

Speed of sale can be a major boost to bottom line profitability and with used petrol sales at 7.0x stock turn it remains the fastest selling powertrain although hybrids and BEVs are closing the gap. Going deeper into the data for cars selling in volume up to 4-years-old, it is the diesel Peugeot 208 selling the fastest at 11.5x, closely followed by the diesel Citroën C4 Cactus (10.7x) with the hybrid Ford Kuga (9.9x) third.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. The rising demand in Denmark is keeping used car prices relatively stable with just a little inflationary pressure.

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The French online used car market rose 30.8% in March 2021 Year-on-Year but, March 2020 saw the first significant impact of Covid-19 with used cars down 29% over the previous year. This means that whilst March 2021 was a relatively good month it was still 7.1% lower than the pre-Covid-19 March 2019.

With March 2020 being atypical we have revised our usual Year-On-Year table to show how sales and stock performed in March 2021 versus February 2021.

Manufacturer backed tactical registrations (cars < 1-year-old) have played a part in pushing up used car sales but, the 5% Month-on-Month increase is much lower than we have seen in other markets.

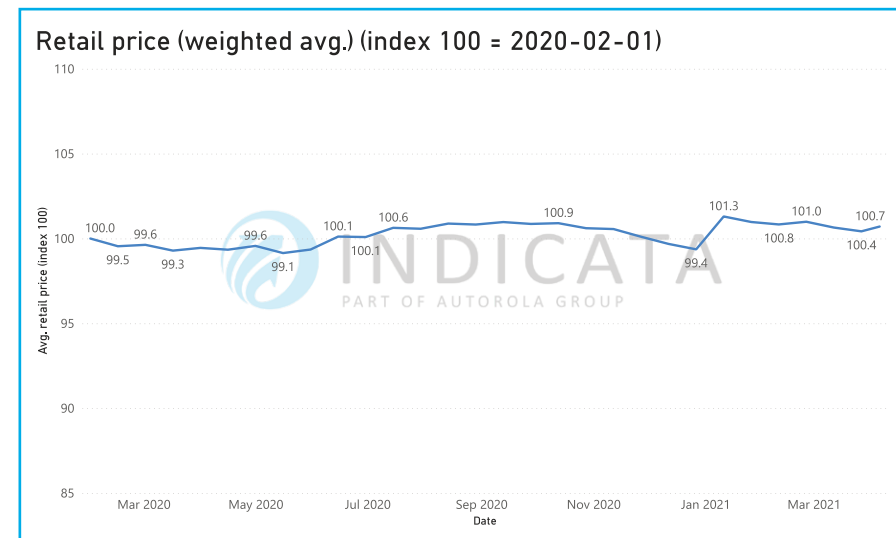
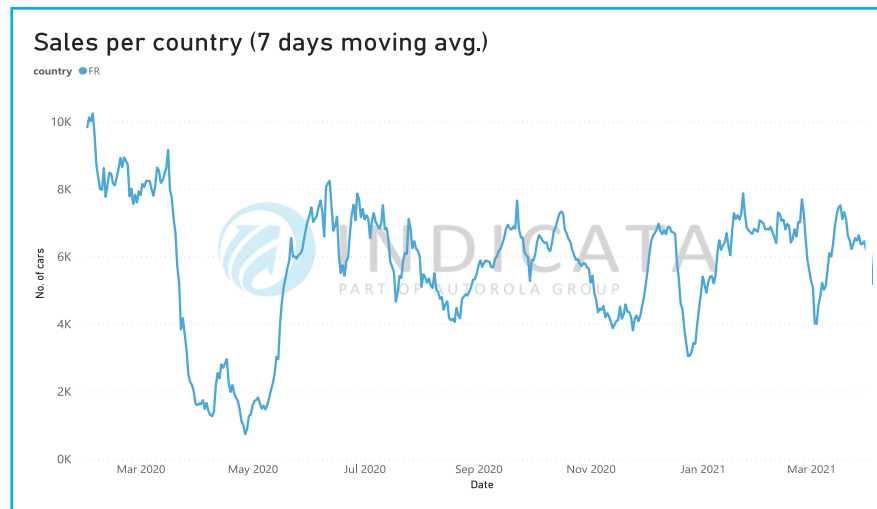
This may be due to the much higher levels of used car stock with YoY stock levels up 43.5% which is also a 6.8% increase in the stock levels a month ago.

In a very unusual twist, sales of BEVs fell by 1% in March compared to February 2021, although they are still 185% higher than a year ago. Stock turn also dropped marginally to 4.3x meaning they are sitting in stock far longer than the other powertrains.

At a more detailed level looking at the stock turn of higher volume used cars up to 4-years-old, the petrol Dacia Duster is the fastest selling at 12.1x. The second fastest volume model is the diesel Audi Q3 at 10.2x which is closely followed by the Nissan Qashqai petrol at 10.0x.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. With stock now in more plentiful supply we are seeing used car prices return to a more normal pattern.

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Germany Online B2C used car sales top pre-Covid-19 levels

Covid-19 made March 2020 irregular and therefore doing any comparison with this year's online used car sales would inevitably show a significant (+70.9%) and unsurprising bounce back. Therefore we have revised our table to show how sales and stock performed in March 2021 versus February 2021. That said it is worth noting that March 2021 online used car sales were 22.9% above the pre-Covid-19 March 2019 level.

Tactical registrations have played a key role in pushing up used car sales with very young used car sales (<1-year-old) up 64% in March versus February 2021 with a knock-on effect to cars at all ages.

