



Brego
Driven by Data

Car Market Insight

December 2025

The contents of this document are private and confidential and are for the intended recipient only. If this is not you, you are not authorised to read, print, retain, copy, disseminate, distribute, or use this document.

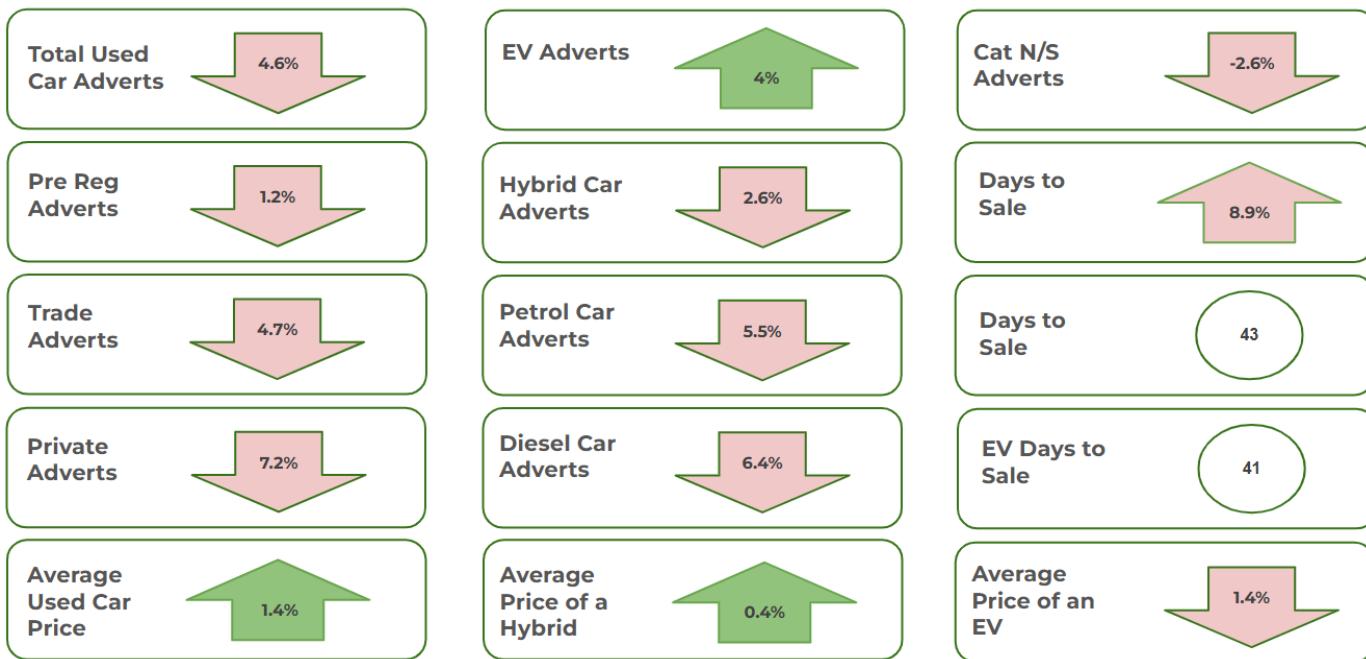
This page does not need to be printed. The information displayed here is displayed elsewhere in the document - please try not to print this page.

December Monthly Car Market Insight

The December Monthly Insight report reviews what happened in the UK automotive sector during the month with some comparisons to November, whilst also highlighting key economic indicators that influenced consumer and dealer behaviour.

Key Used Car Market Indicators

Using the comprehensive and complex whole market Brego data, these are the key market indicators for the month of December when compared with market activity experienced in November:-



