



Brego
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Car Market Insight

November 2025

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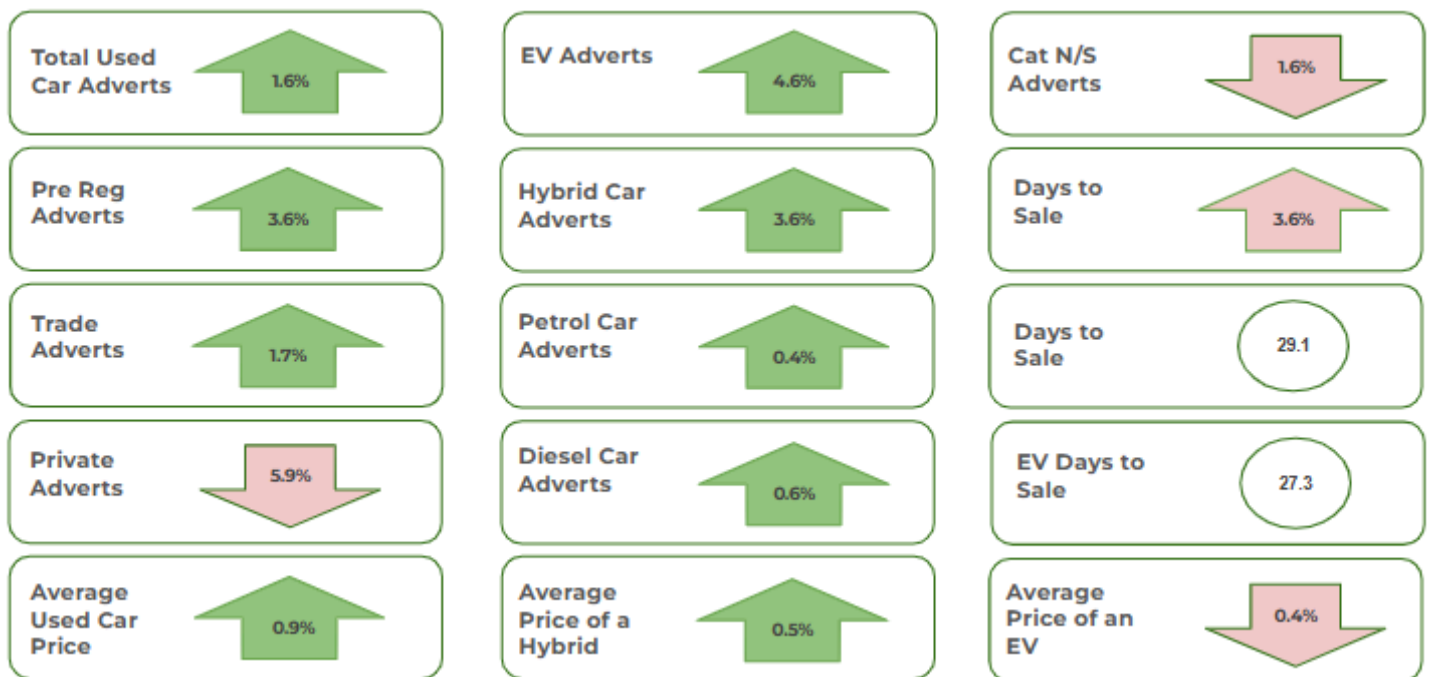
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November Monthly Car Market Insight

The November Monthly Insight report reviews what has happened in the UK automotive sector during the previous month, whilst also highlighting key economic indicators that have 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 November when compared with market activity experienced in October:-



