



**Brego**  
Driven by Data



# Monthly Car Market Insight

October 2025

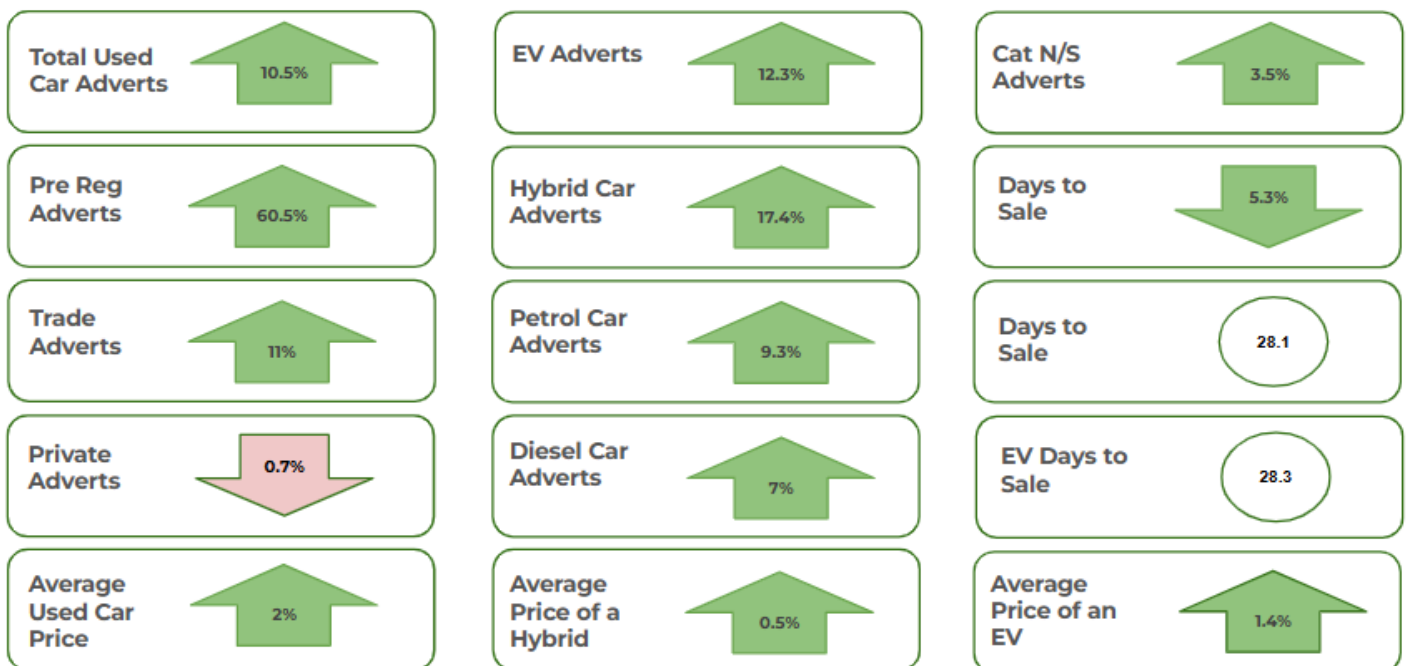
The contents of this document are private and confidential and are for the intended recipient only. If this is not you, you are not authorised to read, print, retain, copy, disseminate, distribute, or use this document.

# October Monthly Car Market Insight

The October 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 October when compared with market activity experienced in September:-



