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Monthly Car Market Insight

August 2025

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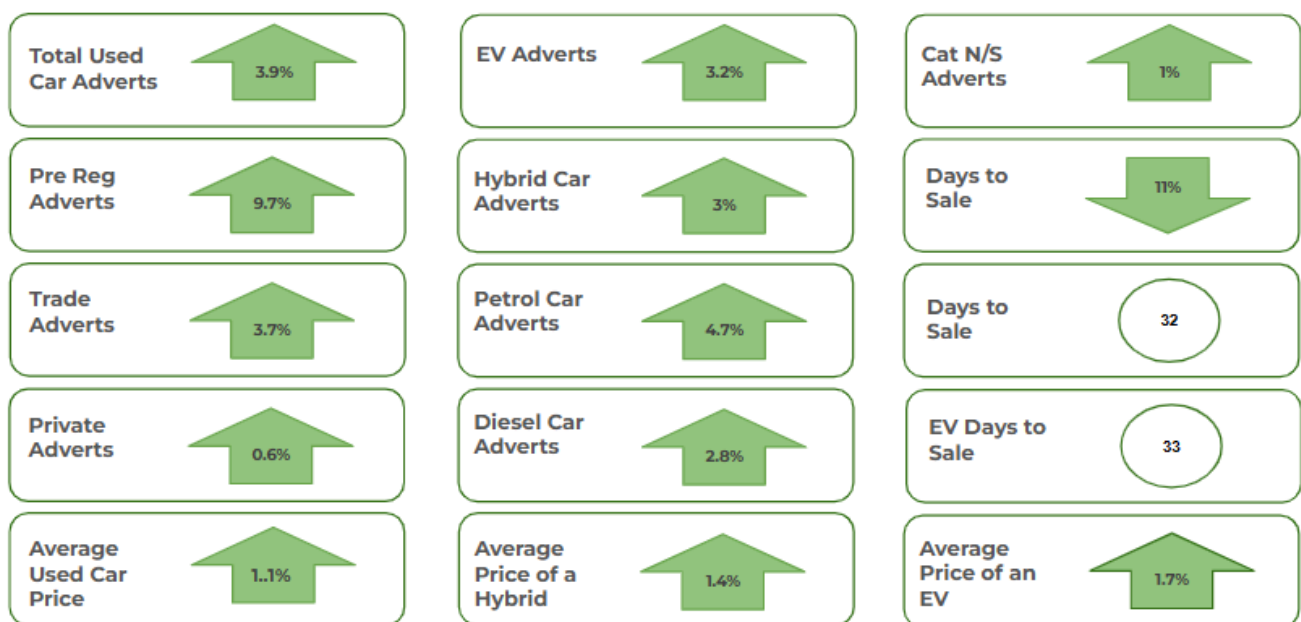
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August Monthly Car Market Insight

In this month's expanded report we look at what has been happening in the UK used car market during the last month and we highlight the key areas of the economy that are impacting the automotive sector and economy as a whole.

Key Used Car Market Indicators

Using the comprehensive and complex whole market Brego data, these are the key market indicators for the month of August when compared with market activity