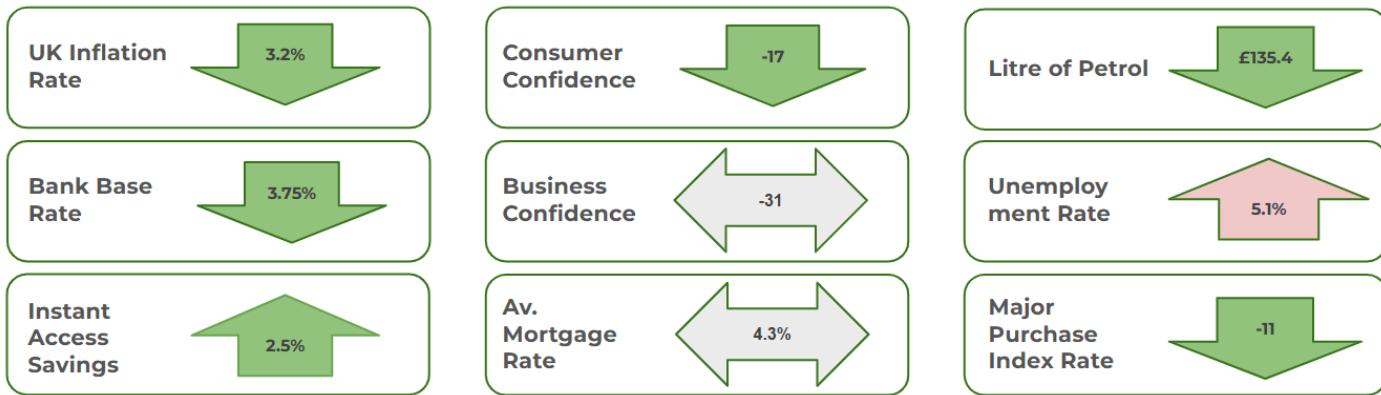
Data Powered by Brego Insight

At a glance, the KPIs for the month show a lot of red down arrows and at first sight this may seem to be a picture of doom and gloom but there is more to the data than meets the eye. Granted used car sales dropped by 11.8% on the previous month which is not great news, but for context the drop in used car sales in December 2024 was 19.4%.

Many of the red arrows report on the volume of used car adverts in the market and it is abundantly clear that the number of used car adverts dropped, which is normal for the time of year as dealers reduce advertising costs in a traditionally quiet period when consumer demand is low due to the festive season.

Of note is that the number of Pre-Reg adverts dropped for the first time in several months and one can only hope this will continue going forward. However, days to sale increased.

Key UK Economic Indicators



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

