



Ministry of Infrastructure
and Water Management

The market for used electric passenger cars

KiM | Netherlands Institute for Transport Policy Analysis
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Summary

The share of battery electric vehicles (BEVs) in the Dutch passenger car fleet rose to 3.7% in December 2022. In other words, 328,300 BEVs are currently in use on Dutch roads. The increase was the consequence of the influx of new and imported used BEVs. Sales of used vehicles also increased, although compared with the market for used combustion engine cars, the number of vehicles on this market is still very limited. In this publication, the Netherlands Institute for Transport Policy Analysis (KiM) has investigated the development of the market for used electric passenger cars in the Netherlands.

The growth in the total BEV fleet has remained constant over the past three years, at around 70,000 cars per year. This growth will have to accelerate if we are to succeed in considerably reducing the CO₂ emission level, as laid down by the government in its coalition agreement. Moreover, the Dutch government has set the goal that from 2030 onwards, car dealerships in the Netherlands will sell no more new combustion engine cars. In order to have replaced the entire vehicle fleet within 20 years, the total annual influx into the BEV fleet will have to rise to around 450,000 cars per year.

The electric vehicle fleet is still young. This means that the number of electric cars in the total vehicle fleet and hence the number of electric cars available for the market for used cars is still low. That is why the market for used electric cars operates differently from the market for used fossil fuel cars. At present, new BEVs tend to transfer to the market for used cars earlier in their life than combustion engine cars. The government can introduce targeted measures to facilitate the rise in the number of used electric cars in the vehicle fleet, among others via the market for new cars.



Higher influx of compact and medium segment cars

To date, buyers of fossil fuel used cars have a clear preference for cars from the small and medium segment (B and C class) but as yet few such vehicles are available as used electric cars. In other words, a large group of potential buyers is not yet served, because the cheaper, older used BEVs they wish to purchase are not yet available.

For that reason, it makes sense to make the more compact and medium segment more attractive, for new BEV sales. Importing used cars from these segments could also contribute to improving the balance. At the same time, some buyers are adjusting their segment choice in order to tie in with the electric cars that are available.

Accelerating the growth of the market for new cars

Encouraging an increase in numbers of new BEVs in the vehicle fleet will help to create sufficient supply on the market for used cars. Although in the short term, the consequences of the COVID-19 pandemic and the war in Ukraine have impacted on the supply, in the longer term, the supply of BEVs is set to grow.

For the time being, potential buyers of new and used BEVs are fairly similar. On that basis, it could be meaningful to lower the perceived obstacles to electric driving, by introducing incentives.

At present there are no indications of obstacles in the transfer to the market for used electric cars. By increasing the influx of BEVs in the compact segment and as the market for new cars grows, we expect that in due course, supply on the market for used cars will also grow.

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In this brochure we use the term BEV or Battery Electric Vehicle to refer to electric and plug-in passenger cars.

A (plug-in) hybrid vehicle is always referred as a hybrid, despite the fact that it also has a rechargeable battery, which permits partial electric driving.





1 Composition of the vehicle fleet

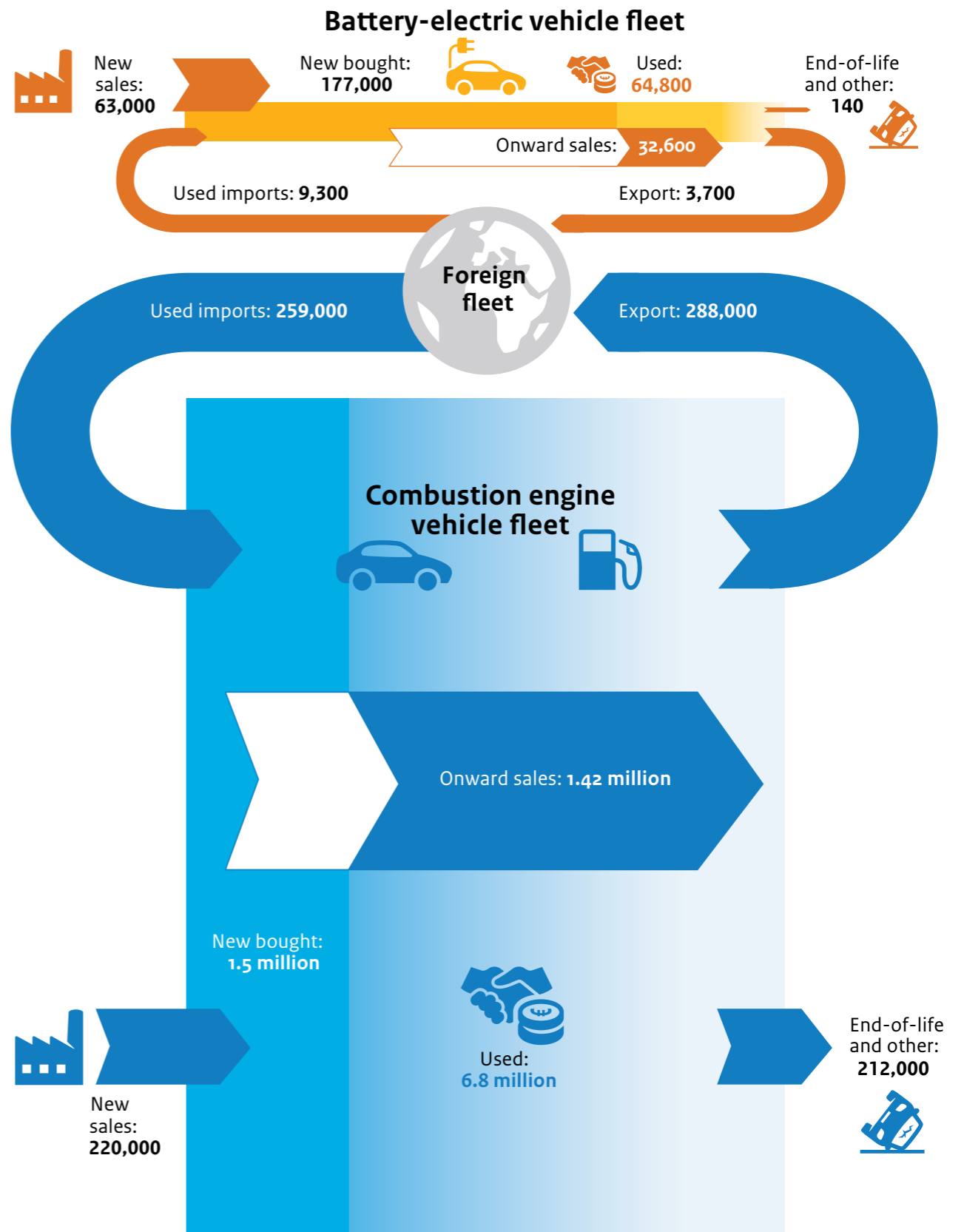
New relates to a new car purchased by the first owner. Used refers to used cars sold on to the second, third or subsequent owner.