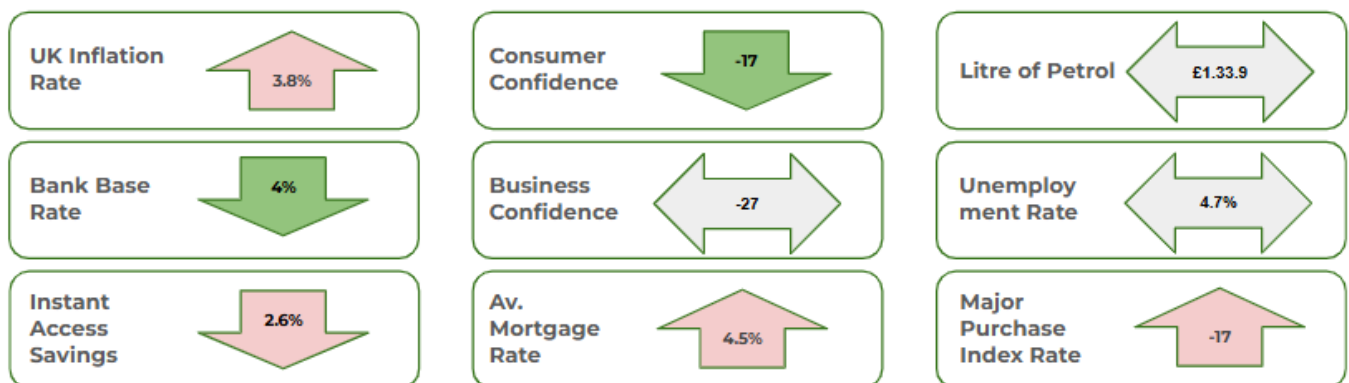
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Looking at the August KPI's we can see that the total number of cars on sale in the UK automotive market across all channels and platforms increased by 3.9% on the July figure. This suggests that either the market has slowed a little or there are more cars available to the dealers in the wholesale market resulting in more cars available for sale on dealer forecourts. There is also the possibility that cars bought in June and July that were held up in the refurb process have now made their way to the forecourts.

However the average days to sale has dropped a further 11% during August and now stands at 32 for all cars. This contradicts the possibility that the market is slowing unless the detail in the data reveals that a significant rise in demand for certain vehicles has brought that average down. This is perhaps evident later in the report when we look at the best selling 3 year old cars.

Other KPIs of note are the 3.7% increase in the number of trade adverts which would support the theory that refurb capacity had slowed used vehicle prep for the forecourt. Also interesting to see that the largest increase in vehicles on sale was for petrol models that increased by 4.7%. In pricing terms the biggest increase in retail asking prices was for EVs with a 1.7% increase. There has also been a 9.7% increase in the number of pre-registered cars advertised which is often the case as dealers push to meet targets at this time of year.