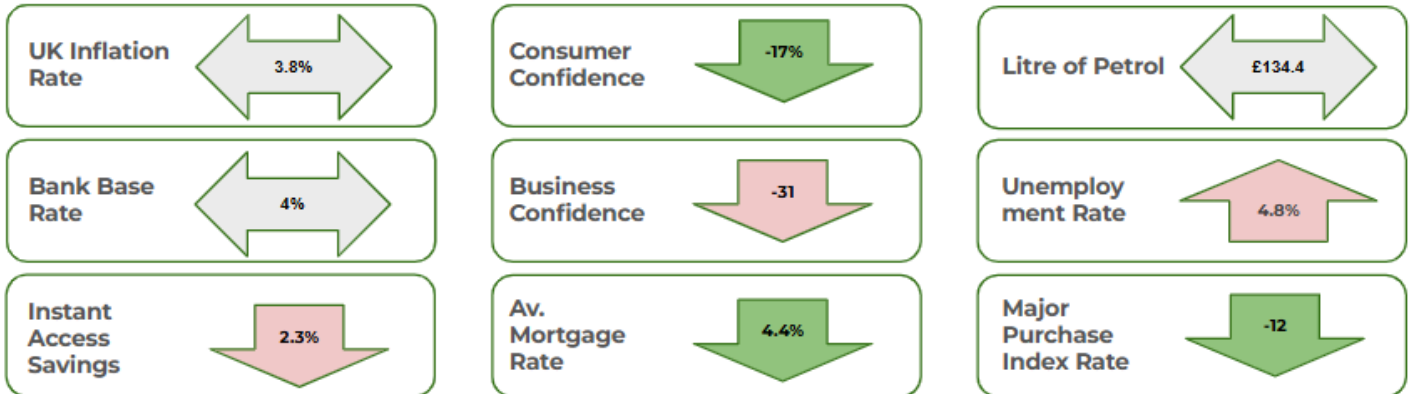
Data Powered by Brego Insight

The October used car market showed a little resilience and posted a sales uplift of 2.5% over the previous month. From an EV perspective used EV sales were actually 0.9% lower than during September which was a disappointing surprise. Once again the volume of cars advertised increased by 10.5%, as more stock found its way firstly into the wholesale market and then to the dealer forecourts. This is likely due to the increase in new car sales during September which at 13.7% up on the previous year and a more conservative 0.5% in October provided a greater supply of part exchanges.

From a stock perspective all fuel types increased although it was Hybrids that experienced the greatest uplift at 17.4%. The devil is always in the detail, and it is worth highlighting that the pressure to register new cars has seen a significant jump in pre-registered cars on sale with a 60.5% increase over the September figure. It will be interesting to see how quickly these find homes with retail buyers as is it is a practice likely to continue through to the end of the year.

On another positive note, the average time to sell a car dropped to 28.1 days from 29.5 the previous month with EVs taking just 28.3 days, the closest match for some time.

## Key UK Economic Indicators



Data Courtesy of Trading Economics, Gemini AI and [www.gov.uk](http://www.gov.uk)

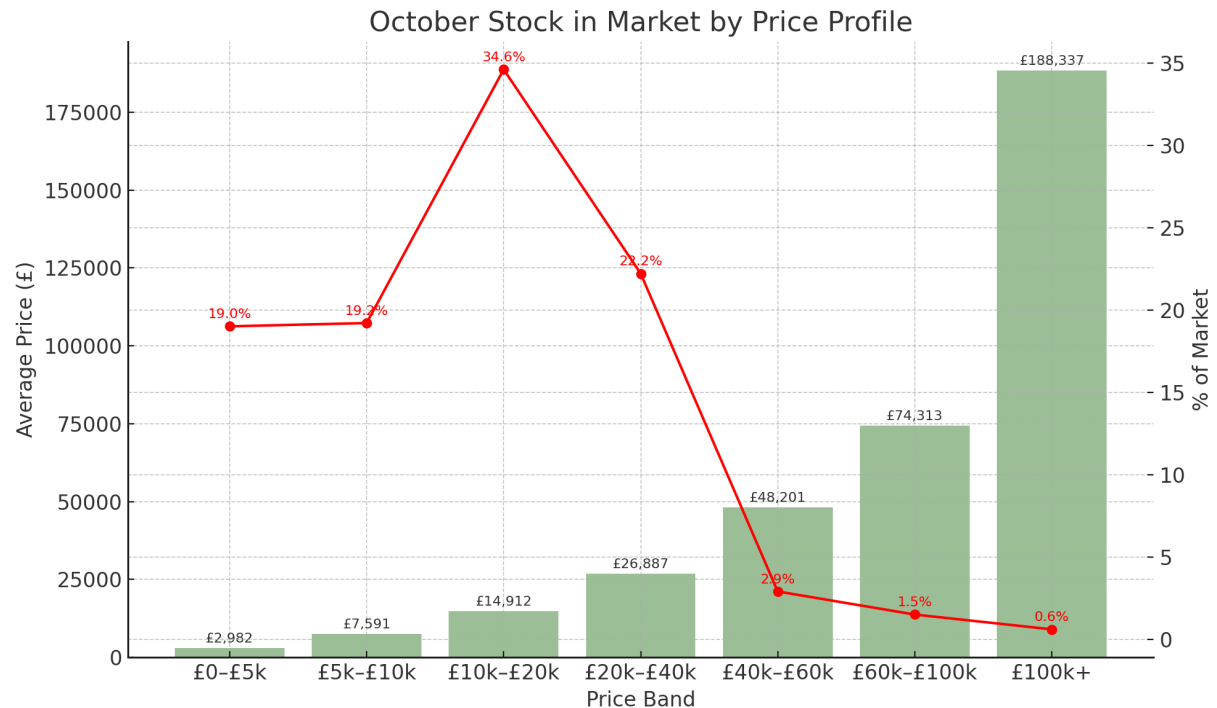
Looking at the KPIs above one would be forgiven for thinking the economy looks fairly settled. At the time of writing, the Bank of England has just announced that the base rate will remain at 4%. However it is now rumoured that there will be another drop before the end of the year which had previously been ruled out. Apparently despite the fact that the rate of inflation remains at 3.8% there are expectations that the rate will drop in the coming months thus influencing the Bank of England's decision.

