



Monthly Market Intelligence

The latest insight from the UK's largest new and used car platform.

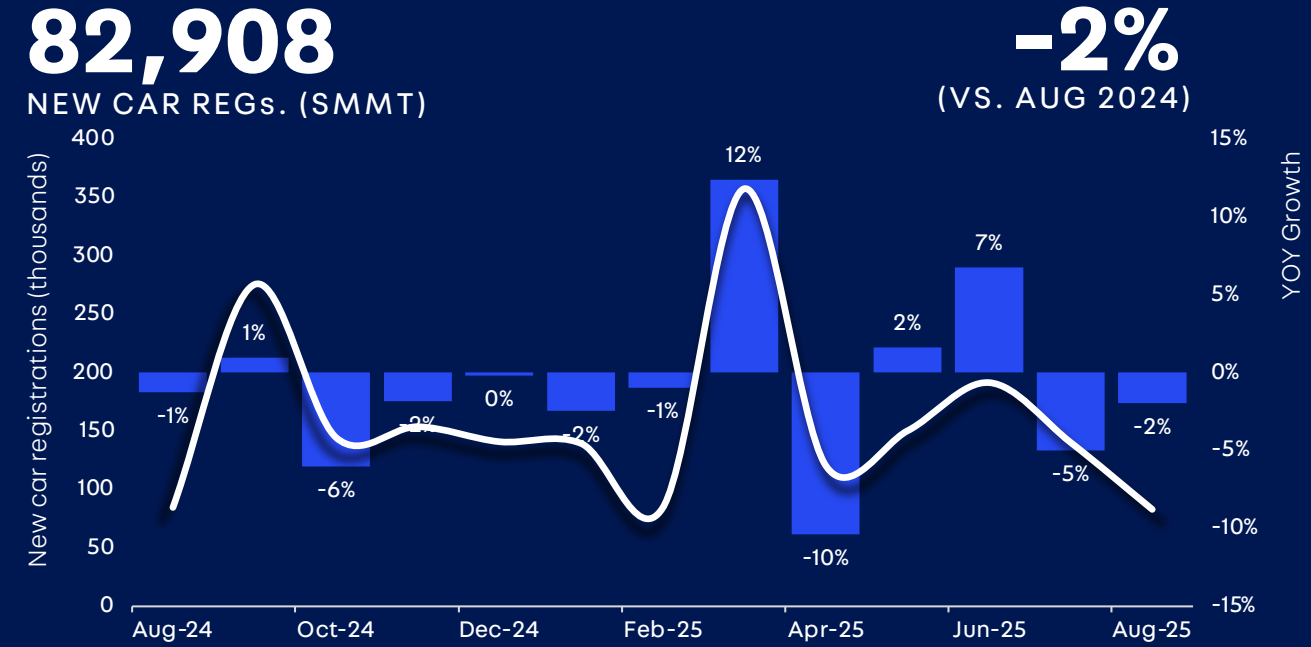
AUGUST 2025

 Autotrader

Used and new car markets show stability in line with August trends, while EVs gain momentum