Key UK Economic Indicators

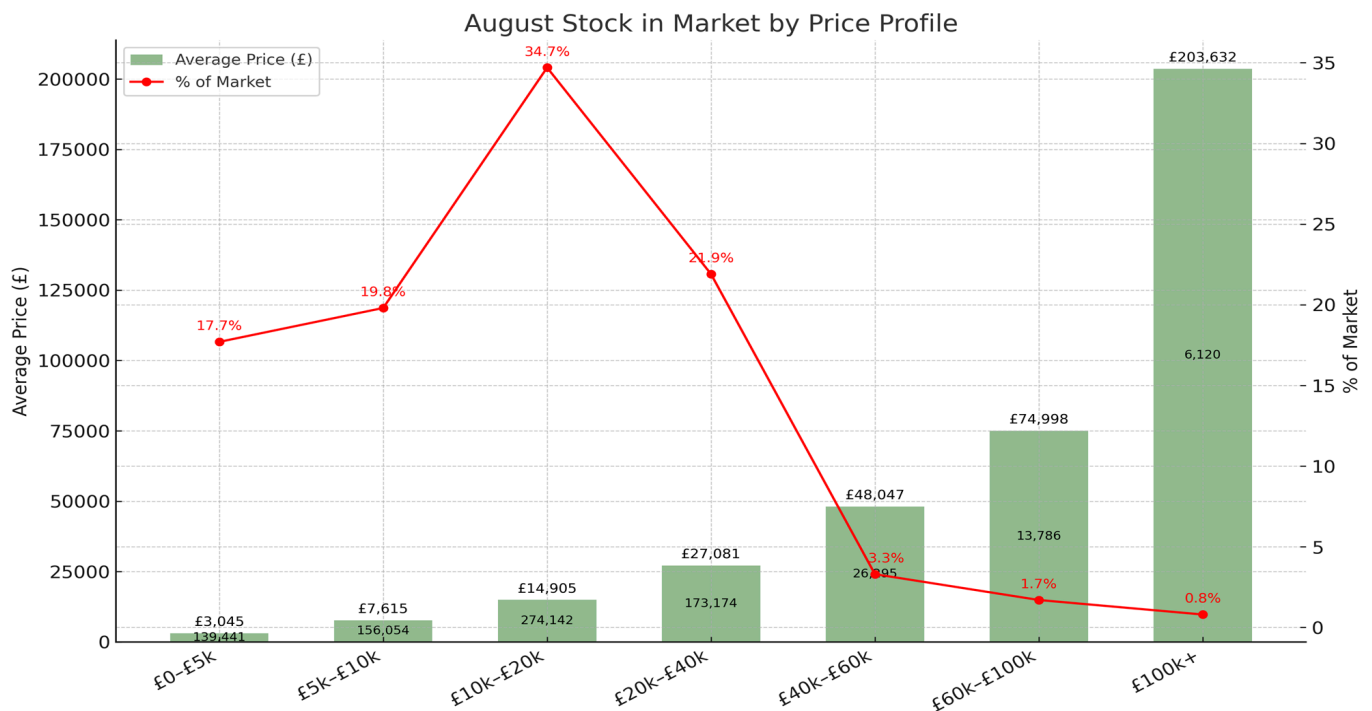


Data Courtesy of Trading Economics, Gemini AI and www.gov.uk

August was a difficult month for the government with a number of bubbling issues causing concern in different sectors. However, the automotive sector was particularly impacted by higher vehicle production costs and confusion over the somewhat slow introduction of new EV grants by the government. In addition the cyber attack on JLR has caused mayhem that is still causing difficulties at the time of writing in September.