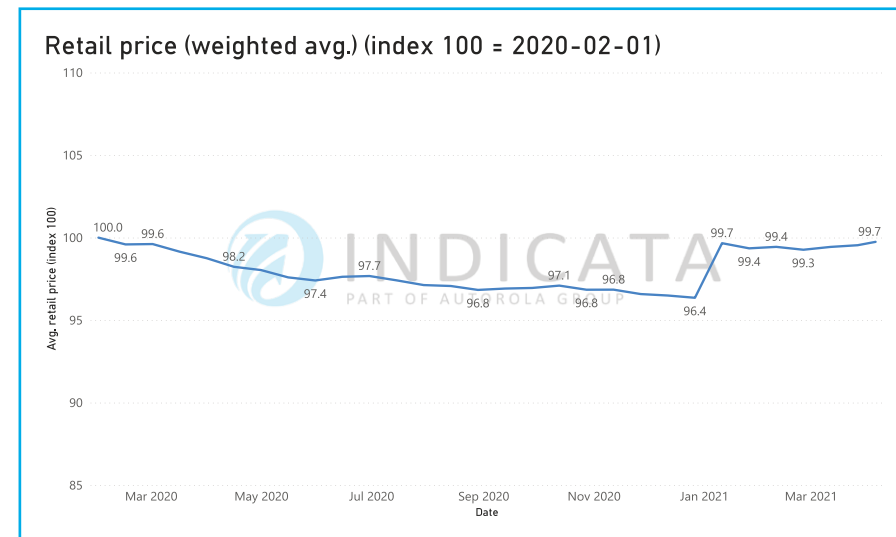
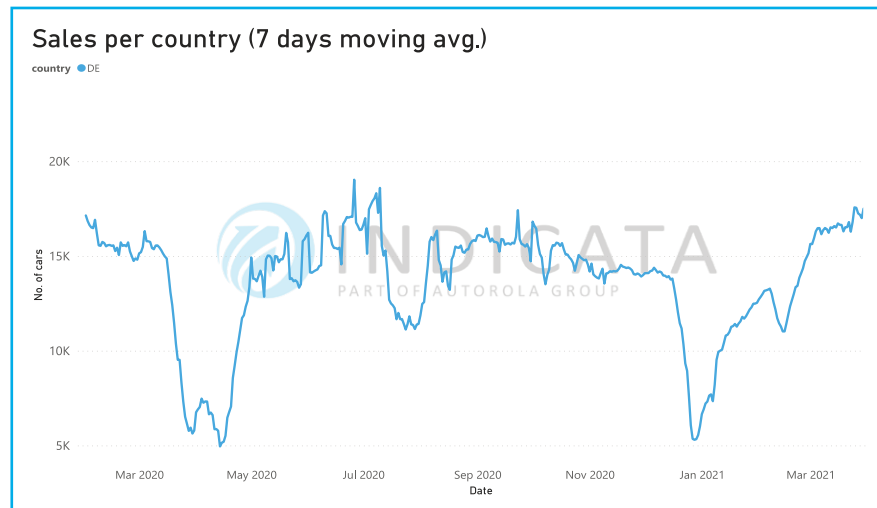
Currently demand is outstripping supply with used car stock levels down 6.5% YoY and down 5.1% going into April 2021 compared to a month earlier.

With demand rising and supply a little constrained it is inevitable that stock turn has increased so sharply Month-on-Month. Used diesel cars increased its rate of turn by 41% as they remain the fastest-selling powertrain at 7.4x although used petrol cars at 6.9x are close behind.

Looking at the high volume used cars under 4-years-old the petrol Mercedes-Benz A-Class is the fastest selling at a 9.4x stock turn, followed by the SmartFortwo petrol at 8.3x and the Mercedes-Benz GLC-Class diesel at 8.2x.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. With supply failing to match demand, used car prices are seeing some inflationary pressure as prices rise a little.

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The Italian online used car market rose 111.1% in March 2021 Year-on-Year but, March 2020 saw the first significant impact of Covid-19 and the accompanying restrictions, so we have revised our table to show how sales and stock performed in March 2021 versus the previous month.

Whilst such a YoY increase was expected, after the collapse in used car sales last year, March 2021 was still a strong used car market with sales 20.4% higher than the pre-Covid-19 March 2019 as incentives continue to stimulate the new car market.

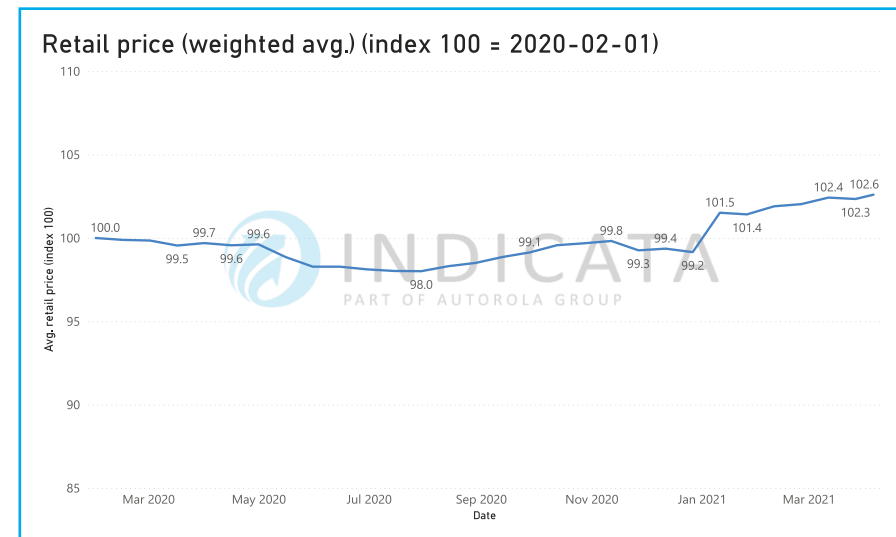
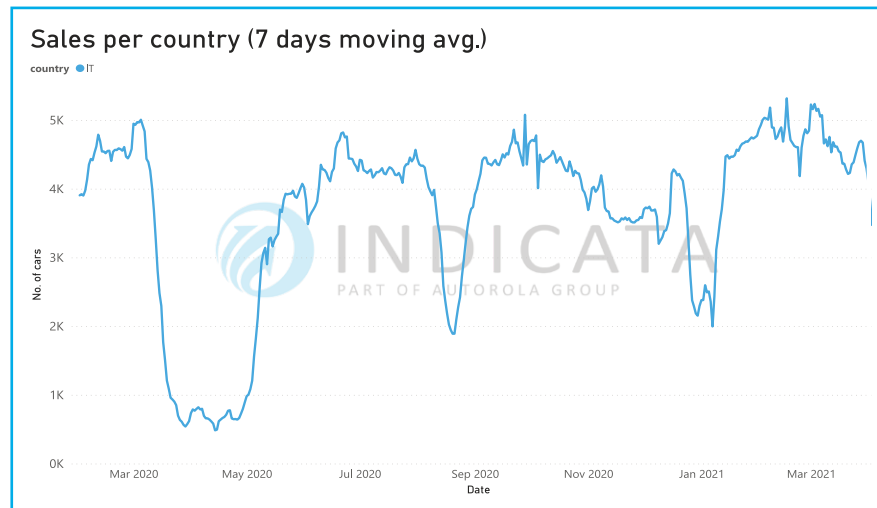
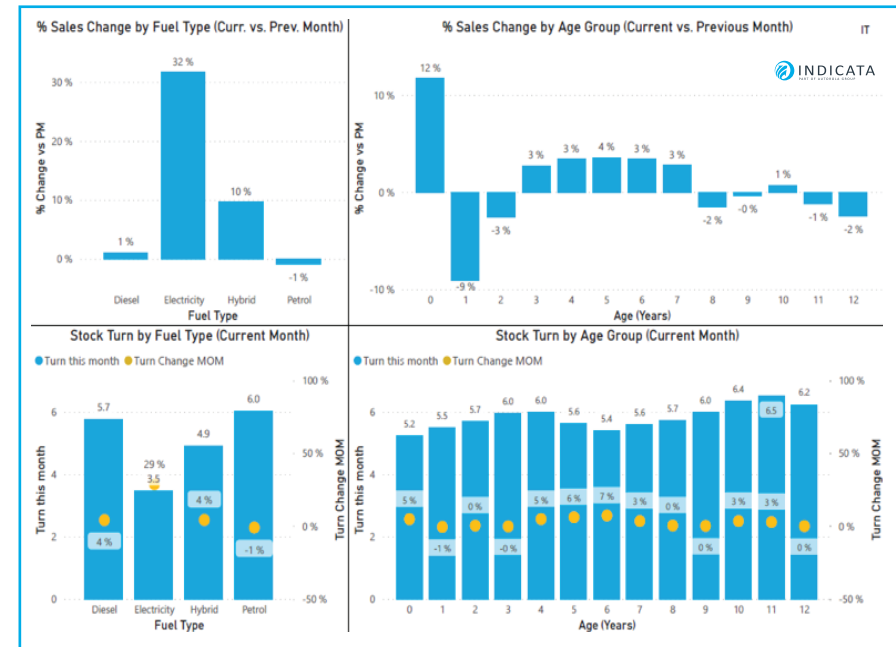
In a trend seen elsewhere across Europe, manufacturer backed tactical registrations are playing an important part in the used car market with sales up 12% in March 2021 compared to February.