The Dutch BEV fleet (in yellow) consisted of 249,200 vehicles at the end of 2021, and those numbers are growing. On 31 December 2022, 328,300 BEVs were in use on Dutch roads. The fleet of fossil fuel cars (blue) is more than 30 times larger. The size of the coloured blocks represents the ratio between the two vehicle fleets, in 2021. A vehicle fleet consists of new bought and sold (used) cars.

In this flow diagram the arrows indicate the annual changes in both vehicle fleets. Cars enter the vehicle fleet via new sales and imports and exit via exports and scrapping at the end of their life. Within the vehicle fleet, domestic onward sales take place involving new and used cars. Total onward sales within the fossil fuel vehicle fleet is more than 40 times the size of onward sales within the BEV fleet.



The vehicle fleet data in this figure date from 31 December 2021. The influx, exit and onward sales numbers relate to the year 2021. The white section of the onward sales arrow illustrates the share of sales from first owner to second owner; the coloured section the domestic used car onward sales. The graduated colour change in the used car section symbolises the decrease in numbers as the age of used cars increases.

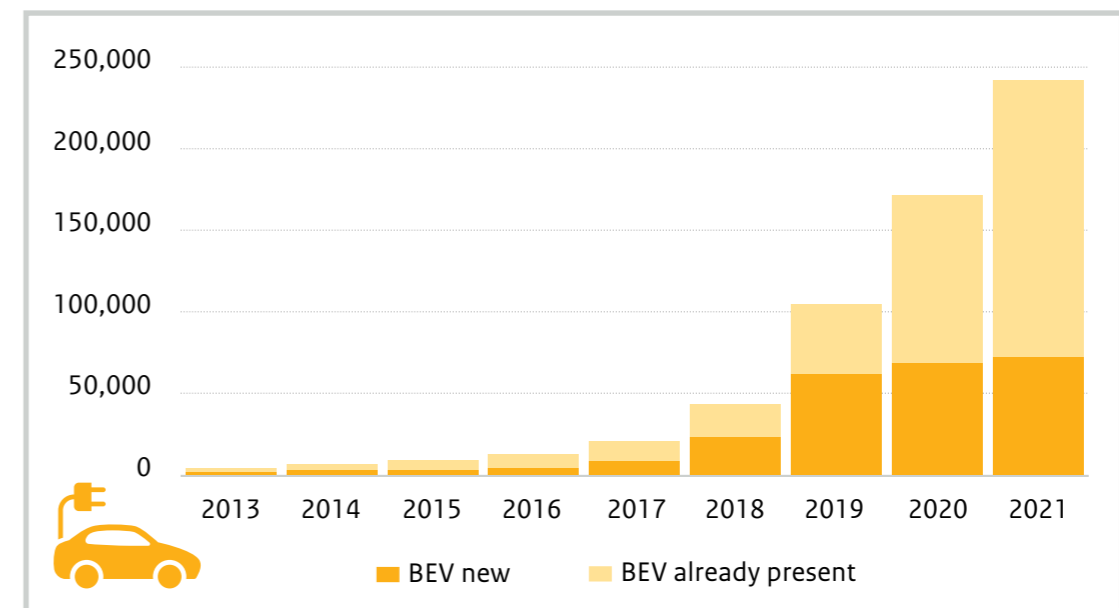
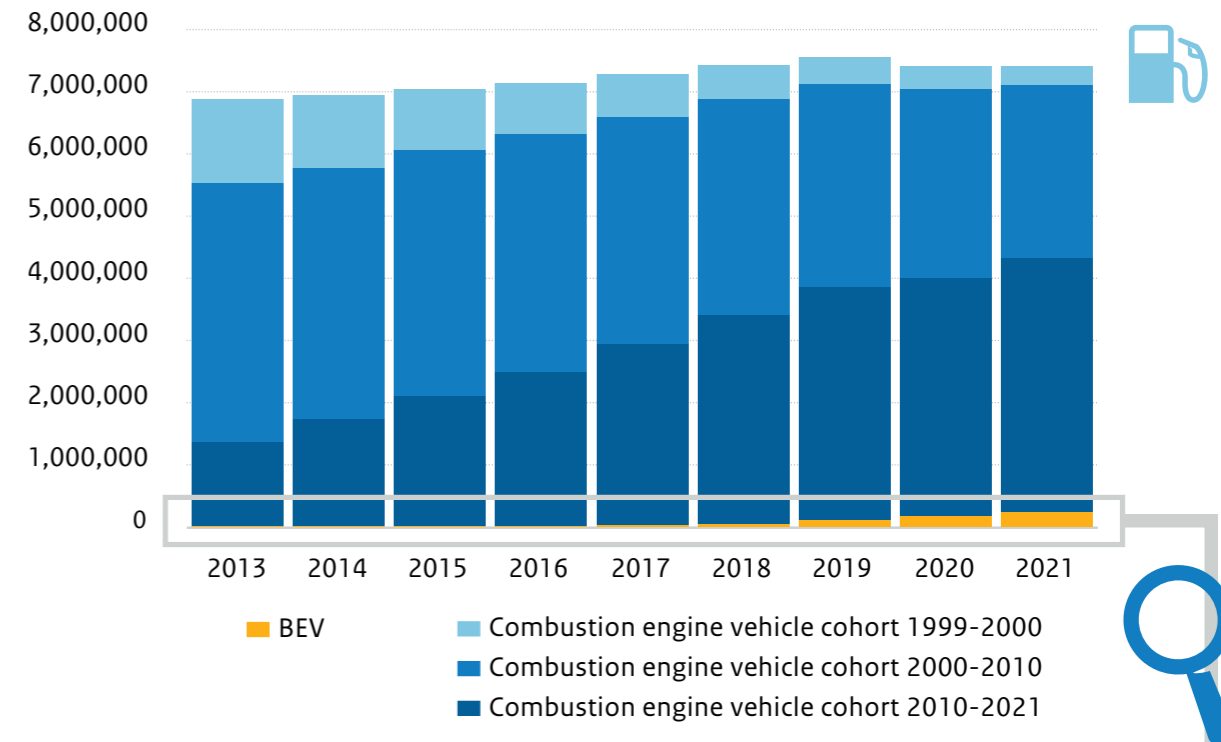


The BEV fleet is growing year on year. Over the past 3 years, the market grew each year by around 70,000 electric cars; in previous years, the numbers were considerably lower. Despite the annual increase, BEVs still represent just 3.5% of the total vehicle fleet. Of every five new cars entering the vehicle fleet, one is electric. This annual share is illustrated in the bar chart with the yellow bars.