On a positive note the further increase in inflation to 3.8% has not damaged either business or consumer confidence which is a welcome surprise. The drop in the bank base rate is probably the driving factor behind this improvement in consumer confidence from -19 to -17.

Average Used Car Value by Price Band



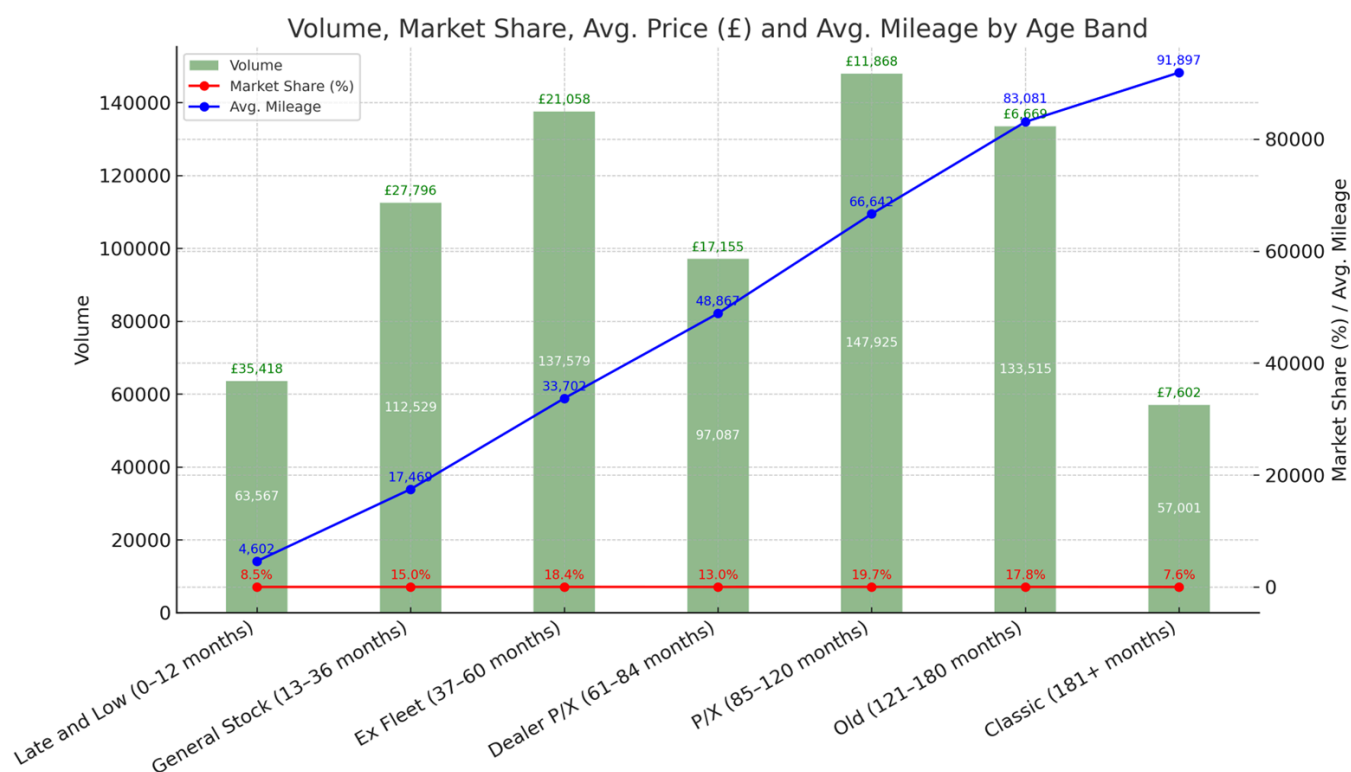
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The chart above gives a breakdown of the Average Used Car Price by price banding. The volume of cars in the market is shown in the bars, with an average price above the bars and the % share of the market for each price range is shown by the red line.