Another common trend is the growth in BEVs with March seeing a 32% uplift over February's sales but, whilst stock turn on BEVs improved by 29% Month-on-Month in March they remain the slowest selling powertrain at just 3.5x compared to 5.7x for used diesel cars and 6.0x for used petrol.

At a more detailed level the DS 4 petrol was the fastest selling used car under 4-years-old in March with a stock turn of 18.5x compared to the second placed petrol Toyota GT86 at 16.7x. Amongst the higher volume sellers, Dacia did well with the Duster at 10.5x and the Sandero at 9.2x with the Mercedes-Benz A-Class hitting a stock turn of 8.2x.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. With supply constraints continuing and demand rising, used car prices are still increasing in the Italian market.

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Covid-19 made March 2020 irregular and therefore doing any comparison with this year's online used car sales would inevitably show a significant (+31.1%) and unsurprising bounce back. Therefore we have revised our table to show how sales and stock performed in March 2021 versus February 2021. However it is worth noting that March 2021 online used car sales were 9.2% above the pre-Covid-19 March 2019 indicating some pent-up demand.

Very young used car sales (<1-year-old) have done particularly well, with sales up 51% in March 2021 versus February 2021, as manufacturers support tactical registrations to meet some of that demand.

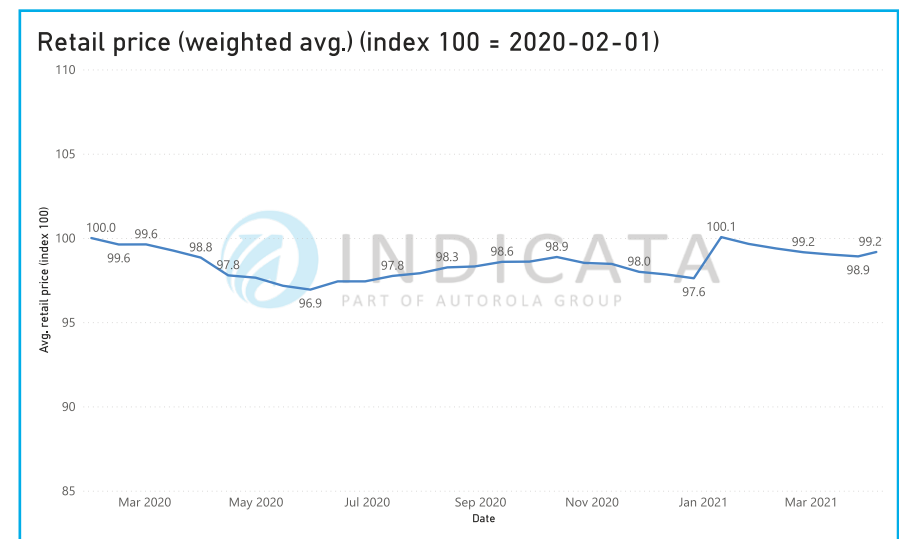
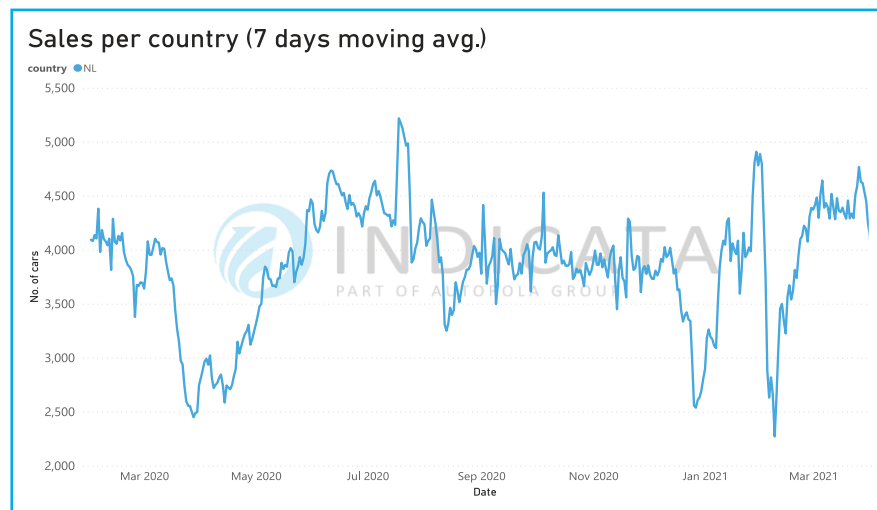
In a break from the common trend seen in other markets, BEVs saw the lowest MoM increase in sales, up just 14% in March compared to February. BEVs are also the slowest selling used cars with a stock turn of just 3.1x well behind third placed hybrids at 4.6x.

A quick look at the fastest-selling used cars up to 4-years-old provides an interesting mix with Mazda CX-30 petrol selling the fastest with stock turning over at 10.0x per annum. Second fastest is the Fiat Abarth 124 petrol at 9.1x with Volvo XC40 petrol coming in third at a very respectable 8.9x.

Whilst used car sales are increasing the supply has been a little slower to arrive with stock levels going into April 2021 down 5.5% YoY and 1.7% lower than a month earlier.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. With demand rising and stock falling dealers are starting to apply some inflationary measures to their prices with a small increase in March.

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Poland Stock shortages push up used car prices

The Polish online used car market rose 38.5% in March 2021 Year-on-Year but, March 2020 saw the first significant impact of Covid-19 and the accompanying restrictions, so we have revised our table to show how sales and stock performed in March 2021 versus February 2021.

Compared to just a month earlier, March online used car sales jumped up 38.5% as buyers looked for bargains but the increase still was not enough to overtake the pre-covid era with sales 6.6% lower than March 2019.

Looking at sales by age manufacturers were clearly willing to support dealers with tactical registrations with very young used car sales up 123% to help fill the gap of 1-year-old vehicles caused by the low new car sales last year.

