



Brego
Driven by Data



Monthly Car Market Insight

September 2025

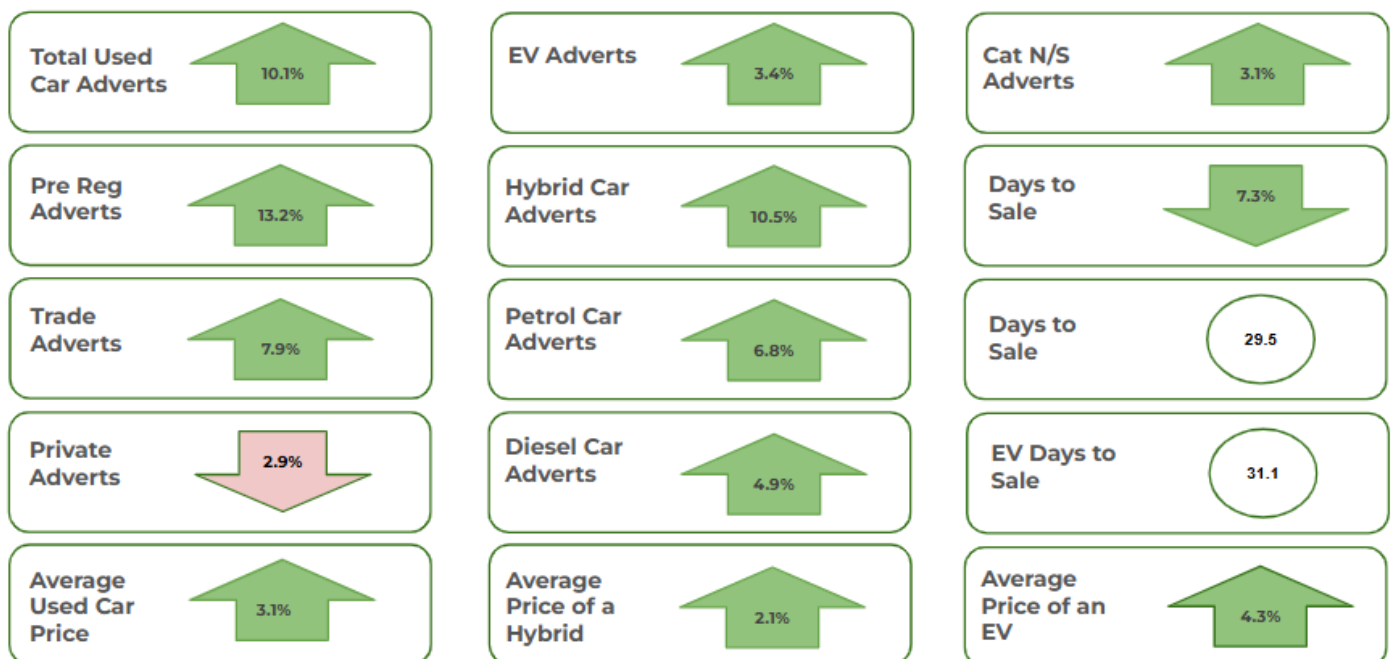
The contents of this document are private and confidential and are for the intended recipient only. If this is not you, you are not authorised to read, print, retain, copy, disseminate, distribute, or use this document.

September Monthly Car Market Insight

In this month's 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 the used market 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 September when compared with market activity experienced in August:



Data Powered by Brego Insight

There were some important nuances in the used car market during September, the most notable being the 10.1% increase in total used cars advertised. This indicates that there has either been a slow down in the market or an increase in the number of cars available in the wholesale and private sector. The data clearly shows that private adverts have decreased and the volume of trade adverts has grown by 7.9%.