This chart is broadly similar to July which is positive as it suggests stability in market share and pricing. This will largely be due to consistent used car supply in the wholesale market and a steady level of demand from the consumer meaning there is no need to reduce retail pricing to drive sales forward.

Market Analysis by Age Profile

This chart contains a lot of information and looks at the market by sector/stock profile combined with the Average Price on top of the bar, the Volume of vehicles inside the bar and the Average Mileage and % of Market share by the blue and red lines respectively.

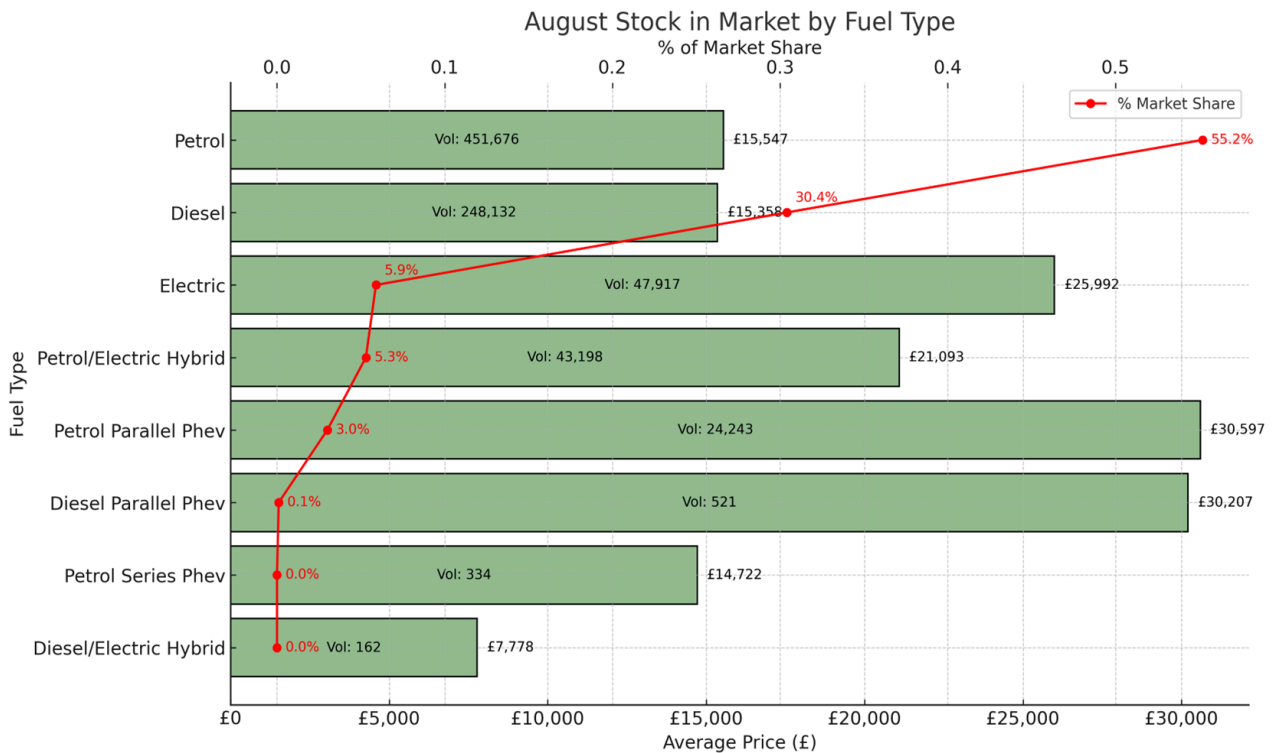


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This month's chart shows an expanded view of the market with a more detailed age breakdown for greater clarity and insight. Vehicles in the general P/X market place take the largest share of the market at 19.7% which is up 1.3% on last month although the average price has decreased by around £900 from last month. The volume of ex fleet cars in the market has jumped by 3.6 percentage points to 18.4% market share and the average price has also increased by close to £1,000.

Average Used Car Value by Fuel Type

The data in this chart slices the market by fuel type with the Average Price to the right of the bar with the Volume in Market inside the bar. The red line shows the % of Market Share.



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As indicated earlier in the main KPI sheet, the number of petrol cars on sale increased in August and the market share lifted from 54.1% to 55.2% which to some may come as a surprise. Diesel share of the market is similar to July but the average price dropped by around £2,350 which is significantly lower. This could be due to defleets of lower spec mainstream models which will help to bring the retail asking prices down.