Unlike the previous month, consumer confidence has improved by 2 points despite the fear of the now almost guaranteed tax rises in the budget on November 26th. Some reports indicate that this confidence is being driven by the upcoming "Black Friday" sale events, although underlying inflation in certain sectors of the economy have already started to decline and will gather momentum in the coming weeks which would be great news.

The negatives are firstly the drop in business confidence to -31 from -27 although this is in line with forecasts. Expectations are that this will rally during the third quarter to -29 and is set to trend at around -18 during 2026. The second negative is the drop in the instant access savings rate which will not encourage saving, although by design may help the economy by encouraging spending. Finally a quick mention of the unemployment rate which grew by 0.1% to 4.8% which was actually lower than predicted and set to be a blip before returning to 4.7% in 2026.

## 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

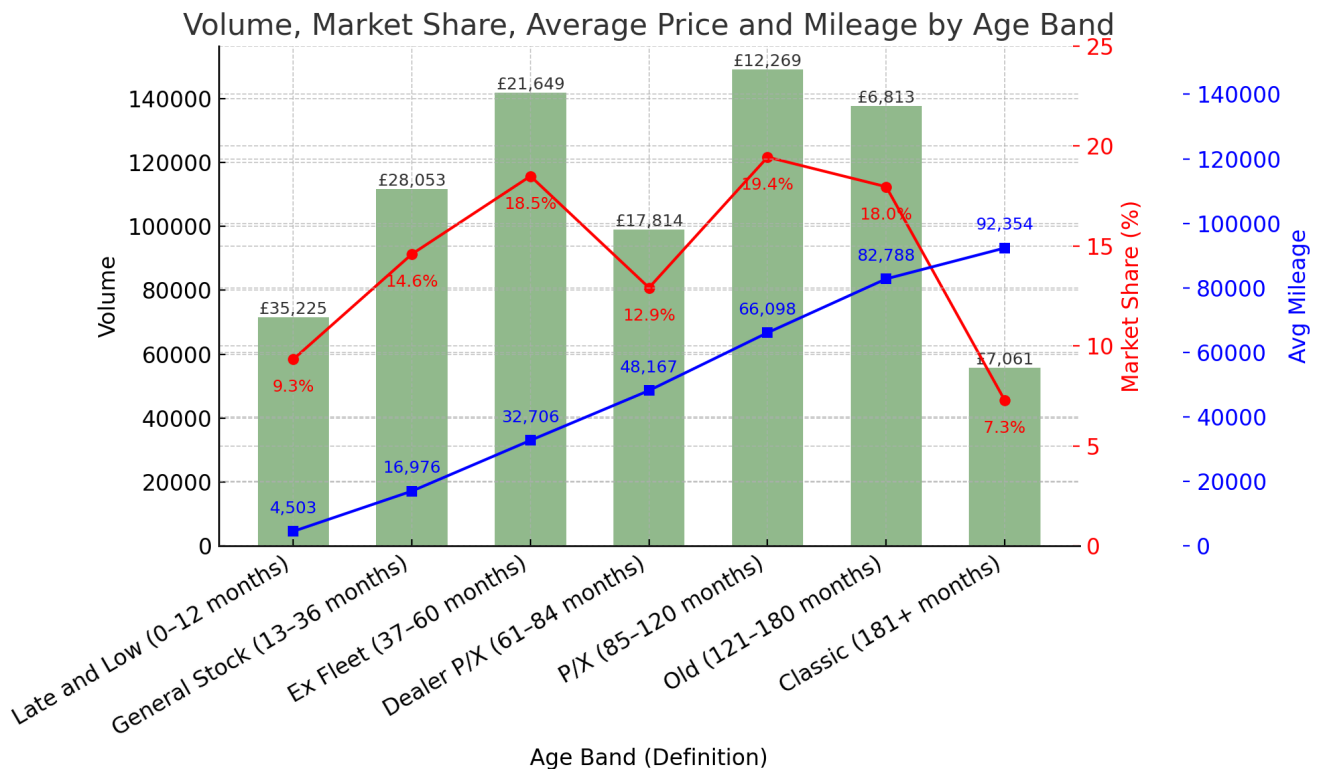
When compared to the September data the key moves have been in the £0 to £5k price bracket and the £40k to £60K price bands. The former has seen a 1.8 percentage point increase of market share with the average price remaining almost stable. This shows that there are more cheap cars available for sale. In addition there has been a 0.5 percentage point drop in the market share for the latter band.