To give a clearer picture of the growth in the electric market, in the lower graph, we zoom in on the BEVs. In this graph, we have adjusted the y-axis compared with the upper graph. This clearly shows that the number of BEVs rose exponentially between 2016 and 2019, at growth rates rising from 60 to 140% percent per year. For the last few years, however, annual growth has been constant, at around 70,000. The vast majority of these electric cars are still young.

The vast majority of the Dutch vehicle fleet consists of combustion engine vehicles. These cars last around 20 years, and on average are 10 years old. Many of these combustion engine cars are therefore far older than the BEVs in the vehicle fleet. In the bar chart, the cars that have entered the market over a period of 10 years have been grouped together to form a cohort. The more recent the cohort, the darker the blue colour. The cohorts for the periods 1990-2000 and 2000-2010 are becoming visibly smaller within the vehicle fleet. The most recent cohort is growing; the oldest cohort is slowly disappearing. Sales numbers of new combustion engine cars have been shrinking since 2017. This decline above all relates to diesel cars. The number of BEVs is growing.

Cohorts of combustion engine cars and BEVs



These bar charts are not based on exact data, but on a combination of known numbers of cars and estimates of annual changes such as exports and scrapping.



2 Constant growth

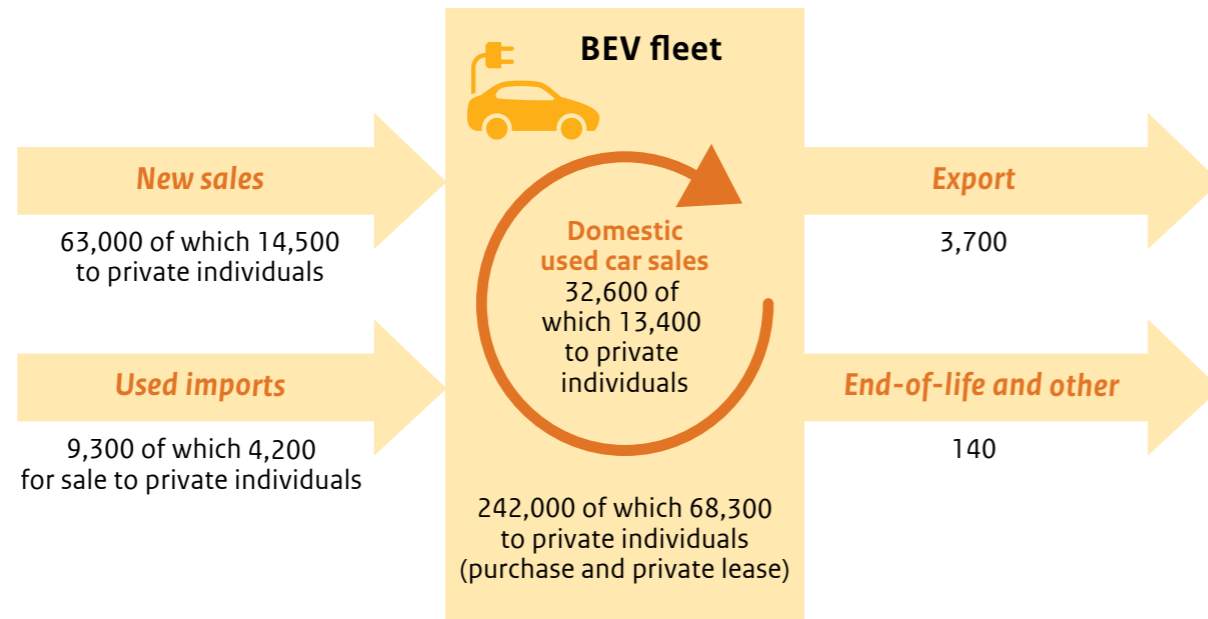
More BEVs are entering the vehicle fleet than leaving it. In 2021, 63,000 new BEVs were sold, slightly fewer than one year previously. In that year, overall new car sales fell slightly but in those new sales, the share of BEVs remained constant at around 20%. Dutch car dealerships also import used BEVs from abroad; in 2021, around 9,300. In other words, around one in every seven BEVs that entered the vehicle fleet was imported. The size of the export market for used cars is small: just 3,800 BEVs were exported. And the share for end-of-life vehicles and others amounted to just 140 cars. In this way, the electric vehicle fleet grew by around 70,000 cars. This growth has been practically constant for the past 3 years.

Absolute growth remains unchanged rather than accelerating

In order to arrive at a fully electric vehicle fleet in due course, the growth in the number of BEVs will have to accelerate. Emission-free mobility will contribute to the aim laid down in the coalition agreement to considerably reduce the level of CO₂ emissions by the mobility sector.

The sooner this acceleration is achieved, the greater the total number of car drivers in electric vehicles, instead of fossil fuel vehicles. That in turn will reduce the level of CO₂ emissions from road traffic. Given the average useful life of a car of 20 years, the total growth in the BEV fleet will have to rise to 450,000 vehicles per year, in order to replace the existing vehicle fleet of 9 million cars, in due course.





