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Annual Car Market Insight

2025

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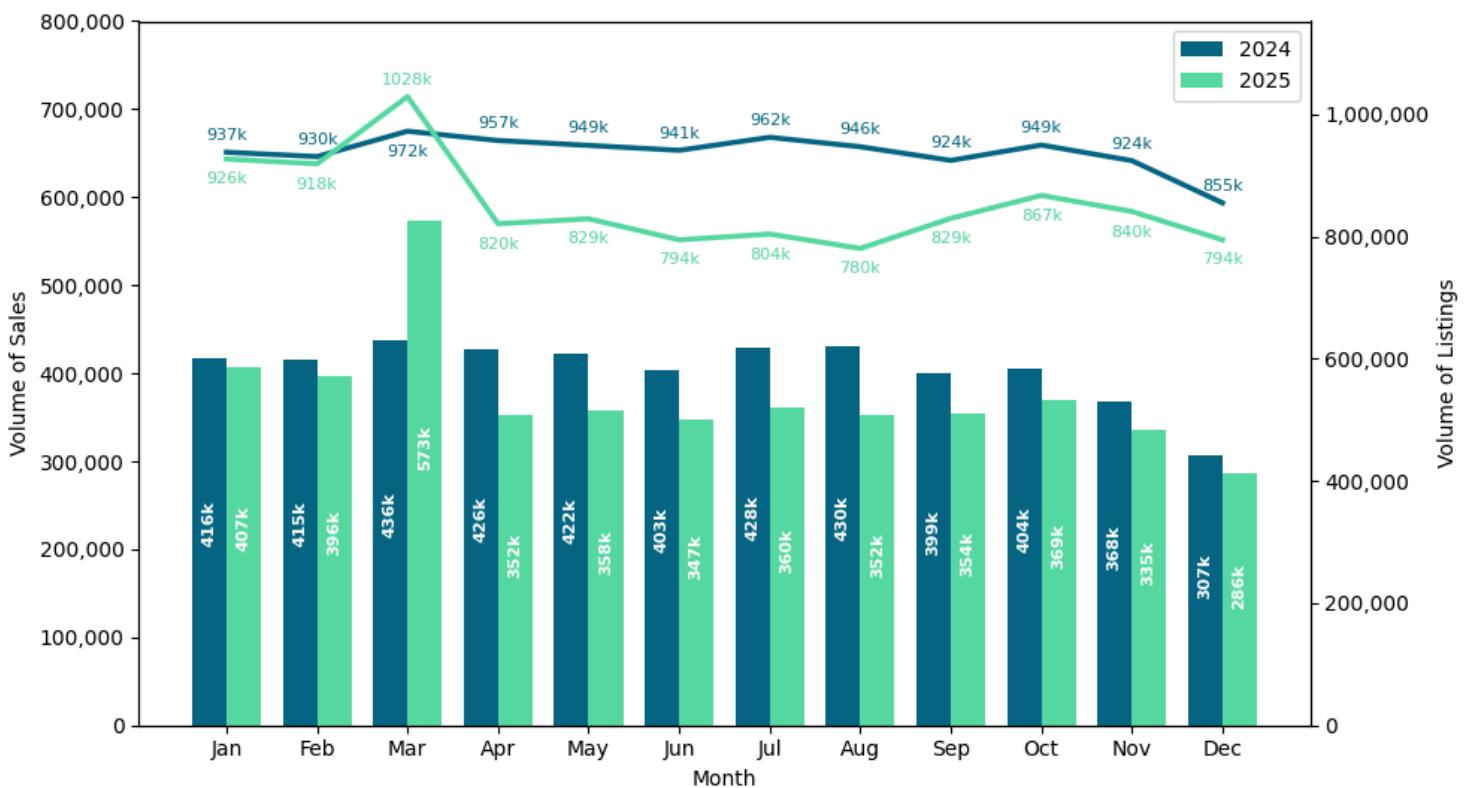
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Annual Market Insight

The 2025 Annual Market Insight report looks at what happened in the UK Used Automotive sector during the course of the year. There are a number of charts that show key market indicators which are in most cases compared against activity in the sector during 2024.

Volume of Sales and Listings

The chart below shows the volume of sales for 2024 and 2025 using bars with the volumes marked inside the bars whilst the lines on the top of the chart show the average daily listings over the same period and use the secondary y axis as a scale.



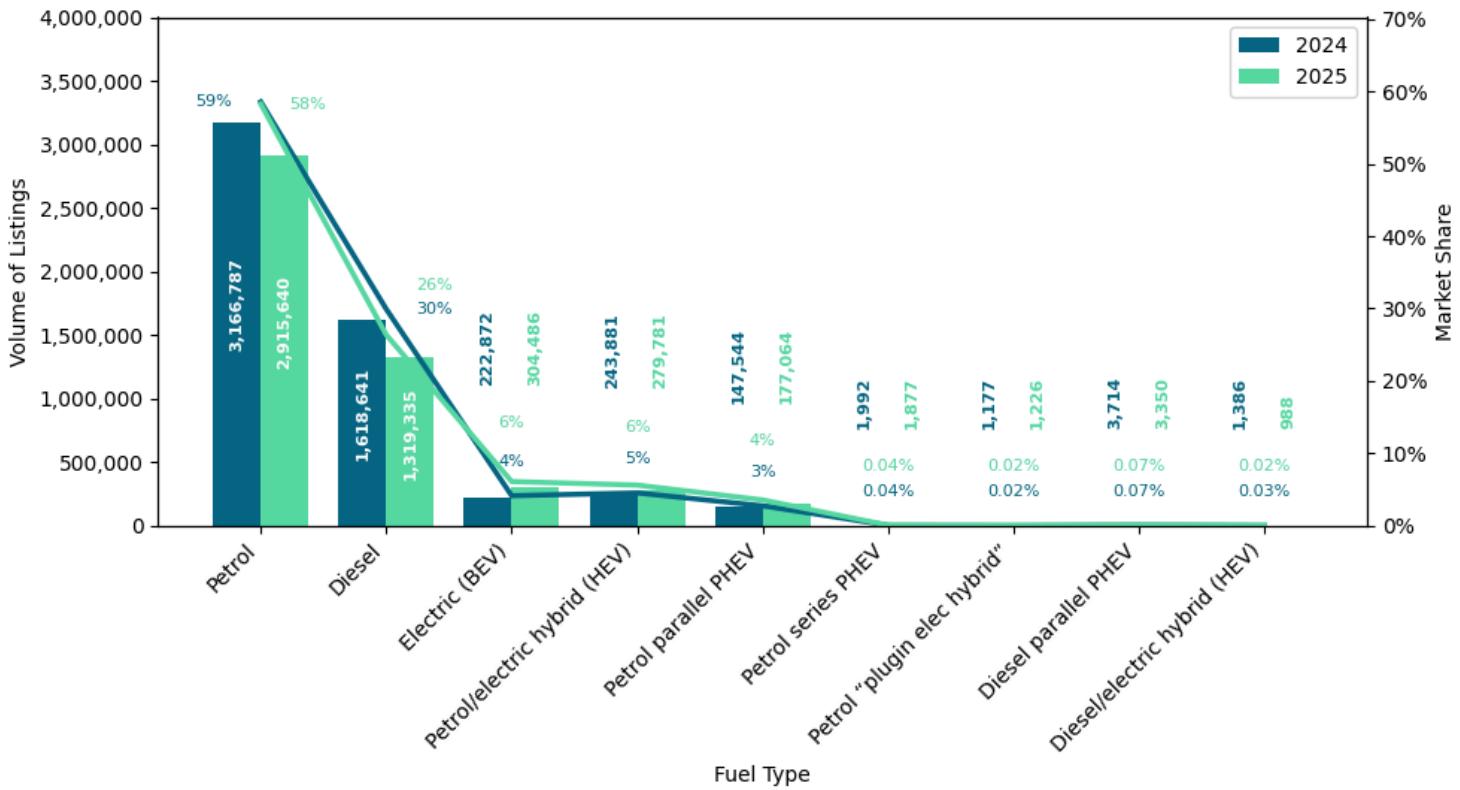
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This chart shows that both used cars sales and advert listing volumes dropped in 2025. Over the course of year sales and advert listings were lower in every month other than March 2025 and the growth in adverts for that single month was impacted by a "Stock Boost" tactical marketing activity implemented by Auto Trader resulting in more cars appearing for sale. It will also have been affected by the 12.4% new car sales increase in March 2025 which will have generated significantly more part exchanges

In total sales dropped by 8% in 2025 whilst listings dropped by 9%. In addition Sales as a percentage of listings in 2025 increased by 1% from 43% to 44%.

