

Report

Plug-in Hybrid Electric Vehicles: an out of reach option for second-hand consumers

July 2026

Why it matters to consumers

Consumers currently face a shortage of affordable vehicle options and are compelled to purchase second-hand. Therefore, EU policies must focus on incentivising the supply of used Battery Electric Vehicles (BEVs), which are cheaper to buy, to run and to maintain, but whose availability is still insufficient, especially in the small segment. In this context, the promotion of Plug-in Hybrid Electric Vehicles (PHEVs) misleads consumers into thinking they offer the “best of both worlds” between combustion engines and fully electric vehicles. In reality, PHEVs are large and expensive vehicles tailored for a limited audience, primarily corporate drivers. Our research clearly shows they are nowhere near as affordable as BEVs for second-hand consumers.

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The European Consumer Organisation (BEUC) is the largest organisation promoting the general interests of Europe’s consumers. Founded in 1962, it proudly represents more than 40 independent national consumer organisations from over 30 European countries. Together with [our members](#), we inform EU policies to improve people’s lives in a sustainable and fair economy and society.

BEUC, The European Consumer Organisation

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BEUC RECOMMENDATIONS FOR PHEVs

Give an accurate view of PHEVs' fuel consumption to consumers

1

The **correction of the Utility Factor** (the measure that estimates the share of electric driving of PHEVs to calculate their energy consumption and CO2 emissions) is essential. It would provide consumers with **more accurate information on the real-world fuel consumption of PHEVs and the related costs**.

Introduce a new car label

2

A new Car Label **displaying real-world data** can become a strong comparison tool that allows consumers to easily access new and second-hand PHEVs' real-world fuel consumption.

Do not set PHEV targets in the Corporate Fleets Regulation

3

The **sub-target for PHEVs in the Commission's proposal to green corporate fleets should be deleted**, since these vehicles do not meet consumers' needs on the second-hand market. It is **unjustified for public money to subsidise expensive vehicles** that will not serve the purpose of this initiative.

Maintain the current car CO2 target for 2035

4

To stay on track with the emissions reduction trajectory, current CO2 standards should be maintained, and new PHEV sales should not be allowed beyond 2035.

1. Introduction

1.1. Context of the study

Used vehicles now represent two-thirds of cars bought in France, Germany, Italy and Spain, making the second-hand market the primary choice for most consumers. Driven out of the new car market by high prices, households are looking for options that are reasonably priced and affordable to run and maintain. **On the used market, the supply of these budget-friendly vehicles largely depends on the new cars that are produced and sold today**. This is in part shaped by European Regulations on CO2 standards and the greening of corporate fleets. **Battery Electric Vehicles (BEVs), especially in the**

small and medium segment, increasingly appear as an affordable option, offering the best total cost of ownership (TCO).

However, in parallel to incentivising these models, **the Automotive Package proposal issued in December 2025 still encourages Plug-In Hybrid Electric Vehicles (PHEVs).** These vehicles largely fit the **premium-segment**, and their **average upfront cost is the highest of all powertrains.** PHEVs also expose consumers to **hidden spendings** because **their official energy-consumption (WLTP value) is the most disconnected from real-world performance,** and they become **more expensive to maintain over time.** This is why BEUC opposes the promotion of PHEVs, as they are the opposite of a good fit for consumers on the second-hand market.

1.2. Purpose of this study

To provide further evidence to support these claims, **this report explores the resale value of PHEVs on the second-hand market of six European countries: France, Germany, Italy, Poland, Belgium and Slovenia.** By focusing on **countries with strong second-hand car markets, but different tax policies on PHEVs, car segments and average fleet mileage and age,** this paper offers a contextualised perspective on **the types and prices of PHEVs entering the used market.** This report explores how best-selling new PHEVs in different EU countries, later perform on the used-market.

This study serves as a follow-up to BEUC's 2021 report that already provided data on the total cost of ownership of PHEVs.

1.3. Who participated ?

The data used in this study comes from different sources. Data on the best-selling new PHEV models of six EU countries was retrieved and cleaned up by the International Council on Clean Transportation (ICCT) from the European Environmental Agency. Transport & Environment (T&E) provided information sourced from Data Force on the same topic. BEUC's members, Verbraucherzentrale Bundesverband (Germany), Que Choisir Ensemble (France) and Consumatori Italiani per l'Europa (Italy) provided feedback and insights regarding the findings of their respective country.

1.4. Methodology

This study is based on **the selection of 600 second-hand PHEVs (100 per country), that were searched between 25 March 2026 and 12 May 2026,** on the **main resale websites of six EU countries:** Mobile.de in Germany, Autoscout24 in Belgium and Italy, Otomoto in Poland, Leboncoin in France, Avto.net in Slovenia. To ensure that samples were representative of local markets, the **10 best-selling PHEV models on the new market**

over the last four years (2022-2025) were identified for each country.¹ This data was sourced from the International Council on Clean Transportation (ICCT) and Transport & Environment (T&E). Instead of comparing the same models across different countries, we chose this method to **reflect how markets differ in terms of model availability and preference, and how it influences average prices.**

Then, **we verified that the 10 most recurrent models selected for each country accurately matched the most available PHEV options on resale platforms.**² Indeed, new sales figures sometimes don't accurately reflect real-world conditions on the used market. **Checking the listings of each model on resale websites** was an essential step to **ensure that dominant second-hand models are not overlooked and that rare vehicles are not overrepresented.**

In practical terms, **when a model ranked in the best-selling lists of new PHEVs in a country (between 2022 and 2025) more than twice, we checked if a significant number of units were available online** before including them in the sample: for instance, the Mercedes GLC ranked four times in the best new sellers in Germany and had 823 listings on "Mobile De" within the timeframe under study. In case best new sellers were not consistent enough from year to year, we selected models mentioned at least once and checked which ones were most available online: for example, the Renault Captur only ranks once in the best new PHEV sellers but has over 200 listings on Autoscout24 in Italy.³

Following this methodology, 30 PHEV models were searched across all six national samples : **two were B-segment** (Jeep Renegade, Renault Captur), **fifteen were C-segment** (Volvo XC40, Toyota C-HR, Peugeot 308, Peugeot 3008, DS7, Cupra Formentor, Mercedes GLA, BMW X1, VW Tiguan, Ford Kuga, Cupra Leon, Kia Sportage, Audi Q3, Mercedes CLA, Jeep Compass), **eight belonged to the D-segment** (Volvo XC60, Mercedes GLC, Audi Q5, BMW 330e, Mazda CX60, VW Passat Variant, Skoda Superb) and **five were E-segment cars** (Mercedes E300e, Audi A6, BMW X5, BMW Series 5, Volvo XC90). The most represented brands are BMW (5 models), Mercedes (4 models), Volvo (3 models) and Audi (3 models).

Even if three Chinese PHEV models ranked among the 10 best new PHEV sellers in 2025 in Europe, with the BYD Seal U taking the top spot, they were not included in this study. It is too early to analyse their impact on the second-hand market.

In each country, **only vehicles priced between €10,000 and €80,000 were selected** to avoid abnormal prices that could bias the results. **Vehicles with mileage below 10,000km were excluded** to prevent nearly new vehicles. **No maximum mileage cap was applied** to reflect that some countries have much higher-mileage vehicles on the

¹ See the table with the best-selling new PHEV models in each country between 2022 and 2025 in the Annex.

² See the table with the listings of PHEV models on resale websites in the Annex.

³ See the table with the listings of all PHEV models on the Italian resale website in the Annex.

market than others, and to capture what second-hand buyers encounter on resale platforms. **Only cars manufactured between 2020 and 2025 were retained**, because PHEV sales grew during this period, largely driven by carmakers' need to comply with CO2 standards for 2025 and 2030. Each time, **the search was limited to used vehicles located in the country under study**.