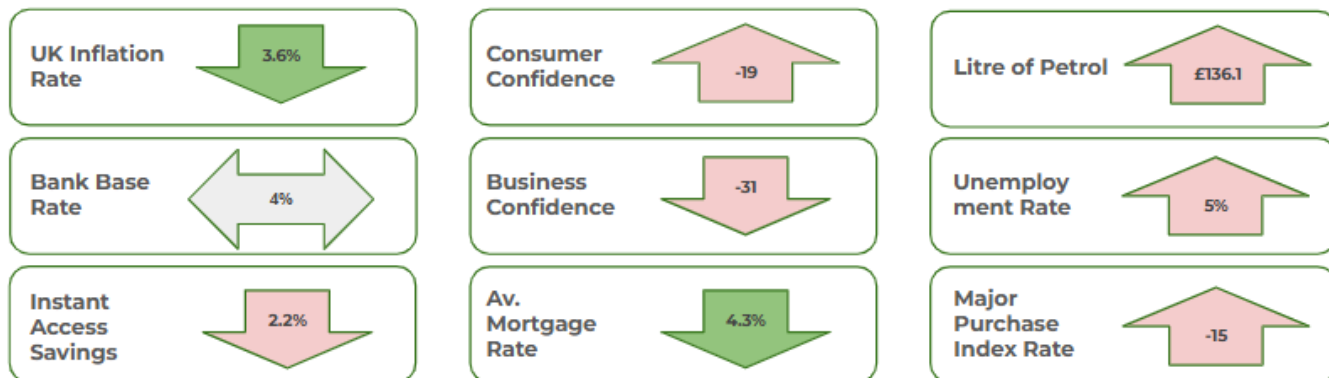
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The November Automotive Market was as difficult as many had predicted with lower footfall and less enquiries for many franchised and independent dealers nationwide. Used car sales dropped by 9.3% when compared with the October figure and the new car market also suffered a drop of 1.6% in registrations when compared to November 2024.

There was only a slight increase in the volume of used car adverts in the market and after a couple of heavy monthly increases this suggests that the market has probably reached its high point in volume terms. The number of Trade adverts increased and as expected the number of Private adverts decreased signalling the annual market slow down, albeit a little earlier than expected.

However, despite the drop in used car sales and the increase in the number of cars on sale, the average time to sell an EV reduced to 27.3 and this means that used EVs are now selling faster than ICE cars.

Key UK Economic Indicators



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

From an economic point of view last month was a very tricky period overall. The lateness of the budget impacted so much of the economy in a negative way it is hard to pinpoint the positives. There were high expectations that the government would break not only their own fiscal rules but also taxation promises given at last year's budget around increased personal taxation. The Chancellor even paved the way for this with a pre budget speech indicating tax rises would be necessary.

The reality was a U-turn that surprised all those that accessed the budget details, released by the OBR, half an hour before the Chancellor took to the floor. However, there was little good news overall. Although the Chancellor was eager to say that no personal tax increases were implemented, the freeze on tax thresholds is a stealth tax that many won't understand properly quite yet.

From an automotive perspective there was further support for new EVs and more investment for the DRIVE35 program as well as business tax relief for EV only forecourts. In addition the proposed changes for ECOS's were delayed until 2030.