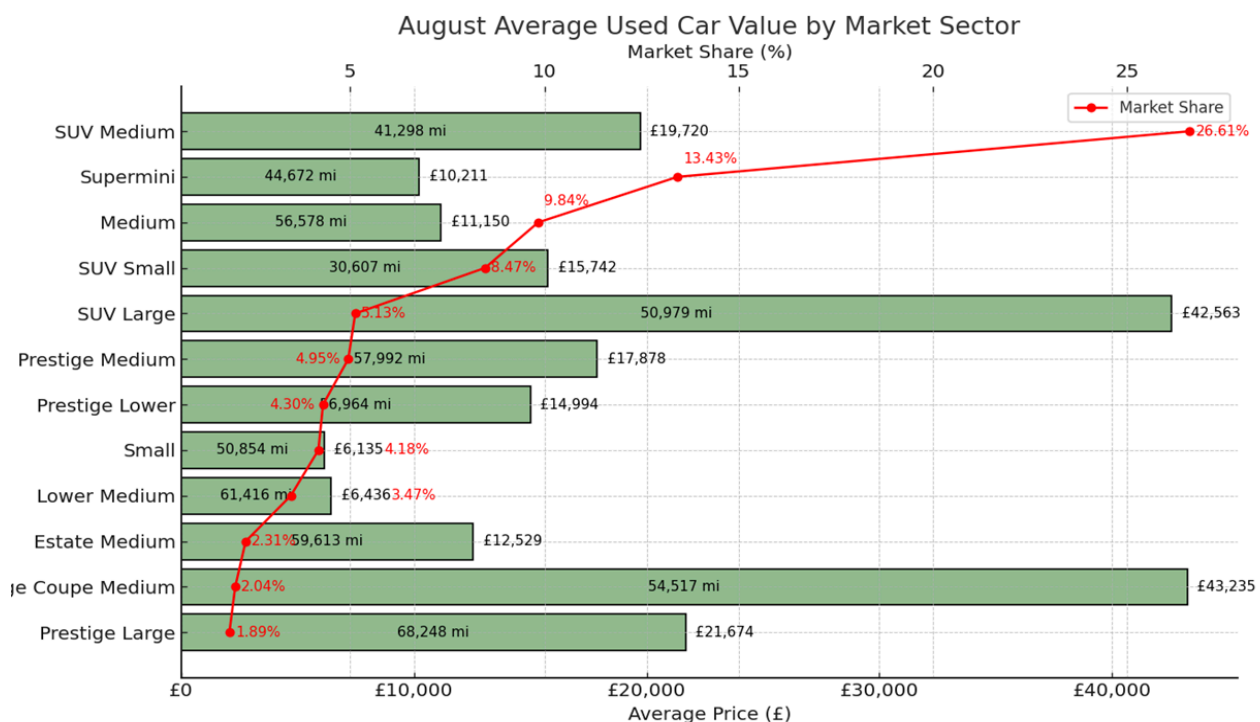
Of note is that EVs remained broadly static suggesting that supply has not increased as may have been expected, although increased supply may well have been absorbed by increased demand. Given the government support on new EVs and the increase in cars from Chinese manufacturers, there will have been an expectation of more EVs in the used market but it is key to remember that higher new EV sales does not mean that EVs have been taken in part exchange. Indeed the jump in the volume of petrol cars in this chart and an increase in the volume of Ex Fleet profile cars intimates that new EVs are driving fleet sales.

Monitoring the EV market has never been so important as with every passing week the number of new entrants into this space is ever increasing. In addition the product offering

and new car pricing is ever improving, offering greater choice to the retail consumer. However, it could also bring instability and pressure on used car pricing and therefore dealer margins and profitability.

Average Used Car Value by Market Sector

The bars show the Average Price by sector with the value shown outside the bar and the Average Mileage inside the bar. The % of Market Share is shown by the red line. This chart covers the 12 largest market sectors accounting for 86.6% of the whole market:-



Data Powered by Brego Insight

Medium SUVs hold the largest market share at 26.6% but it is worth considering that this has declined by 6.7 percentage points since July. This would indicate that there has been strong sales activity for this type of car with an average sale price of just under £20,000 which just fits into the largest sector of sales market share highlighted in the earlier Average Used Car Value by Price Profile chart.