After completing all these steps, the selected models were searched randomly.

This methodology has some limitations. First, it **does not account for different vehicle options**, nor does it differentiate between professional and private resellers. Furthermore, since PHEVs have recently taken off, there is still **limited perspective on these young models**, as **first users might be keeping them longer** than the period under study. What's more, **the data was sourced from the dominant resale website in each country and does not represent the full market**. There might have been different figures if more websites had been screened.

Eventually, **there is not a systematic alignment between best-selling new PHEVs and the most available second-hand PHEV options**. This phenomenon is more prominent in **countries with high intra-EU imports**. In such cases, the **most represented PHEV models on resale platforms were prioritised to reflect the real consumer experience** when purchasing a used car. For instance, in Poland, the Peugeot 3008 and Ford Kuga were added to the sample despite not being top new sellers locally, but since they are among the most available models on the resale website (between 57 and 105 listings each). The same goes for many vehicles in the Slovenian sample. The Hyundai ix35 and Toyota C-HR are best sellers in the new PHEV market but are non-existent on the resale website. The opposite goes for the Volvo XC60, Audi Q5, Mercedes E 300e and Mercedes GLC, that were thus included in the sample. These popular second-hand models are disconnected from new PHEV sales' dynamics in Slovenia. Instead, they echo the popular models sold in Germany, France and Belgium, suggesting strong imports from these countries. This is confirmed by a JRC study showing Germany, France and Belgium as important intra-EU exporters of used cars.

2. What we know about PHEVs and the second-hand market in the EU

With an average EU price of €57,000 in 2025, which is €15,300 more than average BEV prices, it is hard to believe PHEVs are a mass-market option for consumers.



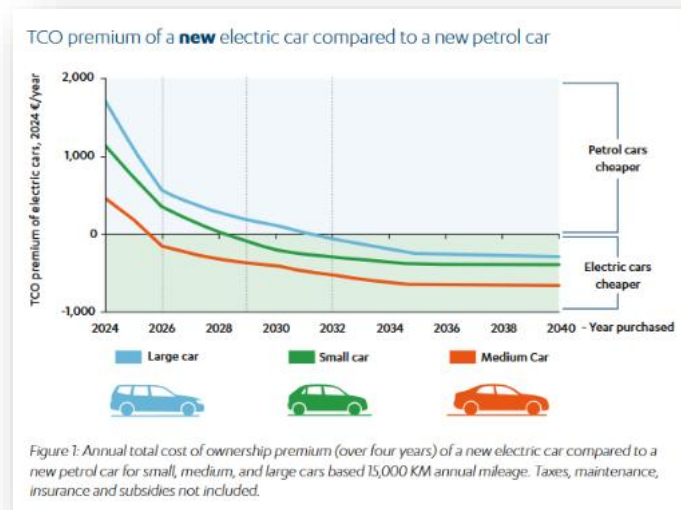
2.1. The second-hand car market in Europe

2.1.1. Most consumers buy second-hand

Because new vehicle prices have significantly increased, most European consumers now buy second-hand. In this regard, figures are striking: according to the Joint Research Centre (2025), **only 1/3 of cars sold in the EU over the last 15 years were new.** This trend is strongly reflected in countries like France, Germany and Italy, where second-hand vehicles now account for 63% to 74% of overall sales. On the used market, **the European regulation on CO2 standards largely shapes available options.** By encouraging BEVs' uptake, **these policies increase the supply of new affordable and carbon-neutral vehicles, that will later flow into the second-hand market, expanding options for consumers.** Given that transport is the second-largest expense for households, policies that support vehicle affordability are particularly impactful.

2.1.2. Used BEVs offer benefits to consumers over their lifetime

BEUC's work has already demonstrated that **electric vehicles offer significant cost savings over their lifetime, especially for second and third-hand buyers.** In the small and medium segment, BEVs purchased between 2026 and 2028 will have a lower annual Total Cost of Ownership (TCO) than petrol cars. The TCO is 27% lower for second-hand medium BEVs compared to their petrol equivalent, and 21% lower for third-hand medium BEVs, offering between €262 and €849 of yearly savings. This difference is due to the lower residual value of BEVs, savings on fuel, especially at a time of high price volatility, and BEVs' lower maintenance issues.



BEUC, 2025

2.2. The misleading push for PHEVs as an alternative to BEVs

While the deployment of BEVs is on track to alleviate costs for consumers, incentivising alternatives such as Plug-in Hybrid Electric Vehicles (PHEVs) risks derailing this dynamic. Through dilution of CO2 standards, the creation of a dedicated sub target in the corporate fleets' proposal, and loopholes that misrepresent these vehicles' real-world energy performance, **PHEVs' development diverts investments at a tipping point for BEVs' mass market adoption.**

Their promotion by car makers as an option offering the “best of both worlds” is highly misleading. OEMs argue that PHEVs serve as a transition technology for consumers who want to move away from the Internal Combustion Engine (ICE), but who remain wary of electric vehicles due to range and charging anxiety. According to this narrative, PHEVs offer flexibility to drivers who can use the limited electric range (charge depleting mode, CD mode) for short trips, while relying on the combustion engine (charge sustaining mode, CS mode) for longer journeys.

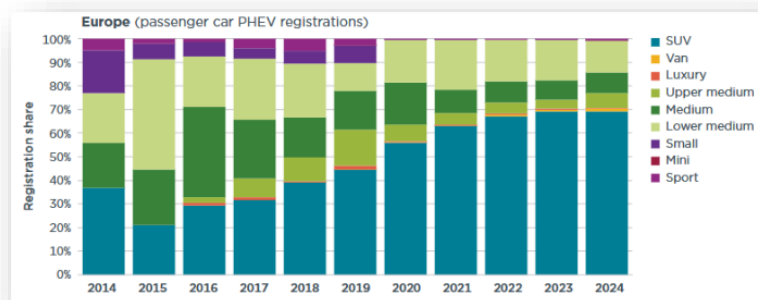
However, with an average EU price of **€57,000** in 2025, which is **€15,300** more than average BEV prices, it is hard to believe PHEVs are a good option for consumers, simply looking for an interim option and an introduction to electric driving.

2.2.1. PHEVs have the highest upfront cost of all powertrains

Indeed, PHEVs are the opposite of a solution to the affordability crisis of cars. **They are the most expensive vehicles on the market, and their prices keep increasing.** In France, the average price of a new PHEV was **€68,000** in 2024 (+15% since 2023) compared to **€43,000** for BEVs (-2.5% since 2023). In Germany, the average PHEV price

was €46,000 in November 2025, which is €13,000 more than ICE vehicles and €11,000 more than BEVs. Which?, BEUC's UK member, also reported a €48,000 average PHEV price in 2025 (compared to €44,000 in 2024), whereas BEVs were on average priced at €42,000 (compared to €45,000 in 2024)⁴.

This high up-front cost is explained by the disproportionate share of SUVs, which represented **69% of PHEVs** registrations in Europe in 2024.