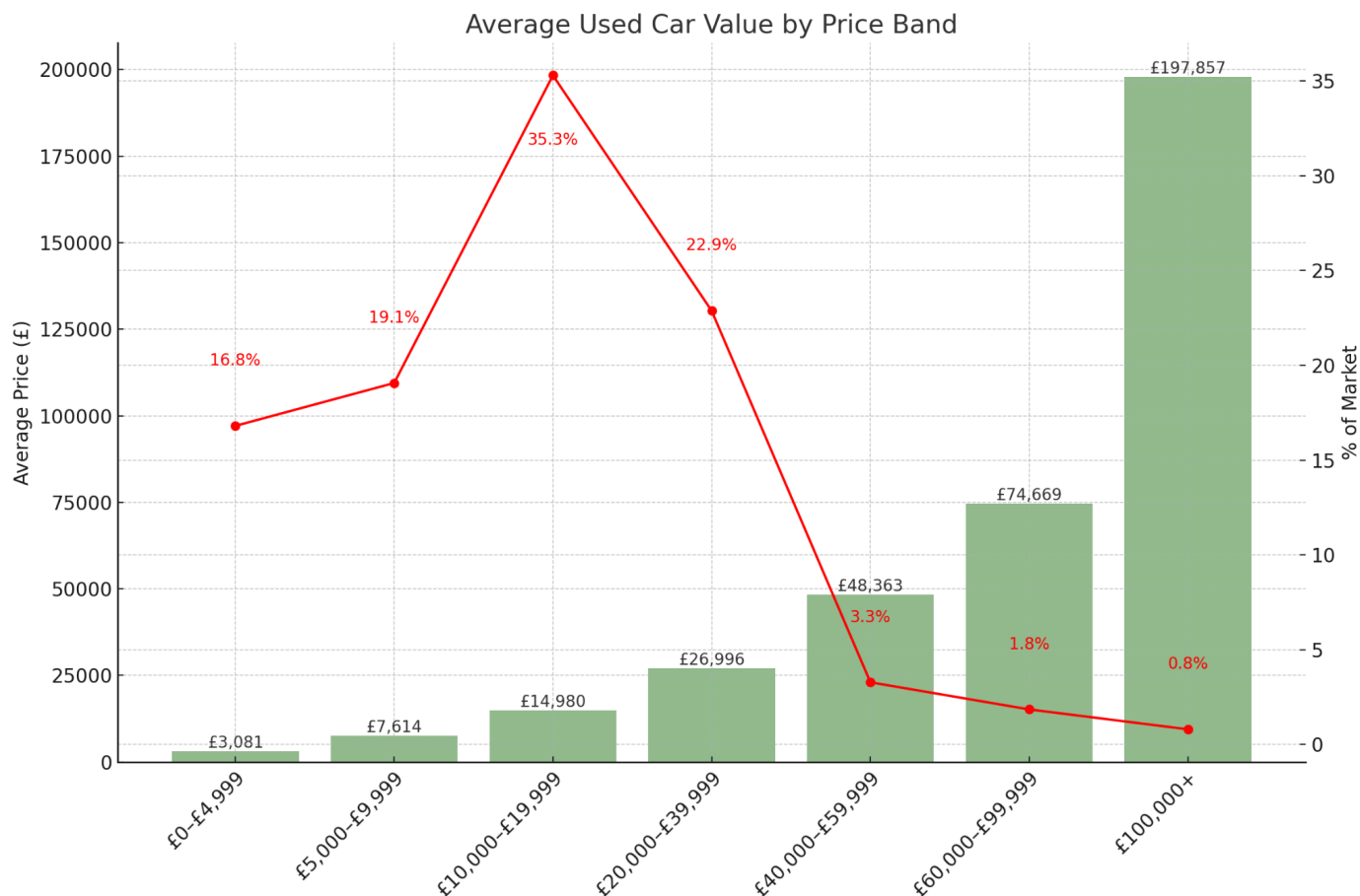
However, the big kick came from the announcement of a new pay-per-mile tax for EV and PHEV drivers. Essentially this new tax is designed to replace falling road tax revenue on ICE cars and reduced income from tax on fuel. Unfortunately, this does not encourage consumers to swap to EVs and Hybrids and appears somewhat counter productive to recent measures put in place by way of the EV grant.

Common sense should have made this tax less of a surprise as it is evident to most drivers that something would need to be done to fill the hole being created by the switch to EVs, but there is

disappointment with this solution and the cost increase it will impose upon drivers. Only time will show how this will play out and what impact it will have on new and used EV sales and on the used car pricing.

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.



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This chart will always look fairly similar 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.