One in four new BEVs are sold to private individuals

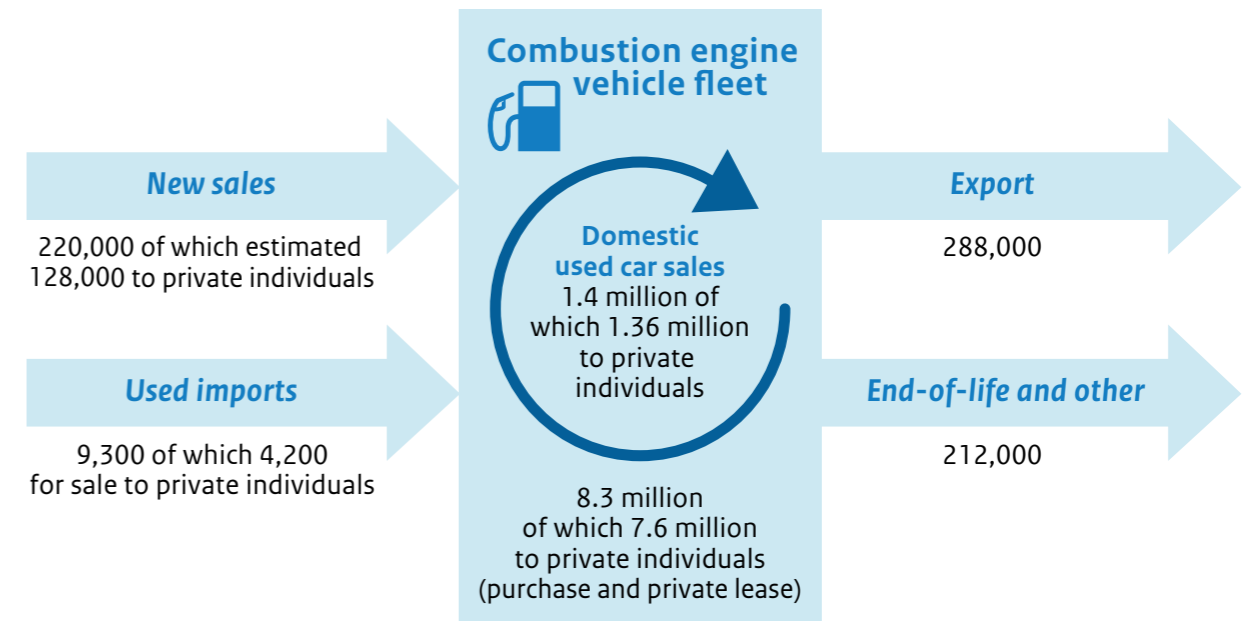
The number of BEVs and their share in sales numbers is growing sharply, but not sharply enough to realise the government’s ambitions. That growth applies both to new sales and used cars. New BEVs are mainly purchased by companies for which the cars form part of their business model, such as lease companies and taxi companies. In 2021, 48,510 newly sold cars went to these buyers. That is more than three times the 14,490 BEVs purchased new by private individuals: 8,190 direct and 6,300 via private lease.

Electric driving for company cars is beneficial. For a BEV driven for business purposes, the driver pays less own tax contribution for private use of the business car than for a combustion engine car. For BEVs, the rate is 16% on the catalogue price up to €30,000 in 2023 and 22% on the amount above that. For combustion engine cars, the 22% applies to the full catalogue price. In other words, electric driving can be as much as €150 per month cheaper.

Possible reasons for unchanged growth

On the one hand, bottlenecks in the production of BEVs are hindering rapid, stable growth in supply. Developments such as the war in Ukraine, the COVID-19 pandemic and shortages on the labour market are resulting in shortages of the raw materials needed for the production of batteries and computer chips. The production costs for both electric and combustion engine cars are rising, as a result. It is uncertain when the supply of BEVs can be accelerated. Despite the current temporary unstable period, this is expected to happen in due course.

On the other hand, the stagnation may in part be the consequence of limited demand, but this cannot be confirmed on the basis of the current study. For various different reasons, people prefer not to purchase a BEV (yet). The most commonly mentioned reasons are the high price and concerns about the range and charging. The uncertain period of war and pandemic over the past few years may also be a contributing factor when it comes to buying a car.

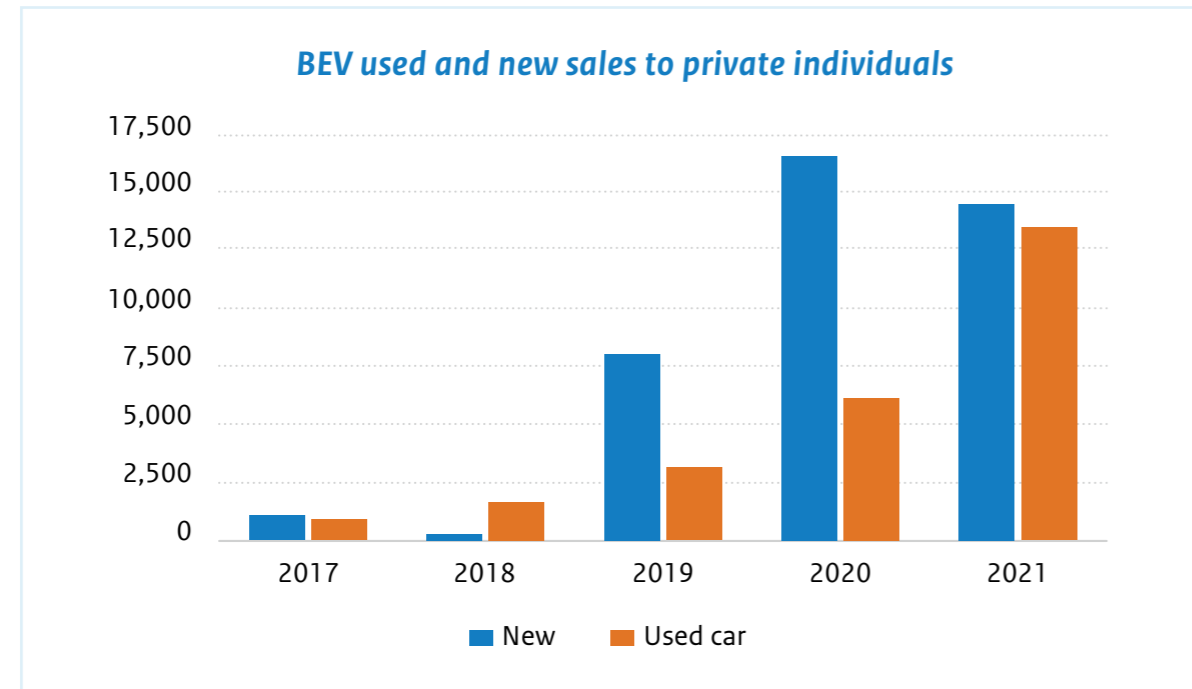




Growth in used BEV fleet lagging behind new sales

Many cars from lease constructions make their way onto the market for used cars after around 5 years, when the business driver's lease contract expires. One in three BEVs is now stood on the driveway of a second (or third) owner as a used car. The used vehicle fleet of BEVs is growing, but this growth is lagging behind that of new sales. The first owner of a new car naturally first drives the vehicle for a number of years, before putting it up for sale. Current used BEVs in the vehicle fleet are on average four years old.