These moves could also indicate that sales of cheaper cars have dropped off. Given the increase in new car sales it may be directly related to increased volumes of cheap part exchanges being traded against new cars.

For the £40k to £60k band the average price has also remained largely stable and it is understood that the decrease in market share is related to greater sales activity at this price point.

## Market Analysis by Age Profile

This is a complex chart and looks at the market by Sector/Age Profile 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

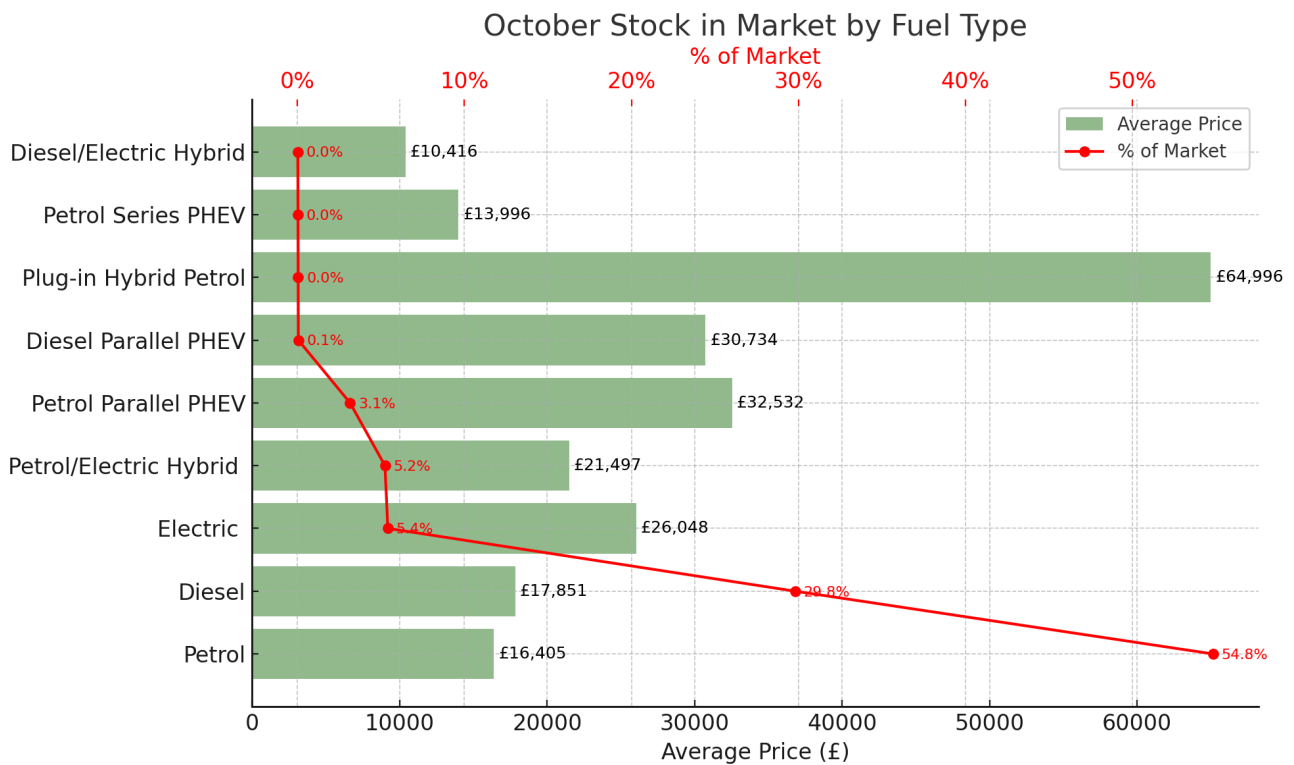
The October data has a number of changes that show a gentle shift in the market. With the increase in pre-registration activity it should come as no surprise to see that the Late and Low market share has increased by 1.4 percentage points to 9.3%. In addition the average price for this sector has dropped by £1,230 which suggests it is lower priced cars that have made the difference. It will be interesting to see if the market share increases further towards the end of the year or if it is a blip off the back of the impressive September new car market.