Listings by Fuel Type

The chart below shows the volume of listings by fuel type for 2024 and 2025 using bars with the volumes marked inside/above the bars. The lines on the chart show the % of market share for the year and use the secondary y axis as a scale.



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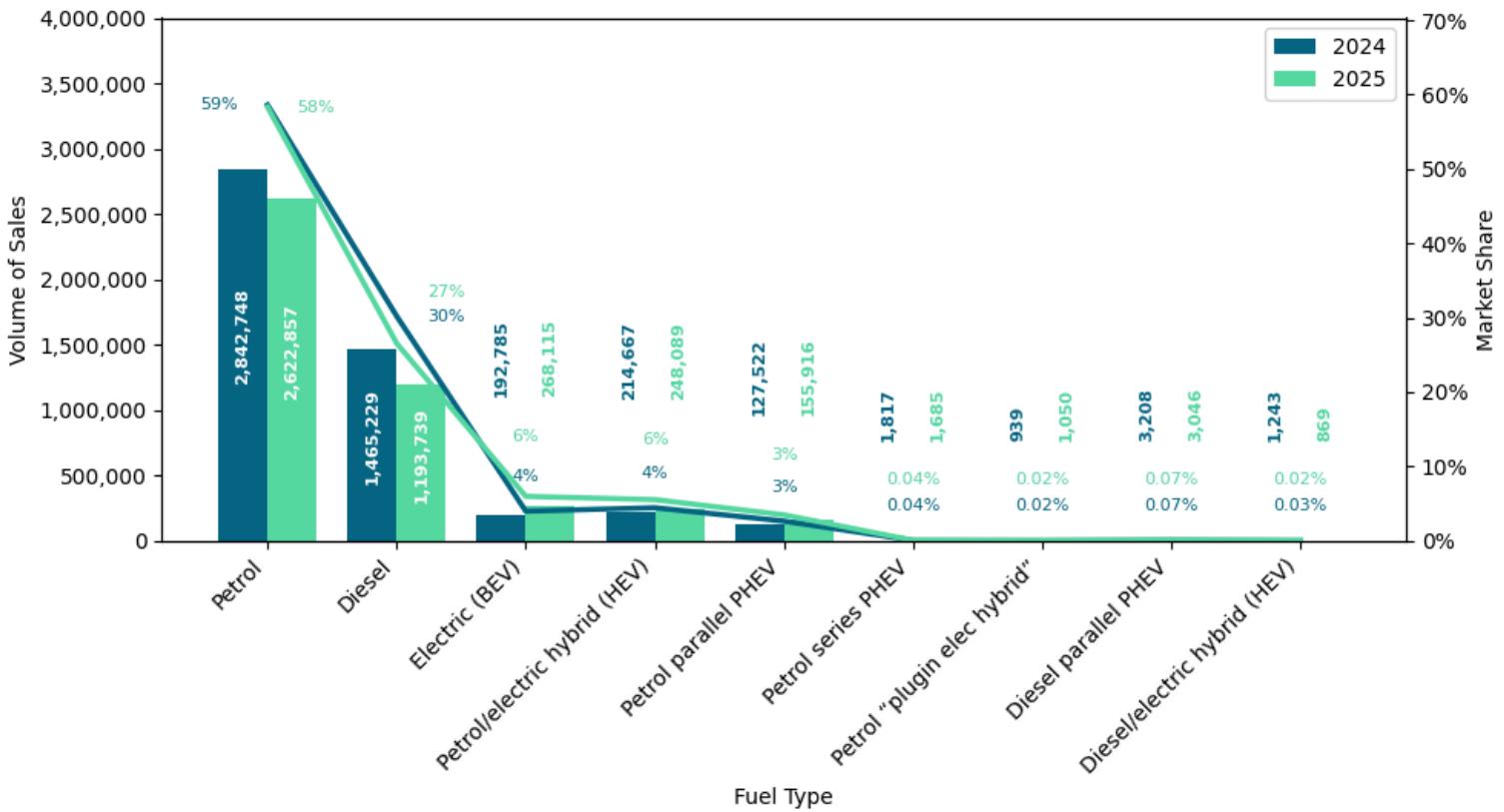
This is an interesting chart that will evolve significantly in the coming years as the industry shifts to EVs from ICE powered cars. That said the timeline for change may well alter from the anticipated 2030 deadline as has been witnessed in Europe as the appetite for swift adoption has changed.

The change in the volume of used petrol cars listed for sale in the UK in 2025 dropped by 1% in comparison to 2024. Unsurprisingly diesel dropped by 4% reflecting reduced new diesel car sales over the last few years. The number of EVs advertised increased by 2%, hybrids by 1% and PHEVs by 1% with those 3 propulsion types acknowledged as being the future for the industry.

In 2025, ICE cars took 84.6% of total listings which was 3.8 percentage points lower than the previous year, whereas EV took 6% of all listings, up 1.9 percentage points on 2024. The various hybrid offerings took 9.3% which was also up 1.9 percentage points on the previous year. All other fuel types took less than 1% of the market share.

Sales by Fuel Type

The chart below shows the volume of sales by fuel type for 2024 and 2025 using bars with the volumes marked inside/above the bars. The lines on the chart show the % of market share for the year and use the secondary y axis as a scale.



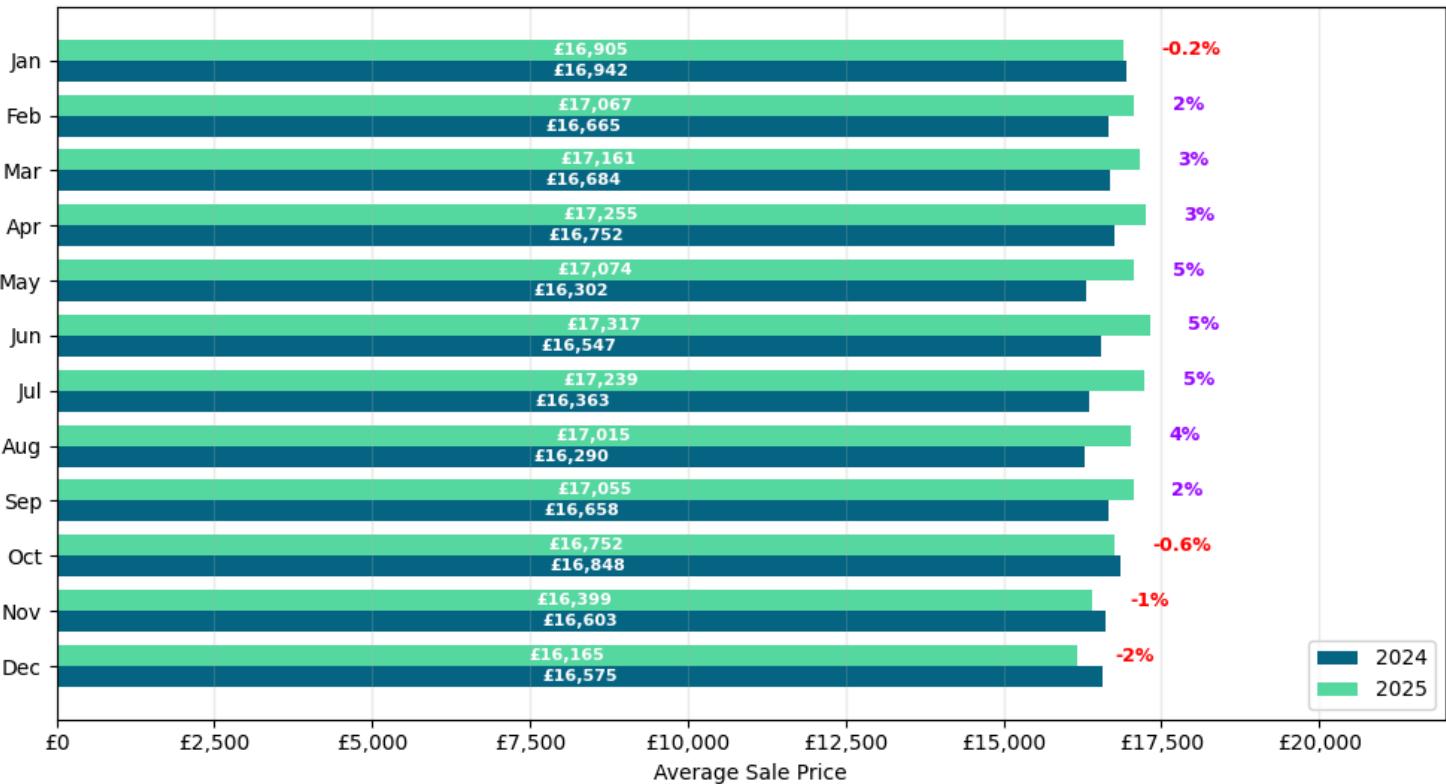
Data Powered by Brego Insight

It was too complex to map this data onto the listings chart so it sits separately here and to be fair the sales by fuel type data is fairly similar to the previous chart. The volume of sales for petrol cars dropped by 1% year on year in parity with the listings chart. Diesel however, fell by just 3% and this lighter drop in relation to listings reinforces the fact that there is still good demand for this fuel type at the moment. The number of EVs sold increased by 2% in line with the listings data, although hybrid sales improved by 2% which is a reflection of the reluctance for consumers to jump straight to an EV. Finally, PHEVs sales remained consistent year on year.