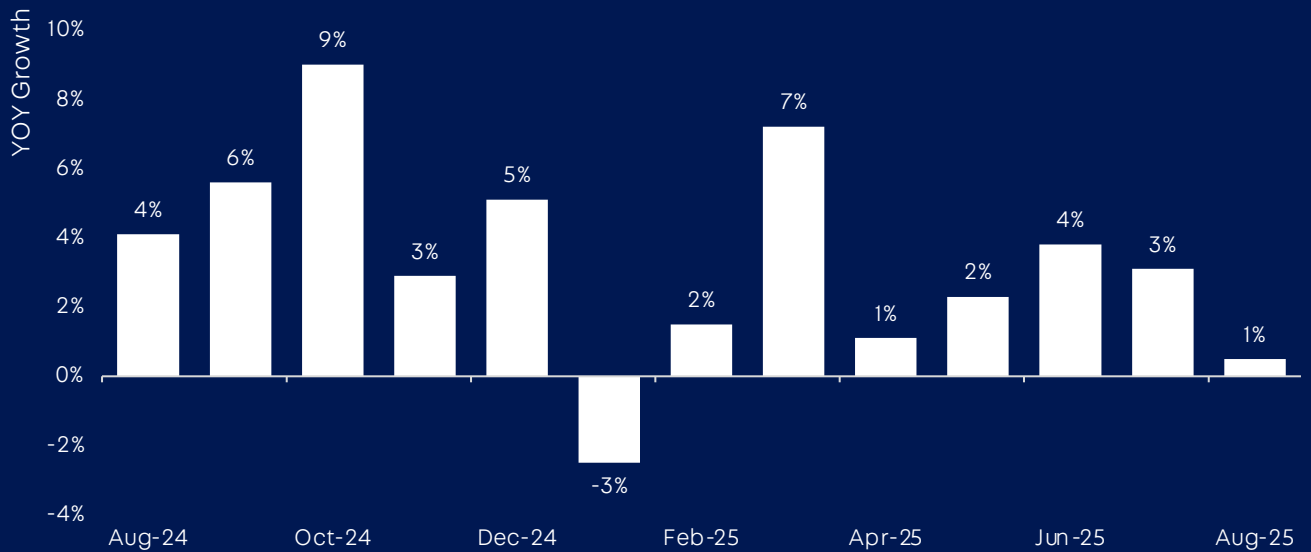
NEW CAR REGISTRATIONS

New car registrations fell by 2% year-on-year in a typically small month for the market ahead of the September plate change. Electric car registrations rose by 15% compared to prior year and reaching a 27% share, the highest recorded in 2025, but the full impact of the new Government EV grant will be felt in the coming months. This aligns with trends seen in August 2023 and 2024, where low overall registration volumes and high fleet activity contributed to elevated EV shares for the month. Overall fleet registrations fell back 5% on last year whilst retail sales grew slightly by 1%.



USED CAR SALES (YEAR-ON-YEAR)*

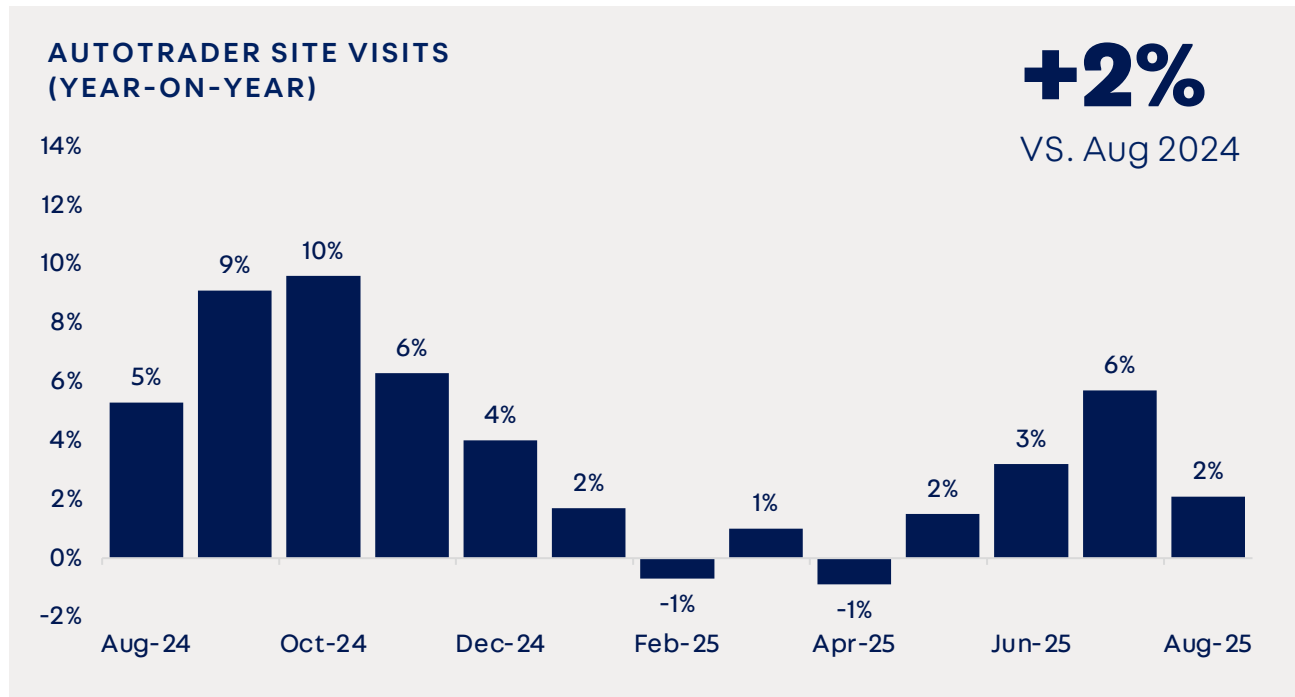
Used car sales in August saw a modest 1% year-on-year increase based on stock removed from Autotrader, marking the 7th consecutive month of growth. Independent retailers and supermarkets drove this momentum, supported by strong consumer demand and improved supply of 1-3 and 5-10-year-old cars. By contrast, franchise retailer sales fell 3% compared with last August.