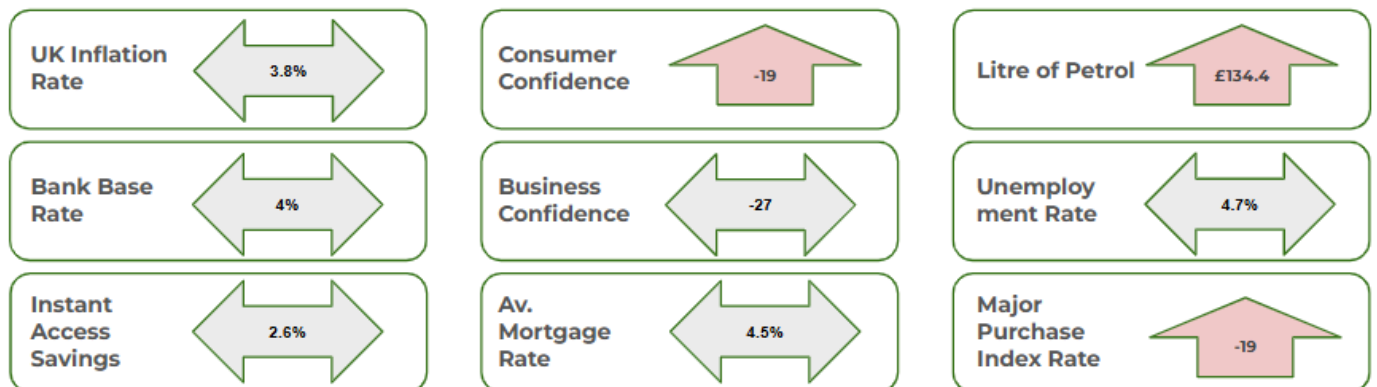
It is worth highlighting that September is the plate change month, and as such much of the focus in franchised dealerships will have been on new cars rather than used. The SMMT new car registration data supports the fact that dealers have worked hard at

moving new cars into the market with registrations up 13.7% on the same period last year.

Another important KPI to address is the jump in pre-reg adverts, which have increased by a significant 13.2% on the August figure. This is higher than usual and spotlights the pressure on dealers to move new EVs into the market. Used EV adverts increased by 3.4%.

However, despite this increase in volume of used cars in the market the Average Days to Sell have dropped once again to 29.5 which suggests there is still consumer demand for certain models and derivatives.