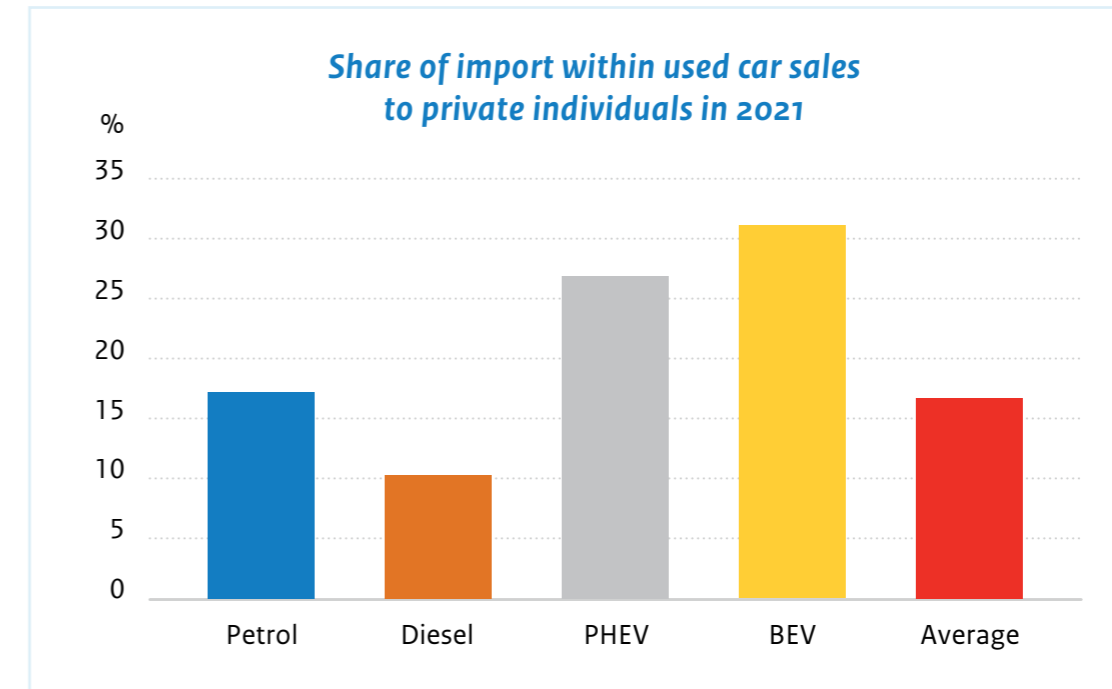
The number of private individuals purchasing used BEVs is growing steadily. In 2021, 32,600 used electric cars were sold, of which 13,400 to private individuals. A doubling compared with the previous year. Since the introduction of the Subsidy Scheme for Electric Passenger Cars for Private Individuals (SEPP) (on 1 July 2020), the government has also been encouraging the purchase of used electric cars. For each used car, the buyer receives a subsidy of €2,000 while the subsidy for a new BEV in 2023 is €2,950. Two in every three used BEVs sold in 2021 was previously driven in the Netherlands; one in three was imported from abroad.



Sharp growth in used BEV imports, limited exports

The import of used electric cars is growing rapidly. In 2021, 9,300 used cars were imported, twice as many as in 2020. Of this total, around half were sold to private individuals. In other words, one-third of privately purchased used vehicles came from abroad. That is almost twice as many as the share of foreign used petrol cars sold to private individuals. This may be because the young age of the BEV fleet restricts the domestic supply of used vehicles. The other two-thirds of used BEVs sold to private individuals came from a Dutch owner.

A large proportion of the new electric cars sold remains in the Netherlands: in 2021, 3,700 BEVs were exported. That amounts to around 5.7% of the total used electric vehicle fleet and is slightly higher than the 4.2% of combustion engine cars exported compared to the total used combustion engine vehicle fleet. For the sake of completeness, we also make the comparison for the import of used cars. Compared with the used electric vehicle fleet, the imports amount to 14.4%, while the import of combustion engine cars represents less than 4% of the total used combustion engine vehicle fleet.





Compact and medium-sized used BEVs particularly popular among private individuals

Cars are generally divided into segments. For passenger cars these are: A (small), B (compact), C (small-medium), D (medium-large) and E (large, luxury and sports).



Among private individuals purchasing new BEVs, above all the medium segments C and D are popular. Among new combustion engine cars, the more compact segments B and C are particularly popular. Among used BEVs, segments B and C were the most purchased, analogous to combustion engine cars. These are the segments also reflected in the import of used cars.

If the current preference for segments among buyers of used combustion engine cars also applies to future used electric car buyers, the demand for B and C cars will rise. In 2021, however, above all the large segments were popular among new BEV purchases. These vehicles are expected to transfer to the used car market in around 5 years time.

At that time, it will be necessary for private individuals to be able to afford these models. Particularly noticeable is the high proportion of the expensive E-segment in the export share. Cars from this segment are popular in business lease constructions. However, if after 5 years the own tax contribution for these cars expires, they are no longer attractive for business drivers. And given the high price, they are still too expensive for many private individuals.