*Data based on vehicles removed from Autotrader. We assume that the vehicle is sold on the last day we saw it on our site. Strong historical correlation to official SMMT used car transactions and retailer data. Ongoing improvements to the data means historic figures may change slightly each month.

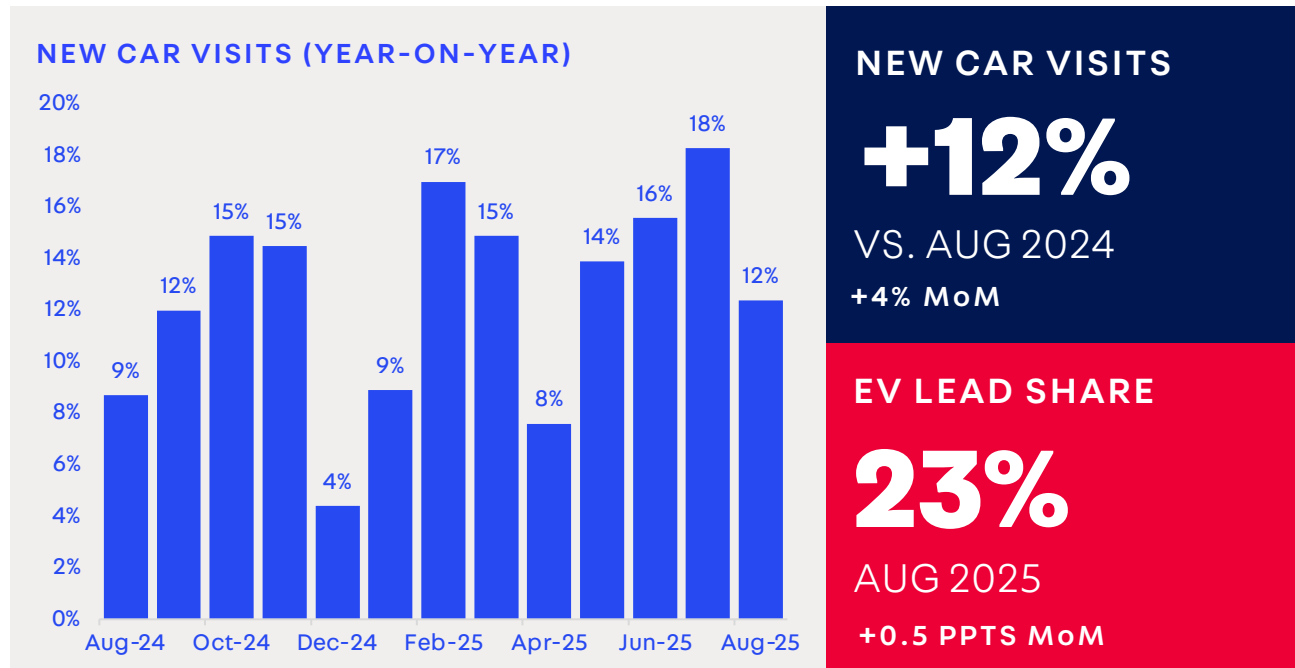
AUTOTRADER AUDIENCE

Over the summer, Autotrader saw an average of 84 million visits each month, up 4% year-on-year as car buying activity remained healthy amid warmer, sunny weather. Historic trends indicate that consumer interest in September will remain strong; manufacturer marketing activity will stimulate interest, and with 9 in 10 new car considerers also looking at used cars the month is likely to be busy.



NEW CAR ACTIVITY

Buyers researching ahead of September helped drive new car visits up by 12% in August versus last year, with a 4% month-on-month increase in activity. The share of new car adverts with discounts hit 82%, growing by 3 percentage points compared with July. The average discount on a new car was 9.8%. Despite having the highest average discount (11.4%), the proportion of discounted electric cars listings remained lower than for all other fuel types.