Following the budget announcements at the end of November, there was a more positive outlook for the economy during December. Of specific note was the somewhat unexpected drop in the rate of inflation, which brought great relief to the government as well as the general working population. This in turn triggered the Bank of England to reduce the base rate to 3.75% which is the lowest it has been since February 2023.

In addition, consumer confidence improved by 2 points and the expectation was for consumer spending to increase over the course of the month. The drop in the major purchase index rate also suggested that December could have been an impressive period for retailers nationwide.

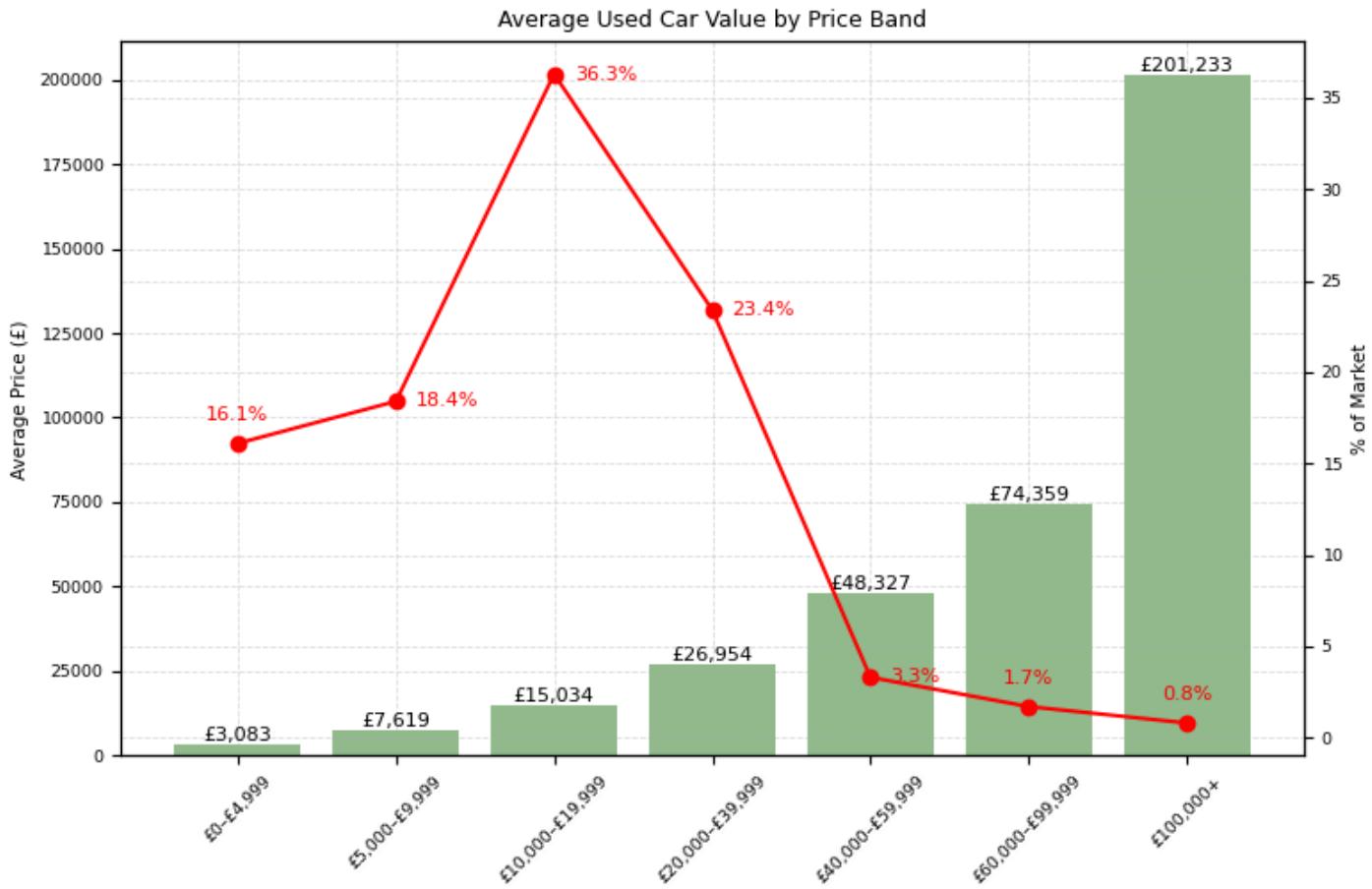
However, this has not been the case and despite the positive KPIs these did not translate into reality. Reports show that consumers remained nervous and focussed on value driven products rather than returning to normal spending patterns. This included shopping at value supermarkets for groceries and for many larger purchases there was a tendency to fund these using “buy now - pay later” options.