However, the General Stock market share has dropped by 0.8 of a percentage point which could indicate that this market band has enjoyed greater sales success. The average price has also dropped by around £500. The only other sector to show a marked change is the Classic car banding which has seen a drop of £341 to the average price perhaps suggesting that some of the cars part-exchanged for new cars were of this type.

All other market shares have stayed broadly similar which shows market consistency.

## 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

The October fuel type data continues to be as unstable as it has been for the last couple of months. The most significant change has been in the average price for the Diesel cars which has increased by £2,973. This suggests that there has been an influx of high value diesel cars to the market, indeed the % of market share has increased by 3.8 percentage points.

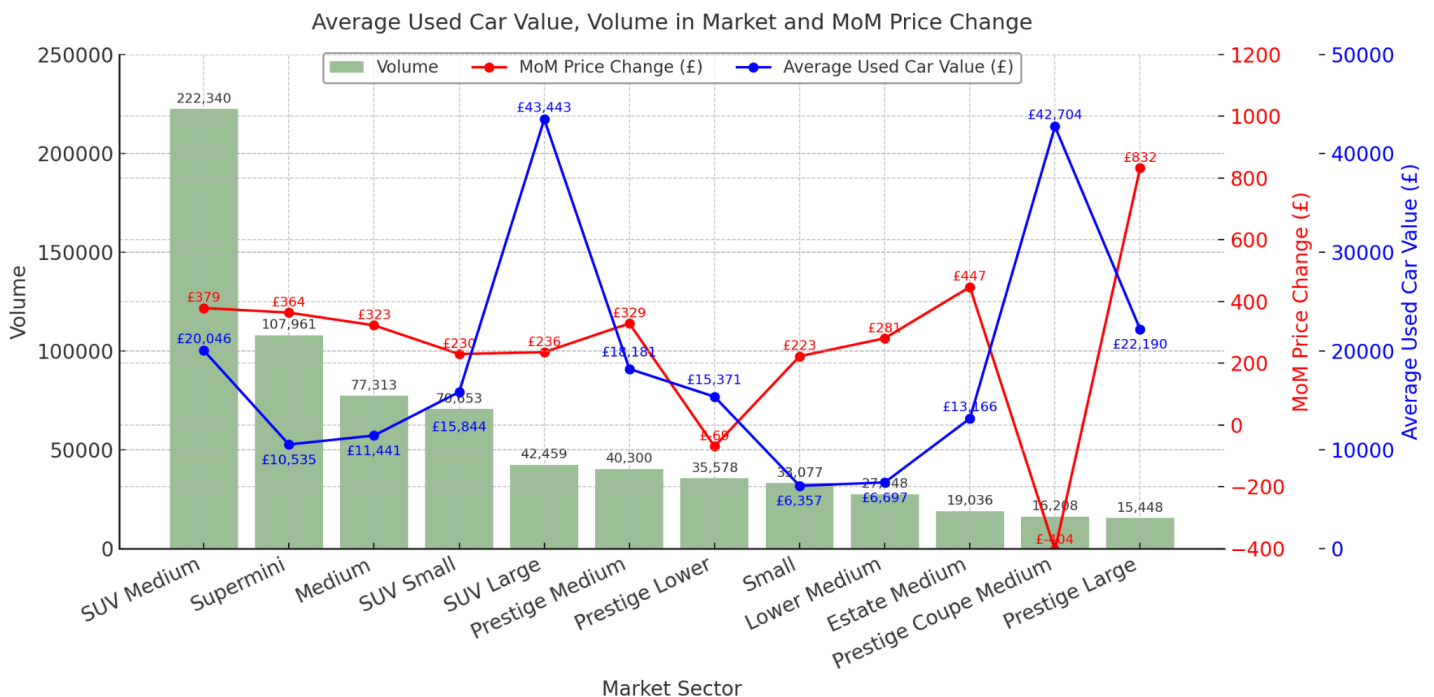
In addition the Petrol data shows a decrease in the average price of £672 although the % of market share has remained fairly consistent at 54.8%.