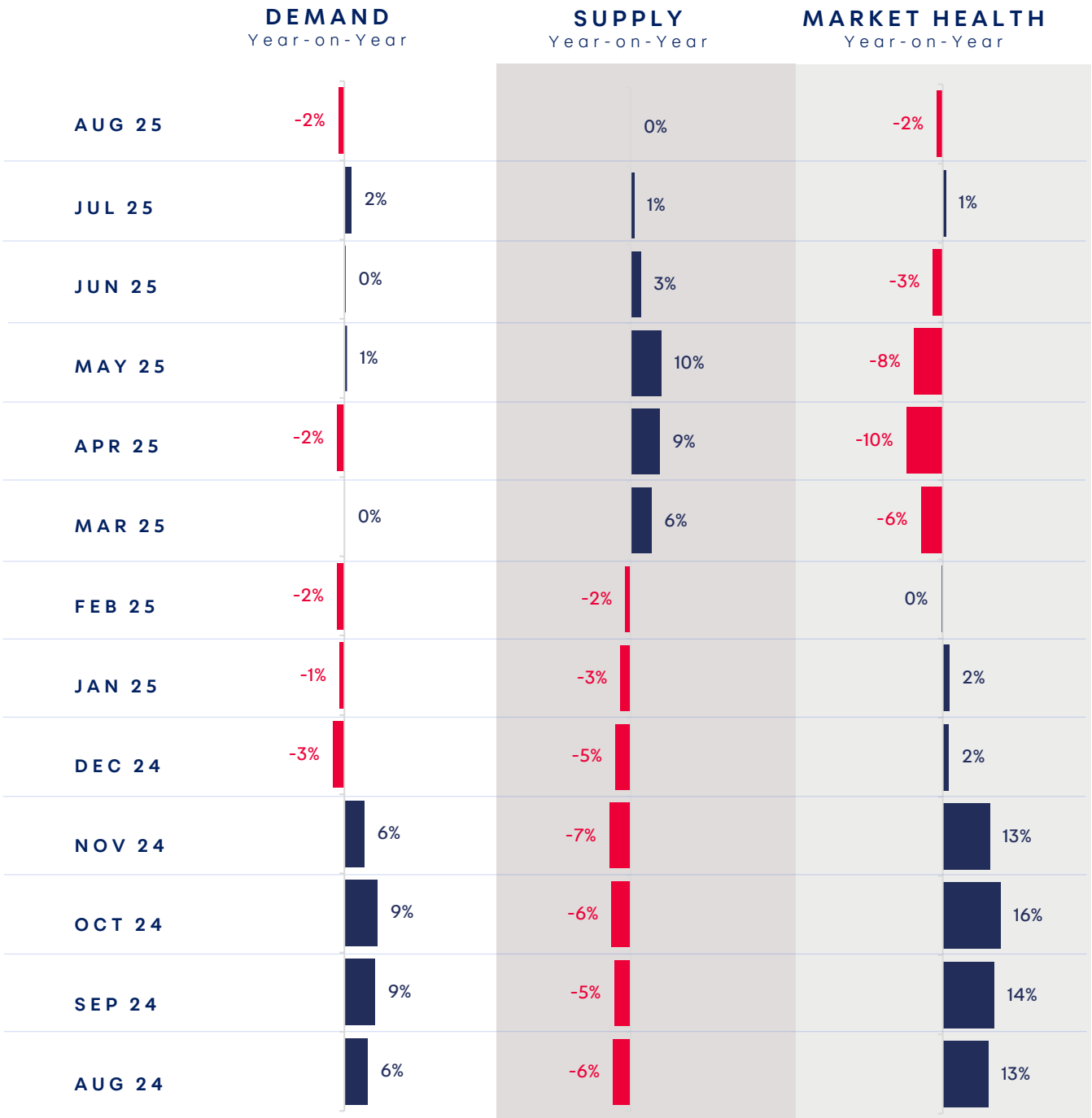
¹Source: Autotrader Consumer Survey Data (n=1,111)

USED CAR MARKET HEALTH

Used car supply was stable year-on-year (0%), while demand dipped 2% against a strong August 2024, producing a -2% market health position. Cars sold every 29 days on average – one day quicker than last year and two days faster than August 2023. Vehicles aged 5-10 years saw the strongest consumer demand and were the fastest selling as a result, turning every 27 days, and the fastest through franchise and supermarket retailers.