Barclays reported that consumer spending in 2025 dropped by 2.3% when compared with 2024. In addition many sources including Barclays have reported that card spending dropped by a milder 0.2%.

However on a positive note for the industry, the FLA (Finance and Leasing Association) reported that in October consumer car finance grew by 3% when compared to the same period in 2024. Indeed, new car finance was up 12% on the same period last year. The latter is likely to have been driven by heavy new car discounting but it still shows a positive picture. The question is whether the FLA data will report positively for November and December 2025.

Average Used Car Value by Price Band

The chart below gives a breakdown of the Average Used Car Price by price banding. The Average Price is shown above the bars and the % share of the market for each price range is shown by the red line.



Data Powered by Brego Insight

This chart will always look fairly similar month on month due to the nature of the UK market in recent years although the influx of new Chinese brands is likely to influence some changes in the next 12 to 24 months.

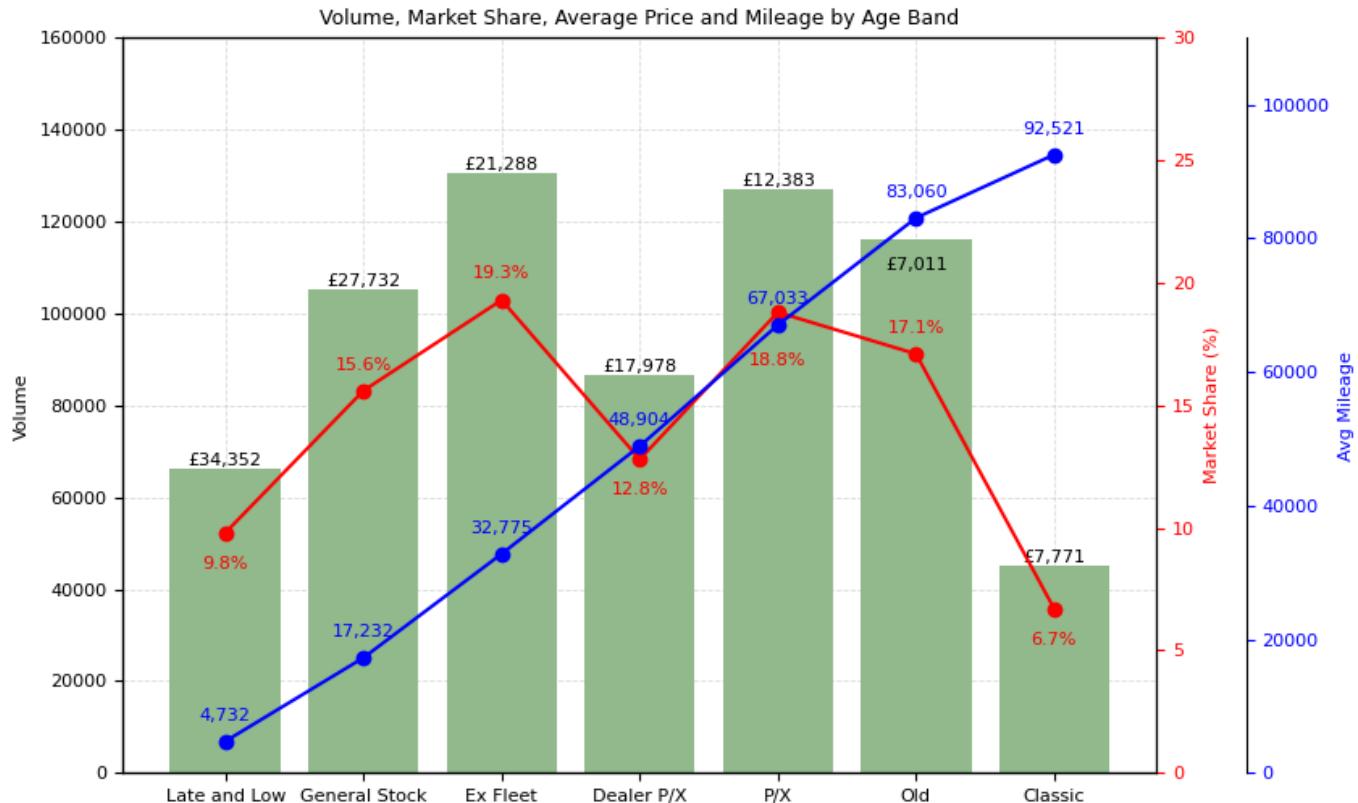
Generally speaking the Average Price by band has remained consistent when compared to November. However there have been some changes to the market share for bands up to £39,999. The largest change has been an increase of 1 percentage point for cars on sale between £10,000 and £19,999 signifying either a drop in sales or more cars becoming available for sale. Likewise the market share for cars priced between £20,000 and £29,999 also increased by half a percentage point.

These changes have been at the expense of cars in the price bands up to £9,999 where there has been a decline in market share. This indicates that sales at this price level have increased

although it is worth considering that at this price level there are more privately advertised cars and we know from the KPIs that the volume of private adverts declined by 7.2% and this could be the driving factor.

Market Analysis by Age Profile

This is a detailed chart and looks at the market by Sector combined with the Average Price on top of the bar and the Average Mileage and % of Market Share by the blue and red lines respectively.