The key issue with sales by fuel type is the migration from ICE to EV and this affects both the new and the used market. Government EV sales targets are proving difficult to meet without significant discounting and genuine consumer demand is still poor, not helped by the recent PPM tax changes due to come into effect in 2028.

Average Sale Price - All Cars

The chart below shows the average sale price for all cars during 2024 and 2025 shown by the bars with the year on year % change at the end of the bar. An increase is shown in purple and a decrease is shown in red.



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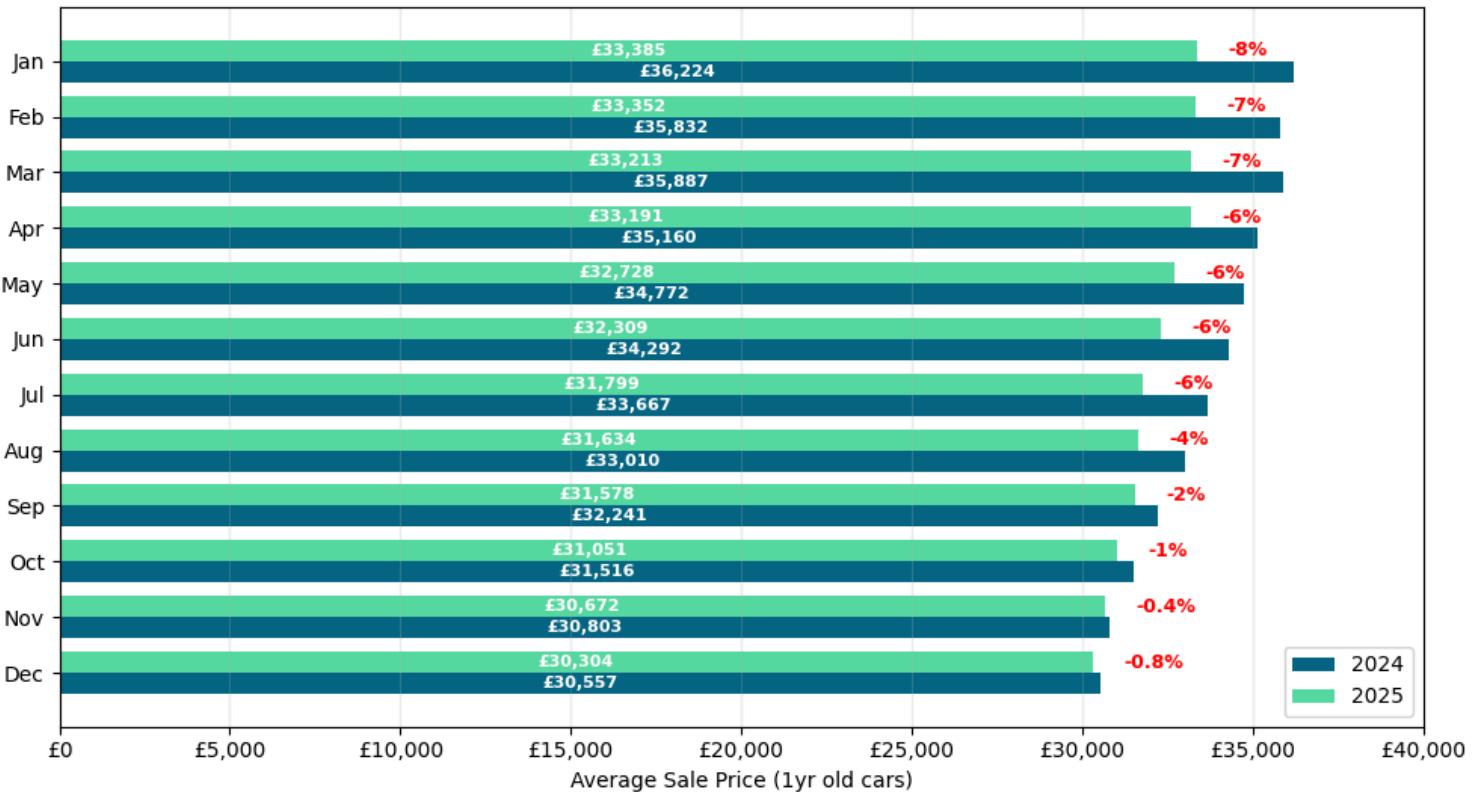
With this chart focussing on the whole market there are some interesting nuances worthy of observation. The average sale price increased for eight of the twelve months during the course of the year 2025. Of note is that the average prices dropped for the last 3 months of the year. This can be for two reasons, the first being that there was a change in the profile of advert listings with less newer cars in the market.

The second is that consumers were buying older cheaper cars saving money in a period of political and economic uncertainty. This falls in line with the drop in consumer confidence towards the end of 2025 and is most likely the driving factor as consumers battled to reduce monthly expenditure.

Of note is that the average sale price in 2025 was £16,950 which was £348 or 2.1% higher than in 2024.

Average Sale Price - 1 Year Old Cars

The chart below shows the average sale price for 1 year old cars sold during 2024 and 2025 shown by the bars with the year on year % change at the end of the bar. An increase is shown in purple and a decrease is shown in red.