The Market Health metric shows the ratio of supply vs. demand compared to the previous year

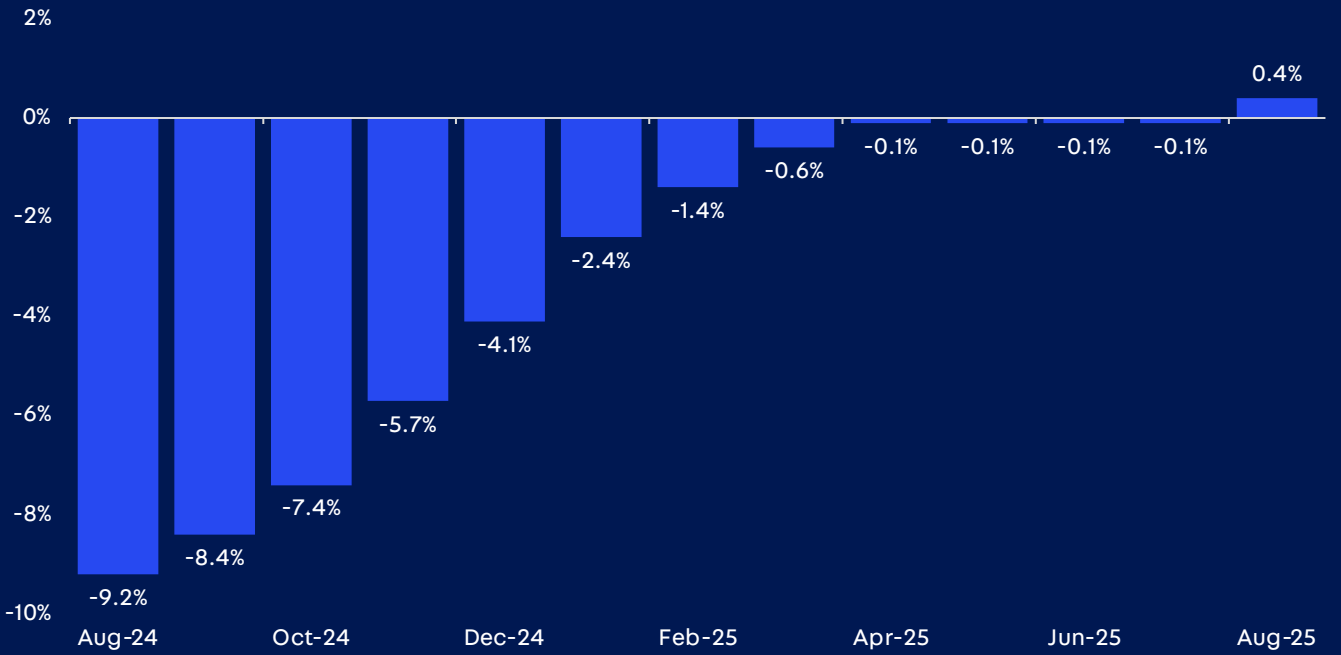


USED CAR RETAIL PRICE GROWTH

Used car prices rose by 0.4% year-on-year in August, marking the first positive movement in pricing since August 2023. The market price growth was led by older vehicles, with 10-15-year-old vehicles up 6.2% and 15+ year vehicles up 6.3%. The 5-10-year segment saw positive pricing in spite of slightly weakened demand (-1.1%) and stable supply (+0.3%). Retail prices have now been stable for most of 2025 and continue to reflect resilience and underlying balance in most of the market.