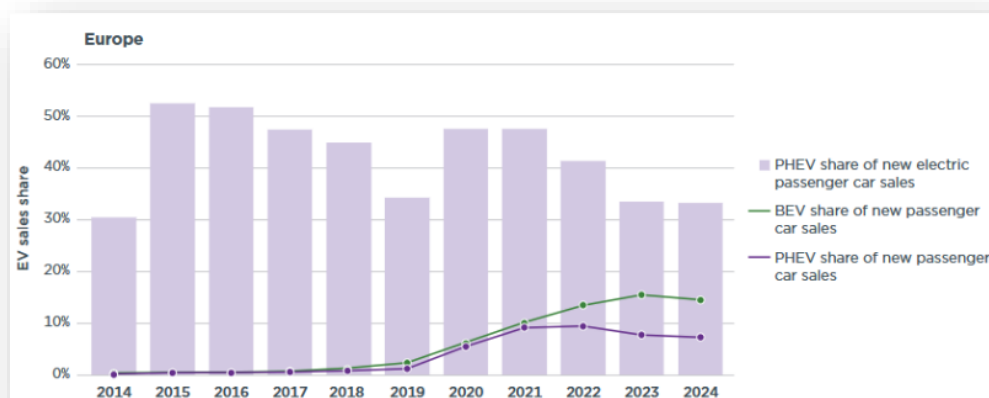


ICCT, 2025

In this regard, **SUV- focused OEMs produce a higher share of PHEVs than manufacturers specialising in the small and medium segment**. In 2025, PHEVs represented 13 % of BMW's, 18% of Mercedes' and 31% of Volvo's total production. In contrast, they only accounted for 0.8% of Renault's, 3% of Stellantis' and 7% of Kia's output. Additionally, Chinese car makers have a clear edge and dominate the PHEV segment: it represents 35,7% of Chery's and 42,6% of BYD's total production.

To date, **PHEVs remain a niche market that is unlikely to experience a mass deployment**. According to the ICCT, new PHEV sales declined between 2022 and 2024 as subsidies were cut in many European countries, and **PHEVs now represent 10% of the car market in Europe**. In 2026, PHEVs have a 5% market share in France, 8% in Italy, 7% in Poland and Belgium and 11% in Germany. In contrast, **BEVs represent 20% of new European car registrations in 2026**.

⁴ Which? magazine, Car guide: the best cars for 2026. Paper magazine.



ICCT, 2025

To further illustrate the limited target audience of these vehicles, it is noteworthy that in Poland, Slovenia and Belgium, the Porsche Cayenne was recurrently among the 10 best-selling PHEVs on the new market between 2022 and 2025 (Data force and EAA).⁵ Overall, recurring models in best-selling PHEVs' rankings across the EU over this period, include the Volvo XC60, Mercedes GLC and GLA, the BMW X1, the Volkswagen Tiguan, Cupra Formentor and Ford Kuga. There are C and D-segment vehicles that do not meet consumer demand for smaller affordable models.⁶

10%

In 2026, PHEVs represent **10% of new car registrations** in Europe, compared to 20% for EVs.



2.2.2. PHEVs' hidden energy inefficiency exposes consumers to unexpected fuel spendings

In addition to their high purchase cost, PHEVs are expensive to run. However, these costs are largely hidden from consumers because **WLTP figures widely underestimate the real-world fuel consumption of PHEVs: it is 300 % higher than officially advertised.** Out of all powertrains, the gap between the two figures is the largest for PHEVs and continues to widen. The **discrepancy is mostly due to the Utility factor.**⁷ This metric tool is **overly optimistic on users' charging behaviour** and thus **underestimates the**

⁵ See the table with best-selling new PHEV models in each country in the Annex.

⁶ According to the EU classification, the C-segment refers to medium-size vehicles such as compact SUVs, while the D and E-segment range from large to luxury cars. <https://alternative-fuels-observatory.ec.europa.eu/general-information/vehicle-types>

⁷ Given that PHEVs have two powertrains, the utility factor is the metric tool that calculates how much they are driven on electric mode, compared to the time they are propelled by the combustion engine, out of the total distance. It is used to estimate PHEVs' fuel consumption and CO2 emissions.

distance that is in fact driven with the combustion engine: it accounts for 69% of total driving (Fraunhofer Institute, 2026). BEUC has previously demonstrated that these **inconsistent charging behaviours are even more prevalent among company car drivers**, whose fuel expenses are often covered by employers, which does not incentivise them to use the limited electric range of their vehicle.

According to the [Fraunhofer Institute](#) (2026), when a PHEV runs with an empty battery, its fuel consumption is 7.5l/100km, which is equivalent to a petrol car. Even when the battery is full, the fuel consumption is not zero but approximately 2.8 l/100km. Indeed, due to their two powertrains and the prevalence of SUVs, PHEVs can only be heavy vehicles. Therefore, **even when the driver uses the electric range, the combustion engine still kicks in intermittently to power the vehicle** during sudden acceleration, speed variations or uphill driving. Overall, **PHEVs in Europe consume 5.9l/100km on average**. Having to refuel this heavy vehicle more frequently than anticipated directly **exposes consumers to an additional cost of €500 per year**.

2.2.3. A negative climate impact



PHEVs are not low-emission vehicles, and their environmental performance is nowhere near equivalent to that of BEVs.

In addition to straining households' budgets, **this high fuel consumption shows that PHEVs are not low-emission vehicles**. [OEMs](#) argue that technology neutrality is necessary to achieve emission reduction, as if the environmental performance of BEVs and PHEVs were equivalent. Data retrieved from the On-Board Fuel Consumption Monitoring (OBFCM) device⁸ inside the car clearly shows the opposite: **real-world CO2 emissions of PHEVs (around 139g CO2/km) are 5 times higher than official figures suggest (around 29.5g CO2/km)**. This is **the widest gap of any powertrains**, and it has **increased since 2021** (rising from 3.5 to 5 times the official value). [BEUC's member in the Netherlands](#) confirms this trend. In its Green NCAP rankings for the 2022-2024 period, PHEVs scored between 48% and 61%, which is equivalent to many petrol cars, that scored between 30% and 58 %.

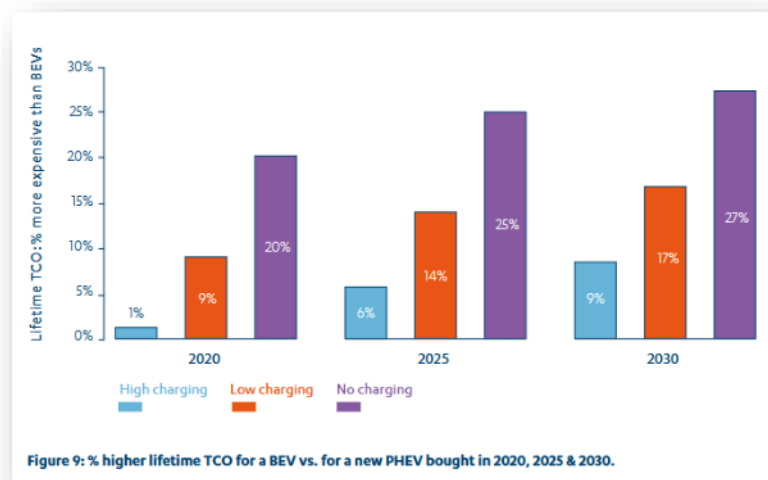
Real-world CO2 emissions of PHEVs are 5 times higher than official figures suggest.

⁸ This device installed in cars tracks real-world energy consumption.

2.2.4. An overall bad deal for consumers : PHEVs' Total Cost of Ownership

PHEVs require more frequent and expensive maintenance spendings over their lifetime than any other powertrains, making them one of the least reliable vehicles. BEUC's members in the Netherlands and in the UK report that **the complex structure of the vehicle makes it more prone to faults, especially with the tyres, fuel and cooling system**. Coupled with PHEVs' large size, this drives up costs for users. Which? (2026) showcases that nought- to four-year-old PHEVs' servicing costs are up to £444, compared to £351 for BEVs. Overtime, the difference becomes even more pronounced: PHEVs' costs remain stable, while BEVs' decrease to £283, in the five-nine age group⁹.

It appears clearly that **the high up-front cost of PHEVs is not compensated over time by lower running and maintenance costs**. These figures also hint at the fact that **PHEVs do not match the demand for smaller affordable vehicles on the used market**. On the contrary, second-hand buyers risk bearing a disproportionate financial burden, since **the total cost of ownership of PHEVs compared to BEVs, more than doubles over time**. Indeed, by 2035, PHEVs' TCO in France is expected to be 7% higher in the new-car market and 18% higher in the second-hand market compared to BEVs, across all segments and usage. Back in 2021, BEUC had already explained that by 2030, the TCO of new PHEVs would be the highest of all powertrains, and 27% higher than BEVs, if the vehicles were not regularly charged.