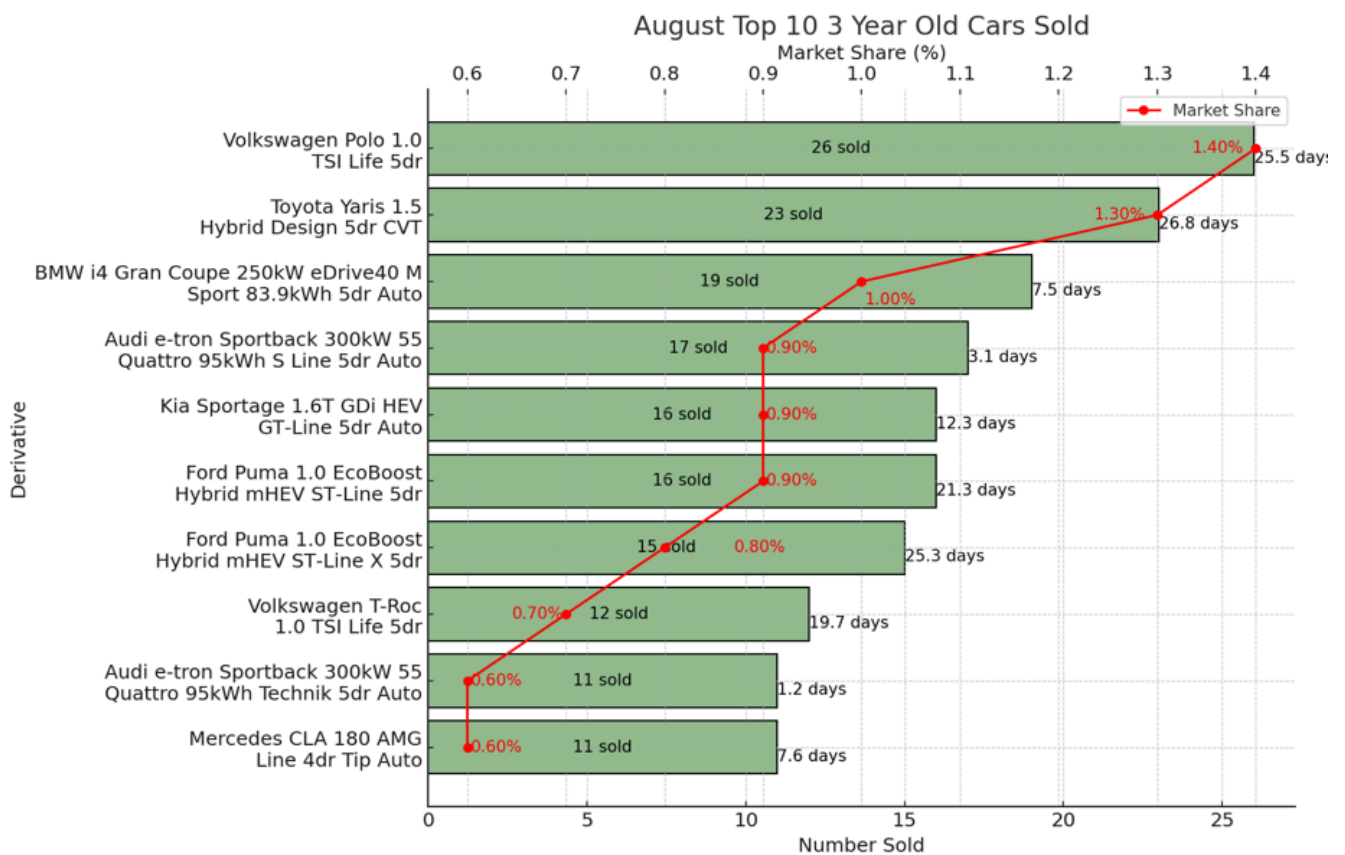
Best selling medium SUVs for the month were:-

Rank	Model	Volume	Market Share - Medium SUV	Avg Sale Price
1	Ford Kuga	2,066	16.50%	£15,429
2	Kia Sportage	1,595	12.70%	£14,685
3	Hyundai Tucson	1,495	11.90%	£15,339
4	Range Rover Evoque	1,443	11.50%	£14,727
5	Land Rover Discovery Sport	1,176	9.40%	£14,040

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Top 10 Used 3 Year Old Cars Sold in August

The bars in this chart show the Volume of Cars sold of the individual top selling derivatives with the number of each derivative sold shown in the bar. The Average Days to Sale is shown outside the bar and the % of Market Share is shown by the red line.:-