Data Powered by Brego Insight

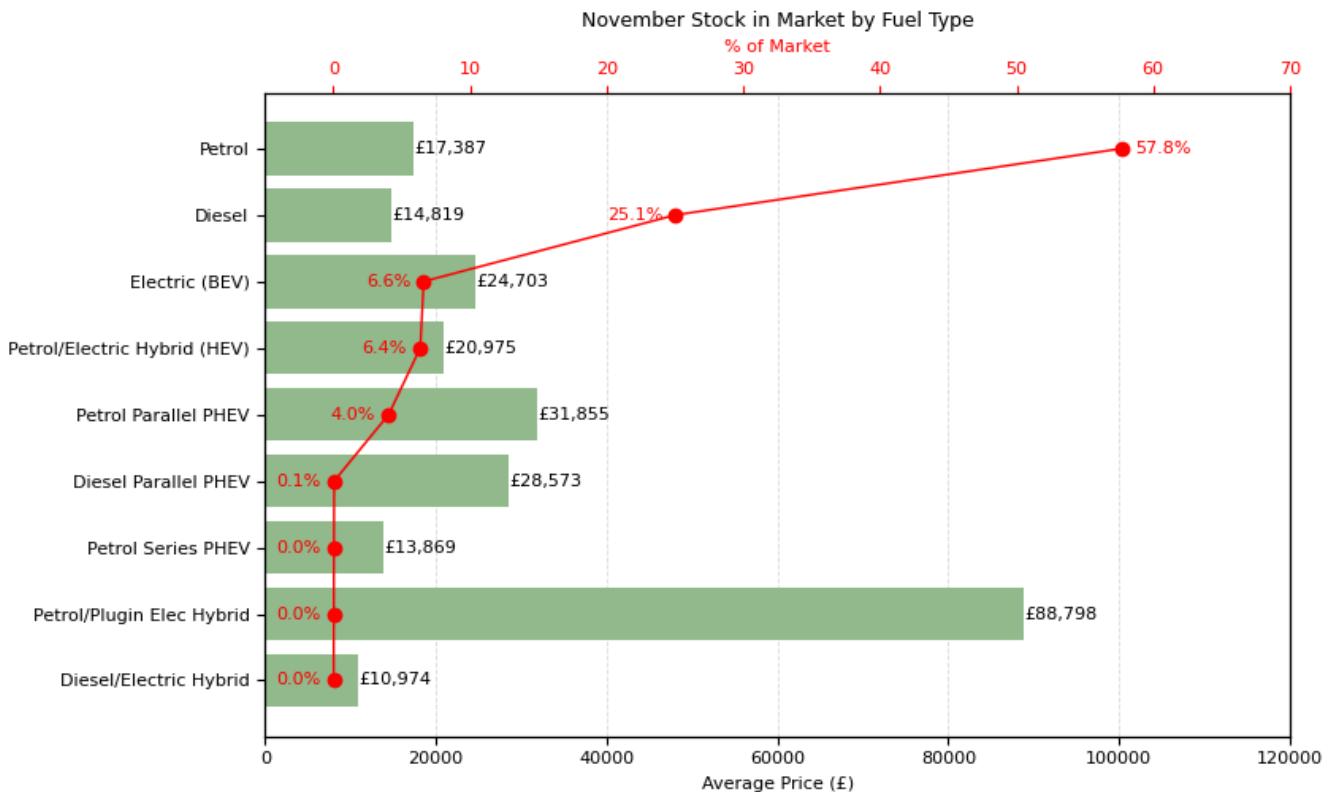
Whilst the average mileage for each market sector remained largely consistent across the board there were a number of changes in this month's data to consider. The volume of younger cars in the market have increased. Late and Low volumes jumped by 1.4 percentage points to 9.8%, a sector that includes Pre-Reg cars and we know that there has been an increase in this activity in recent months. The average price for this sector also fell by £956 highlighting more cheaper models on sale.

It was a similar picture for General Stock with a 0.8 percentage point increase and a £458 drop in average price whilst Ex Fleet showed a 0.4 percentage point increase but a drop of £258 in average price.

P/X, Old Car and Classic Car sectors all saw a decline in market share and it is once again worth reminding ourselves that this is where most of the privately advertised vehicles are found and we know from earlier that there was a 7.2% drop in private adverts.

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 and the red line shows the % of Market Share.