⁹ Which? magazine, Car guide: the best cars for 2026. Paper magazine.

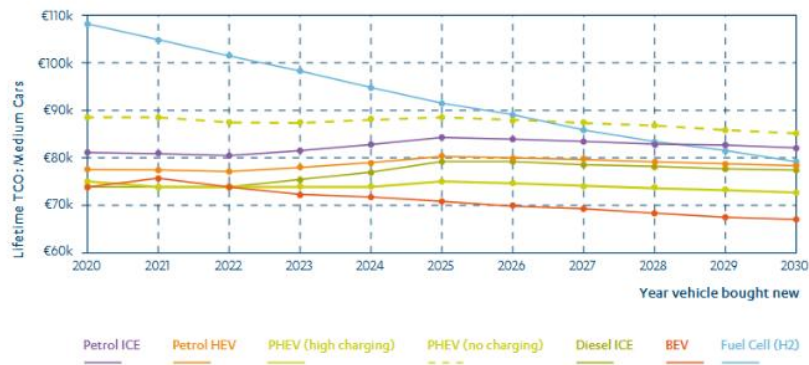


Figure 2: Lifetime owner TCO comparison between different powertrains for a medium car. Note that the year indicates when the car is first bought new.

BEUC, 2021

By 2030, the TCO of new PHEVs will be the highest of all powertrains, if not regularly charged.

3. Detailed case study

3.1. Core results of the research

						
	France	Germany	Belgium	Poland	Slovenia	Italy
1	Peugeot 308	Mercedes GLC	BMW 330	Mercedes GLC	BMW Series 5	Jeep Compass
2	Volvo XC60	Volvo XC60	Ford Kuga	Volvo XC60	BMW X5	Jeep Renegade
3	DS7	Ford Kuga	Volvo XC60	Toyota C-HR	BMW X1	Volvo XC40
4	Cupra Formentor	Cupra Formentor	BMW X5	Volvo XC90	VW Passat Variant	Volvo XC60
5	Mercedes GLA	Cupra Leon	BMW X1	Lexus NX	Mercedes E Class 300	Renault Captur
6	Mercedes GLC	BMW 330e	Mercedes GLC	BMW Series 3	Volvo XC60	Kia Sportage
7	BMW X1	VW Tiguan	Audi Q3	Mazda CX60	Audi Q5	Ford Kuga
8	Audi Q5	BMW X1	Mercedes CLA	Ford Kuga	Ford Kuga	Peugeot 3008
9	Peugeot 3008	Mercedes E300e	Peugeot 308	Audi Q5	Skoda Superb	BMW X1
10	VW Tiguan	Audi A6	BMW Series 5	Peugeot 3008	Mercedes GLC	Audi Q3

Table 1: PHEV models in each country's sample based on 1) best new sellers on the PHEV market and 2) most available PHEV options on resale platforms.¹⁰

						
Second-hand PHEVs	France	Germany	Belgium	Poland	Slovenia	Italy
Average price	€36,690	€32,431	€32,258	€34,756	€29,884	€25,721
Average mileage	47,938 km	65,767 km	72,871 km	73,623 km	110,977 km	67,236 km
Average year	2023	2022	2022	2022	2021	2022
Min price	€15,990	€21,390	€18,000	€17,431	€15,999	€14,900
Max price	€69,990	€65,850	€58,900	€65,765	€55,990	€54,900

Table 2: Results of the search of 600 second-hand PHEVs across 6 EU countries.

Out of the 600 vehicles (100 per country), **the average price of second-hand PHEVs across the six EU countries is €31,956**, for an **average mileage of 73,068km**, and an **average construction year of 2022**.¹¹ Second-hand PHEVs are **the most expensive in France (€36,690)**, with an average mileage of 47,938km, and **the least expensive in Italy (€25,721)**, with an average mileage of 67,236km. Slovenia's fleet has the highest mileage

¹⁰ See the methodology section and the tables in the Annex.

¹¹ See the methodology section.

(110,977km), while France has the lowest (47,938km), which is correlated to France having the youngest fleet (the average registration year is 2023), and Slovenia the oldest (the average registration year is 2021).

Based on the samples, the **minimum price for a second-hand PHEV** across the six EU countries **ranges from €14,900** in Italy for a 2021 Renault Captur with a 104,000km mileage, **to €21,390** in Germany for a 2020 Ford Kuga with a 65,200km mileage. **The maximum price** varies **between €54,900** in Italy for a 2024 Volvo XC60 with a 18,456km mileage, **and €69,990** in France for a 2024 Mercedes GLC with a 29,000km mileage.

3.2. Most second-hand PHEVs are premium segment vehicles with some variations between countries

High-end vehicles are prevalent in most samples, with C, D and E-segment models which are mostly SUVs, representing a large majority, and B-segment being very rare.¹² However, this trend is more pronounced in some countries, explaining price variations.

3.2.1. Italy

The used market in Italy is the only one with a large **supply of some B-segment PHEV options**: the **Renault Captur and Jeep Renegade** were popular new PHEV models in 2022, 2023 and 2024¹³ and had 206 and 482 listings respectively on the Italian resale website. The Renault Captur is on average resold at €18,190 for a 51,750km average mileage, and the Jeep Renegade has an average resale price of €18,808 for a 66,520km average mileage. These models partly explain why Italy has the lowest average PHEV resale price: around €25,721. However, this price remains high for consumers, given that used cars in Italy usually cost on average €21,273. What's more, we can question whether it is advantageous for a household to invest more than €20,000 in a PHEV with a high mileage, **considering that on top of the up-front cost, they will have to spend more on fuel and maintenance than for a BEV.**

3.2.2. France

In France, **even if C-segment PHEVs are the most prevalent options on the used market, some of them are mid-range vehicles**, that are more accessible compared to other premium models. The **Peugeot 3008 and Peugeot 308** were among the best-new PHEV sellers in 2022, 2023 and 2024 and had respectively 654 and 613 listings on the French resale website. Their average resale price ranges from €22,463 to €24,179 for an average mileage between 61,348 km and 71,415 km. However, due to most of the other models being premium vehicles, the fleet's low mileage and France's penalising tax policy on PHEVs, it doesn't compensate for the high average resale price in France

¹² According to the EU classification, the B-segment describes small cars, the C-segment refers to medium-size vehicles such as compact SUVs, while the D and E-segment range from large to luxury cars. <https://alternative-fuels-observatory.ec.europa.eu/general-information/vehicle-types>

¹³ See the table with best-selling new PHEV models in Italy in the Annex.

(€36,690). Second-hand PHEVs are thus on average significantly more expensive than what French consumers are used to, considering **the average resale price of a car in France is €19,999 (2025)**. PHEVs are also significantly pricier than used BEVs that cost on average **€22,955**, with the Renault Zoé starting at **€11,990** (2026).

3.2.3. Belgium

In Belgium, predominant PHEV models are similar to the ones in France and Germany, with a noteworthy **prevalence of BMW: the BMW X1** (four times in the top 10 between 2022 and 2025, over 205 listings on the resale website) **with an average price of €25,391** ; **the BMW X5** (four times in the top 10, over 187 listings on the resale website) **with an average price of €47,576**; **the BMW 330e** (three times in the top 10 and over 272 listings on the resale platform) **with an average price of €28,834**; **the BMW Series 5** (two times in the top 10, 251 listings on the resale platform) **with an average price of €38,141**.¹⁴ In the sample, the most expensive option is the BMW X5 cited above with an average mileage of 89,211km, while the least expensive one is the Peugeot 308 (average price of €21,349, for an average mileage of 71,823km). Apart from the Peugeot 308 and the Ford Kuga (average price of €24,145), **most PHEV models in the sample are more expensive than the usual average price for a used car in Belgium** (between **€20,000 and €25,000** in 2025).