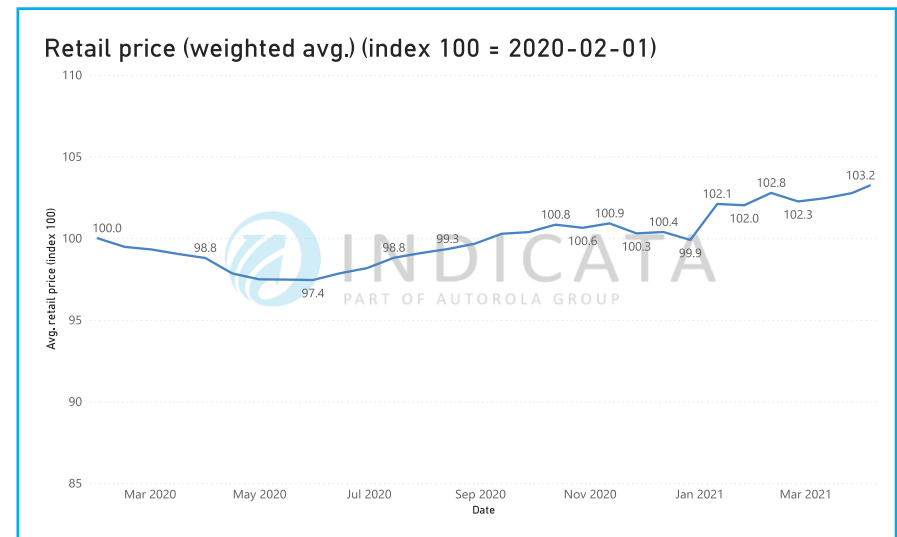
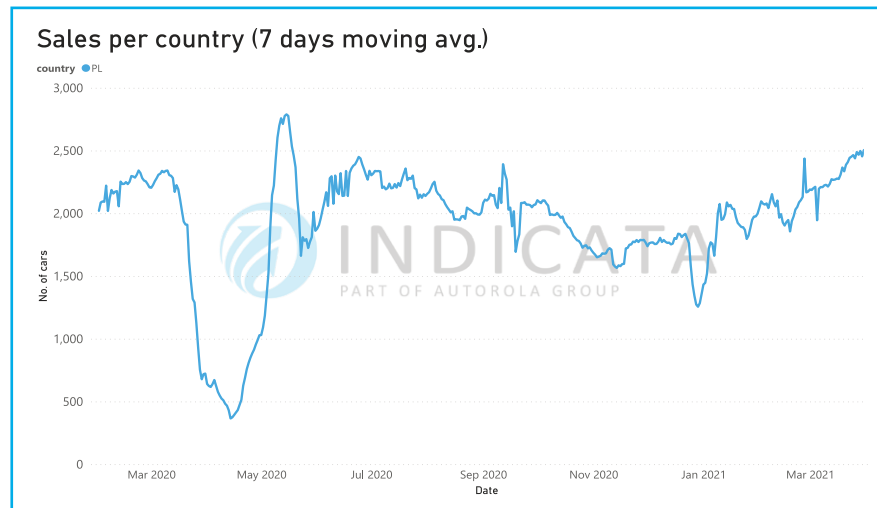
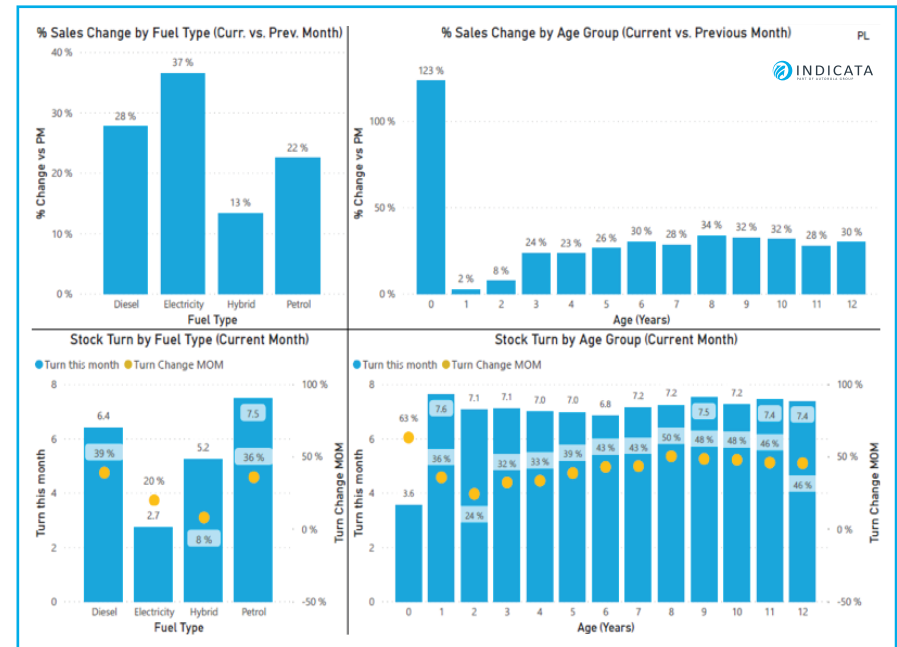
Total used car stock levels going into April were 31.3% lower than a year earlier and this shortage of used stock has been increasing since the start of the year when stock levels were 16.4% lower than in January 2020.

Compared to February 2021 sales increased across all powertrains in March with diesel up 28% MoM. Whilst BEV sales grew even more, up 37%, the 2.7x stock turn shows supply is outstripping demand with plenty of stock sitting around.

Looking at cars under four years old for all powertrains the Toyota Auris was the fastest-selling model in March with a stock turn of 8.7x. Second place went to the VW Golf at 8.7x with Toyota Corolla being the third fastest-selling car.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. With supply constraints continuing and demand rising, used car prices are still increasing in the Polish market.

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Portugal Used car market bounces back in March

The March 2021 Portuguese online used car market rose 76.8% over March 2020 but March 2020 saw the first impact of Covid-19 and the accompanying restrictions, so we have revised our table to show how sales and stock performed in March 2021 versus February 2021. March 2021 continues to highlight the growth in online used car sales which were up 33.4% over February following Month-on-Month falls of 13.4% in February and a January drop of 6.4% over December 2020.