Electric cars have decreased by just £174 although the market share has surprisingly dropped by 0.6 percentage points. This could indicate that sales have increased although one must consider that the increases in other fuel types in the market may also have influenced this decline in market share.

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

## Average Used Car Value by Market Sector

The bars show the difference in 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 Average Price. This chart covers the 12 largest market sectors.



Data Powered by Brego Insight

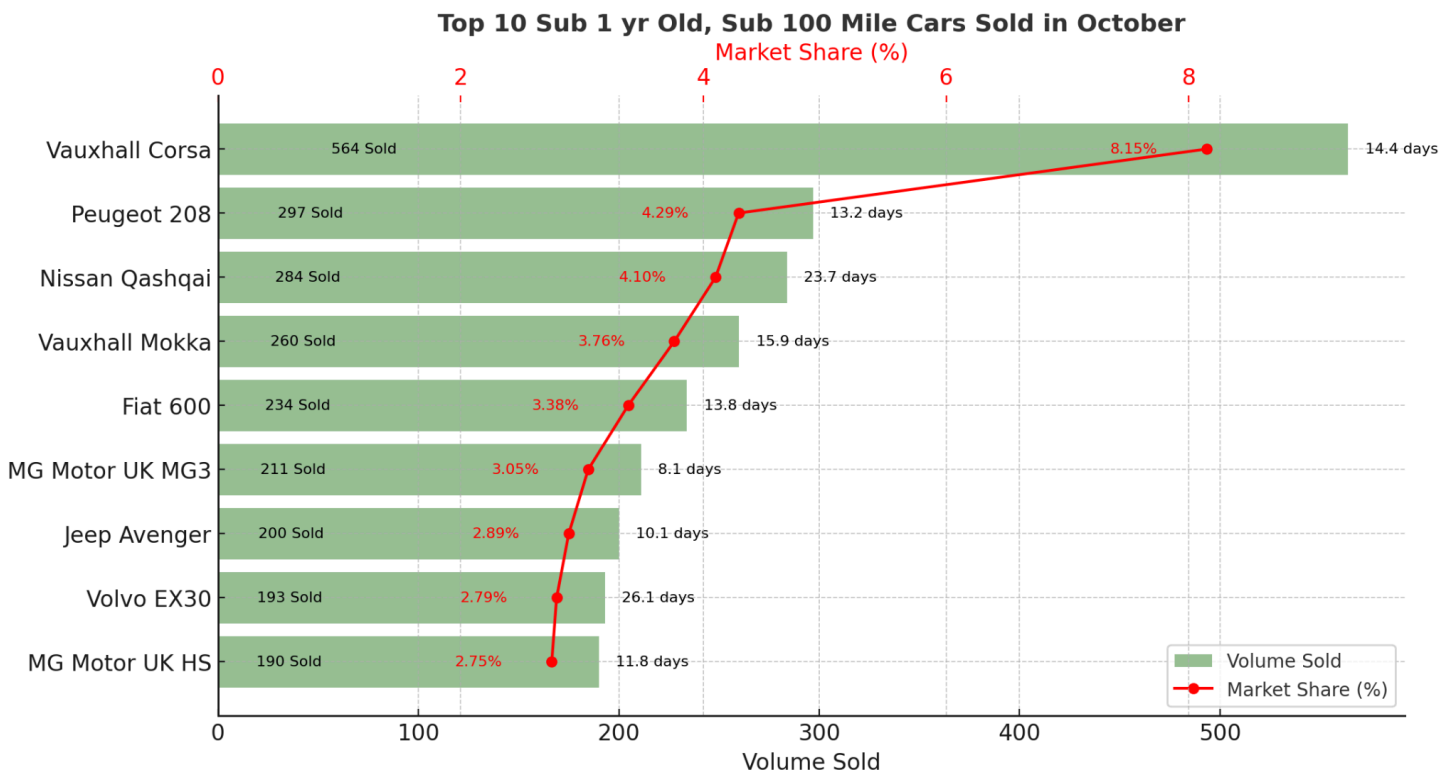
Whilst Medium SUVs still hold the largest market share at 27.3%, up 0.8% on the September figure, it is interesting to note that the average price for all of the top 12 largest market sectors has increased. There is one exception in the case of the Prestige Coupe Medium sector which has seen a drop of £404 in the average price leading us to deduce there has been some significant sales activity at the higher end of the market.