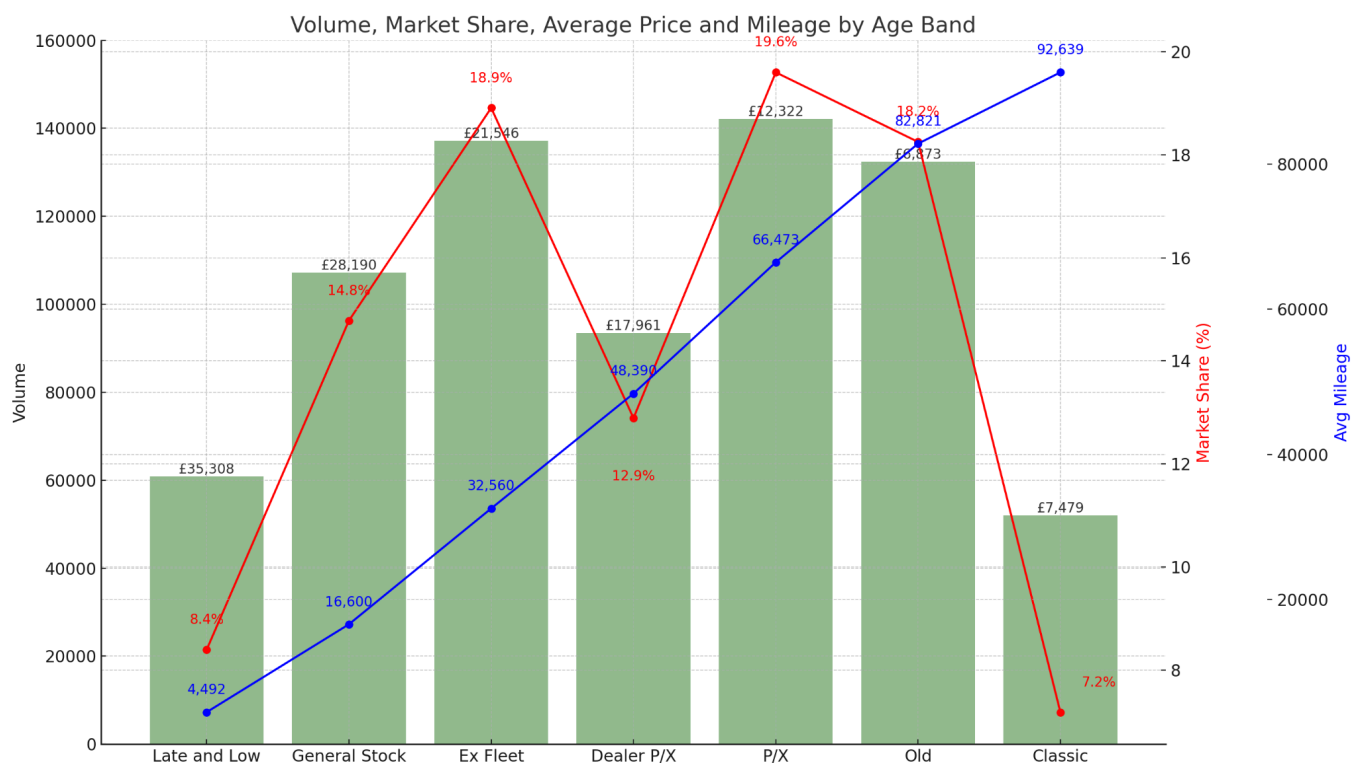
Of note this month is the 2.1 percentage point drop in market share in the sub £5k price band. The average price is very similar to October but the drop in market share implies that more of his profile of car have been sold during November. This is perhaps inline with cost conscious buyers wary of the budget measures.

Of equal note is the 5% shift upwards in Average Price of cars in the £100,000+ band which has increased by £9,520 to £197,857. Now this suggests that there have been less high end cars sold during the month. Indeed the % of market share for this band has also increased by 0.2%. Combine those two pieces of insight and we can deduce that not only is the market slower but more expensive cars are not selling.

It will be interesting to see the December figures once the budget dust has settled.

Market Analysis by Age Profile

This is a complex 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.