Key UK Economic Indicators

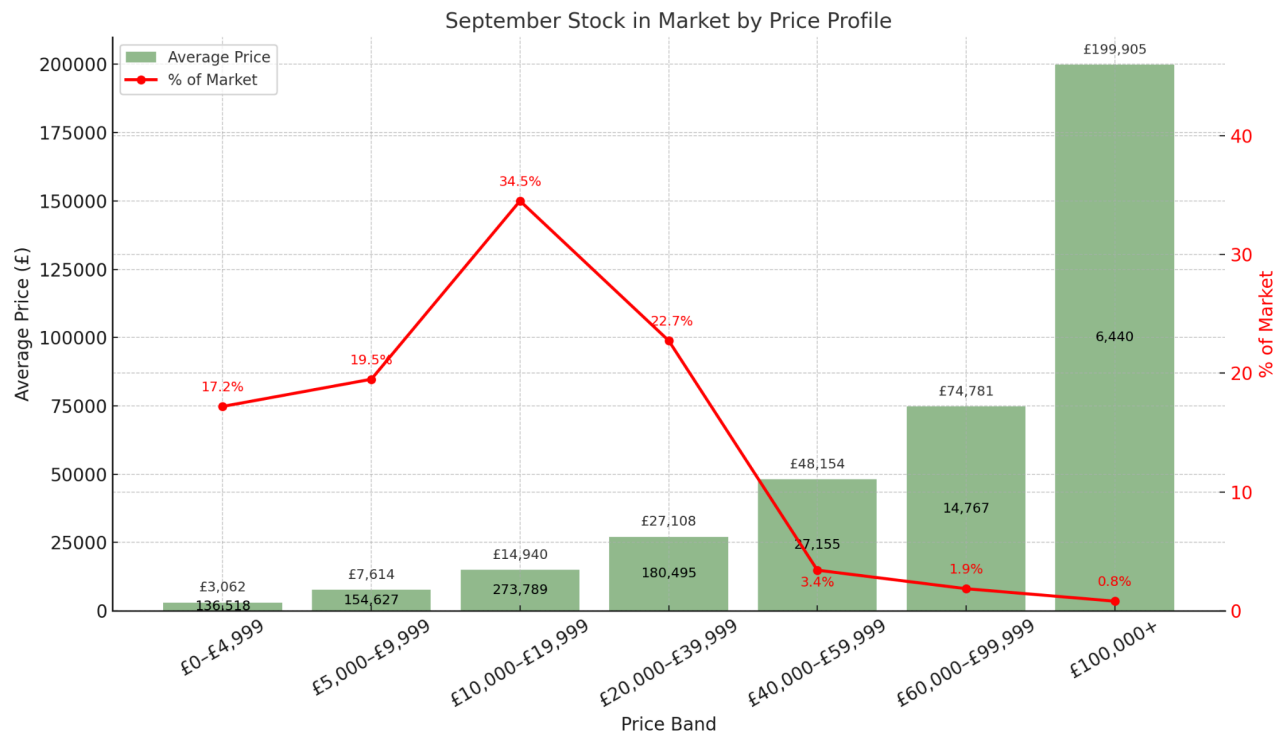


Data Courtesy of Trading Economics, Gemini AI and www.gov.uk

September was a tough month politically and the economy was surprisingly resilient given the circumstances. Inflationary pressures are evident across all sectors and the chances of further bank rate decreases this year have probably now disappeared. Consumer confidence has dipped to -19 and although the business confidence figure is stable at -27 this is a quarterly updated figure and set to fall further later in the year.

In addition, the annual party conference season is underway and the government is facing challenges in all areas with the prime minister's popularity falling further amidst a backdrop of impending tax increases in the coming budget, the ongoing impact of the national insurance increases and unease over immigration. The coming weeks will be extremely interesting.