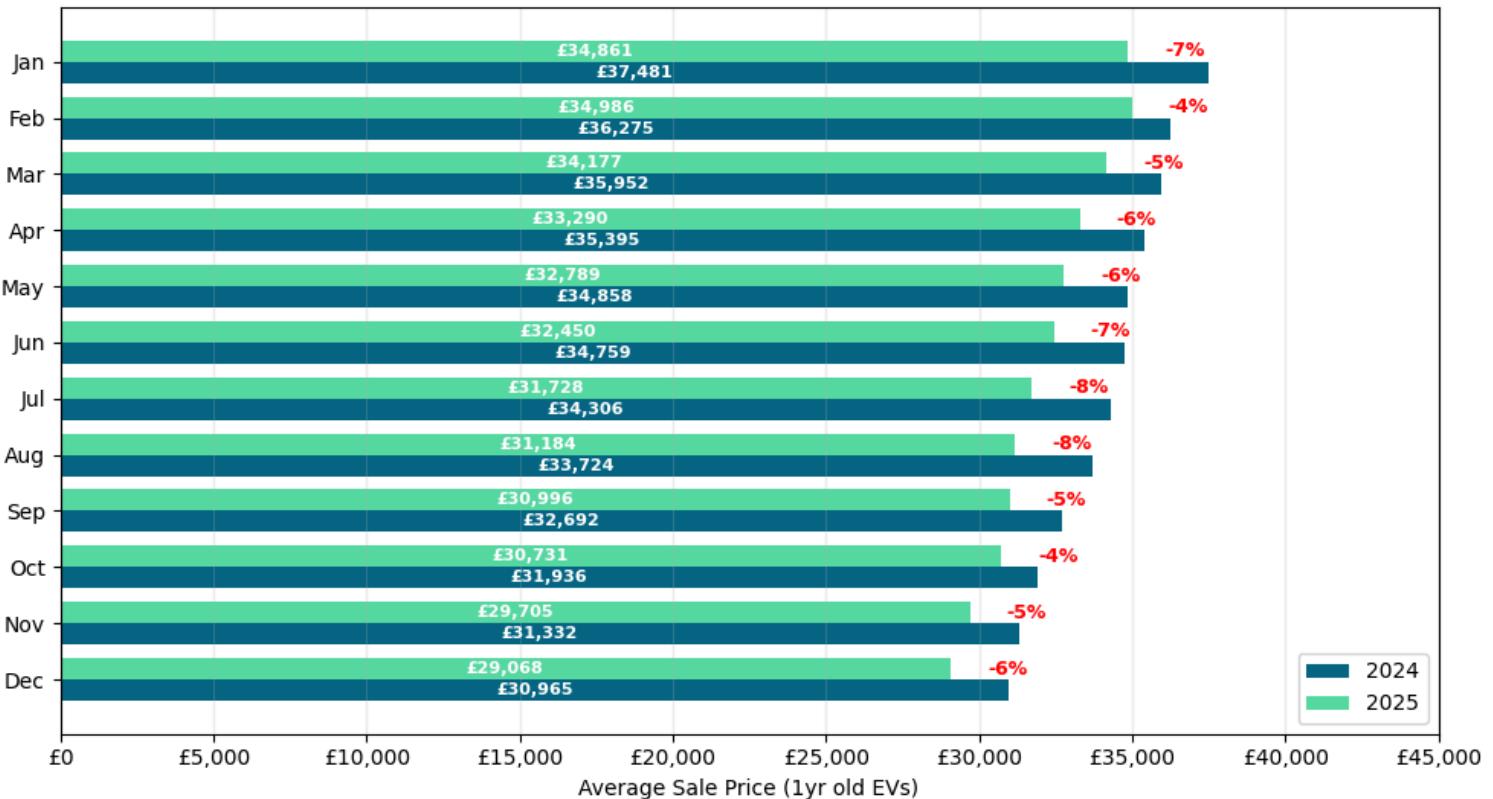
Data Powered by Brego Insight

This is similar to the previous chart with the key difference being the fact that we are looking solely at one year old cars of all fuel types. At this age, the average sale price decreased in every month of the year when compared to 2024. Each monthly drop is above 5% until August which is quite a surprise, although it is encouraging to see that this was not the case as the end of the year approached.

Of note is that the average sale price in 2025 was £32,101 which was £1,562 or just over 4.6% lower than in 2024. The question is why did the market see such a marked drop in the average sale price. Is it that consumers were looking to cut costs by buying a cheaper car or perhaps there were more lower priced smaller cars in the market. There is not enough time in this report to do a deep dive, but the following charts may shed some light on this data. For those of our customers using the Brego platform the Brego Insight tool will allow you to query the Brego data yourselves in more detail

Average Sale Price - 1 Year Old EV

The chart below shows the average sale price for 1 year old EVs sold during 2024 and 2025 shown by the bars with the year on year % change at the end of the bar. An increase is shown in purple and a decrease is shown in red.



Data Powered by Brego Insight

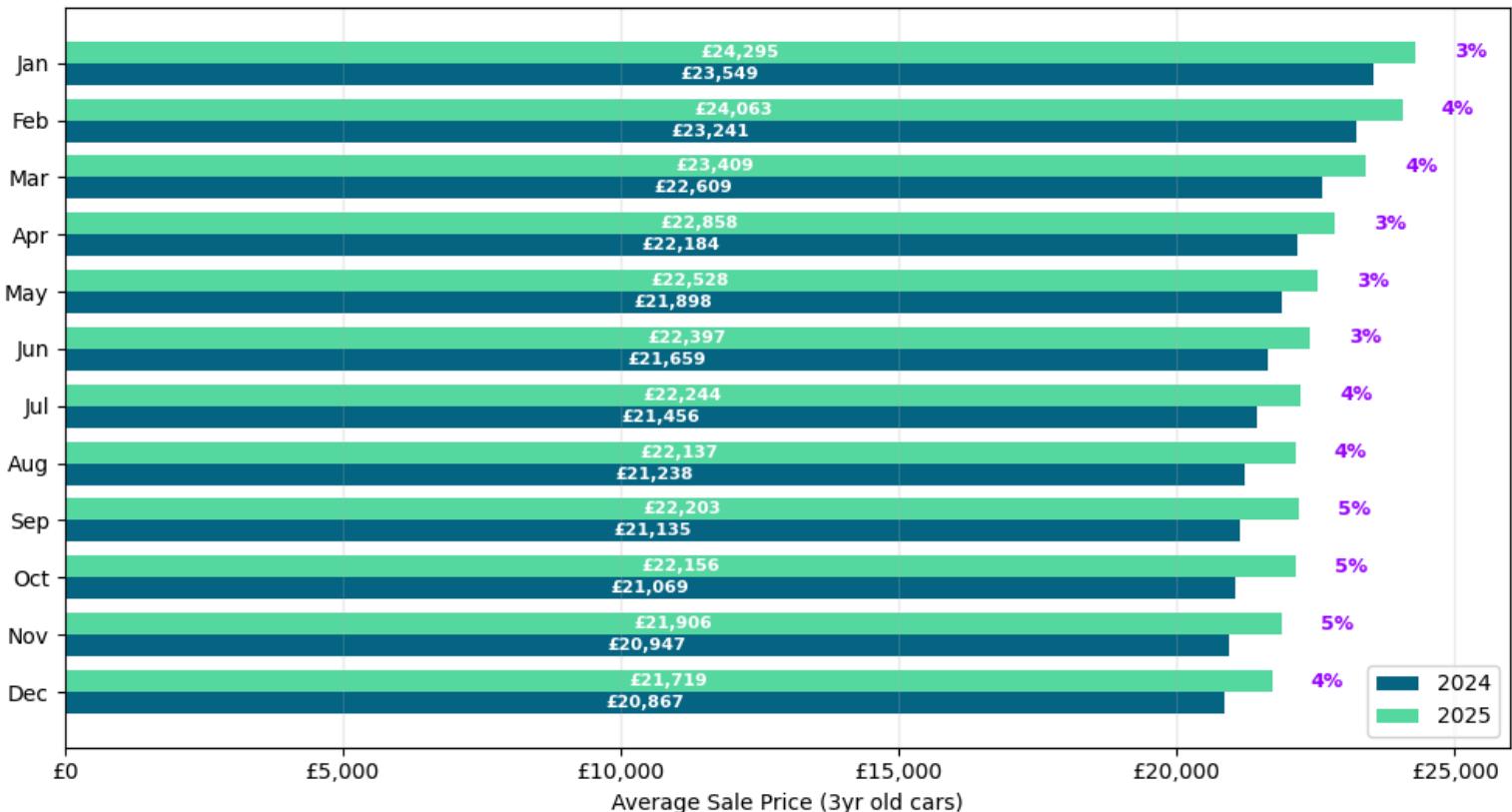
This chart takes a different view of the market sales data. Given the Automotive industry is going through the migration away from ICE to EVs, this chart looks at just the EV sales over the course of 2025. The chart immediately highlights that as with the data in the previous slide, the average sale price has dropped consistently month by month all year.

Of particular interest is the level of monthly drop which was never less than 4% and peaked at 8% during July and August. Over the full year the average sale price dropped by 16.6% in comparison to a drop of 17.4% in 2024. From January 2024 to December 2025 the drop in average sale price was 22.4%.

The question is why was there such a significant drop in the average sale price and it is likely that there are two primary reasons for this. Firstly the volume of cheaper EVs appearing in the used car market will have had a marked impact and secondly pre-reg activity will also have put pressure on used prices.

Average Sale Price - 3 Year Old Cars

The chart below shows the average sale price for a 3 year old car sold during 2024 and 2025 shown by the bars with the year on year % change at the end of the bar. An increase is shown in purple and a decrease is shown in red.