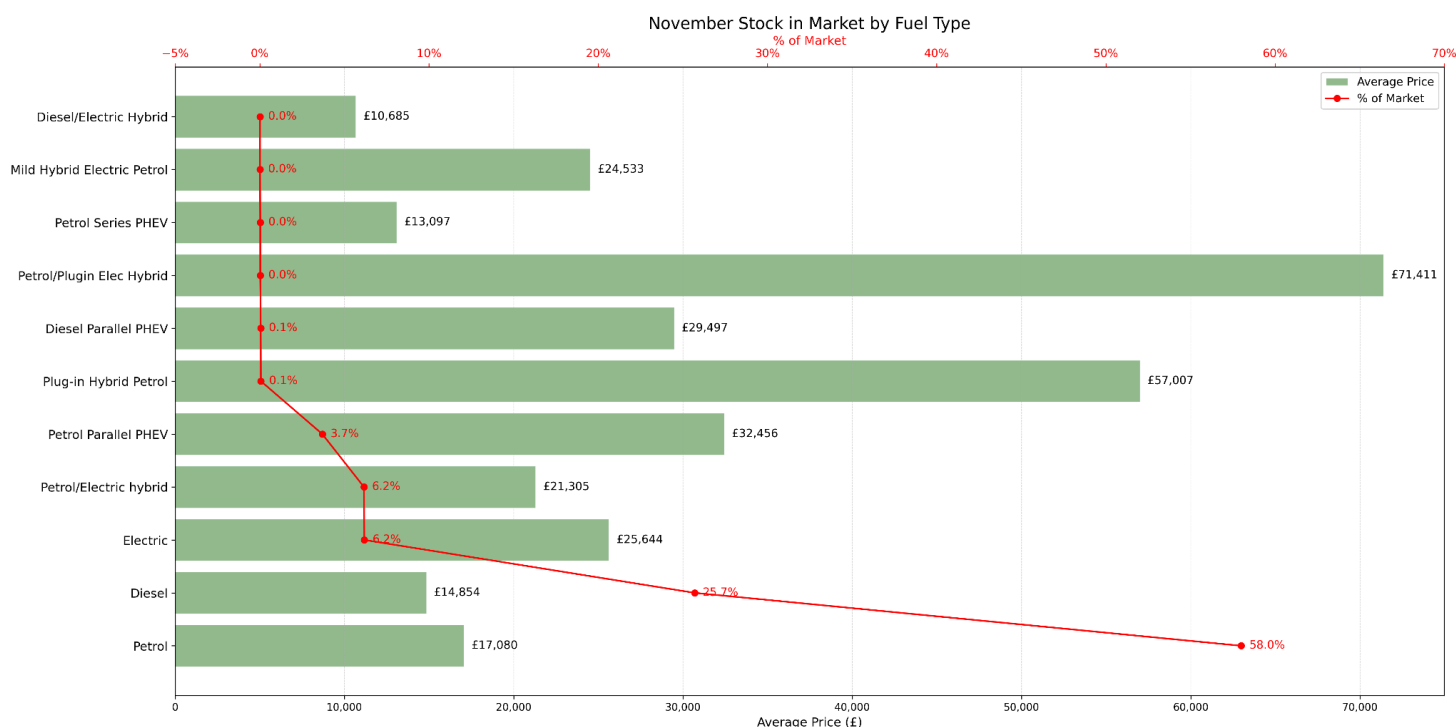
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This month's data reveals a number of little changes that have had an impact on the UK market. For most market sectors the data is similar to October but we have seen a drop in the number of Late and Low cars advertised with a market share decrease 0.9 of a percentage point to 8.4%. The average price has stayed largely the same so it suggests that this Age Profile has seen more sales activity and less supply which contradicts some of the data messages around pre-registered cars. More to come on that shortly.

There has also been a marked increase in the Average Price for the Classic/Old Car sector which has gone up by 6% to £7,479. This is slightly contradictory to the previous chart but given we are looking at a different perspective then it is understandable. It is worth considering the fact that at this time of year the market often experiences an increase in older “classic” cars from private vendors keen to catch the Christmas buyers that tend to look and buy with their hearts rather than out of necessity. As such there can be a skew to average prices.

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

There is further volatility in the data for November and this is proving to be a trend when we consider analysis of the market by fuel type. The largest change has been in the % of market share for petrol cars which has shifted upwards by 3.2 percentage points to 58%. This seems a little at odds given the increasing number of both EVs and Hybrids coming to the market. The Average Price has also increased by 4.1% to £17,080 and this suggests that there were more higher value petrol cars in the market than before and this could be because of cars part exchanged for new EVs and Hybrids.