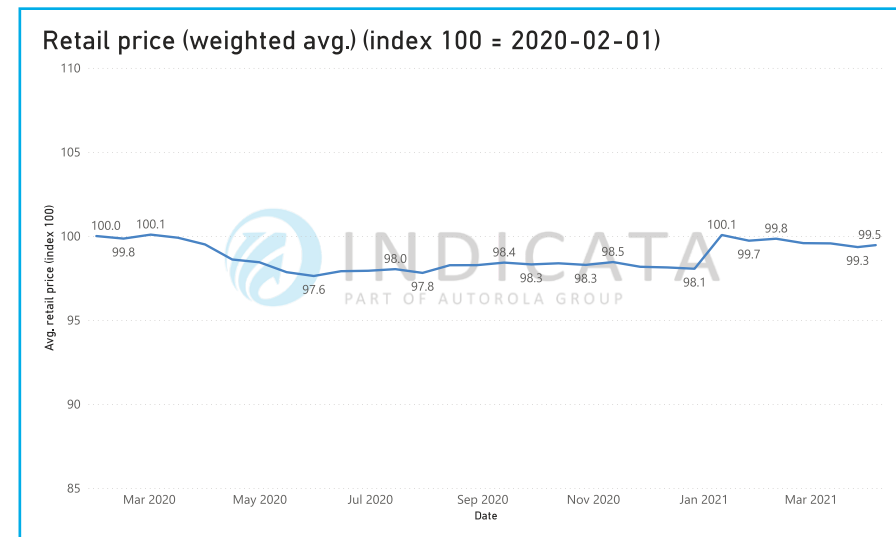
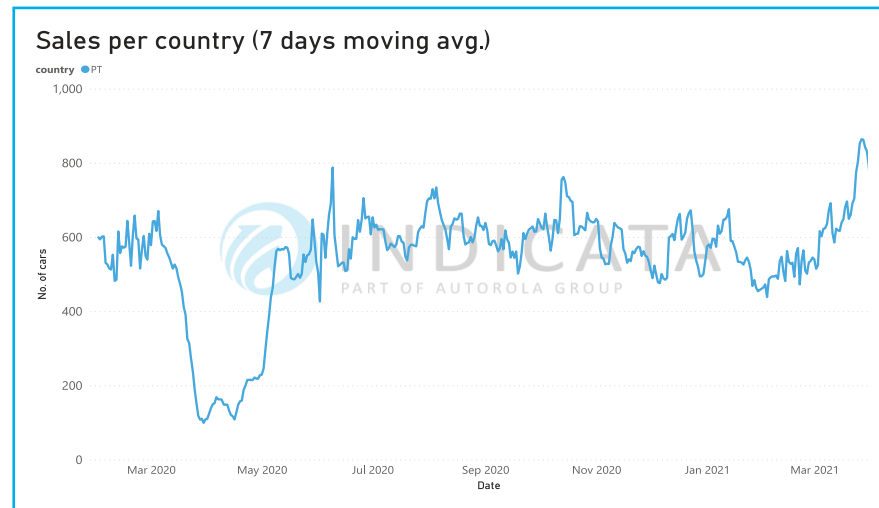
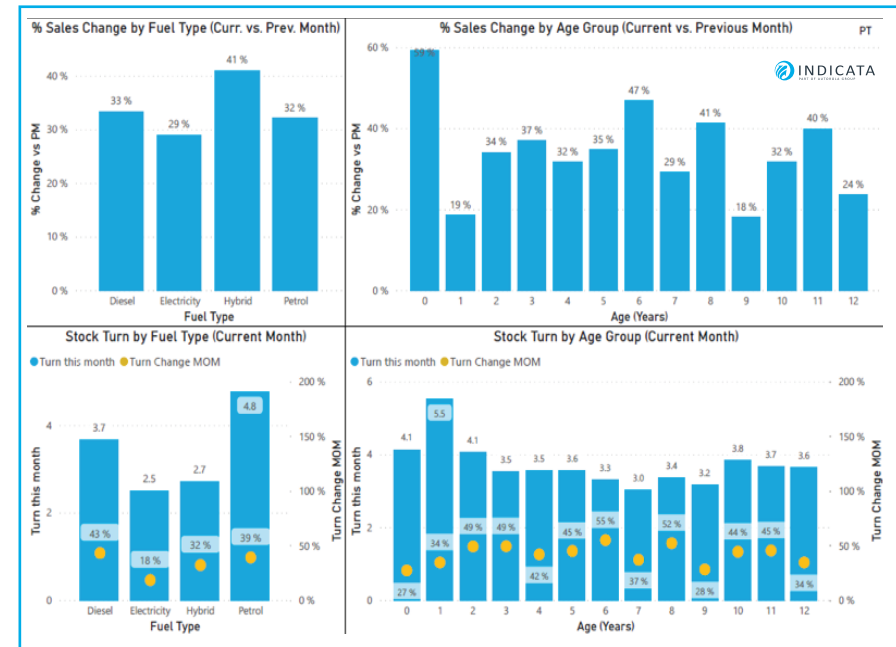
Whilst sales across all ages have seen healthy MoM growth the 59% increase in young used cars (<1-year-old) indicates an increase in manufacturer backed tactical registrations which is a common theme across most markets.

It is worth noting that all powertrains saw strong MoM growth but used petrol cars continue to sell the fastest with stock turn of 4.8x, a 39% increase over the previous month. In contrast BEVs appear to still be in free supply with stock selling very slowly at a stock turn of just 2.5x.

Even though used petrol cars typically sell faster than used diesel ones, the fastest selling used car up to 4-years-old in March was the Opel Zafira diesel at 11.6x, followed by the Dacia Duster at 10.4x and the Fiat 124 at 9.0x.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. Whilst dealers had been holding firm on prices due to historic supply constraints, they are now starting to price in line with the natural depreciation expected.

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Spain Audi Q8 diesel was the fastest selling used car in March

The March 2021 Spanish online used car market rose 29.7% over March 2020 but March 2020 saw the first impact of Covid-19 and the accompanying restrictions, so we have revised our table to show how sales and stock performed in March 2021 versus February 2021.

Online used car sales for January were weak compared to December 2020 but a 24.5% Month-on-Month increase in February and a stable March has resulted in a pattern consistent with quarter 1 trends in previous years.

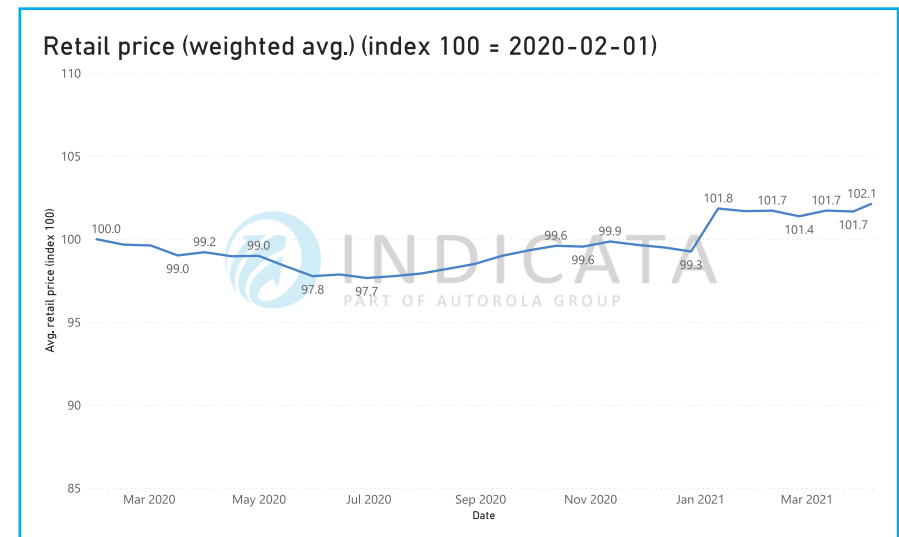
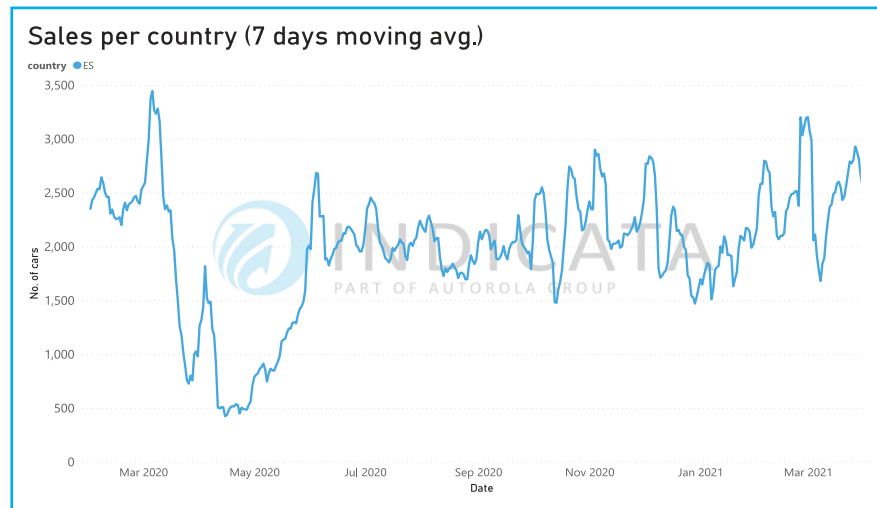
The most noticeable dynamic in the market is how sales of almost all ages of used cars are down except for the sale of very young used cars (<1-year-old) which grew 35% in March compared to just a month earlier, indicating some heavy support by manufacturers of tactical registrations.

