

The European used bus market is under **significant pressure**. Here's what the data shows.

Two converging shocks are reshaping supply, demand, and pricing for used coaches and buses across Europe — and the window for strategic action is open now.

Two simultaneous shocks are hitting the bus market

01

The Diesel Crisis

EU diesel prices up nearly **+25%** since January 2026, driven by tensions around the Strait of Hormuz. Industry associations across Europe — ANAV, IRU and others — are formally requesting EU intervention.

02

The Tourism Collapse

Oxford Economics forecasts **11–27% fewer arrivals** from the Middle East in 2026. Asian tour groups that used GCC hubs to reach Europe are cancelling or postponing trips en masse.

Diesel is up 25%. Margins are being squeezed hard.

+25%

Rise in EU diesel prices since January 2026

Strait of Hormuz tensions

**ANAV · IRU
ASSTRA**

Industry bodies formally requesting EU and government excise cuts

Italy, France, Germany + EU level

**#1–2
cost item**

Diesel is one of the two biggest operating costs for bus companies, alongside labour

For operators, service cannot stop

- Public transport operators cannot reduce service — they absorb the full cost increase, compressing already thin margins
- Coach and tourism operators face both higher costs *and* lower revenues — a double squeeze that is forcing fleet decisions
- Fleet freezes and early disposals are already being observed — operators are starting to offload vehicles

Asian tourism into Europe is collapsing — fast.

-11/27%

Forecast decline in Middle East arrivals in 2026

Oxford Economics

38M

Fewer international visitors expected globally in 2026

Oxford Economics forecast

5,000+

Flights cancelled in Dubai, Doha and Abu Dhabi within the first 48 hours of the conflict

GCC hub disruption

Asian tour groups that historically used GCC hubs as a stopover to visit Europe are cancelling or deferring. Turkey is absorbing some traffic, but at significantly lower volumes. For European coach operators, fewer tourists means fewer contracts, fewer kilometres, and less need for fleet capacity.

The result: more buses available, fewer operators buying.

Supply increases

Operators under margin pressure are freezing purchases and offloading vehicles early. More buses entering the used market than in prior years.



Demand softens

Tourism operators are not replacing fleet. Public operators are delaying purchases. Buyer appetite is down across nearly every segment and geography.



Price pressure

More supply meeting weaker demand creates downward pressure on used bus values — a dynamic now visible in transaction data across Europe.

The used bus market is not immune to macro forces. This is a structural, not cyclical, shift — and it is already in motion.

Used bus prices are declining across Europe.

DRIVER 01

Diesel shock forcing operators to offload fleet at accelerated pace

DRIVER 02

Tourism demand down → lower utilisation → faster depreciation realisation

DRIVER 03

Buyer freeze → more competition among sellers → price concessions across segments

Two positions. One window.

IF YOU ARE A BUYER

This is a rare acquisition window

- Quality vehicles entering the market from operators under pressure — not because of asset condition
- Prices at levels not seen in recent years; the spread between ask and transaction is narrowing fast
- Buyers who move in the next 90 days will capture the most value

ACT: NEXT 60–90 DAYS

IF YOU ARE A SELLER

The window to exit is open — not indefinitely

- As more operators offload, buyer choice increases and leverage shifts — prices will continue to fall
- Vehicles sold today will achieve significantly better prices than vehicles sold in 6–12 months
- Strategic disposal now preserves asset value and frees capital

ACT: BEFORE VALUES ERODE FURTHER

The data layer the bus market was missing.

70+

Countries represented

Bidding patterns and buyer behaviour tracked across more than 70 countries — a global demand signal no single broker or operator can replicate.

Real

Transaction prices — not estimates

Fleequid's value models are built on actual transaction data, vehicle specifications, and usage histories — replacing operator intuition with verifiable pricing intelligence.

TCO

Applications beyond the sale

Fleet TCO calculations, insurance pricing, financing terms — the used bus market is decades behind automotive on price transparency, and we are changing that.

Live

The market, in real time

In a market where price discovery still relies on broker relationships and inherited knowledge, Fleequid provides an unambiguous, data-driven reference for every asset in every condition.

The European used bus market is moving. The question is whether you move with it — or after it.

fleequid.com

Europe's auction platform for used coaches and buses

Data sources: Oxford Economics, IRU, ANAV, AGENS, ASSTRA, AN.BTI
Confcommercio, Fleequid transaction database. This brief is intended for fleet
operators and transport industry professionals.