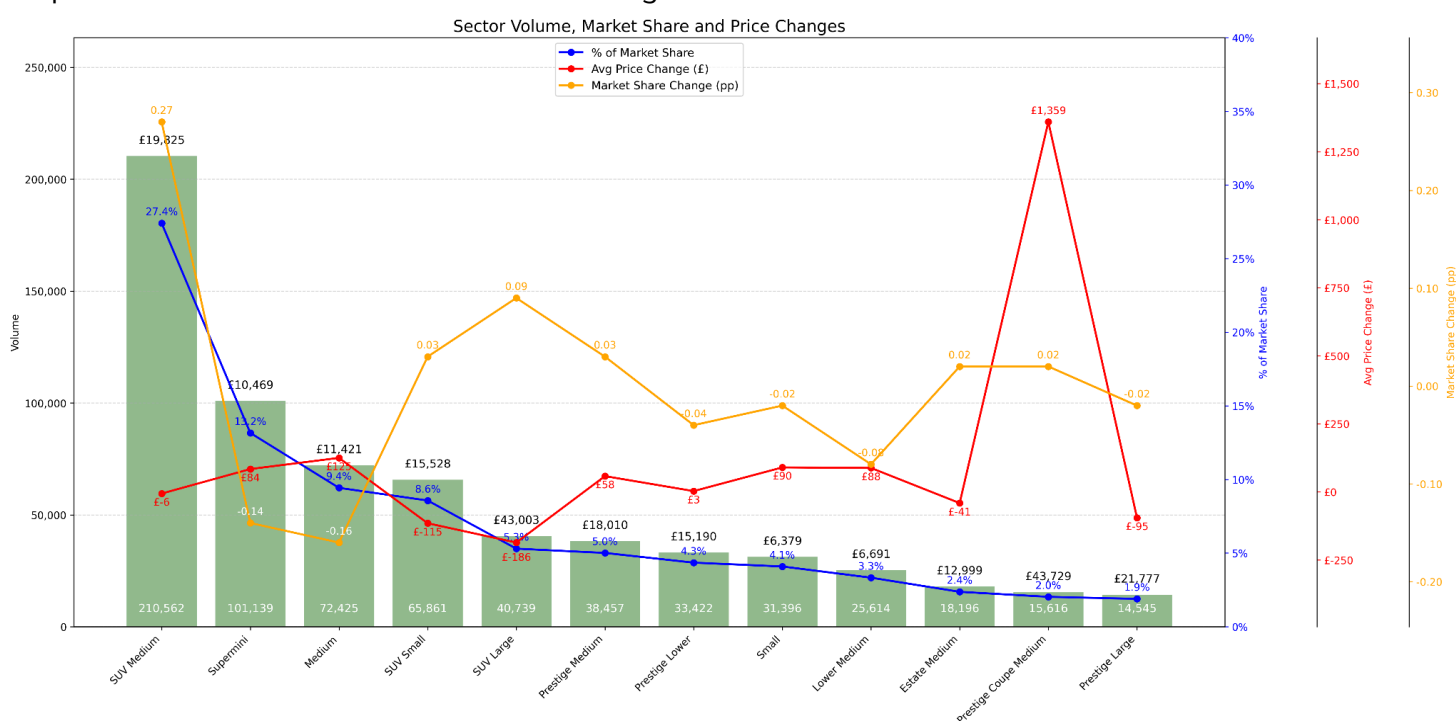
For EVs and Hybrids the growth of market share was 0.8 of a percentage point and 1 percentage point respectively although the increase in Average Price was much lower. It was the diesel cars

that showed the biggest move in Average Price with a drop of 16.9% to £14,854 which incidentally reverses the uplift seen in October.

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.



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The Medium SUV market share remains the highest at 27.4% which is in line with new vehicle sales over the years. It has also seen the highest growth in size at a somewhat low, but relevant, 0.27 percentage points over October.

The other key point to note is that the Prestige Coupe Medium sector showed the largest increase in Average price, jumping by £1,359. This sector appears to be more price sensitive month on month than many others which is important to recognise if you trade and retail these models.