An unusual aspect to note for the Spanish March market was the strong percentage growth in used hybrid car sales which rose 15% MoM and where sales of very young used cars were up 310% YoY.

Despite sales falling MoM for both used diesel cars (-1%) and used petrol cars (-3%), they are still the fastest selling powertrains with stock turn of 5.2x for diesel and 5.1x for petrol. At a model level for 3-4-year-old cars Audi Q8 diesel is the fastest selling used vehicle with stock turning at 10.1x, with Honda CR-V petrol (9.6x) and Smart ForFour petrol (9.6x) tying for second place in March.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. Supply constraints have eased but Spanish dealers continue to hold their prices against the natural depreciation expected and prices are rising a little.

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With Covid-19 making March 2020 irregular, doing any comparison to this year's online used car sales would merely show a significant (+30.1%) and unsurprising bounce back, so we have revised our table to show how sales and stock performed in March 2021 versus February 2021. However it is worth noting that March 2021 online sales were a little above March 2019 (+5.4%).

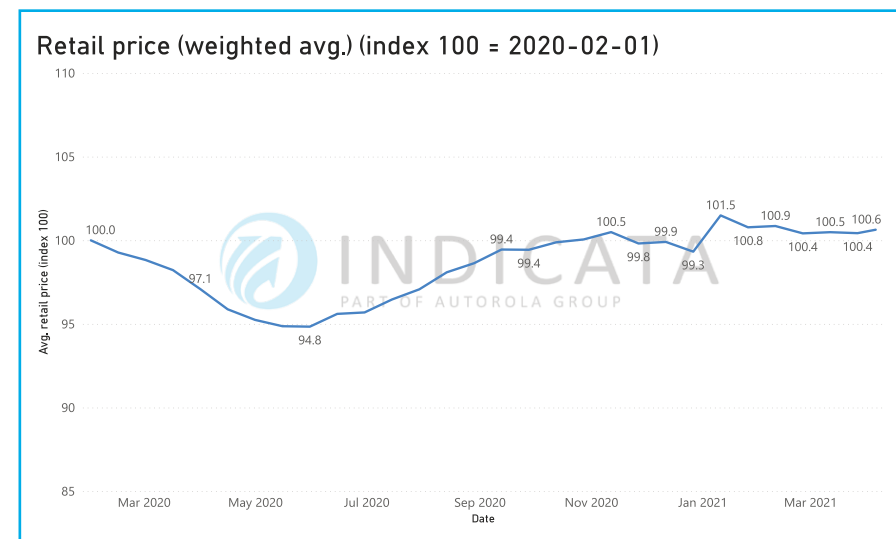
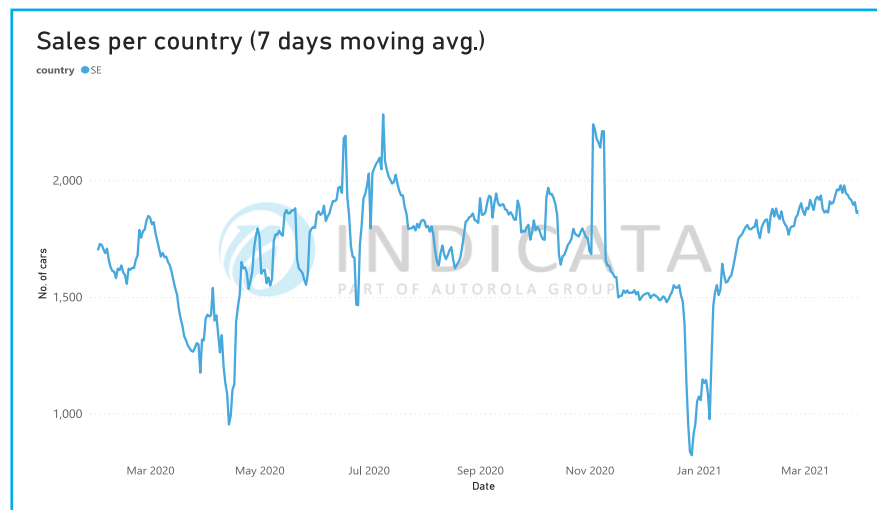
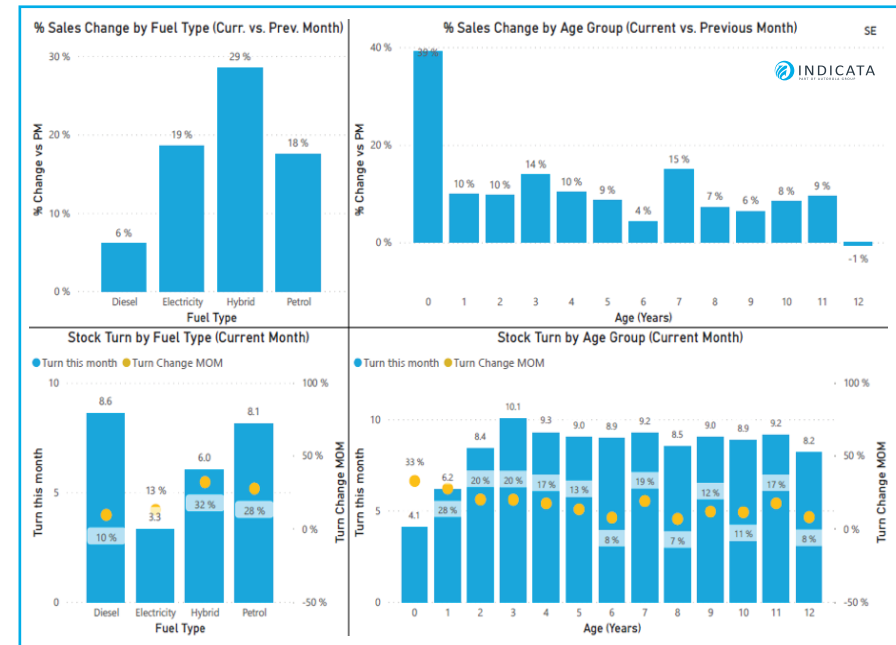
Some of this increase is due to dealers and consumers making increasing use of online sales but that aside 2021 is still performing well with all three months outperforming the previous month. January 2021 saw a 12.3% increase in used car sales over December 2020, followed by February being 6.6% higher than January and March being 11.9% stronger than February. In total quarter 1 2021 online used car sales are 6.8% above Q1 2020 and 5.1% above the same period in 2019.