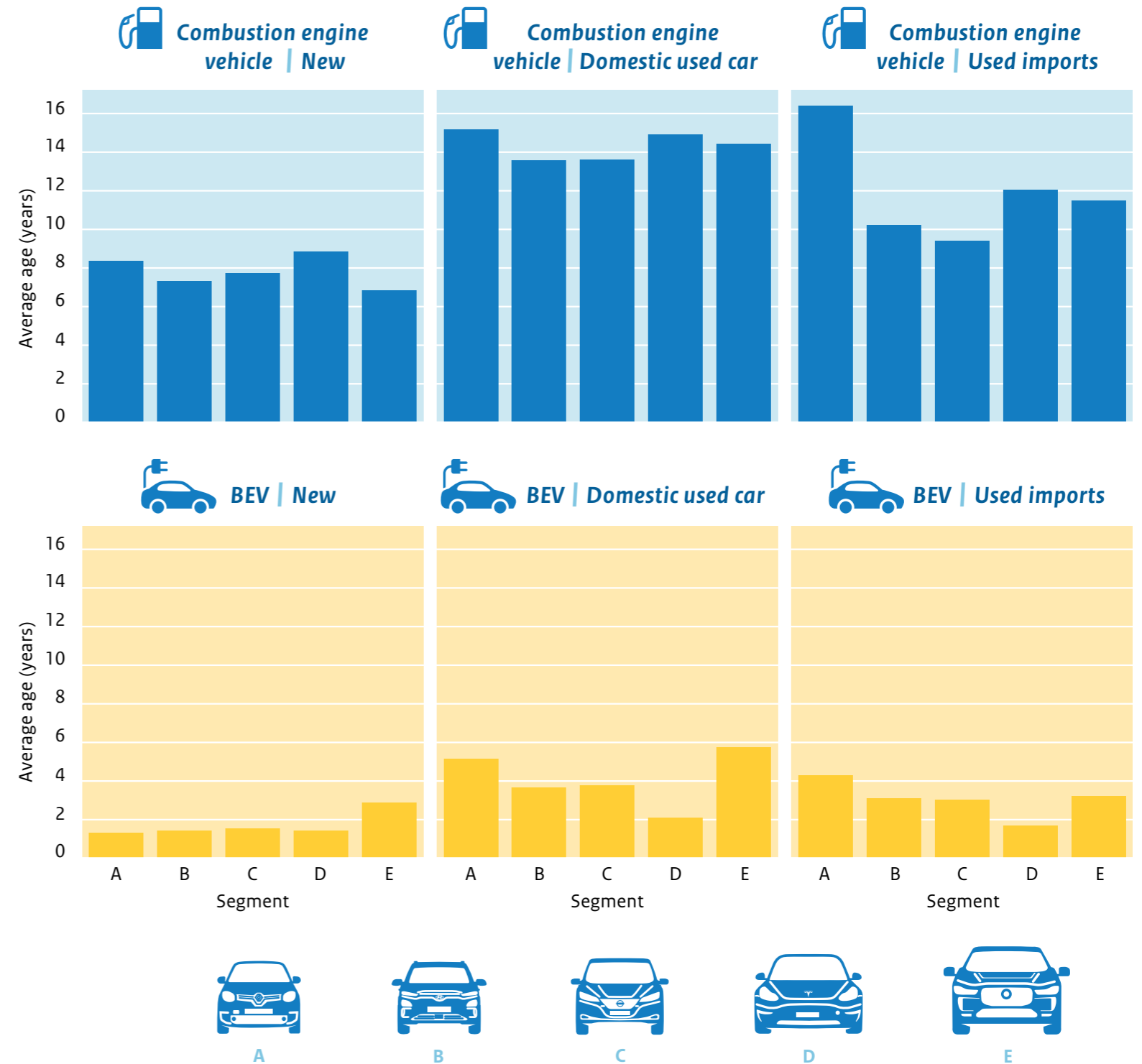
Currently, private BEV drivers often opt for an electric car from a different segment than their previous combustion engine car. On balance, car drivers drive slightly smaller cars. It is however uncertain whether this will continue to apply for the broader majority.

3 Young vehicle fleet

The electric vehicle fleet is young and small compared with the fossil fuel vehicle fleet. Multiple electric models have only been available to the general public for around the past ten years; in the beginning the range was limited. And the vehicles that were available were expensive.

Because there are more new BEVs than used BEVs, the average age of the BEV fleet is lower than that of the combustion engine vehicle fleet. This means that also the BEVs that end up with their current owner as used car are far younger than the combustion engine cars that have made their way to their current owner, as used vehicles. In other words, generally speaking, BEVs are sold on as used cars much earlier in their life. The majority of BEVs that are still with their first owner (shown as new in the attached image), are around 2 years old, as compared with 8 years for combustion engine cars. For domestic and imported used cars, the average age varies per segment. For BEVs the average age is 2-5 years and for combustion engine cars 10-14 years.

The average age of used electric cars shows little variety between segments A through to D. Only in domestically traded used cars from segment E do we see a noticeable peak. Cars from this segment have been available for slightly longer. One popular model in this segment, the Tesla Model S, has been sold in the Netherlands since 2013. In other words, this vehicle has been entering the vehicle fleet for longer and is therefore on average slightly older.



Battery-electric vehicle fleet

New bought: 177,000  Used: 64,800 

Onward sales: 32,600

Combustion engine vehicle fleet



Onward sales: 1.42 million

New bought: 1.5 million



Used: 6.8 million

BEVs are above all owned by (lease) companies but a shift is taking place

In the Dutch vehicle fleet of 9 million passenger cars, the vast majority are in private ownership. The situation for BEVs is different: just one-third of all BEVs are owned by private individuals. The vast majority of BEVs are owned by legal entities, including lease companies. In this breakdown, self-employed persons without employees are counted as private individuals.

Also, for BEV sales, the focus is (still) on legal entities. Around three out of every four new sales went to business drivers. After 5 years the own tax contribution benefit expires, at which point the car is no longer attractive for a business driver. It is at that point that the car often transfers to the market for used cars. However, even in used sales, the majority still goes to legal entities. In the Netherlands, new sold BEVs transfer more often to the used vehicle fleet than are exported. The relatively young market for used BEVs is more dependent on transfer from the market and import, than the more mature market for used combustion engine cars, in which more private trading also takes place.

In 2021, 32,600 used BEVs changed owner, of which 13,400 went to private individuals and the remainder to legal entities. However, this picture is shifting. A growing share of new sales is intended for private individuals. This relates both to private lease and private purchase.

Used BEVs have become relatively less expensive

All used cars became more expensive between 2018 and 2022, but for used electric cars, the average trading value rose less sharply than for used fossil fuel cars. Used BEVs from the 3 lowest segments have on average approximately the same trading value, while for fossil fuel car types, the price rises according to segment.



4 Electric drivers

People opt for BEV for different reasons

People choose whether or not to purchase an electric car based on situational, psychological and social arguments. These are regularly investigated by a number of organisations, such as the Royal Dutch Touring Club ANWB and the Dutch Association of EV Drivers (Vereniging Elektrische Rijders). The Dutch KiM study 'Met de stroom mee' provides an overview. The arguments have not changed much over the past few years.

The primary arguments for not opting for electric driving are:

- High purchase price
- Too few charging points
- Limited operating range

The primary arguments in favour of electric driving are:

- Lower use costs
- Benefits for the environment and climate
- Technical innovation and driving pleasure

More common BEVs change the image of the typical owner

The electric car has become increasingly commonplace over the past few years. At present, a shift is taking place in the type of buyer, from the small group of innovators to the majority of car buyers.