Average Used Car Value by Price Band



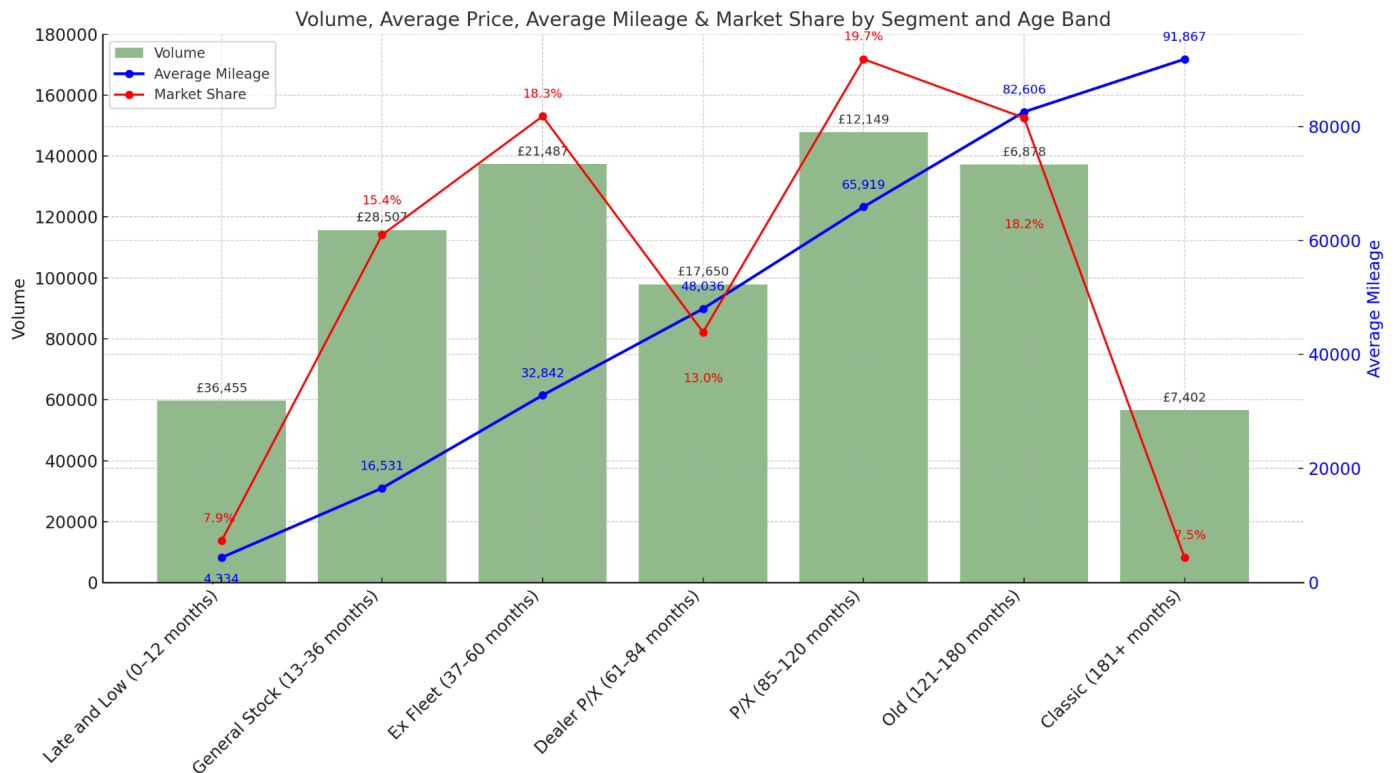
Data Powered by Brego Insight

The previous 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.

In comparison to last month the % of market share for sub £5k cars has dropped by 0.5% and the £5k to £10k share by 0.3% suggesting that there has been an increase in consumer demand for cheaper cars. Conversely the market share for cars priced between £20k and £40k has increased by 0.8% which supports the drop in consumer confidence and commentary that consumers are less willing to commit to higher value purchases.

Market Analysis by Age Profile

This is a complex chart and looks at the market by sector/stock profile combined with the Average Price advertised 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.