3.2.4. Germany

In contrast with other countries, **best-selling new PHEVs and most available used PHEV models in Germany on *Mobile.de*, are all C, D and E-segment cars, and are premium vehicles. Compared to France and Italy, no low and mid-range PHEV models are widely available in Germany**, except for the Ford Kuga (four top 10 between 2022 and 2025, 1807 listings on the resale website). For instance, the **average resale prices** of the **Volvo XC60** (two top 10, 967 listings on the resale website), **Mercedes GLC** (three top 10, 823 listings on the resale website), **Mercedes E300** (two top 10, 1881 listings on the resale website) and **BMW 330e** (two top 10, 781 listings on the resale website) **range from €29,607 to €40,167** for an average mileage between 69,334 km and 86,659km. The Ford Kuga (average price of €26,913 for an average mileage of 49,522km) and the Cupra (average price of €26,612 for an average mileage of 45,833km) are the cheapest options.¹⁵ PHEV options are expensive considering the average resale price of cars in Germany was around **€27,800** in 2025. What's more, **in contrast with used PHEVs that almost exclusively fit the higher-end segment, small used BEVs priced between €10,000 and €15,000 are available on the German market.**

¹⁴ See the tables in the Annex.

¹⁵ See the tables regarding best-selling new PHEVs in Germany and each models' listings on the resale website in the Annex.

3.2.5 Poland

Poland's fleet strongly illustrates how niche the target audience for PHEVs is. With the average PHEV resale price (€34,756) being almost three times higher than the usual average price of used cars in Poland (€12,000 in 2026), PHEVs do not appear as a viable option for second-hand buyers. For instance, the Lexus NX¹⁶, which ranked three times in the country's best-selling PHEVs and has many listings on the resale website (65 cars for the Lexus NX compared to 57 for the Ford Kuga, 68 for the Audi Q5 and 85 for the Mercedes GLC), is on average priced at €48,000 for an average mileage of 52,712km. Such models drive up costs and explain the very high average resale price in the country. The least expensive model in the sample is the Peugeot 3008 with an average price of €19 885 for an average mileage of 92,103km. It is interesting to note that this model does not feature in the best new PHEV sellers in Poland but is very represented on the resale platform (128 cars). It is most likely due to inter-EU flows. This phenomenon is further explained with the Slovenian case and in the methodology section. In the lower price bracket (around €12,000), second-hand PHEVs options on the Polish website are often limited to damaged cars that are non-operational such as this Ford Kuga, this Mercedes GLC, or this Kia Sportage.¹⁷

3.2.6 Slovenia

Due to strong inter-EU imports, second-hand supply in Slovenia is largely shaped by other countries' market dynamics. Therefore, there is a large discrepancy between best new PHEV sellers locally and most available PHEV models on the resale platform: instead of the popular new PHEVs sold on the Slovenian market, the most recurrent used PHEVs are often the popular models on the new market in Belgium, France and Germany. This is further explained in the "methodology" section. For instance, vehicles such as the Volvo XC60 (average resale price of €36,115 for a 85,994km average mileage) and the Mercedes E300 (average resale price of €29,430 for a 127,830km average mileage) never rank in the best new sellers in Slovenia but are available on the resale platform.¹⁸ These are D-segment vehicles, with very high mileage, that are being resold at high prices.

3.3. Different fleet mileage between countries explains price variations

The data shows a **correlation between price and mileage for most PHEV models**.¹⁹ Perhaps unsurprisingly, the lower the mileage, the more expensive the vehicle. Among other factors (fiscal policies, market positioning), the fleet mileage explains price differences between countries. France's sample has the lowest mileage (around

¹⁶ Cheaper models such as the Kia XCeed and the Citroën C5 Aircross were not included because they don't rank on the best-selling lists of new PHEVs in Poland and don't have many listings on the website (between 30 and 40 each).

¹⁷ See the vehicles' pictures in the Annex.

¹⁸ See the table with the listings of PHEV models on the Slovenian resale website in the Annex.

¹⁹ See the graphs in the Annex.

48,000km) and the youngest PHEVs and consequently features the highest average resale price of all countries. Germany's sample has a lower average mileage than Slovenia, and slightly lower than Italy and Belgium, leading to higher prices. Despite having many premium models, Slovenia's average price is one of the lowest due to very high average mileage (around 111,000km). This trend is less obvious in Poland, which has a higher average resale price than Germany and Belgium, despite its fleet having a higher mileage.

3.4. Tax policies influence PHEVs' second-hand prices

Different tax policies are also influencing second-hand prices. Since 2022, **a “malus” system** has been heavily **penalising new vehicles weighing over 1,500 kg in France**. To **counter the trend towards ever-heavier vehicles**, which drives up prices and is detrimental to consumers, the policy seeks to incentivise lighter and more budget-friendly vehicles. Despite the 200kg allowance granted when their electric range is higher than 50km, **PHEVs are some of the heaviest vehicles on the market** and have been subject to this malus since 2025. For instance, the Mercedes GLC, best-selling PHEV model in 2024 in France, weighs more than 2,200 kg, which today makes it subject to an additional purchase tax of €11,000. This could have an **important knock-on effect on resale prices in France**.

In contrast, other countries tend to incentivise PHEVs through their tax policies. After cutting subsidies in 2023, **a 2026 reform in Germany has reintroduced support for PHEVs**, with incentives reaching up to €4,500, depending on household income and family size. Since 2024, **Italy's “Eco bonus”** has also been incentivising PHEVs. In both **Poland and Belgium, PHEVs were also pushed in corporate fleets** by tax benefits until 2026. This preferential policy towards PHEVs also exists in Germany for company cars. This may explain the lower average PHEV resale prices in these countries compared to France.

4. Concluding remarks

Further incentivising PHEVs could lead to risks for consumers' wallets and the EU industry, given the competitive edge of Chinese manufacturers. When looking at real-world performance, up-front, fuelling and maintenance costs, as well as resale prices, it appears clearly that PHEVs do not deliver on affordability and environmental performance. On the used market especially, they are unlikely to become a mainstream option that will alleviate mobility costs, due to premium-segment positioning and the availability of more affordable models like used EVs.