Data Powered by Brego Insight

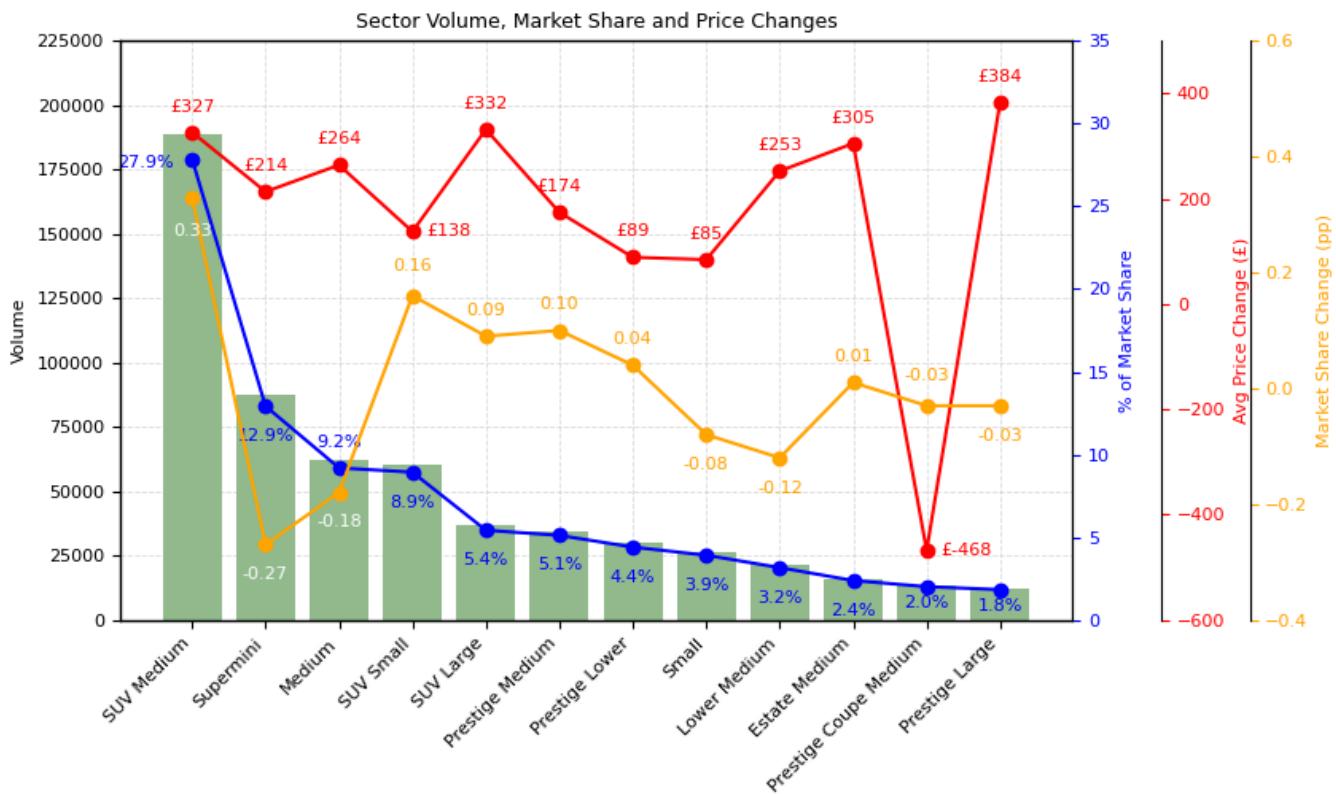
Market share by fuel type has remained largely consistent from November to December with the largest change affecting Electric vehicles that saw a 0.4 percentage point increase which is no great surprise.

There was a minimal change in the Average Price for petrol vehicles which posted an increase of £307 whilst electric vehicles dropped in price by £941 which is a 3.67% reduction. This is likely due to the fact that more cheaper cars are coming to the market, although it is worth mentioning that this may also be due to the heavy discounting and Pre-Reg activity that took place to try and meet the ZEV targets before the end of the year.

Using the unique AI driven Brego Insight tool allows Brego customers to look at these nuances in greater detail.

Used Car Performance by Market Sector

Unashamedly detailed, this chart shows the difference in the Volume of cars advertised in the market. The red line shows the month on month change in the Average Price by sector and the blue line the % of Market Share. The orange line shows the Percentage Point change from the previous month. This chart covers the 12 largest market sectors.



Data Powered by Brego Insight

The Medium SUV market share increased by 0.33 of a percentage point in December and was the largest mover of all the sectors. Perhaps of more note is the red line that shows the change in price month on month. Once again the Prestige Coupe Medium was the most volatile sector as it experienced a downward shift of £468. The Prestige Large sector showed the next largest move at £384 upwards.

Of interest is the activity in the popular Supermini sector which is the second largest in the market and showed a 0.27 percentage point decline, the biggest drop of all sectors, and this comes as a surprise in some respects although it suggests that that is where the sales activity has been.