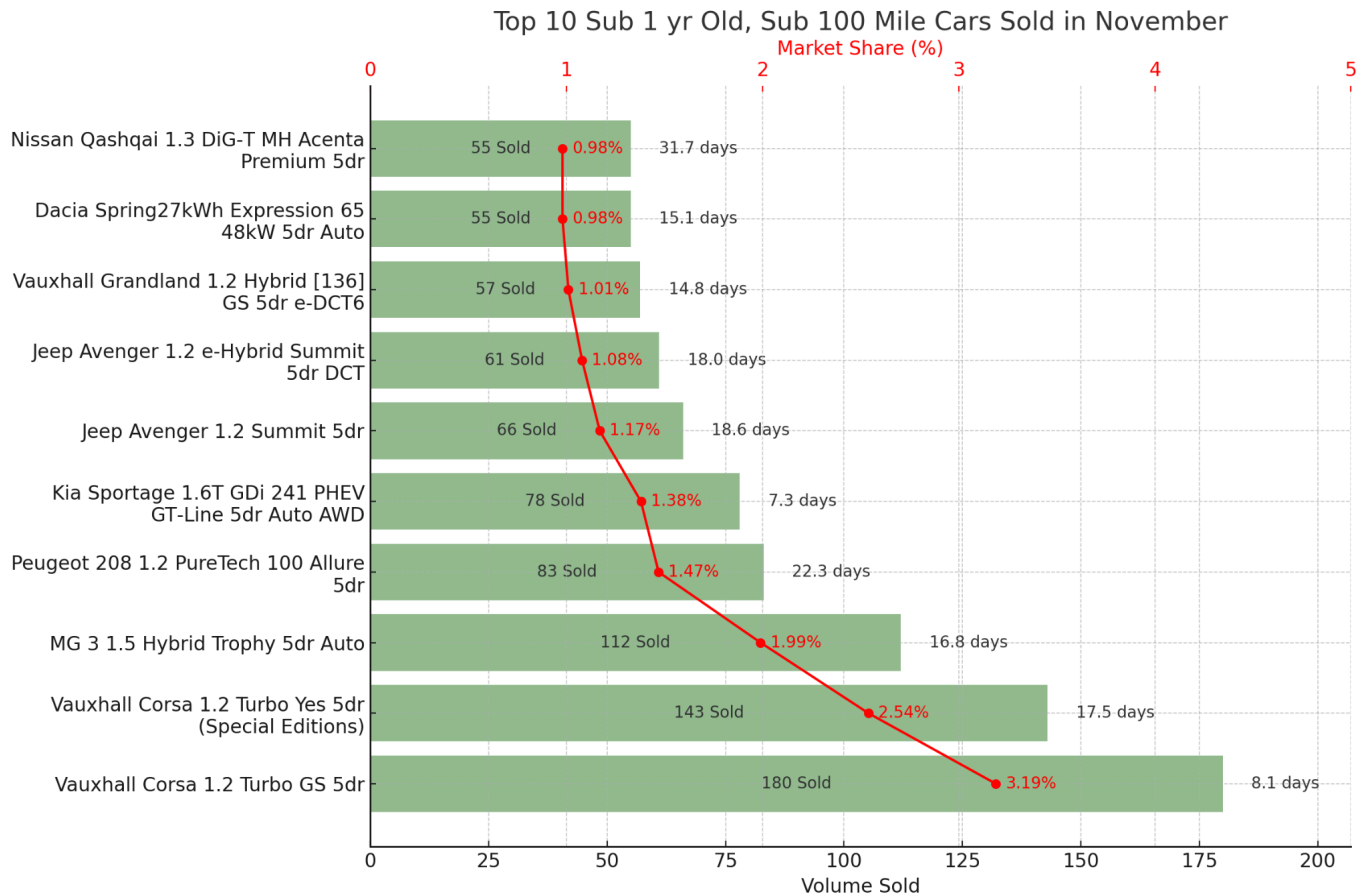
For context the Best Selling SUV Medium sector for the month were:-

Model	Sold Volume	Market Share	Avg sale price (£)	Avg Days to Sell
KIA Sportage Estate	3,050	5.93%	£21,092	29.1
HYUNDAI Tucson Estate	2,766	5.37%	£19,727	27.2
LAND ROVER Range Rover Evoque Diesel Hatchback	2,486	4.83%	£16,102	28.9
FORD Kuga Diesel Estate	2,113	4.11%	£10,747	29.4
FORD Kuga Estate	2,093	4.07%	£18,736	29.7

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Top 10 Pre-Registered Cars Sold

The bars in this chart show the Volume of Cars sold by individual top selling model, 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:-