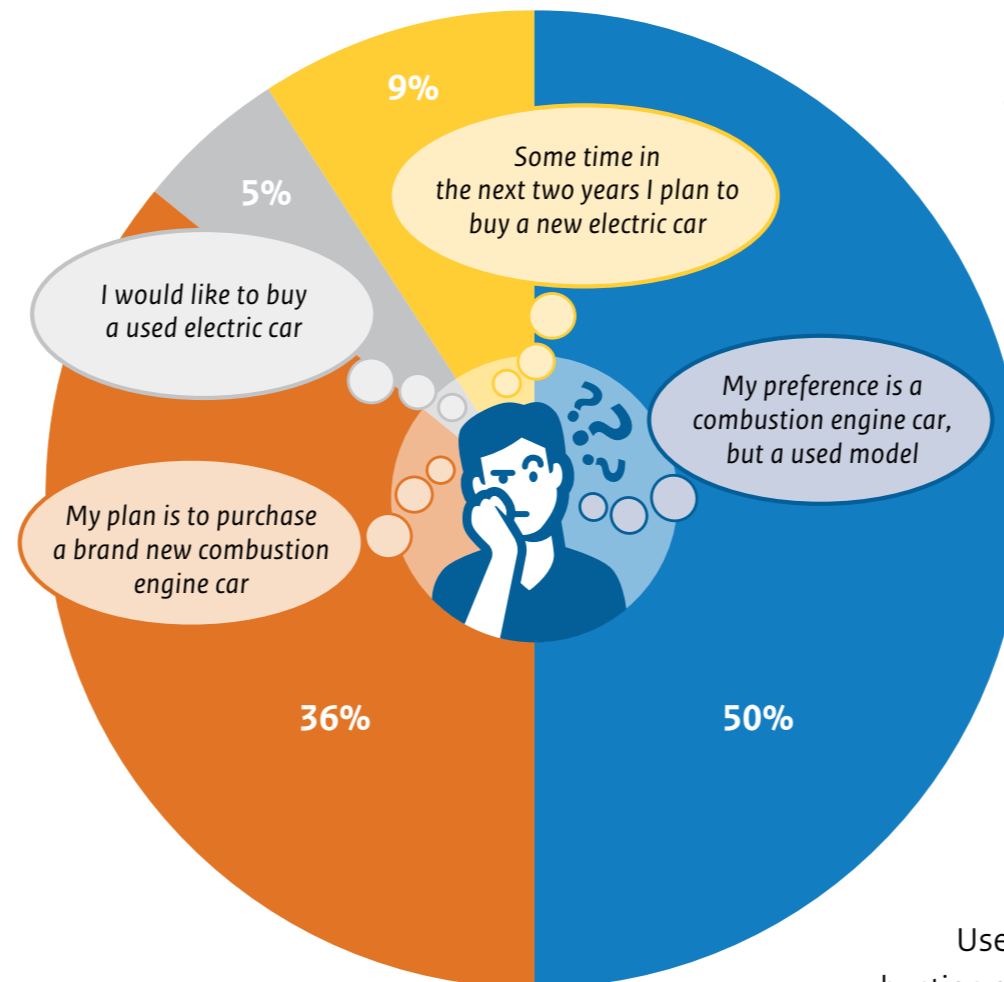
People who already drive an electric car are part of the group 'early adopters'. These are above all business drivers and partly as a consequence more often men with a high education level and higher income. The first widely sold BEVs were often larger, more expensive cars, ideally attractive for this segment. These buyers often also drive large numbers of kilometres per year, making the BEV relatively cost efficient. Electric driving costs less per kilometre than fossil fuel driving.

However, the private BEV market is growing rapidly. This group of buyers values practical arguments such as price and range more than the group of innovators. The stereotypical image of the business BEV driver as outlined above will therefore need to be adjusted.

The demand for used BEVs is set to rise over the coming years

Many new BEV models will continue to be too expensive for the ever growing group of potential buyers over the coming years. Their preference will be for a used vehicle.

In 2020, we asked the participants in the Netherlands Mobility Panel (MPN) whether they intend to purchase or lease a car in the next two years. Around one-third said they were planning to do so. The majority intend to buy a combustion engine car, most of them a used car. Among people intending to buy a BEV, the majority intend to purchase a new car. However, among this group too, used cars are already fairly popular. We expect the interest in used electric cars to grow proportionally, over time.



The numbers are still too limited for used BEV buyers

Many potential used BEV buyers face the problem of a limited supply of used vehicles. BEVs are in a growing market, in which the vehicle fleet is still dominated by relatively young cars. As a result, not many BEVs are transferring to the market for used cars. In addition, the BEVs that do make it onto this market are often very expensive. The ANWB figures show that 62% of used car buyers consider the range of used BEV models too limited and too expensive.

Moreover, many of the used cars currently transferring from the new (lease) market are very large car types. These were the first pioneering models. The majority of used car buyers are however in search of smaller models. This is reflected in the size of used combustion engine cars, but not in used BEVs. This suggests a restricted supply of BEVs.

Used BEVs are not excessively expensive compared with used combustion engine cars, given the age and size of the cars. However, specifically because this group of used cars is on average far younger and consists of larger models, the vehicles available are still often very pricy. Although according to the ANWB, buyers are willing to pay more for an electric car than for a combustion engine car, many of these models still remain beyond their reach. As a result, a large group of buyers are not served because the cheaper older used BEVs they desire are not yet available on the market for used cars.

	Used car buyer	New car buyer
Petrol/diesel	€ 10,700	€ 24,900
Electric	€ 13,000	€ 29,000



The used BEV buyer is similar to the BEV new car buyer...

The used BEV buyer shows similarities with the BEV new car buyer. In other words, the group of car drivers wanting to drive electric vehicles are similar, whether they want to buy a new car or a used car.

An analysis of the MPN questionnaire for 2020 shows that people who expect to buy or lease an electric car often travel more kilometres per year than other car drivers. This is to be expected, because the total costs of an electric car over its useful life are relatively low for someone who drives more kilometres. This partially removes the financial objections, although the high purchase price will still remain a major obstacle.

Also, people who intend to purchase a used electric car still have a high income and high education. Given the limited supply on the market for used cars, these are the groups with sufficient income to purchase an electric car.