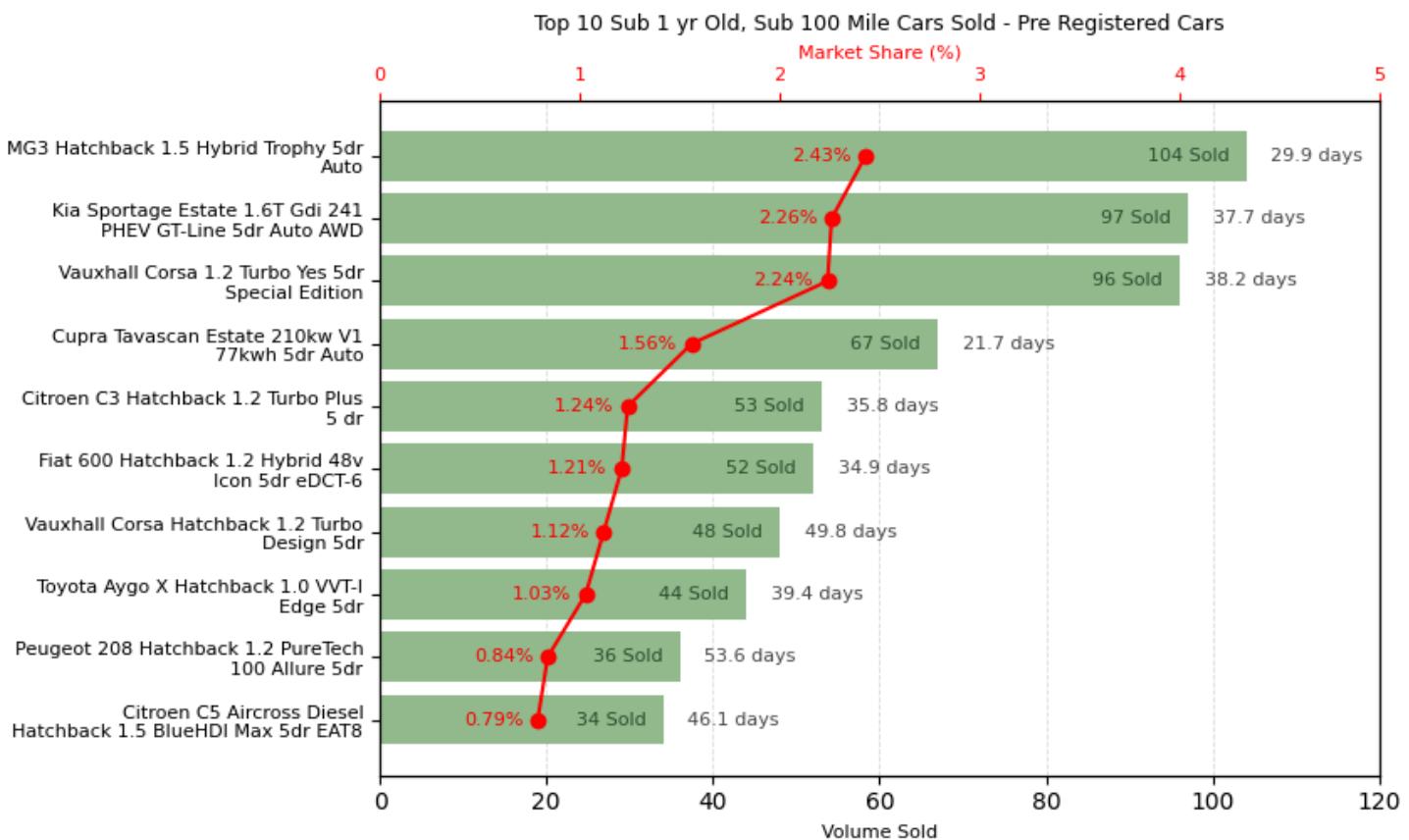
For context the Best Selling Cars in the Supermini sector for the month were:-

Model	Sold Volume	Market Share	Avg Sale Price	Avg Days to Sale
Ford Fiesta	6,908	18.8%	£6,324	36
Vauxhall Corsa	6,303	17.1%	£7,709	35.4
Volkswagen Polo	4,798	13.0%	£10,003	35.6
MINI Hatchback	3,834	10.4%	£10,581	35.4
Audi A1	2,793	7.6%	£12,920	42.4

Data Powered by Brego Insight

Top 10 Pre-Registered Cars Sold

The bars in this chart show the Volume of Cars sold by individual top selling model derivatives with the number of each 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:-