5. Annex

Best-selling new PHEVs per country	2022	2023	2024	2025
France	1.Peugeot 3008 2.Peugeot 308 3.Citroën C5 Aircross 4.Hyundai Tucson 5.DS7 6.Kia Sportage 7.Mercedes GLA 8.BMW X3 9.Mini SE Countryman 10.Mercedes GLC	1.Peugeot 308 2.Mercedes GLA 3.Mercedes GLC 4.Cupra Formentor 5.BMW X1 6.VW Tiguan 7.DS 7 8.Peugeot 3008 9.DS4 10.Citroën C5	1. Mercedes GLC 2.BMW X1 3.Peugeot 308 4.Cupra Formentor 5.BMW X5 6.Volvo XC60 7.AUDI Q5 8.Mercedes GLA 9.VW Tiguan 10.DS7	1.BYD SEAL U 2.MG EHS 3.VW Tiguan 4.Volvo XC60 5.BMW X3 6.BMW X1 7.AUDI Q5 8.AUDI Q3 9.Mercedes GLC 10.AUDI A3
Germany	1.Ford Kuga 2.Mitsubishi Eclipse Cross 3.Cupra Formentor 4. BMW 3-Series 5.Hyundai ix35 6.Audi A3 7.VW Golf 8.Mercedes A-Class 9.Audi Q3 10.VW Tiguan	1.Mercedes GLC 2.Mercedes C-Class 3.Ford Kuga 4.Cupra Formentor 5.Cupra Leon 6.BMW 3-Series 7.Audi A6 8.Audi Q5 9.Hyundai ix35 10. Koda Octavia	1.Volvo XC60 2.Mercedes E-Class 3.Mercedes GLC 4.Ford Kuga 5.Volvo XC90 6.Mercedes C-Class 7.Porsche Cayenne 8.BMW X1 9.Cupra Formentor 10.Cupra Leon	1.VW Tiguan 2.Volvo XC60 3.Mercedes E-Class 4.VW Passat 5.Cupra Formentor 6.BMW 5 Series 7.Cupra Leon 8.Mercedes GLC 9.Ford Kuga 10.Cupra Terramar
Belgium	1.BMW X5 2.BMW 3-Series 3.Volvo XC40 4.Audi Q3 5.Mercedes GLE 6.BMW X3 7.Mercedes CLA 8.Mercedes C-Class 9.BMW 5-Series 10.BMW X1	1.BMW X1 2.Volvo XC60 3.Audi Q3 4.BMW 3-Series 5.BMW X5 6.Volvo XC40 7.Ford Kuga 8.Mercedes CLA 9.Mercedes GLC 10.Mercedes C-Class	1.BMW X1 2.Volvo XC60 3.AUDI A3 4.AUDI Q3 5.BMW X5 6.BMW 3 series 7.Mercedes GLC 8.JLR Range Rover Sport 9.Peugeot 308 10.Mercedes GLE	1.BMW X1 2.Volvo XC60 3.BMW X5 4.Land Rover Range Rover Sport 5.BYD Seal U 6.BMW 5 Series 7.Ford Kuga 8.Mercedes GLC 9.Mercedes GLE 10.VW Tiguan
Slovenia	1.Hyundai ix35 2.Mitsubishi Eclipse Cross 3.Jeep Wrangler 4.VW Multivan 5.Porsche Cayenne 6.Koda Octavia 7.Toyota RAV 4 8.Bmw X5 9.Peugeot 308 10.VW Tiguan	1.Hyundai ix35 2.Mitsubishi Eclipse Cross 3.Toyota RAV 4 4.BMW X1 5.VW Multivan 6.BMW X5 7.Ford Kuga 8.Lexus NX-Series 9.Porsche Cayenne 10.BMW 2-Series	1.Hyundai ix35 2.Porsche Cayenne 3.BMW x1 4.Toyota RAV4 5.Toyota C-HR 6.BMW X5 7.Skoda Kodiaq 8.BMW 5 series 9.BMW 7 series 10.Ford Transit	1.Skoda Koadiaq 2.Hyundai Tucson 3.Toyota C-HR 4.Ford Transit Custom 5.Ford Kuga 6.BMW 5 Series 7.Skoda Superb 8.Porche Cayenne 9.Toyota RAV4 10.MG HS

Poland	1.Mercedes GLE 2.Toyota RAV4 3.Mitsubishi Eclipse Cross 4.Mazda CX-60 5.Kia XCeed 6.BMW X5 7.Mercedes GLC 8.Lexus NX-Series 9.BMW 3 Series 10.Porsche Cayenne	1.Lexus NX (470) 2.Mazda CX-60 3.Volvo XC60 4.Mercedes GLC 5.Lexus RX 6.Volvo XC90 7.Kia Sportage 8.Kia Ceed 9.Porsche Cayenne 10.Mitsubishi Eclipse Cross	1.Audi Q8 2.Toyota C-HR 3.Audi Q5 4.Audi Q7 5.Porsche Cayenne 6.Audi A6 7.Koda Kodiaq 8.Porsche Panamera 9.Mitsubishi Eclipse Cross 10.Koda superb	1.Volvo XC60 2.Toyota C-HR 3. BYD Seal U 4.VW Golf 5.Lexus NX 6.MG HS 7.BMW Series 5 8.Volvo XC90 9.BMW X3 10.Porsche Cayenne
Italy	1.Jeep Compass 2.Jeep Renegade 3.Lynk & Co 01 4.Volvo XC40 5.BMW X1 6.Ford Kuga 7.Audi Q3 8.Peugeot 3008 9.Renault Captur 10.Mercedes GLE	1.Jeep compass 2.Ford Kuga 3.Volvo XC40 4.Alfa Romeo Tonale 5.Volvo XC60 6.BMW X1 7.Peugeot 3008 8.Jeep Renegade 9.Cupra Formentor 10.Audi Q3	1.Cupra Formentor 2.AUDI Q3 3.BMW X1 4.Volvo XC60 5.Ford Kuga 6.AUDI Q5 7.Mercedes GLC 8.Jeep Renegade 9.Prosche Cayenne 10.Toyota C-HR	1.BYD Seal U 2.Toyota C-HR 3.BMW X1 4.VW Tiguan 5.Jaecoo 7 6.VW Golf 7.Cupra Formentor 8.Kia Sportage 9.Ford Kuga 10.Cupra Terramar

Table 1: Best-selling new PHEVs in six EU countries between 2022 and 2025.

Germany (Mobile DE)	Mercedes GLC : 823 Volvo XC60 : 967 Ford Kuga : 1807 Cupra Formentor : 1066 Cupra Leon : 591 BMW 330e : 781 VW Tiguan : 665 BMW X1 : 494 Mercedes E300e : 1881 Audi A6 : 1277
France (Le Bon Coin)	Peugeot 3008: 654 Peugeot 308 : 613 Volvo XC60 : 387 DS D7 : 740 Cupra Formentor : 365 Mercedes GLA : 301 Mercedes GLC : 475 BMW X1 : 292 VW Tiguan: 260 Audi Q5: 363
Italy (Autoscout 24)	Renault Captur: 216 Jeep Compass: 798 Jeep Renegade : 481 Volvo XC40: 157 Volvo XC60: 185 Kia Sportage: 402 Ford Kuga: 462 Peugeot 3008: 150 BMW X1: 188 Audi Q3: 372
Belgium (Autoscout 24)	BMW 330e: 272 Ford Kuga: 190

	Volvo XC60: 65 BMW X5 : 187 BMW X1 : 205 Mercedes GLC : 71 Audi Q3 : 128 Mercedes CLA : 75 Peugeot 308 : 71 BMW Series 5 : 251
Poland (Otomoto)	Mercedes GLC : 85 Volvo XC60 : 183 Toyota C-HR : 110 Volvo XC90 : 136 Lexus NX : 52 BMW Series 3 : 79 Mazda CX60 : 54 Ford Kuga : 57 Audi Q5 : 68 Peugeot 3008 : 105
Slovenia (avto.net)	BMW Series 5: 54 BMW X5: 35 BMW X1: 23 VW Passat Variant: 21 Mercedes E Class 300 : 35 Volvo XC60: 25 Audi Q5: 19 Ford Kuga : 31 Skoda Superb : 24 Mercedes GLC: 22

Table 2: Listings of PHEV models on each country's resale website within the timeframe of the study.

Belgium	France	Italy	Germany	Poland	Slovenia
BMW 330: 10	Peugeot 308: 13	Jeep Compass: 10	Mercedes GLC: 10	Mercedes GLC: 9	BMW Series 5: 11
Ford Kuga: 11	Volvo XC60: 12	Jeep Renegade: 9	Volvo XC60: 10	Volvo XC60: 11	BMW X5: 9
Volvo XC60: 10	DS D7: 9	Volvo XC40: 11	Ford Kuga: 10	Toyota C-HR: 12	BMW X1: 7
BMW X5: 9	Cupra Formentor: 12	Volvo XC60: 9	Cupra Formentor: 11	Volvo XC90: 9	VW Passat Variant: 11
BMW X1: 10	Mercedes GLA: 7	Renault Captur: 11	Cupra Leon: 10	Lexus NX: 10	Mercedes E Class 300: 11
Mercedes GLC: 10	Mercedes GLC: 11	Kia Sportage: 11	BMW 330e: 10	BMW Series 3: 8	Volvo XC60: 10
AUDI Q3: 10	BMW X1: 7	Ford Kuga: 10	VW Tiguan: 9	Mazda XC60: 10	Audi Q5: 10
Mercedes CLA: 10	Audi Q5: 7	Peugeot 3008: 10	BMW X1: 11	Ford Kuga: 10	Ford Kuga: 11
Peugeot 308: 11	Peugeot 3008: 10	BMW X1: 8	Mercedes E300e: 10	Audi Q5: 10	Skoda Superb: 10
BMW Series 5: 9	VW Tiguan: 12	Audi Q3: 11	Audi A6: 9	Peugeot 3008: 11	Mercedes GLC: 10

Table 3: Models' frequency of occurrence in each country's sample.