For context the Best Selling Prestige Coupes for the month were:-

Rank	Model range	Sold Volume	Market Share	Avg Sale Price	Avg Days to Sale	MoM Price Change
1	Mercedes-Benz CLA	1,800	18.10%	£22,267	27	£194
2	Audi TT	1,018	10.20%	£14,120	29.8	£420
3	Mercedes-Benz C-Class (Coupe)	922	9.30%	£15,274	32.1	-£473
4	BMW 4 Series	835	8.40%	£18,515	29.5	£468
5	Audi A5	705	7.10%	£14,072	29.4	-£320

## Top 10 Pre-Registered Cars Sold

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



It is interesting to look at this data given the significant increase in the number of pre-registered cars in the used market. The uplift of 60.5% reflects the pressing need of the manufacturers to both meet the year end internal targets and also the government ZEV mandate target of 28% of all registrations to be EVs.

This list is interesting as it highlights the fact that Stellantis are pushing cars into the market pretty hard. Of the Top 10, five of the model ranges are Stellantis owned with two ranges from Vauxhall. There are a few reasons this may be the case, the first being high production levels in the factory. In addition they could be looking to increase presence in



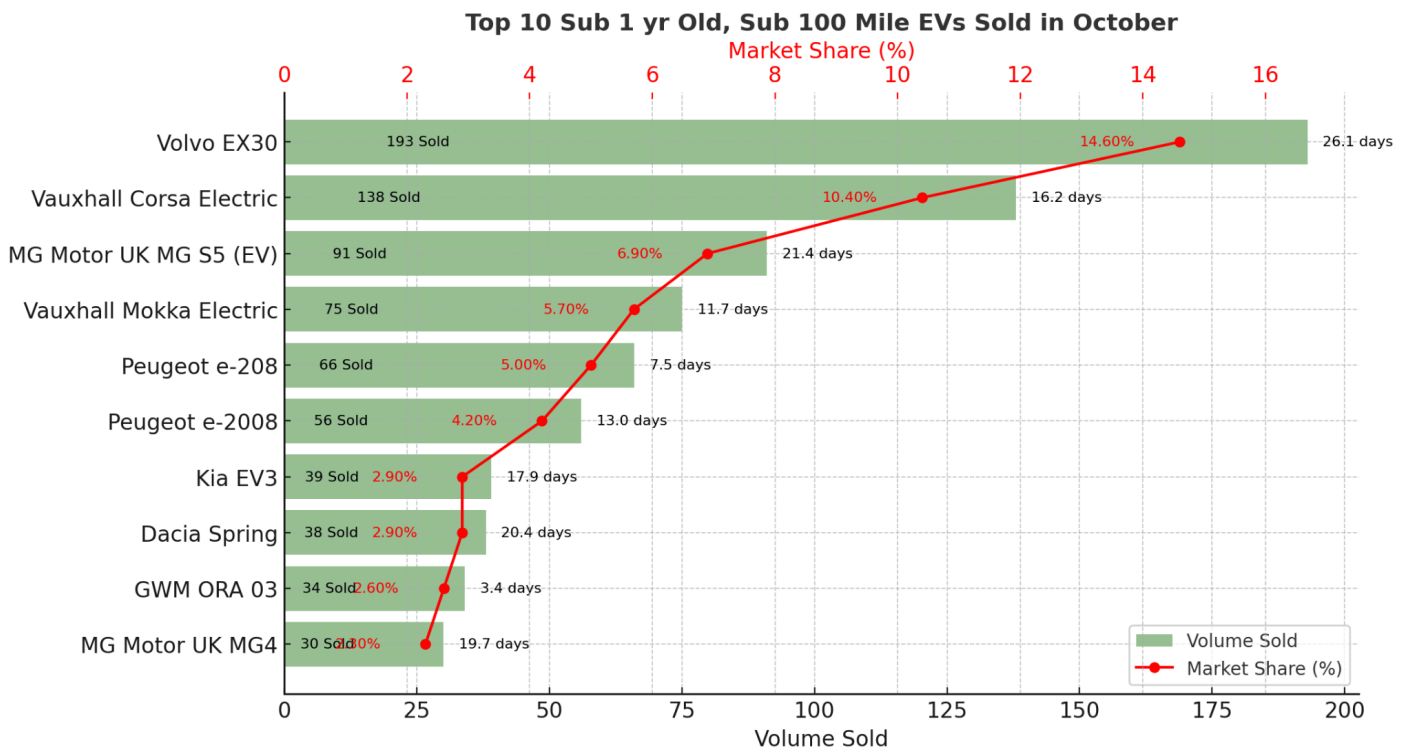
the market and boost market share. What is worrying is that supply is clearly exceeding demand which is never good for residual values.

MG also has two ranges in the Top 10, but neither of these ranges have electric models although there is a hybrid HS.

The Volvo EX30 is the only full electric range in this list which is perhaps a surprise given some of the press reports of excessive EV pre-registration activity. The next chart gives clarity on what is happening with sales in the EV market.