Data Powered by Brego Insight

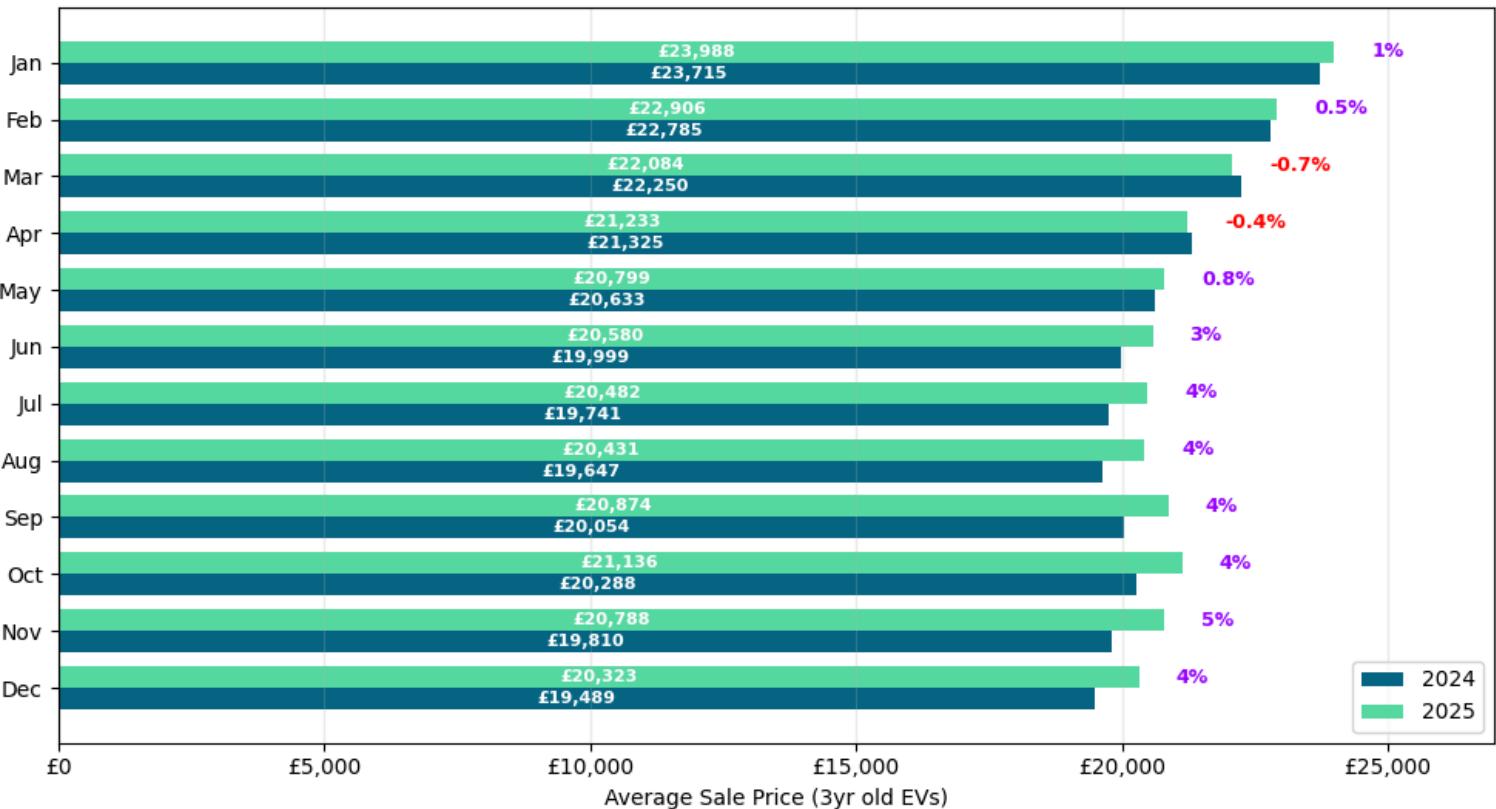
This data shows that the average sale price of a 3 year old car rose year on year in every month of 2025 when compared to 2024. This is quite a rare occurrence and it is evident that these are not minimal increases.

However, it is worth remembering that although there were monthly increases against the previous year, the average sale price did drop during 2025 by 10.6% which is slightly less than the 11.4% drop over the course of 2024.

When compared with the 1 year data the movement is similar for 2025 at 9.2% but in 2024 the average sale price dropped by 15.6% which is remarkably high. This was due to new car tactical activity during the year putting pressure on late plate pricing and the resulting sale price.

Average Sale Price - 3 Year Old EV

The chart below shows the average sale price for 3 year old EVs sold during 2024 and 2025 shown by the bars with the year on year % change at the end of the bar. An increase is shown in purple and a decrease is shown in red.



Data Powered by Brego Insight

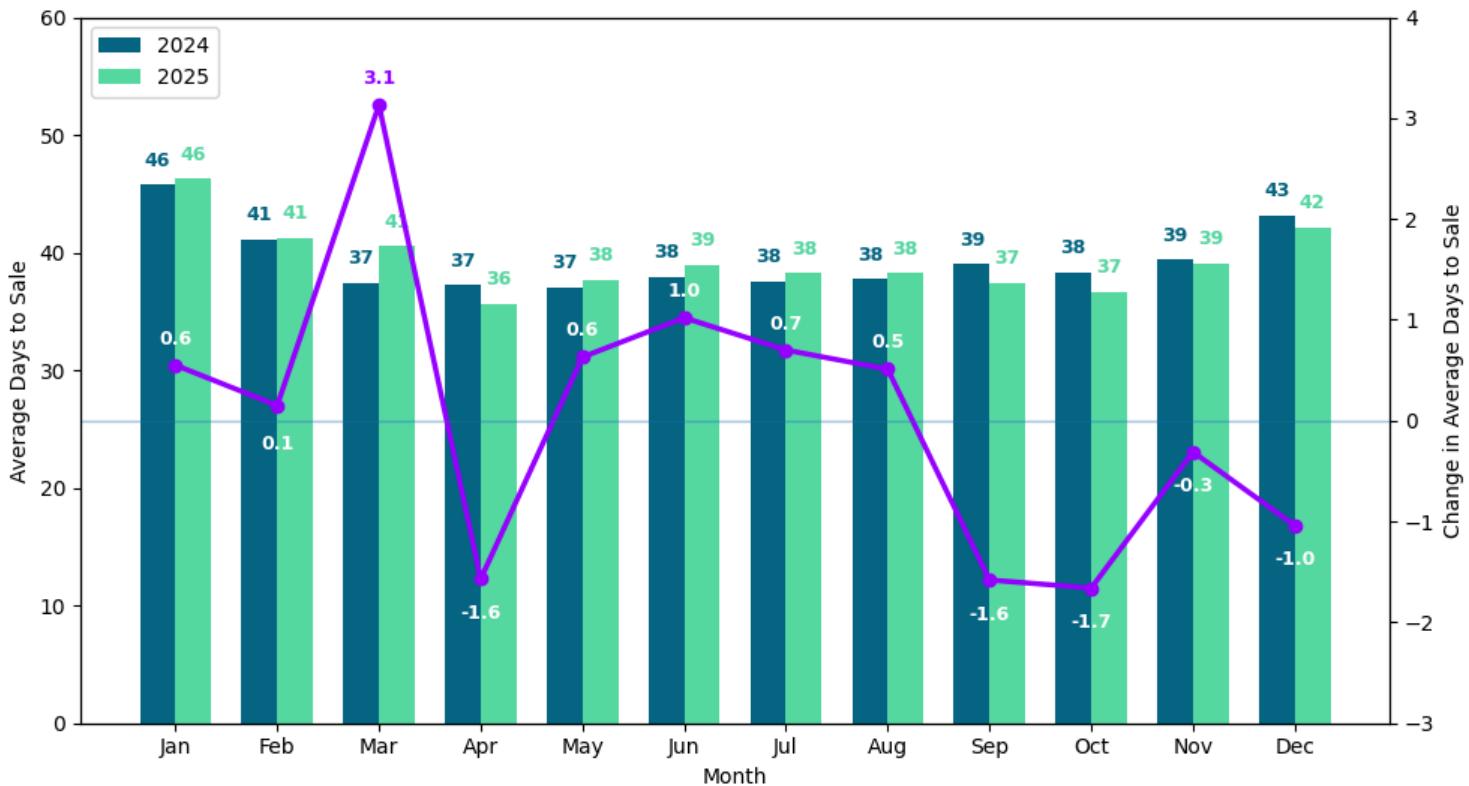
The data in the chart is similar to the data for all 3 year old sales by virtue of the fact that it shows an increase in the average sale price in 2024 for all but two months of the year. However, it differs from the 1 year old EV average sale price performance as that data showed decreases for the full year on a month by month basis.

The 3 year old EV average sale price dropped by 15.3% in 2025 in comparison to the 1 year EV which dropped by 16.6%. For 2024 the decline was greater at 17.8% for 2025 and for the 1 year old EV that drop was 17.4% so broadly similar.

It is hard to say exactly why the drop in average sale price was heavier other than as already mentioned there were more cheaper used EVs coming back to the used market.

Average Days to Sale

The chart below shows the average days to sale for 2024 and 2025 using bars with the data marked at the top of the bars whilst the purple line overlaying the bars chart shows the change month on month and uses the secondary y axis as a scale.