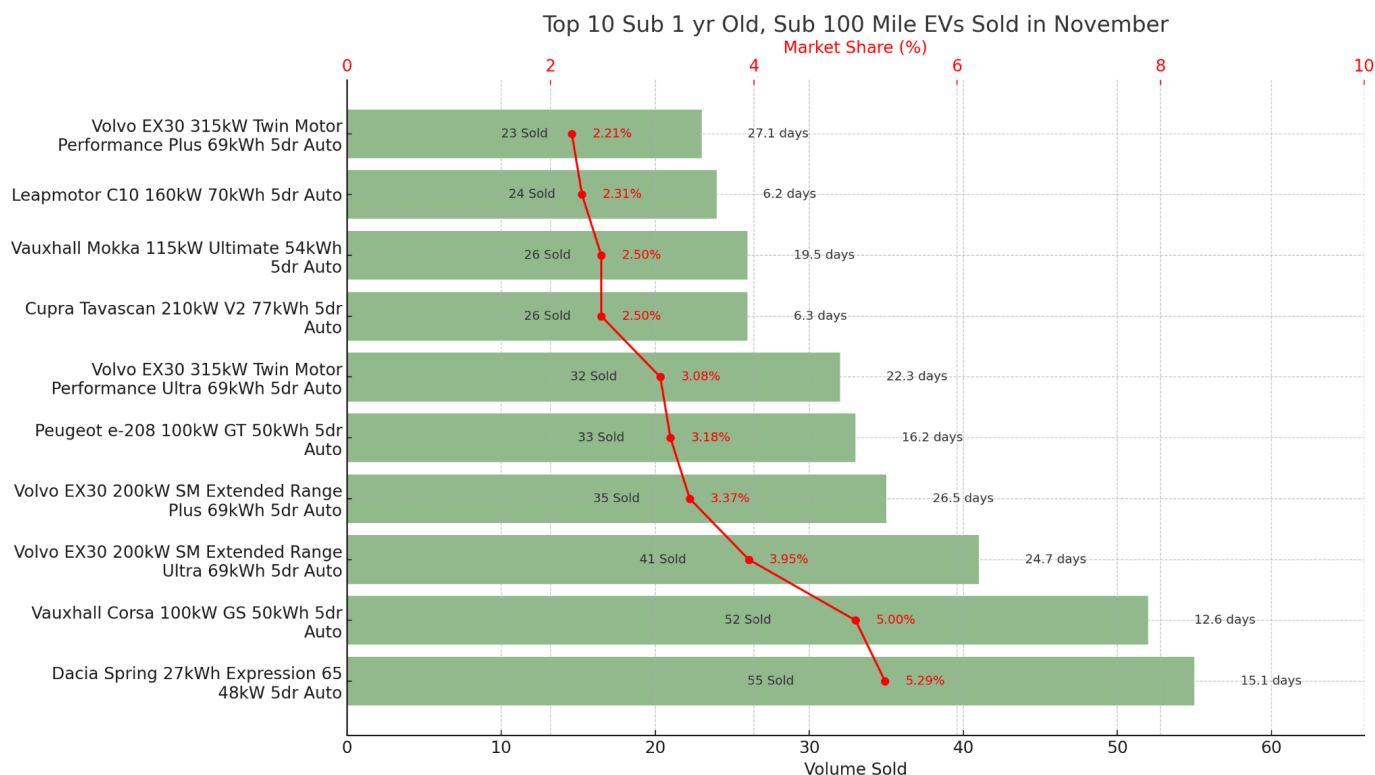
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Following the 60.5% leap in pre registered cars on sale in October, the November increase was far more conservative at 3.6%. As the year draws to close these figures will become more interesting as OEMs struggle to meet government targets and their own aspirations. What is particularly fascinating is to watch the volumes registered by day and also by hours over the last few days of the month.

The top 10 list consisted of 5 different OEMs, and of those 5, Stellantis owned brands took 6 spots including the top 2 with Corsa 1.2 Turbo models seen selling in greater volume. It has to be said it is surprising to see a Kia model in the mix as under normal circumstances they have no need to force sales. For further context the top 10 took a 15.79% share of pre-reg cars sold and of those, Stellantis held an 8.99%.majority.

Top 10 Pre-Registered EVs Sold

The bars in this chart show the Volume of EVs sold by individual top selling model, 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 November, and once again we see that in this view of sales Volvo had the highest representation with 4 EX30 models taking 12.6% of the top 10 market share which was 33.39% of all pre-reg EV sales. Stellantis were not far behind with 10.68%

It is perhaps surprising to see Dacia taking the top spot and also of note that Cupra also had a model in the top 10. The only new Chinese brand to appear in this list is the Leapmotor which by all accounts seems to be struggling with low consumer demand, hence the push on pre-registration activity.

Summary

In conclusion, November was a more difficult month for the UK Auto industry and to be honest it was not unexpected. The combination of poor economic performance, low consumer confidence, mixed government messaging, the budget and the time of year conspired to make retail car sales challenging at best. Dealers have had to work hard to find a way to meet budgets and sales targets. Faced with reduced social media engagement and dwindling leads combined with cost conscious buyers, sales teams have fought to maintain profitability.

The final weeks of the year will be more interesting and having now understood where the government stands there is hope of stability. In addition there are positive rumours around a further drop in the interest rate and a more optimistic view of what will happen with inflation. This does bode well for December and more importantly perhaps, it indicates that the new year may pick up quite swiftly.

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.