Looking behind the figures the 39% Month-on-Month growth in very young used car sales, i.e., < 1-year-old, shows manufacturers are now supporting a significant increase in tactical registrations which are starting to sell a little quicker at a 4.1x stock turn, 33% quicker than the previous month.

Used diesel cars remain the fastest selling powertrain at 8.6x selling over 2.5 times quicker than BEVs.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. The Swedish market had started to show this pattern since the latter part of 2020, allowing for the new year uplift, but the renewed demand is having an inflationary impact on average used car prices.

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Turkey Used diesel car sales experience strong growth

With March 2021 being the first real comparison to the start of Covid-19 and the restrictions that came with it the 35.4% YoY increase does not come as a surprise. March 2020 is clearly an irregular month, so we have changed our usual table of sales and stock turn by age and powertrain to compare the latest month's sales to the previous month.

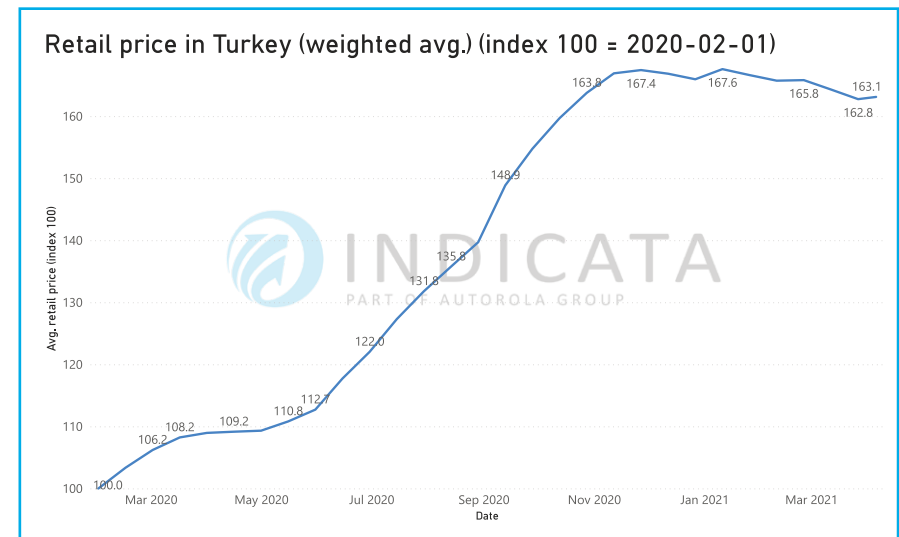
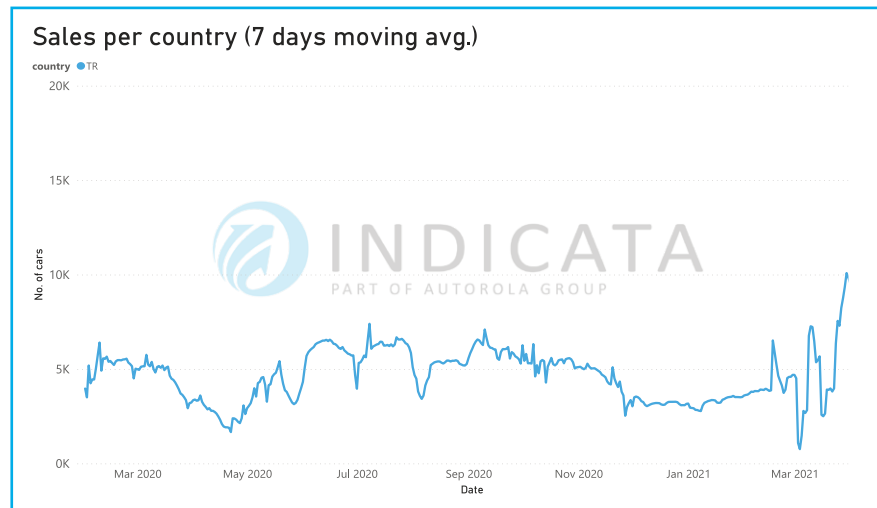
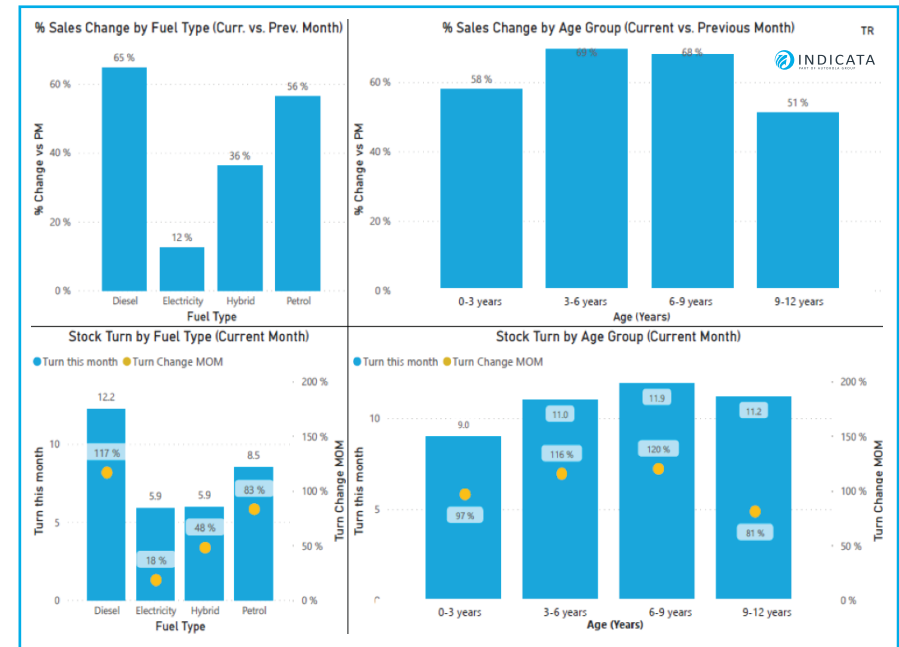
However, what you may not realise is the market has done a good job with adapting to online selling. Consumers are also being more willing to consider buying used cars due to the supply constraints of new cars available in the market during 2020 because of the manufacturer Covid-19 driven shutdowns.

The net result means that not only was March 2021 the expected good month for online used car sales compared to the previous year it was also around 45% higher than March 2019 as well as seeing strong growth compared to February this year.