YEAR-ON-YEAR USED CAR RETAIL PRICE GROWTH

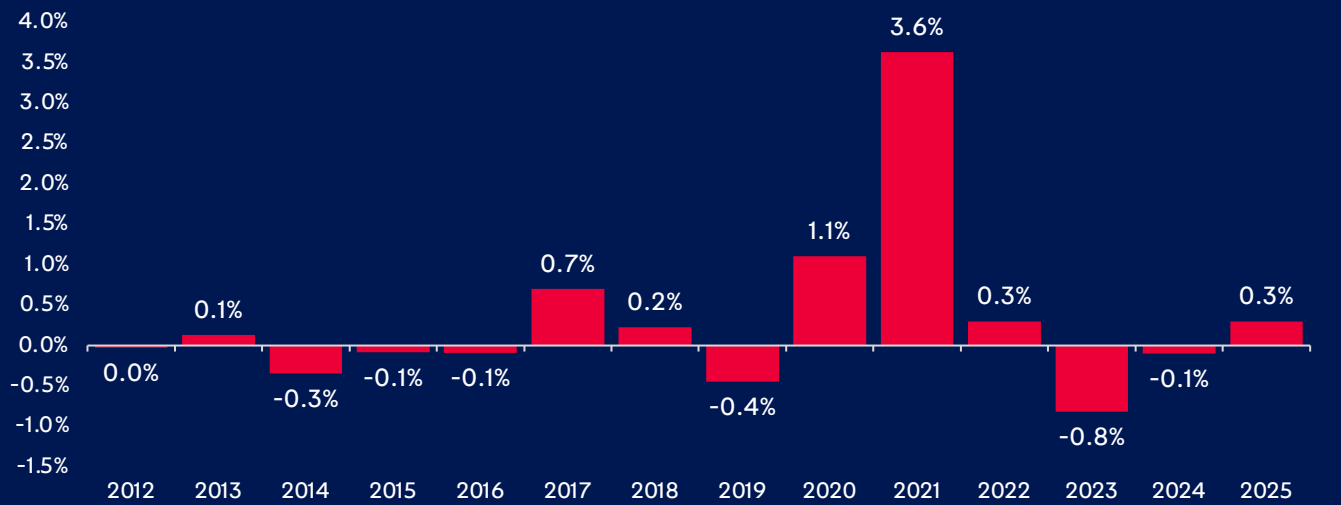
Like-for-Like Basis



On a month-on-month basis, used car retail prices increased 0.3%, the first positive movement for the month since 2022 – all age cohorts, except vehicles under one year old, experienced growth. The 3-5-year cohort recorded the largest increase at 0.6%, closely followed by the 1-3-year cohort, which rose 0.5%. All fuel types saw positive movement from July to August, with electric vehicle prices increasing 0.4% month-on-month.