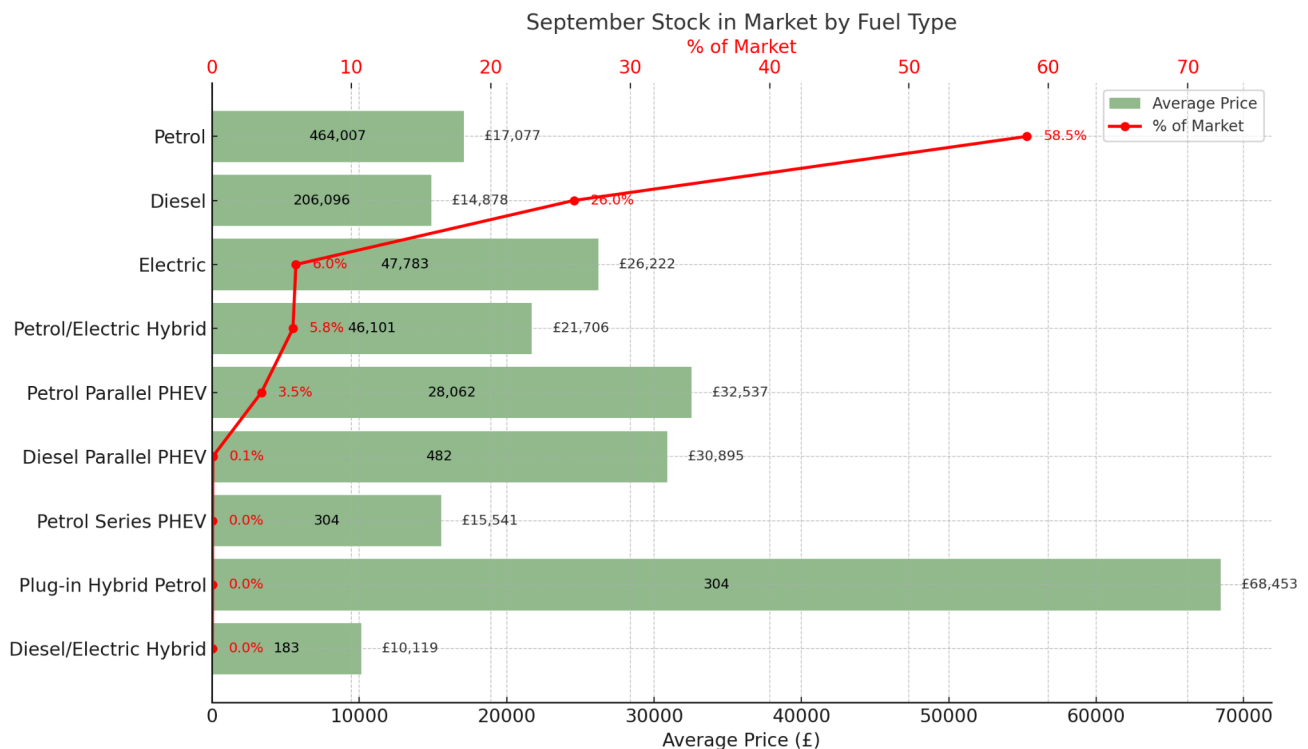
Data Powered by Brego Insight

This month's data is broadly similar to August although there have been some subtle changes. Specifically the market share for late and low product has dropped by 0.6% whilst the average price has increased by close to £1,000 suggesting more cheaper young cars have been sold. General Stock has increased by 0.4% with a £700 increase in average price which suggests once again an increase in sales for cheaper models either at a slower rate or there are more two and three year old cars in the market which is possible due to the increase in new car sales.

Average mileage across all profiles has remained almost the same with drops noted in profiles of vehicles up to 3 years of age.

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.



Data Powered by Brego Insight