Data Powered by Brego Insight

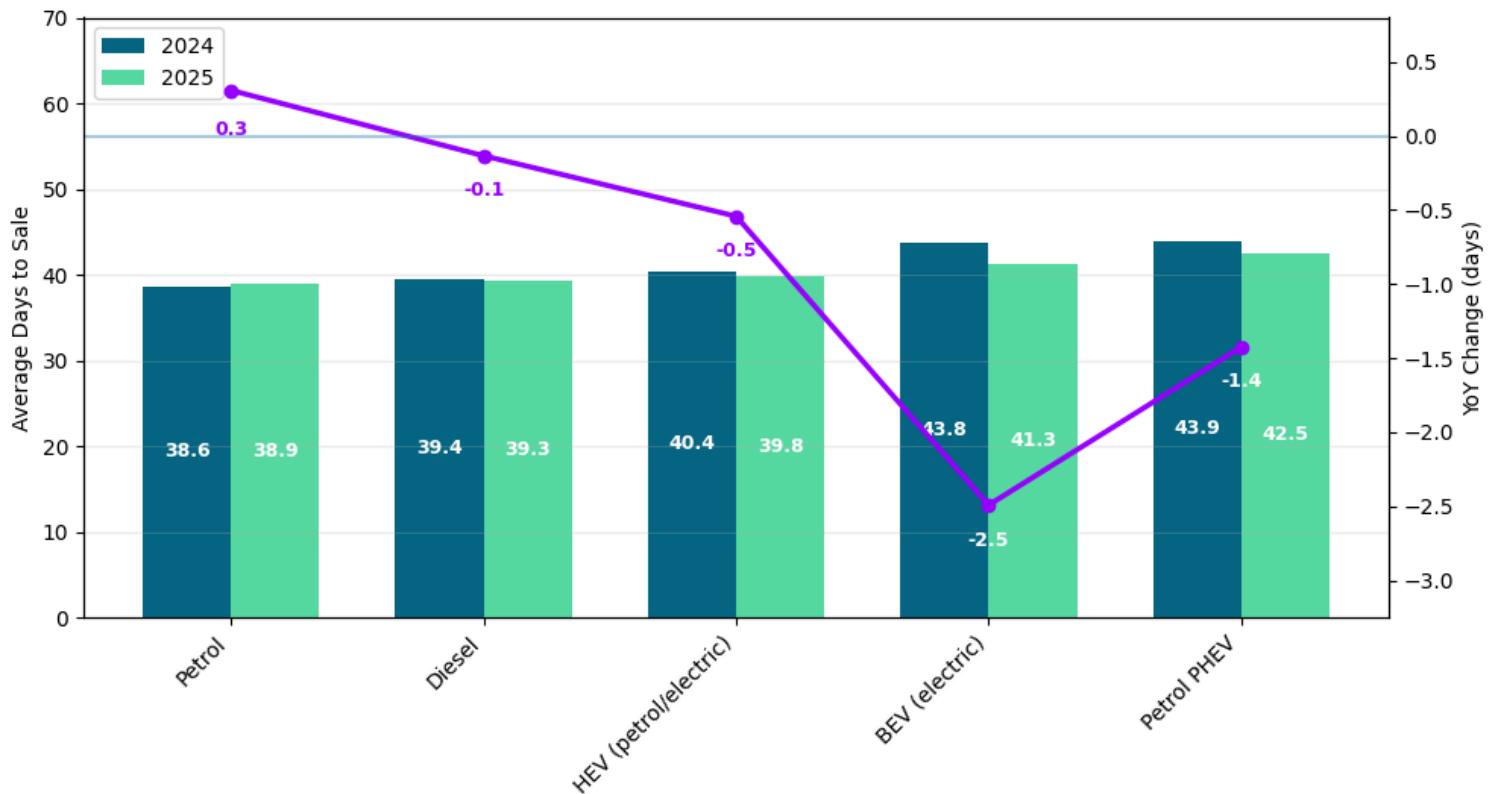
The data shows that there was little difference in the time it took to sell a car over the course of the year. The overall average for the year in 2024 was 39.3 days whilst in 2025 it was almost exactly the same at 39.4. It is fair to point out that there can be some significant variations in the data based on the type of and age of the vehicle. As an example some of the high end prestige cars can take in excess of a hundred days to sell whereas some of the cheaper mainstream models can be far quicker at sub 20 days.

Of specific interest is the increase in the average days to sale in March 2025 followed by a decrease in April. This was probably due to the extremely good new car sales performance in March which left dealers busy with new car activity and a significant jump in used car stock in the form of part exchanges.

It is also worth mentioning that the average days to sale in January is always the highest point of the year due to the slowdown over the festive period in the previous year.

Average Days to Sale by Fuel Type

The chart below shows the average days to sale by fuel type for 2024 and 2025 using bars with the volumes marked inside the bars whilst the line overlaying the chart shows the year on year changes and uses the secondary y axis as a scale.



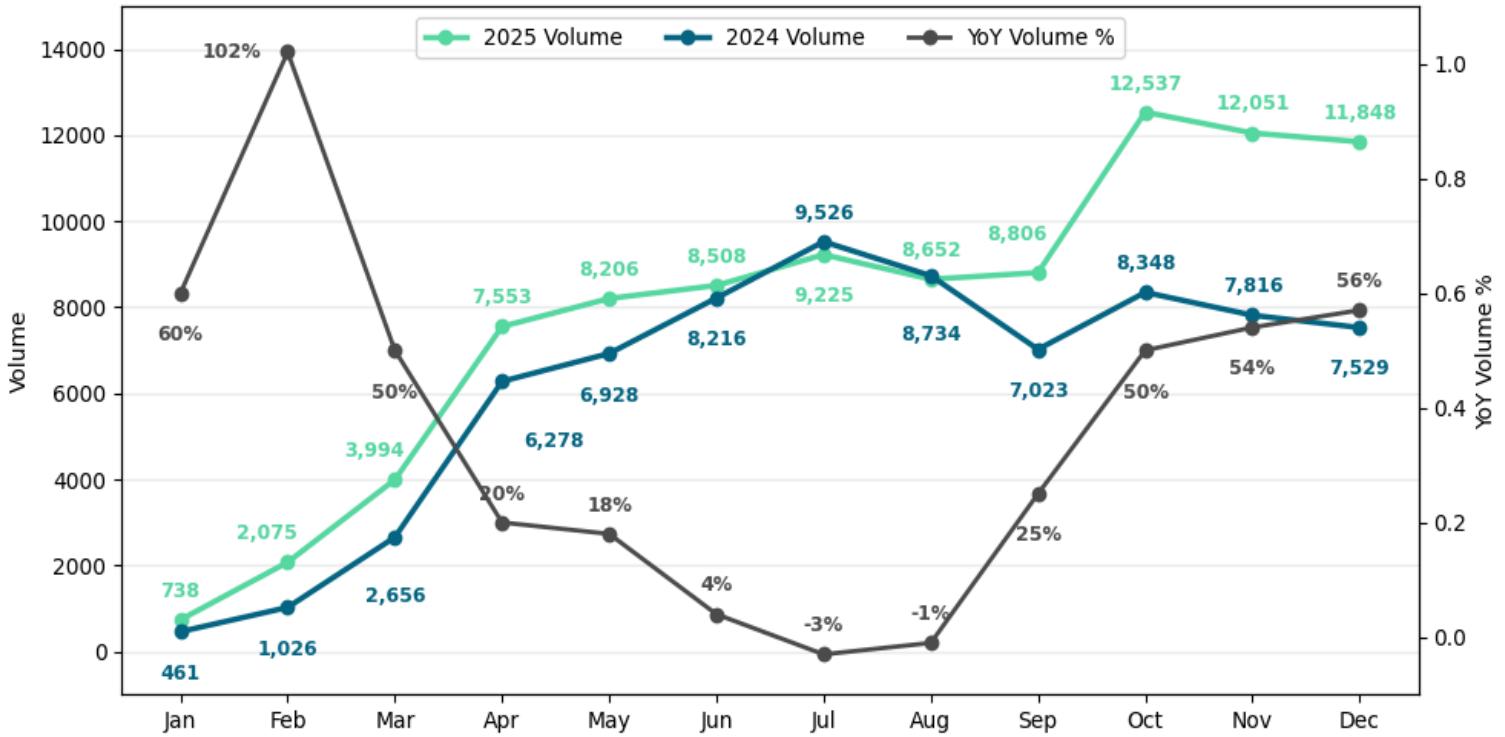
Data Powered by Brego Insight

The data shows that the only fuel type that took longer to sell in 2025 was petrol which for some may come as a bit of a surprise although the difference is minimal. Diesel remained almost exactly the same which supports the fact that the demand for diesel cars has not waned in the way it has for new versions. In fact the drastic drop in diesel new car sales almost props up the demand for used diesels.

Hybrid cars took half a day less to sell which supports the view that many consumers see these as a stepping stone towards a fully electric car. The biggest change in the data was for used EVs which took 2.5 days less to sell. Now this is of specific note because this shows that there is growing demand. Given the increase in the number of EVs in the used market there was a fear that the volume would outpace demand but this data confirms that is not the case.

Pre-Reg Activity - Whole Market

The chart below shows the volume of pre-registered cars listed for sale in 2024 and 2025 using the green and blue lines and the grey line uses the secondary y axis and shows the year on year percentage increase.