Current BEV drivers often already drove younger cars before purchasing an electric car. The purchased BEV is also often younger than the previously purchased combustion engine car. In addition, one in five people interested in a BEV already own a hybrid or electric car.

...but there are also differences

There are nevertheless differences between used BEV buyers and BEV new car buyers. The larger group of used car buyers appears to have more interest in a car that is more compact and more affordable, while – partly because of the vehicles available – the newly sold BEVs are specifically larger models.

A used BEV buyer appears to be more concerned with climate change than new buyers, who seem to be more driven by technology. Both express above average concern for the environment and the climate, compared with people who express a preference for combustion engine cars. It is questionable whether this situation will remain stable over the coming years, when more used BEVs are traded in the vehicle fleet.

It is also notable that used car buyers, more than new car buyers, are already in possession of an electric or hybrid car in their household. It is possible that positive experiences or for example investments in a charging point in their home mean that these households also want to drive electric with their second car.

Finally, women expect more often to purchase a used BEV than men. This difference is probably mainly explained by the above average difference between the first and second car in the household.



5 Accelerating the influx

Striving for zero-emission passenger cars

The current coalition agreement between VVD, D'66, CDA and CU specifies that the government wishes to considerably reduce the level of CO₂ emissions in the mobility sector. The Climate Agreement sets the target that at the latest by 2030, all new passenger cars will be emission-free. This is similar to the agreement entered into by the European Parliament and the Council of the European Union in October 2022, namely that from 2035 onwards, new passenger cars are not permitted to emit any more CO₂. The stimulation measures beyond 2026 have not yet been elaborated; current policy must first be evaluated.

Accelerating the growth in electric driving

The growth of the overall BEV fleet is currently constant, while in order to electrify the entire vehicle fleet, accelerated growth is needed. The overview of the measures for stimulating electric driving from the KiM report 'Met de stroom mee', provides a foundation for potential and implemented (policy) measures, which we also subscribe to in our background report about the market for used BEVs.

The market for used BEVs is still in its start-up phase. We have already noted a shortage in the supply of cars from the more compact segments. At present, we have identified no obstacles in the transfer of electric cars to the market for used cars. The market for used cars is determined by the market for new cars over the past 15 years. However, before policy aimed at the market for new cars trickles down to the market for used cars, many years will pass by.

The study identifies two aspects that are relevant in the targeted facilitation of the growth of the electric vehicle fleet, and hence also the used BEV market:

- More influx of more compact segments
- Accelerating the growth in the market for new cars

If the limited supply of new fully electric cars is unable to meet the demand for passenger cars, the gap could be made up by increasing the import of combustion engine cars. However, additional imports of used combustion engine cars rather than more new electric cars could counteract the target of considerable CO₂ reduction.



Measures that make the import of combustion engine cars less attractive, such as differentiation in import costs or CO₂ standards, could help reinforce the electrification of the vehicle fleet. In the light of the European free market this appears legally impossible at present, but the playing field may change. We do not know whether the BEV fleets abroad do include sufficient numbers of cars from the desired segments to meet the ever growing demand in the Netherlands.

Higher influx of compact and medium segment cars

New BEVs are currently, for the most part, sold on as used cars in the Netherlands. These are above all cars from the medium and larger segments. Electric cars from the largest segment E are more commonly exported. In the case of used combustion engine cars, people mostly drive in cars from the compact and medium segment. If the preference of future used BEV buyers matches this preference, it seems meaningful to make these segments more attractive for new sales. Encouraging the import of used cars could also focus on these segments.

Current policy is already responding in this direction, by making cheaper new BEVs more attractive than BEVs from the more expensive segments, also for business driving. This is above all achieved via the cap on the own tax contribution. This is the cap on the catalogue price below which the reduced rate applies. Since 2020, this cap has been falling year on year and is currently €30,000. By repeatedly lowering the cap, the lower priced BEVs will become more attractive for business drivers than the more expensive vehicles.

Accelerating the growth of the market for new cars

The sale of new electric cars will lead to a larger electric vehicle fleet and hence to a larger rate of transfer to the market for used cars. The Netherlands Environmental Assessment Agency (PBL) in its Climate and Energy Outlook 2022 expects that given the current incentive measures, two out of every three new cars will be electric by 2030. A share that still falls behind the government's ambitions. Encouraging the purchase of new BEVs, also beyond 2025, will reinforce the growth of the total BEV fleet and consequentially a greater supply of used BEVs. Both business and private drivers can be served by this market.



Encouraging electric driving

For the time being, potential buyers of new and used BEVs are fairly similar. Based on that finding, it would be meaningful to continue the current efforts aimed at helping to reduce the barriers to electric driving.

First and foremost, reducing the obstacle of purchase price. For example, through financial measures, but also by offering greater insight into the overall costs of use and ownership of an electric car. Used car buyers are less wealthy than new car buyers, but generally speaking they are willing to pay slightly more for electric cars.

Measures that make a charging infrastructure accessible also reduce the obstacles to use. What steps, for example, are attainable for the large group (60%) of Dutch people who have no private parking space?

Thirdly, the sector association of car dealerships is currently developing a battery check for used batteries. Electric drivers are also happy to share their experiences and sometimes even their car. Good experiences in practice and a realistic estimate of the energy required and available in the battery help remove uncertainty about the range in real life.



Acknowledgements

Method

With this study, the Netherlands Institute for Transport Policy Analysis (KiM) has mapped out the market for used electric cars. Battery electric passenger cars (BEVs, Battery Electric Vehicles) are the main subject. The study therefore does not consider light-electric commercial vehicles or delivery vans. Plugin hybrids (PHEVs Plugin Hybrid Electric Vehicles) are also not separately considered, but wherever meaningful, are referred to explicitly in the results. Where possible, our focus is on used cars. The study also specifically relates to private buyers and only indirectly to business drivers.

We have employed two study methods: a literature study and an analysis of existing data. These data contain information about passenger car sales, the vehicle fleet and trade values. We also use data about car ownership and the intention to purchase a car, from the Netherlands Mobility Panel (MPN).



Background report

For more information on the method used, data and results, consult the Dutch background report to this brochure, which can be downloaded via the website www.kimnet.nl

Terwindt, M.J.A., Uitbeijerse, G.C.M. and Faber, R. (2023). *De tweedehandsmarkt voor elektrische personenauto's*. Background report. The Hague: Netherlands Institute for Transport Policy Analysis (KiM).

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