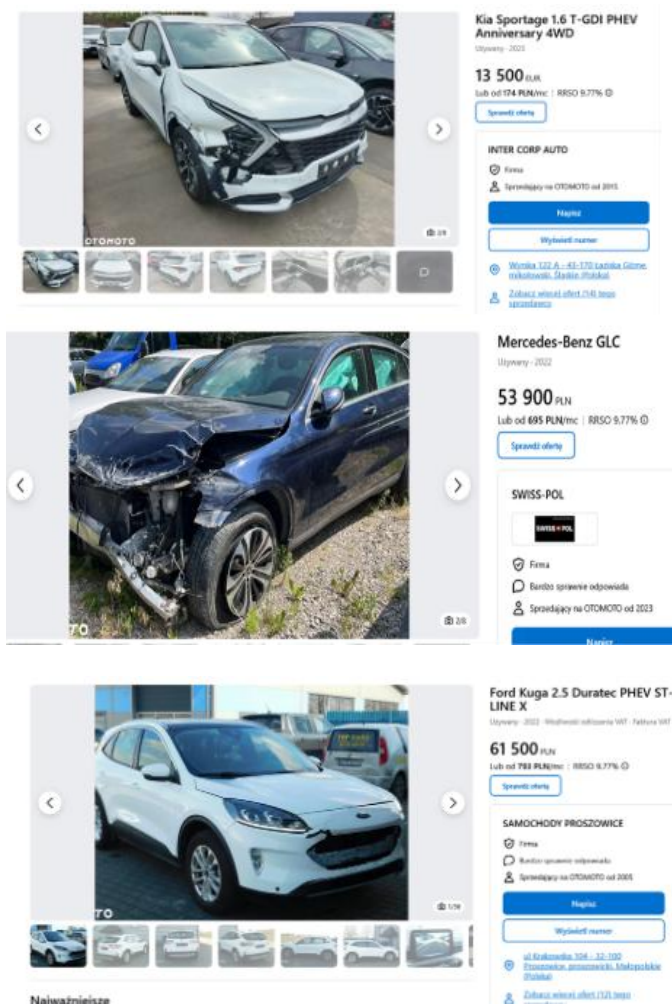
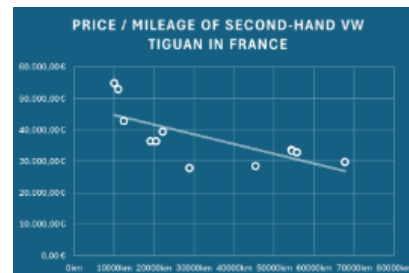
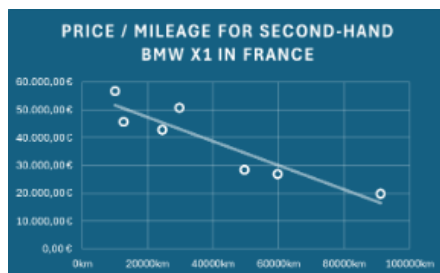
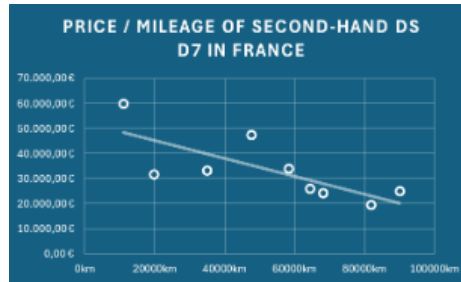
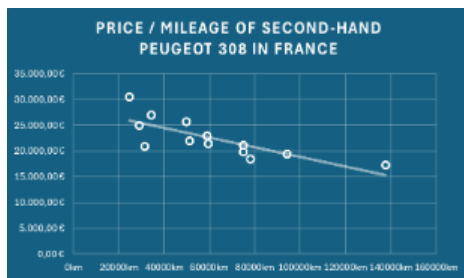
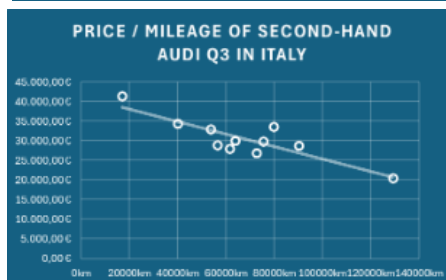
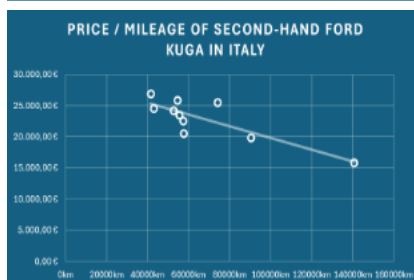
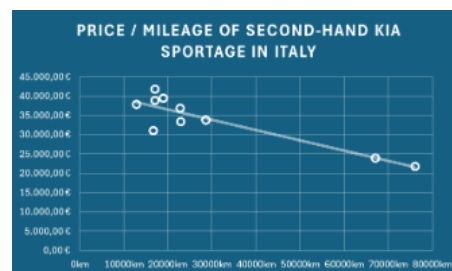
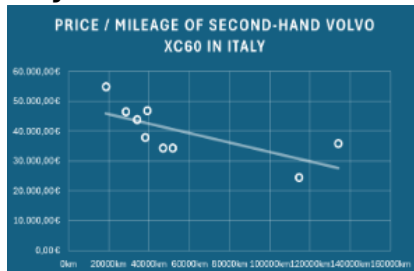


Figure 5: Pictures of damaged lower-priced used PHEVs in Poland

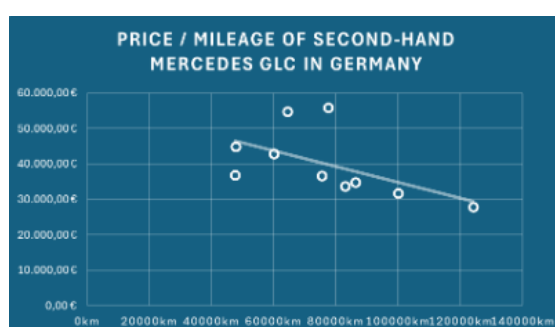
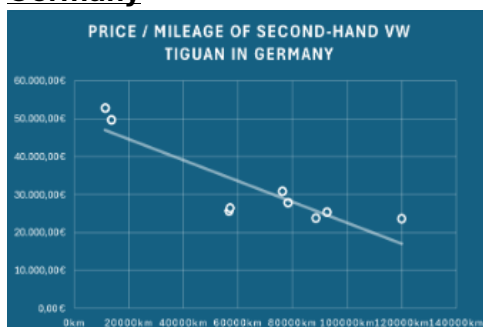
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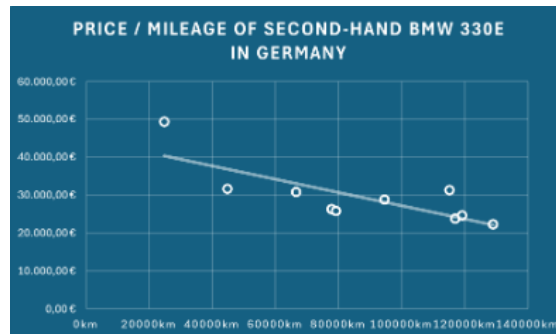
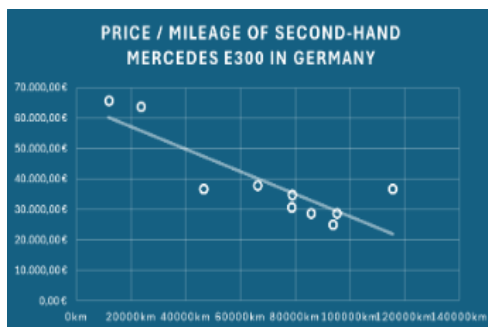