In August we saw an increase in the number of petrol cars on sale with a market share of 55.2% and during September this number has further increased with market share now standing at 58.5% coupled with a jump in average price of just over £1,500. From the previous charts we can see that there has been an increase in market share for 2 to 5 year old cars and this might imply that buyers of new cars are coming away from petrol and shifting specifically to EVs and hybrids. The growth in new EV sales would support this view.

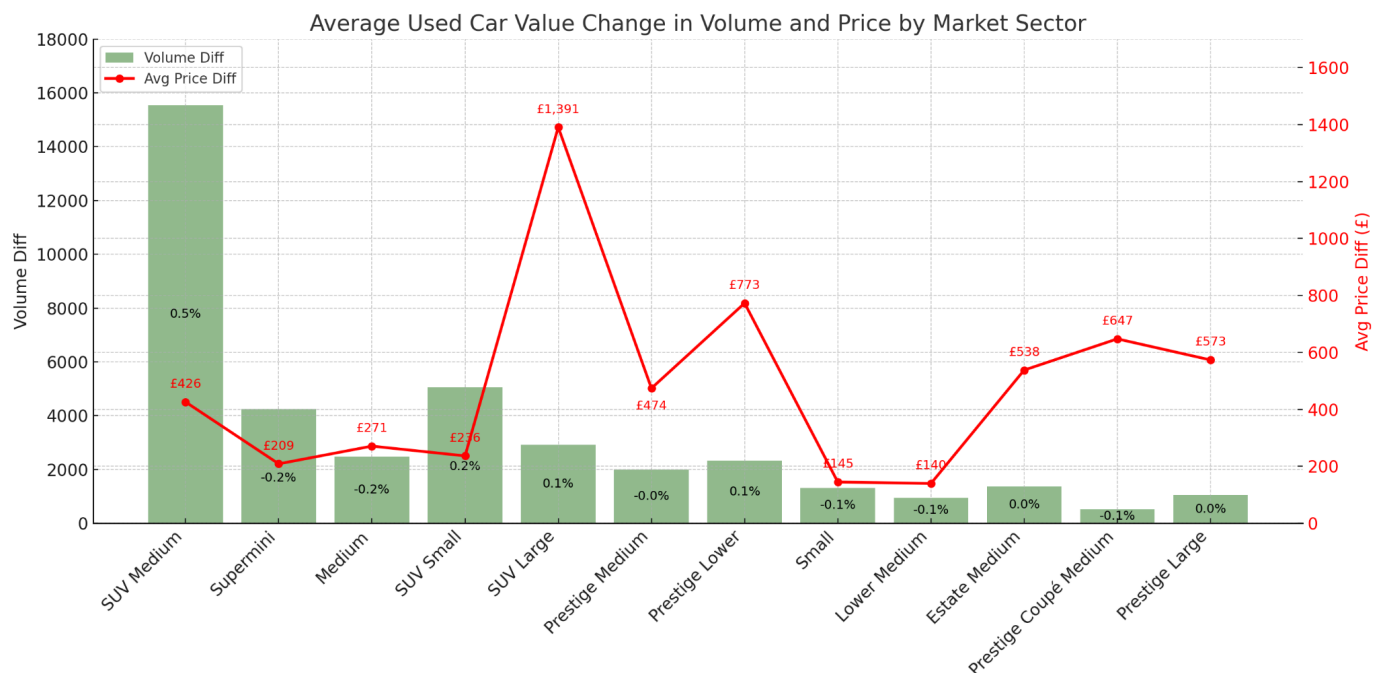
Diesel market share dropped by 4.4% last month with a drop in average price of around £500. The change in the diesel data is becoming a consistent downward trend which implies either greater sales or more likely is a reflection of lower new car sales in recent years. Using the Brego Insight tool within the platform allows further detailed analysis of what is actually driving this behaviour.