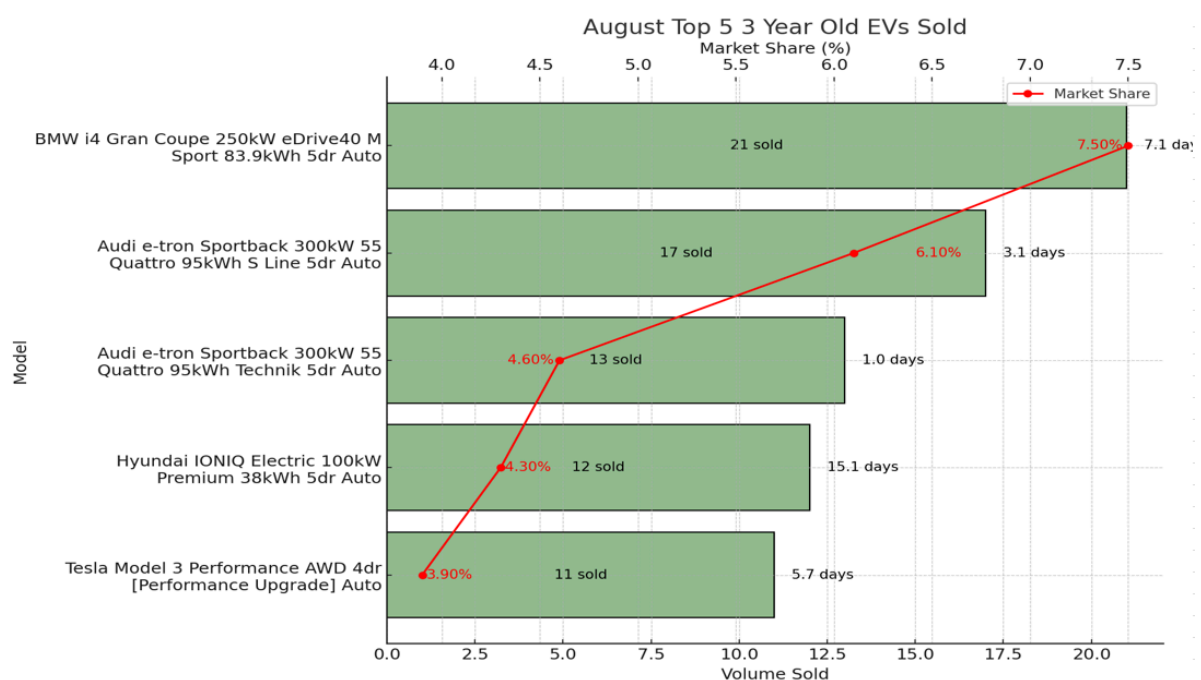


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The data in this chart highlights that three of the top 10 models sold were electric vehicles, with four hybrid models and three petrol. It is perhaps a little surprising to see that the two Audi e-tron Sportbacks in this list both sold in 3.1 days or less of being listed. This is probably due to the fact that these are specialist models and likely to have high spec levels but it is impressive none the less.

There are also two very similar Ford Puma models and one could argue that this should make them top of the best selling list. Separated only by a slightly higher spec level, it shows significant demand for what is arguably one of Ford's most popular cars at the moment as the Puma also topped the new car sales registrations in August.

Top 5 Used 3 Year Old EVs Sold in August



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Last month we looked at the top 5 selling EVs in the market overall and Tesla swept the board with four models in the top 5. Looking specifically at three year old cars and the very desirable BMW i4 tops the chart. Once again it is of note that there are two Audi e-tron Sportback models in the list. Aside from Hyundai, Tesla only muster fifth spot in this data set with the Model 3 High Performance model which will be a surprise to many given how many Tesla models there are in the used market overall.

Summary

The used car market in August was a tale of two stories with inflation increasing, interest rates reducing and consumer confidence rising despite the wider complexities of the global economy. Whilst the start of the month was a little quiet, enquiries and dealer footfall picked up towards the end of the month as the summer holiday period drew to a close and dealing with the customers became a little easier.

Long may this continue but let's not forget that September is the new car plate change and dealers will be focussed on getting as many new cars sold as possible. Pre-registration of new cars in August increased by 9.7 percentage points, which is becoming a familiar pattern, and unfortunately this does put pressure on late plate used car desirability and pricing.

Ultimately, whilst not the best used car month, this August was fairly respectable all things considered.

All the data in this report is available to subscribers using the Brego Platform which now benefits from a cutting edge AI driven Insight platform to help bring detail and clarity to the complex UK used car market.