Data Powered by Brego Insight

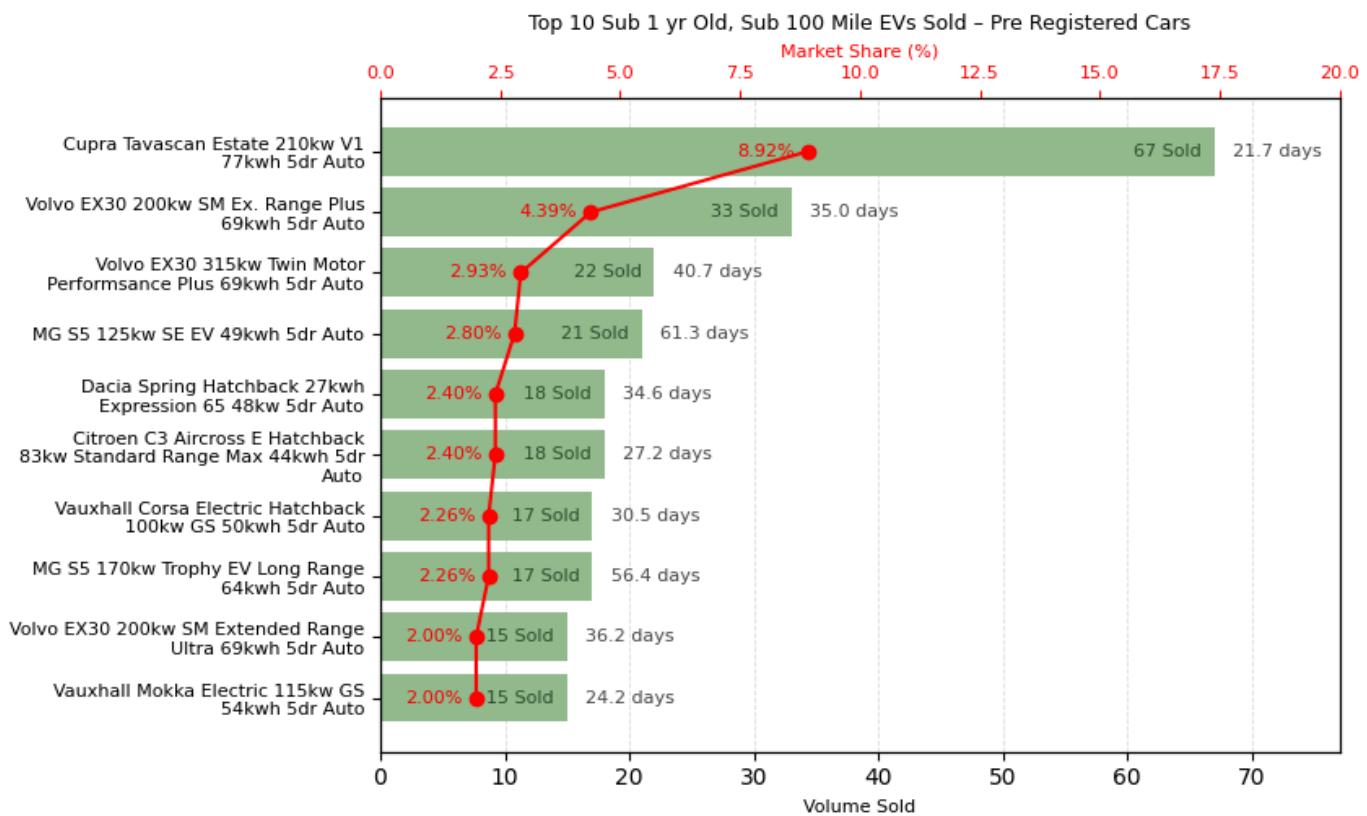
Overall Pre-Reg figures for December actually dipped by 1.2% compared to November which is surprising as it is the end of the year when tactical Pre-Reg activity is usually rife. However, this is also good news as it shows that maybe matters are settling a little but next month's data will be very interesting.

Of the Top 10, 6 models came from the Stellantis Group, highlighting their struggle to sell their products. This represented 7.44% of the total volume of Pre Reg cars in the market and the Top 10 took 14.72% of all Pre Reg cars.

Perhaps the big surprise here was to see both a Kia and a Cupra in the Top 10.

Top 10 Pre-Registered EVs Sold

The bars in this chart show the Volume of EVs sold by individual top selling models, with the number of each 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:



Data Powered by Brego Insight

This data quantifies the level of Pre-Registered EVs during December, and surprisingly the Cupra Tavascan tops the table with just over double the volume sold of the Volvo EX30 in second place. However, the EX30 has 3 of the top 10 spots representing 70 sales in total, highlighting that Volvo are pushing very hard to get these into the market.

For the first time in a few months the Corsa was not at the top of the table and there was only one Corsa model in the Top 10. That said the Stellantis group, like Volvo, still had 3 of the Top 10 slots.

Summary

To summarise, December demand and performance was where the Dealers expected it to be with reduced footfall and lower sales. Although Pre-Reg cars were available in slightly lower numbers than before, they were still an important part of the used car market. With total used car adverts down on the previous month, the split of trade to private adverts was interesting and the volume of privately advertised cars also nuanced several market sectors and changed the shape of the market for the month. That said, expect this to return to the normal balance next month. Consumer confidence may have picked up after the budget but that did not translate into more new and used car activity.

At the time of writing this report the New Year is already under way. Brego ensure you get a full view of the month's activity rather than an almost full view as given by some valuation providers. Early indications are that the consumer is re-engaging, but there are some significant price incentives driving the early month activity.

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