From an EV perspective we see further stability in the data with a minimal 0.1% change in market share and 1% increase in average price. There are two potential factors in play here, the first being that for now the consumer demand is consistent and where we know

that more cars are coming to the market they are finding homes with buyers. Secondly buyers are willing to make the jump to an EV due to the value in comparison to a fossil fuel alternative.

Average Used Car Value by Market Sector

The bars show the difference in volume of cars advertised in the market with the % change shown by the tags in bars. The red line shows the month on month change in the Average Price by sector.. This chart covers the 12 largest market sectors accounting for 86.6% of the whole market:-



Data Powered by Brego Insight

Whilst Medium SUVs hold the largest market share at 26.5%, down 0.1% on the August figure, it is interesting to note that the average price for all of the top 12 largest market sectors has increased. Of specific note is the increase of £1,391 for Large SUVs representing a 3% increase over the August average. The largest % increase during September was for the Prestige Lower sector which is 105% or £773.

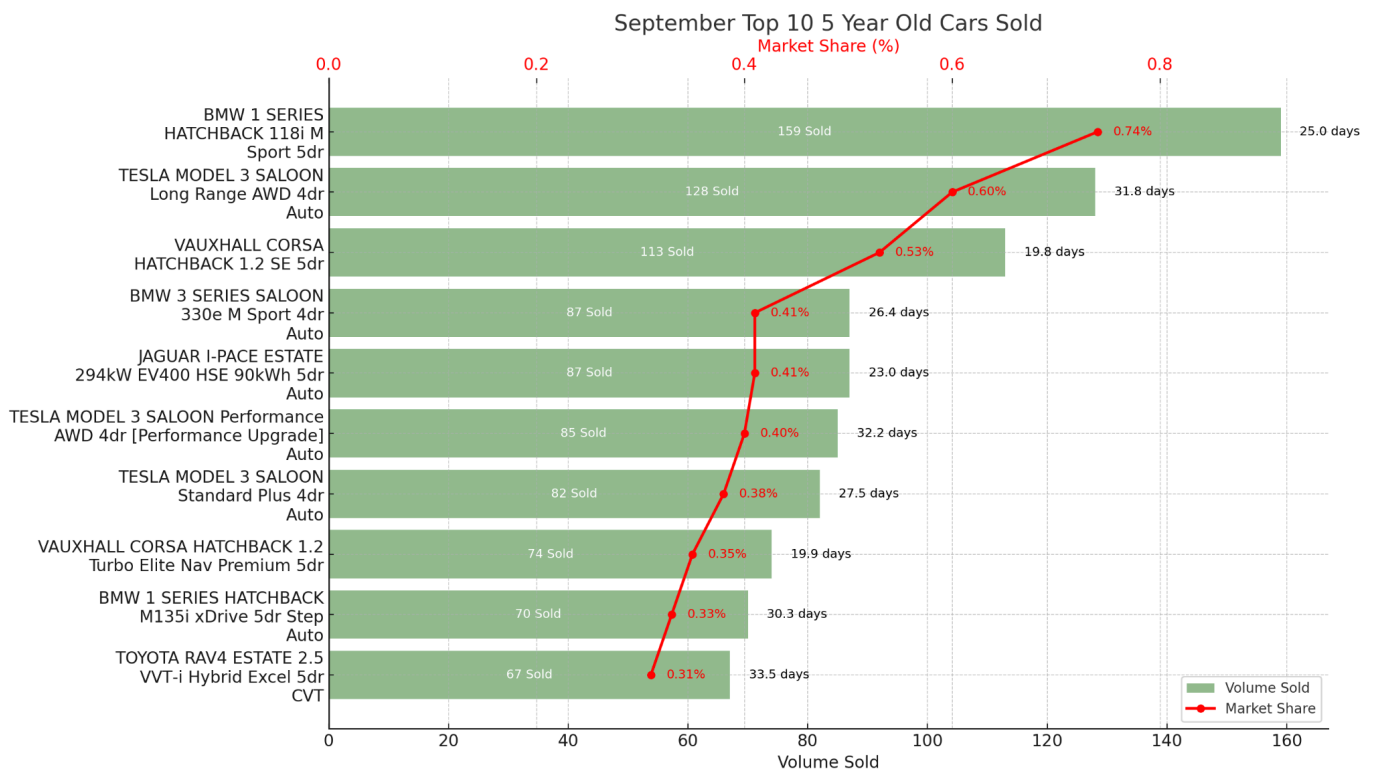
For context the Best Selling Large SUVs for the month were:-

| Rank | Model Range | Sold Volume | Market Share | Avg Sale Price (£) | Avg Days to Sell |
|------|------------------------------|-------------|--------------|--------------------|------------------|
| 1 | Land Rover Range Rover Sport | 2,428 | 19.39% | £39,452 | 38.9 |
| 2 | BMW X5 | 1,542 | 12.32% | £37,014 | 34.7 |
| 3 | Land Rover Discovery | 1,389 | 11.09% | £30,644 | 35.3 |
| 4 | Volvo XC90 | 1,387 | 11.08% | £35,081 | 31.7 |
| 5 | Land Rover Range Rover | 1,261 | 10.07% | £52,061 | 47.8 |

Data Powered by Brego Insight

Top 10 Used 5 Year Old Cars Sold

The bars in this chart show the Volume of Cars sold by individual top selling 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