Mark Twain famously said, "The report of my death was an exaggeration" and the same can be said for diesel as used diesel sales saw the highest rate of growth in March 2021 over the previous month. They were also the most in demand with stock turn of 12.2x well ahead of second place used petrol cars at 8.5x.

Our pricing index is based on a consistent pool of vehicles, so under normal circumstances we would expect a lifecycle driven steady downward movement in average prices as the year progresses. The Turkish market has started to show this pattern since the latter part of 2020, but the renewed demand is having an inflationary impact on average used car prices.

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United Kingdom Used car sales above pre-Covid levels

March 2021 is the 13th month impacted by Covid-19 restrictions and whilst the country remained in lockdown a lot has changed since the first lockdown a year ago. Online B2C used car sales in March 2021 were 38.4% higher than the previous year but the impact of that first lockdown means any YoY comparison at least for the next 3 months is not a meaningful comparison. Therefore we have changed the table to compare this month's performance to last month.

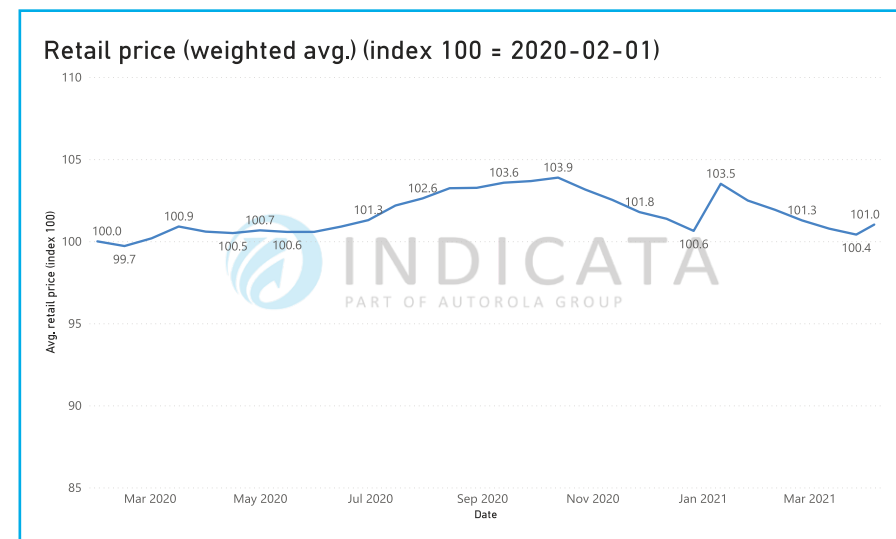
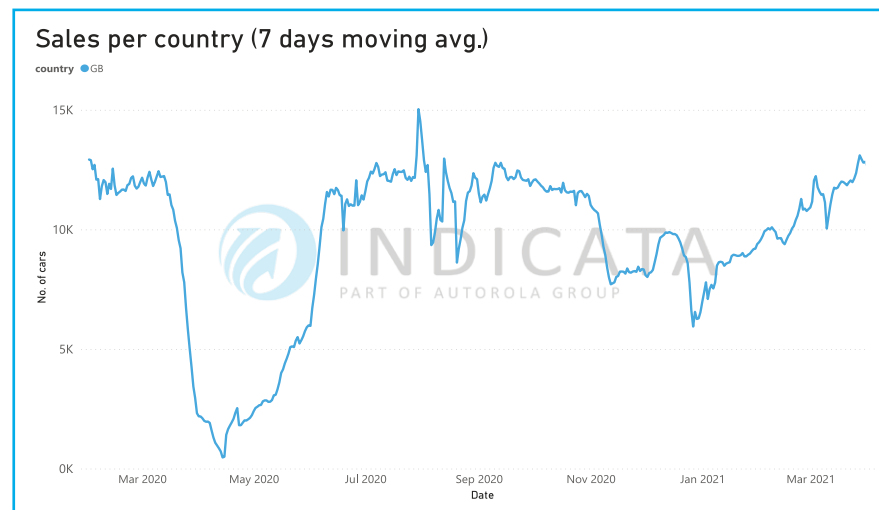
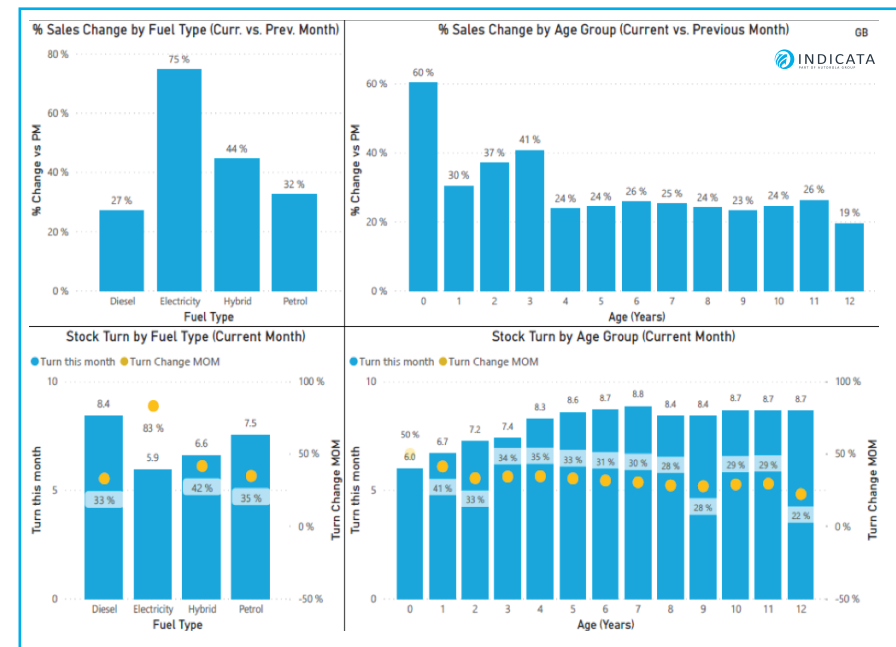
That said if we compare March 2021 with all the current restrictions to the pre- Covid-19 March 2019, online B2C used car sales were still up 2.8% indicating that changing buying and selling techniques are working. Compared to February 2021 March sales jumped up 30.3% with a significant increase in sales of very young used cars, i.e., those < 1-year-old, (+60%).

If you also consider the 50% Month-on-Month increase in stock turn for these very young cars there appears to have been a considerable amount of manufacturer backed tactical registrations.

Traditional petrol and diesel used car sales saw sales increase healthily, falling either side of the 30.3% MoM average rate of growth, although BEVs continue to see the highest percentage growth rates. But BEVs continue to be the slowest sellers at 5.9x whilst the war on diesel has done little to slow down how quickly they are leaving dealers' forecourts.

With sales rising and stock turn increasing MoM across all age groups and powertrains it is unsurprising to see our pricing index rising as demand puts pressure on the supply. Whilst the increase may appear small you should remember that the index is based on a consistent pool of vehicles, so we would expect a lifecycle driven steady downward movement in average prices as the year progresses.

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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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