## Top 10 Pre-Registered EVs Sold

The bars in this chart show the Volume of Cars sold by model range 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-registration of EVs and given the pressure previously stated to get EVs sold, one might expect to have seen greater volumes. However, it is wise to consider the plethora of model derivatives that are being offered.

Once again Stellantis have a majority in this table with four models, whilst MG have two. It is interesting that there are no Tesla's and none of the new mainstream Chinese brand ranges present. This probably signifies that there is genuine consumer demand for them.

## Summary

Despite some of the economic and political indicators, the UK used car market performed pretty well in October. With used sales up by 2.5% and consumer confidence improving the sector can be pleased with the overall outcome.

Granted the volume of cars listed for sale during the month increased by 10.5%, and the significant jump of 60.5% in pre-registered cars has come as quite a shock to some, but these facts have not deterred the consumer. Anecdotal feedback from our dealer customers appears to support the fact that for used cars customers are happy to pay the asking price or very close to it. Condition of the cars on offer is still key and colour can play a big part in the decision making process.

The coming weeks will be important though as the market begins to edge closer to its quietest weeks of the year. In addition, there is the budget to consider and measures introduced on the 26th of November will be closely scrutinised. The Chancellor has already intimated that the government will break their pledge to not increase taxation for the general public. On a positive note, as it stands today we are likely to see a bank interest rate drop before the end of the year and inflation is set to start falling. Interesting times.

**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.**