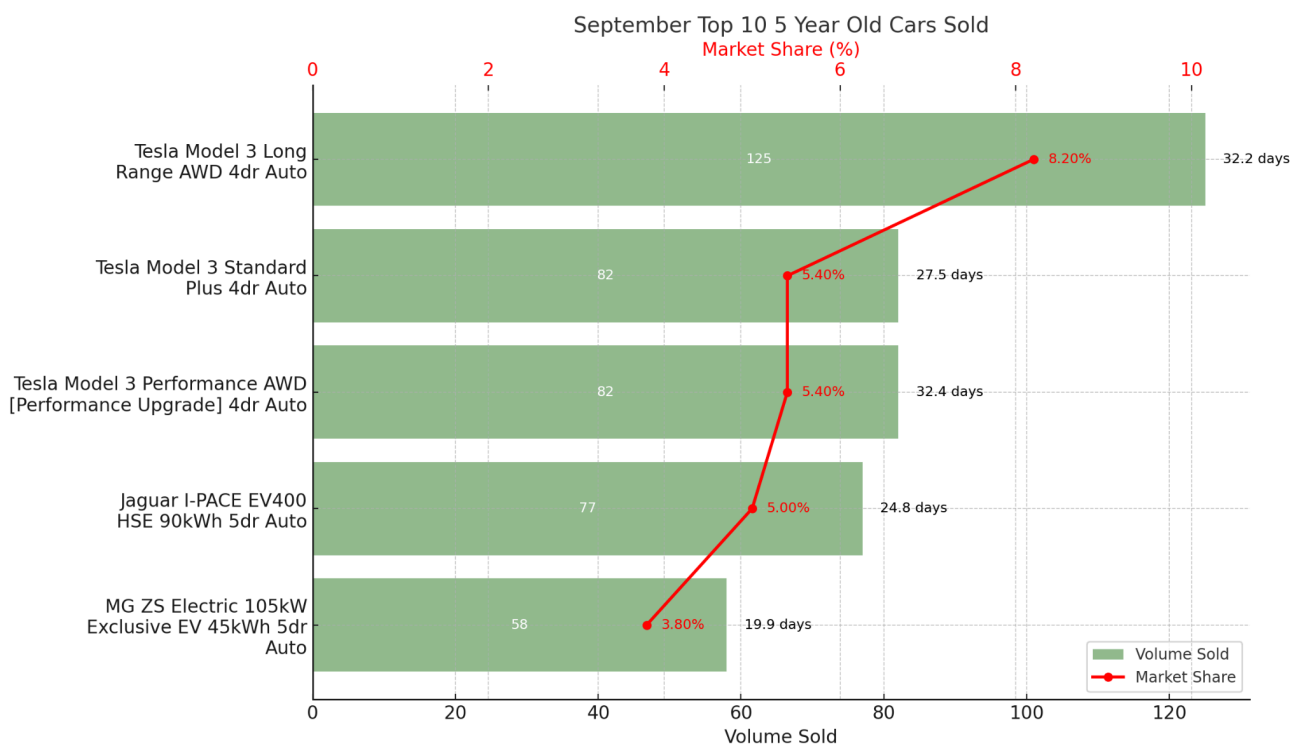
Last month we looked at the top 10 best selling three year old cars and this chart looks at five year old cars. There are four EVs in the top 10 which is one more than last month which is perhaps a bit of a surprise although maybe more shocking is there are no Nissan Leafs in this list.

Of note is that there are three BMWs and Teslas, as well as two Vauxhall Corsas in the list meaning overall there is just representation from five different manufacturers. The fastest selling cars in the top 10 are the two Vauxhalls which again may come as a surprise but the price point is likely to have driven this combined with the total volume of these in the whole market.

It is always fascinating to look at data based on the top sellers and for users of the Brego Platform, the Brego Insight tool allows you to deep dive into the whole market data and develop stocking and sale strategies based on specific vehicles suitable for your location and funding profile.

Top 5 Used 5 Year Old EVs Sold

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



Last month we looked at the top 5 best selling three year old EVs in the market overall and this month we focus on the five year old EVs. Once more Tesla takes the majority of spots but with three instead of four of the top 5. It is interesting to see that the three Tesla models are the slowest sellers of the top 5 with the fastest selling honours going to the MG ZS which also has the lowest average price at £9,702 which is £4,679 lower than the next cheapest on the chart. This suggests that consumers like the value offered by the lower price point offered by the MG despite the fact it also has the lowest driving range.

Summary

The used car market during September has performed well given the challenges in the economy and the fact that the new registration plate was introduced. Lower consumer confidence and the threat of further taxation in the upcoming budget could have had a dramatic effect on sales but there is market wide relief that positive retailing has continued albeit with more challenging consumer buying attitudes.

The significant boost in new car sales for the month is good news although the number of pre-registered cars may impact on late plate used car values if they are not quickly cleared from the used car forecourts. We will know more by next month.

The coming weeks are set to be challenging as the market heads towards a naturally quieter period but thus far the sector has been resilient in the face of adversity and let's hope this position continues.

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.