MONTH-ON-MONTH USED CAR RETAIL PRICE GROWTH: AUGUST

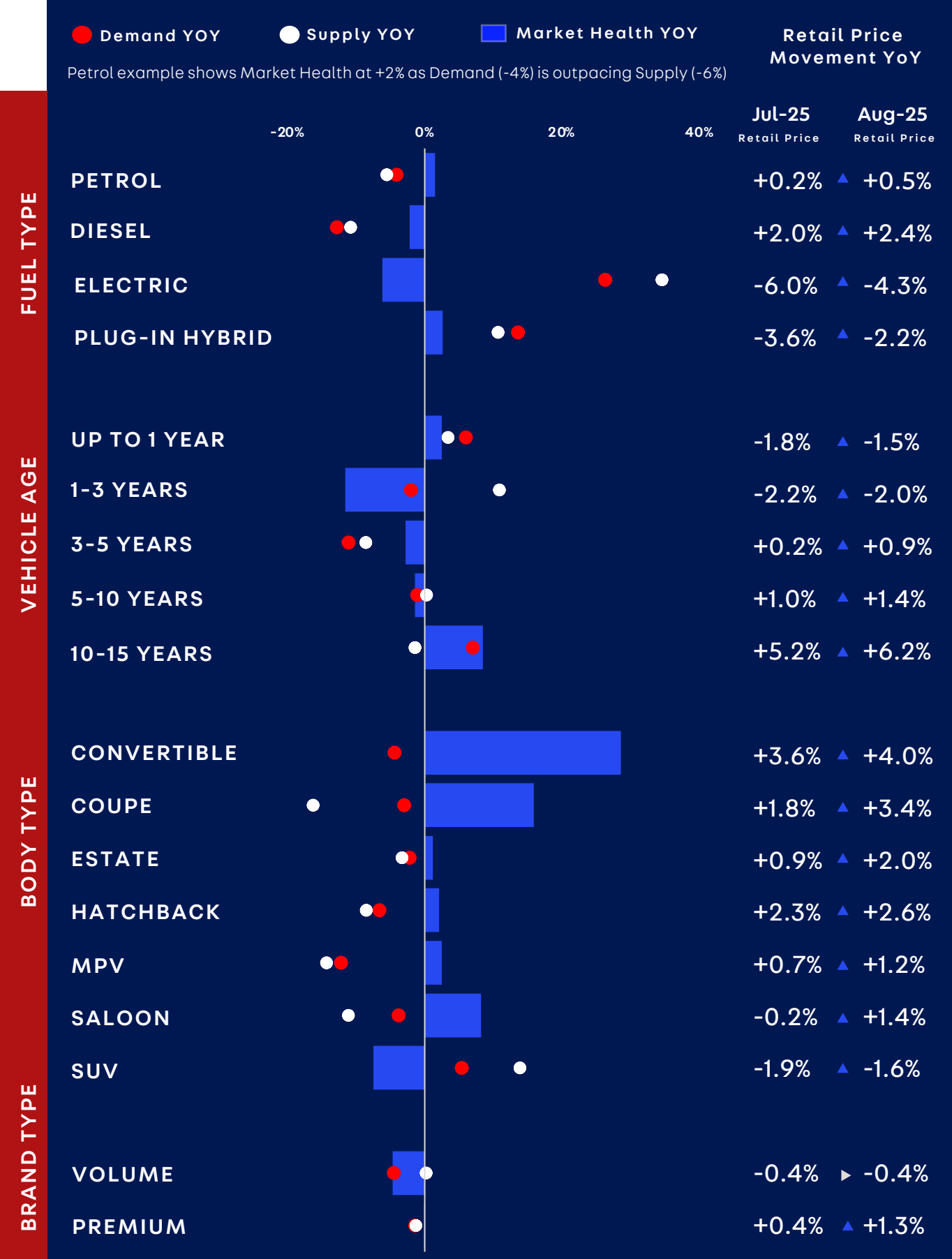
Like-for-Like Basis



Retail price observations. Year on year like-for-like pricing. Removes the impact of stock mix shift to reflect true value adjustments

DEMAND, SUPPLY, MARKET HEALTH & PRICE MOVEMENT (YOY GROWTH)

Charts show Market Health (blue bar), Demand (red) and Supply (white), with pricing movements. The monthly movement of retail prices is illustrated by blue/red arrows.



In focus this month

The September plate-change: is pre-registering back?

The sluggish new car market seen in 2024 has continued into 2025, with self-registrations holding steady year-on-year.

While Q2 experienced a larger-than-usual seasonal rise, volumes remain well below pre-pandemic levels and are expected to stay subdued as we head into the September plate change.

Year-to-date
pre-reg volumes
back -43% vs. 2019

NUMBER OF PRE-REGISTERED VEHICLES ADVERTISED

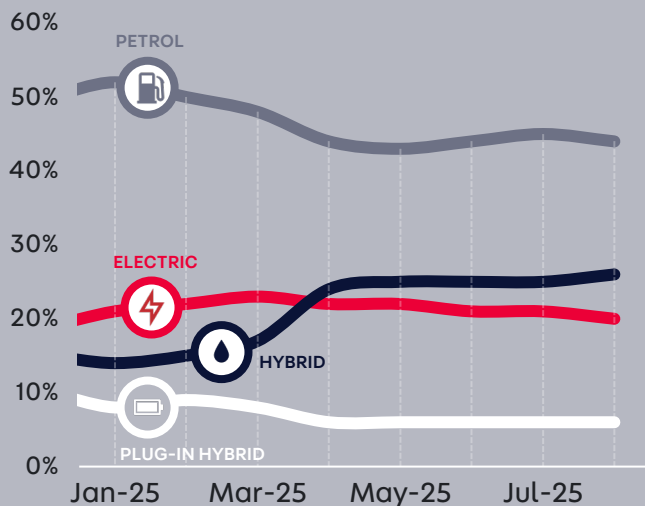
Autotrader. Vehicles advertised with less than 100 miles



Pre-registering EVs has been a strategy to meet ZEV mandate targets, but with hybrids now contributing towards mandate compliance, their share of pre-registration has increased while EVs have edged down slightly. In August, only two electric models featured in the top 10 most pre-registered vehicles advertised on Autotrader.