Data Powered by Brego Insight

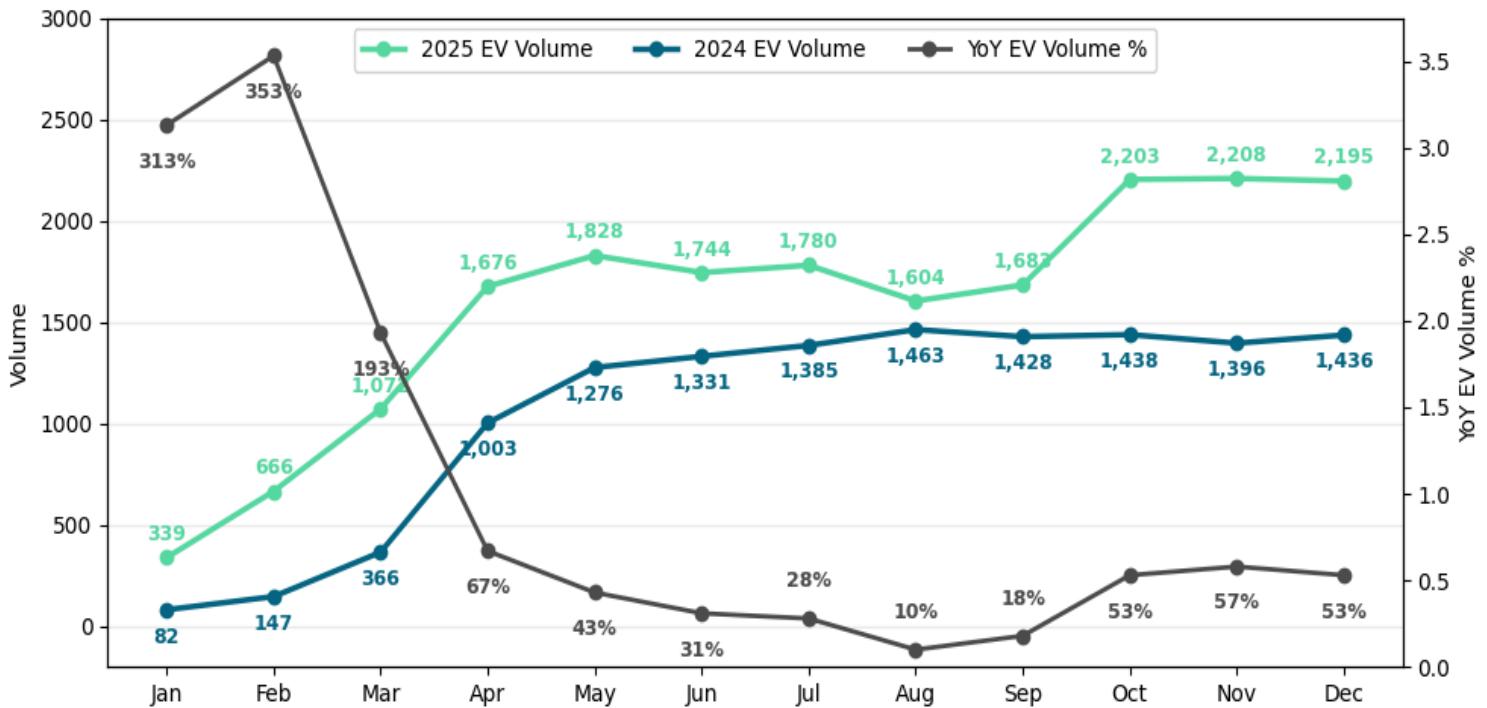
As the new car market dynamics changed in late 2023, the market saw a return to a push model for new cars and as such the practice of pre-registration returned to dealer sales tactics. Primarily driven by excess production by the OEMs, the dealers were moved to get cars sold to meet new car volume targets and reap the volume bonuses needed to maintain profit margins.

Between January and December in 2024 there was a 1533% increase in the number of sub one year old and sub 100 mile cars on sale which increased significantly from March. During 2025 this figure was slightly lower at 1505% although the volumes on sale were very different. The largest month on month change between 2024 and 2025 came in January with a jump of 102% although the line clearly shows that the volumes of pre-registration in the last quarter were continually rising.

July and August were the only two months in 2025 that saw lower volumes than the previous year. This is perhaps due to the time of year and it will be interesting to see how these metrics track through 2026.

Pre-Reg Activity - EVs only

The chart below shows the volume of pre-registered cars listed for sale in 2024 and 2025 using the green and blue lines and the grey line uses the secondary y axis and shows the year on year percentage increase.



Data Powered by Brego Insight

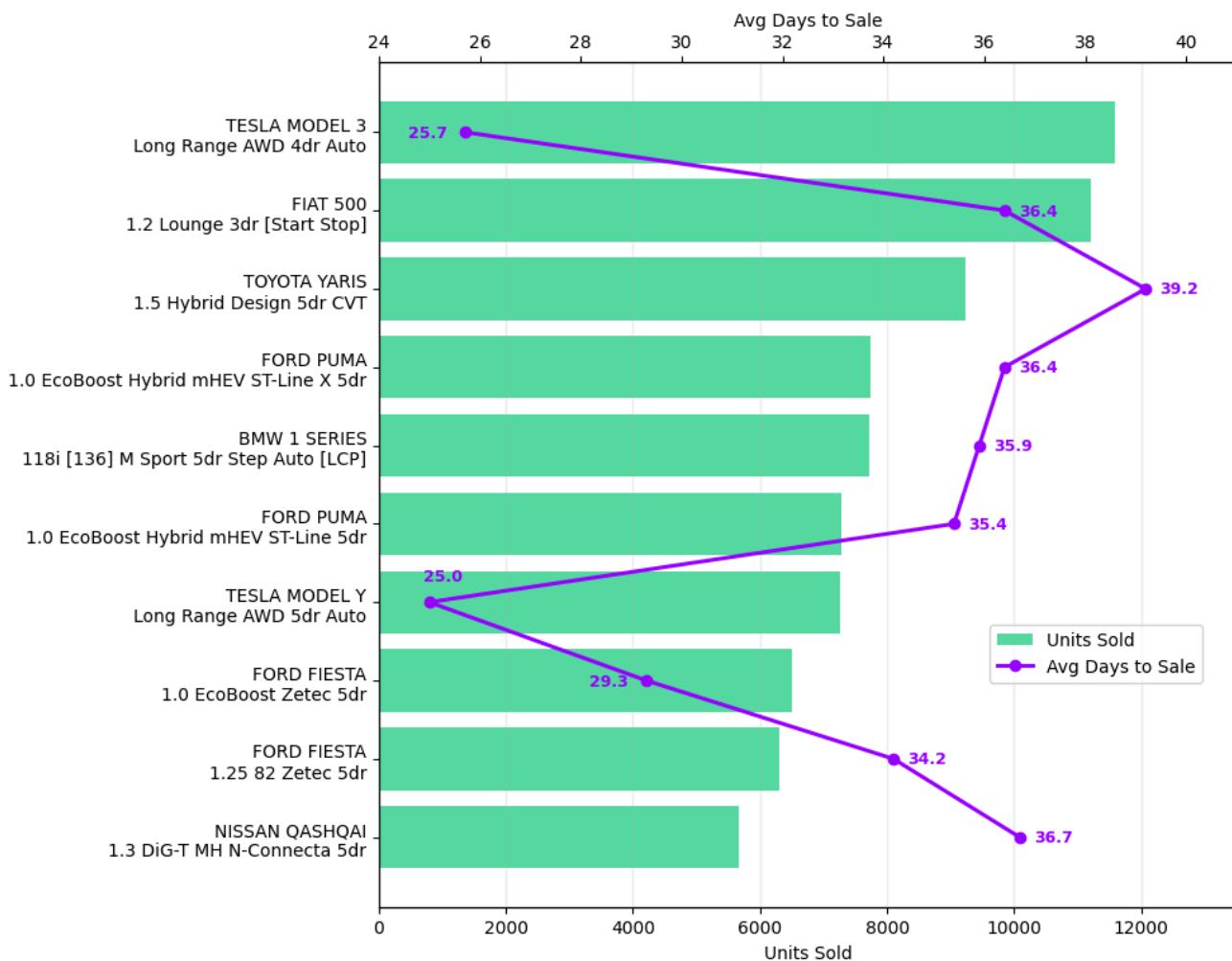
The new EV market had other drivers that meant pre-registration was a necessity for the OEMs and therefore the dealers. The government's ZEV mandate was effective from January 2024 and is pushing the change from ICE cars to EVs. Although amended during 2025 to allow hybrid and PHEVs to be sold until 2035, no pure ICE cars can be sold after 2030. With scaled increases in the number of EVs that must be sold as a proportion of all sales during the course of each year the scheme is backed by a complex system of credits, banked credits, trading options and fines to ensure compliance.

Between January and December in 2024 there was a 1651% increase in the number of sub one year old and sub 100 mile EVs on sale which is slightly higher than the whole market data.. During 2025 this figure was much lower at 547% and for context the average listing price in 2024 was £35,420 and £31,368 in 2025 reflecting a decrease of 11.4%.