Italy

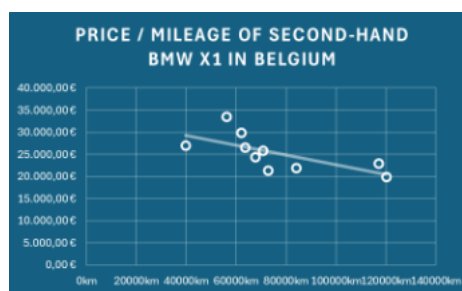
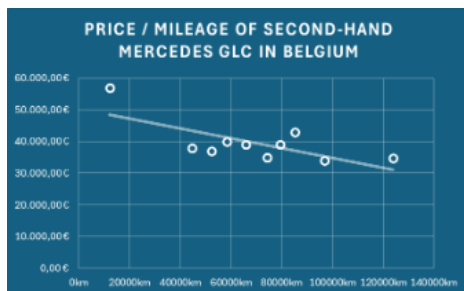
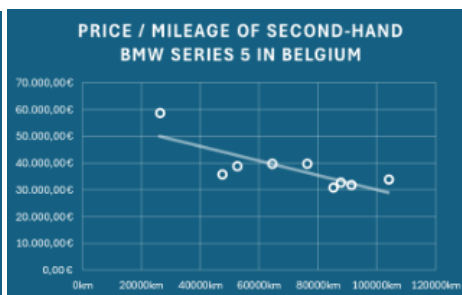
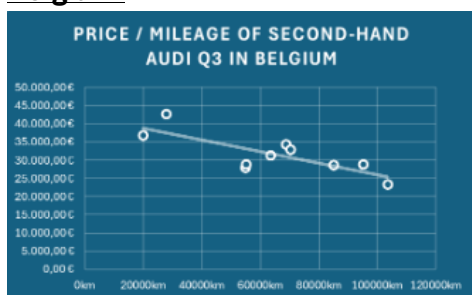


Germany

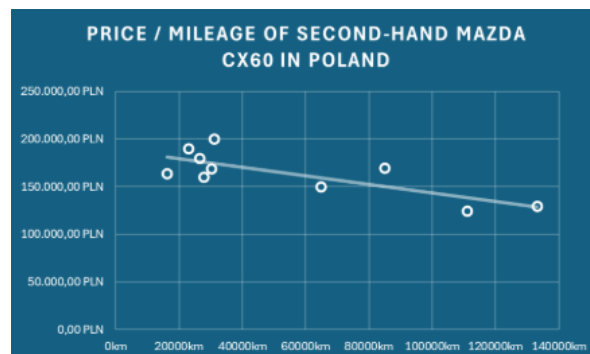
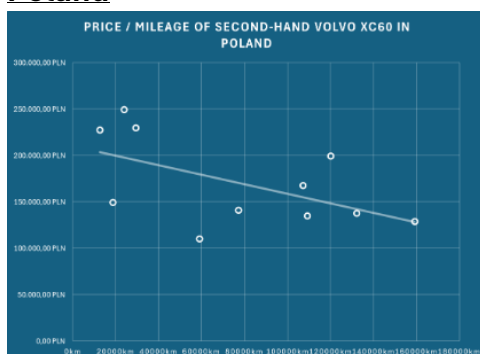


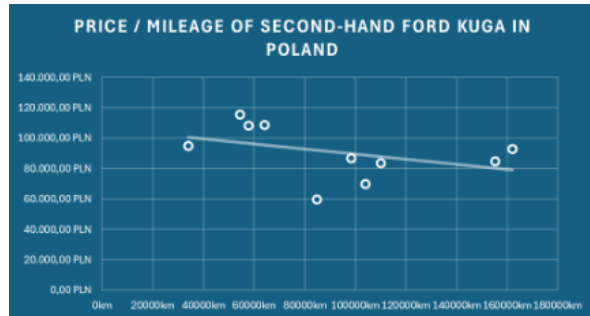
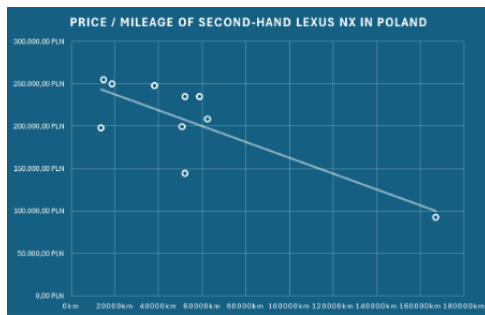


Belgium



Poland





Slovenia

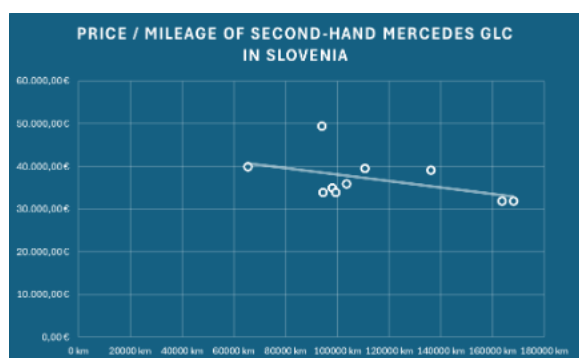
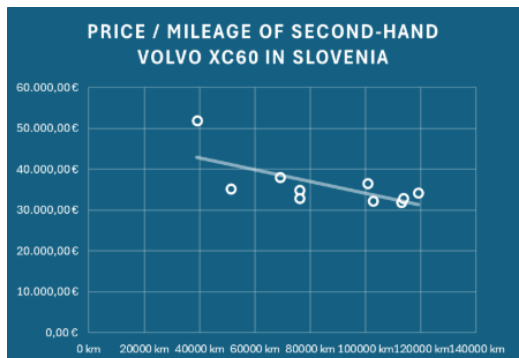
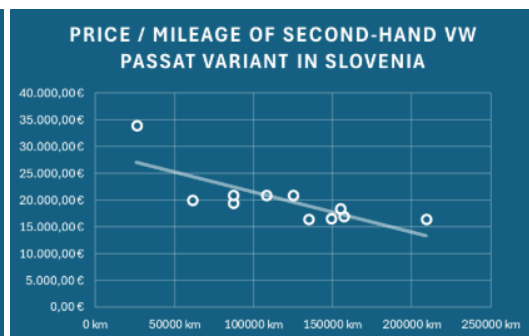
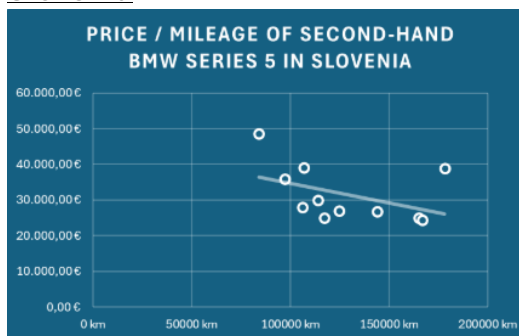


Figure 6: Price per mileage of second-hand PHEVs in six EU countries.