FUEL MIX OF PRE-REGISTERED VEHICLES

Advertised on Autotrader. Less than 100 miles



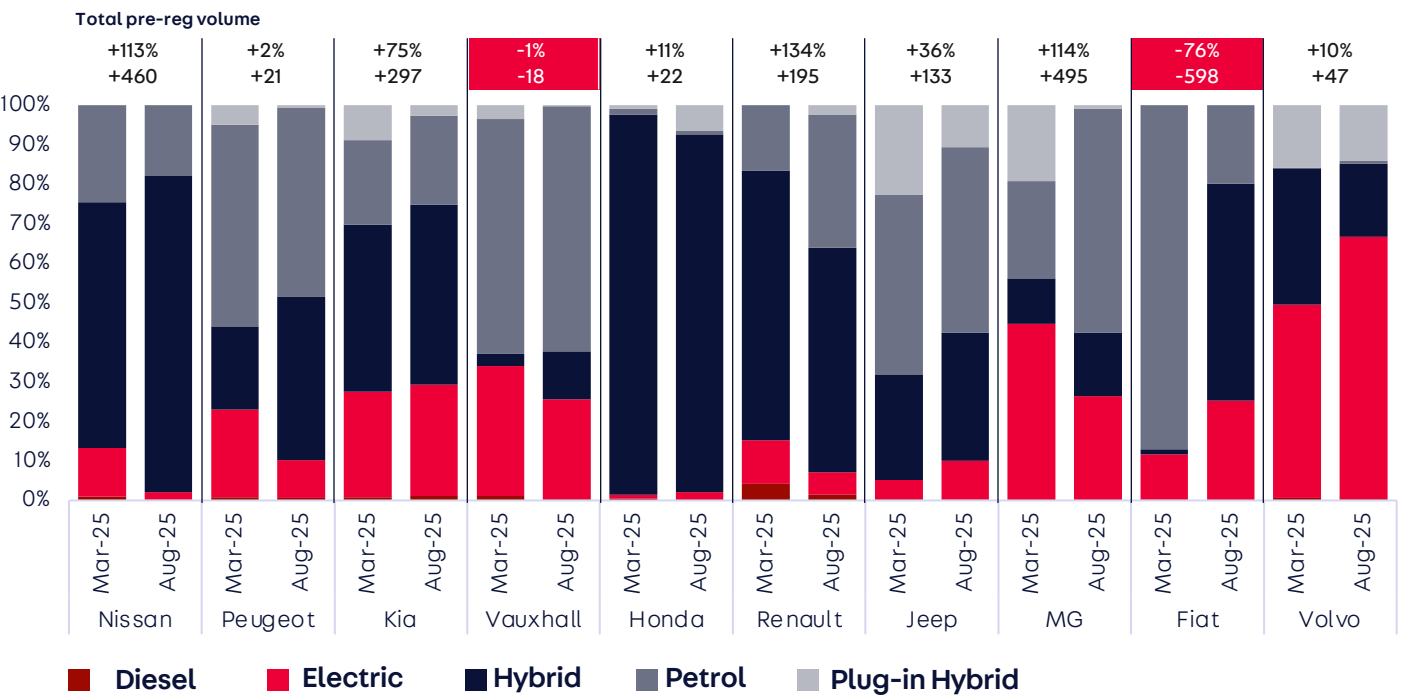
TOP VOLUME PRE-REGISTERED VEHICLES

MODEL	FUEL TYPE	VOLUME
Vauxhall Corsa	Petrol	680
Nissan Qashqai	Hybrid	434
Peugeot 208	Petrol	358
Vauxhall Mokka	Petrol	318
MG MG HS	Petrol	287
Volvo EX30	Electric	281
Kia Sportage	Hybrid	255
Peugeot 208	Hybrid	253
Vauxhall Corsa Electric	Electric	237
Vauxhall Grandland	Hybrid	234

With less pressure to push EVs, some brands have shifted their pre-registration focus to more cost-efficient petrol and hybrid models. This allows them to achieve quarterly targets by pre-registering high-volume models at lower cost and with reduced residual value risk. This approach could also indirectly benefit EVs. With fewer nearly-new EVs entering the market, the downward pressure on younger used EV values should ease.

BRAND FUEL MIX

Top 10 brands by hybrid pre-registered volumes advertised on Autotrader. Less than 100 miles



Pre-registered vehicles face tough competition from attractive new car finance offers, which can lower demand and extend selling times. This is particularly pronounced in the EV market, where 0% APR finance and other incentives make new cars more appealing than nearly-new alternatives. With additional pre-registrations expected in Q4, clear communication of consumer benefits and strong merchandising will be paramount for retailers managing nearly-new stock.

VEHICLE FINANCE OFFER COMPARISON

Manufacturer new car finance vs. nearly new finance offers on Autotrader. Term and deposit the same.

Vauxhall Corsa Yes
Petrol

NEW	NEARLY NEW
£228	£262
PCP Monthly Payment	PCP Monthly payment

Nissan Qashqai N-Design
Petrol Hybrid

NEW	NEARLY NEW
£35,899 RRP	£31,403 RRP
£444 Monthly Payment	£552
£2.5k OEM contribution	11.7% APR

Volvo EX30 Ultra
Electric

NEW	NEARLY NEW
£41,860 RRP	£31,995 RRP
£507 Monthly Payment	£516
0% APR	10.9% APR