What is interesting is the average price in January 2024 was £70,431 which dropped to £28,375 by December and in 2025 the figures were £44,428 in January and £29,223 in December. So the profile of pre-reg cars was very different in early 2024.

Top Selling Cars

The chart below shows the top selling cars in 2025 with the volume represented by the bars and the overlaying purple line showing the average days to sale.



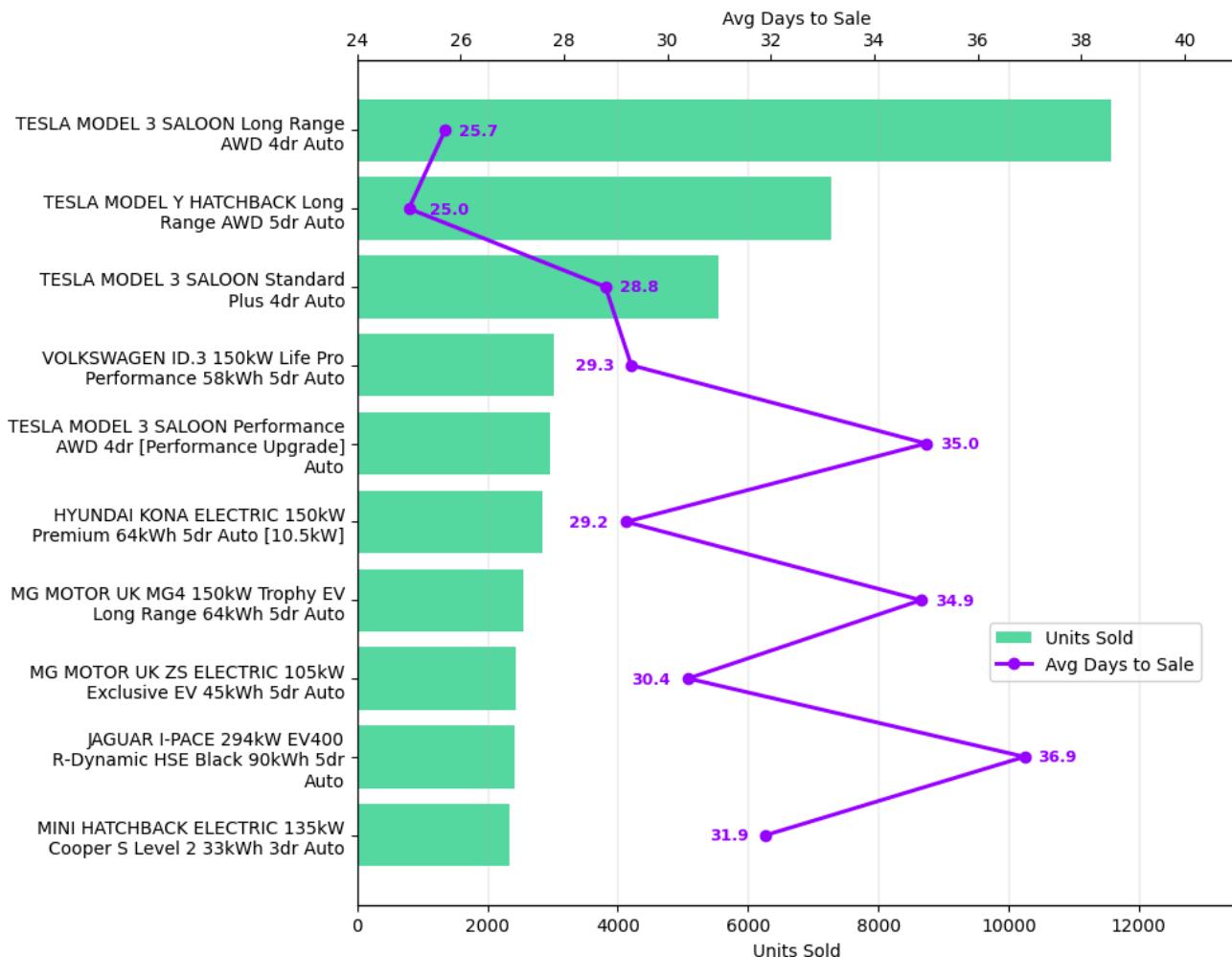
Data Powered by Brego Insight

The data in this chart is very similar to the results in 2024 with eight of the top 10 cars the same in 2025. The new entries are the Nissan Qashqai and the Tesla Model Y at the expense of the Kia Sportage 1.6 GDi ISG 2 and the MG ZS 1.5 VTi-Tech Exclusive.

In 2025 the total sales volume of the Top Sellers was 80,501 in comparison to 75,351 in 2024 which reflects an increase of 6.8%. The average days to sale for the Top Sellers was 32 in 2024 and this increased to 33 in 2025 which is mildly surprising as there has been plenty of industry comment of sales taking less time. This is certainly true of certain cars which is evident in this chart with the two EVs being the quickest sellers.

Top Selling EVs

The chart below shows the top selling EVs in 2025 with the volume represented by the bars and the overlaying purple line showing the average days to sale.



Data Powered by Brego Insight

As with the whole market data this chart is very similar to the results in 2024 with eight of the top 10 cars the same in 2025. The new entries are the MG4 and the Mini Cooper at the expense of the Mercedes EQC and the Audi E-Tron.

In 2025 the total sales volume of the Top Sellers was 42,982 in comparison to 33,420 in 2024 which reflects an increase of 28.6%. Similarly to the data for the whole market the average days to sale for the Top Sellers was 29 in 2024 and this increased to 31 in 2025.

There were 4 Tesla models in the Top 10 and 2 MG's and it is interesting that the three fastest selling cars were all Tesla's. It will be interesting to see how this data changes during 2026 as the new Chinese brands push into the market.

Summary

It is fair to say that 2025 was a year of challenges and surprises. New car sales increased by 3.5% on 2024 and posted the fifth highest volume in the last ten years. The push towards EV adoption was hard at times and the year finished short of the government ZEV target of 28% of all new registrations managing a market share of just 23.43% up from 19.56% in 2024. Pre-registration activity was higher than it has been for some years and for many OEMs this has been necessary to facilitate a push towards the ZEV target, helped partly by the introduction of government support for certain EV models. However, the recent announcement of PPM charges from 2028 was a step backwards.

The used market has been through both highs and lows and following the increase in national insurance contributions and the minimum wage, dealer groups and independents struggled to maintain profitability and in some cases sites have been closed and some businesses have failed. This also resulted in consolidation and reorganisation of some dealer groups.

On a more positive note the consumer demand was fairly resilient for most of the year and used car stock has remained fairly short. As such retail pricing has been pretty resilient for most cars and the sector has also enjoyed increased demand for cost effective EVs with ever better driving ranges helping to suppress range anxiety. Wholesale pricing has also been fairly resilient and conversion rates for the auctions seem to have been better than in 2024 although they did tail off slightly at the end of the year.

There are still some pressure points in the market though and dealers are still facing specific stock shortages of 3 to 5 year old cars. In addition there is downward pressure on late plate prices due to the pre-reg activity. There is also continued concern on profitability as dealers come to terms with higher refurb costs and challenging operational costs although the implementation of AI solutions will help minimise the overall impact.

However, 2026 has brought a more positive outlook and forecasts are for increased new and used car sales for 2026. In addition, following the consumer confidence downturn towards the end of 2025 both in the run up to and after the budget, the economy is looking more positive with low interest rates and the likelihood of further reductions in the inflation rate which will hopefully allow consumers to loosen their purse strings a little.

One cannot round off the year without pausing for reflection on the emergence of the Chinese brands in the UK market. For context the Chinese brands took 6.4% of the market in 2025 in comparison to 1.23% in 2024. The Chery Group led the way with a 2.65% share closely followed by BYD with 2.54% and then Polestar with 0.84%. This is quick growth, particularly for Chery who started sales in the UK in mid 2024 with the Omoda brand. Jaecoo alone took 1.4% of the market in just 12 months. As a reminder the market leaders Volkswagen had a market share of

8.8% and second placed BMW 6.1%. With more brands on the way it will be interesting to see how the Chinese brand representation increases during 2026.

From a used car perspective we will begin to see Chinese brands start to take a larger share of the market as more cars churn and it is highly likely there will be some rental product coming back too. The question is how will used values perform and will they find homes with the UK consumers, after all they are great value for money.

Rest assured that the Brego Team will keep you fully updated on the UK market month by month during 2026 and we welcome new customers looking for unrivalled insight and the most accurate vehicle valuations and forecasts in the market today.

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 Automotive market.