



Monthly Market Intelligence

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

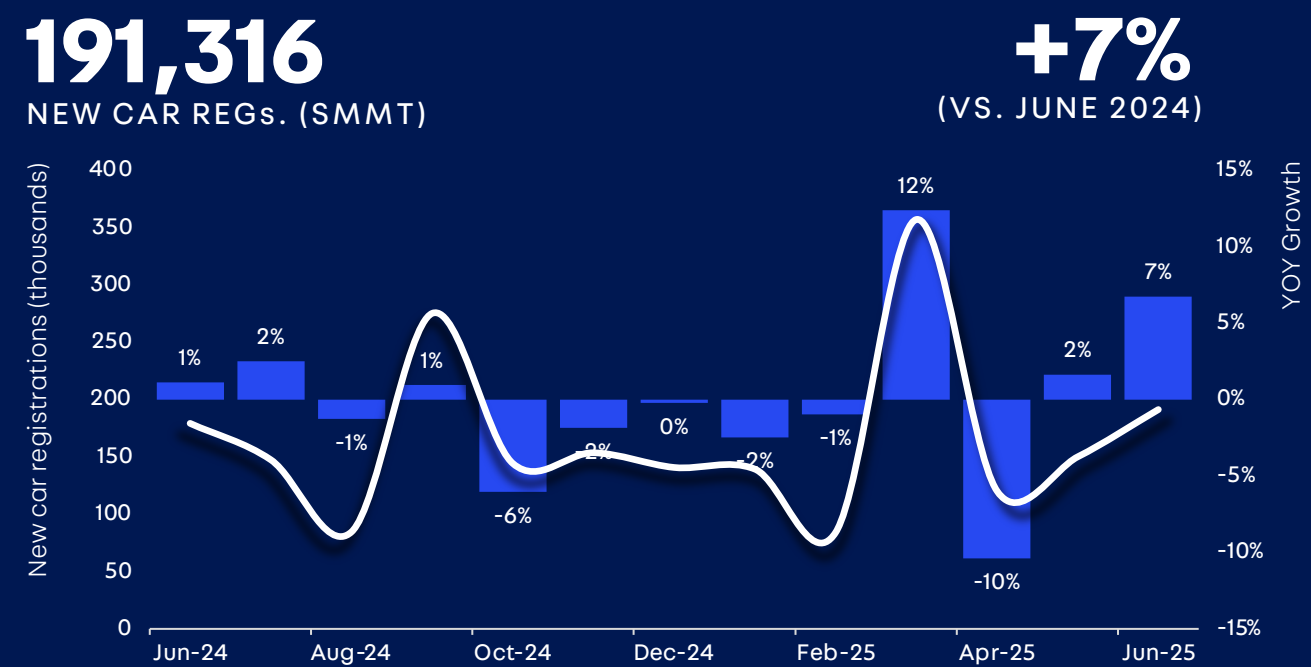
JUNE 2025

 Autotrader

The first half of 2025 closes strong with growth in sales, stable pricing and fast speed of sale

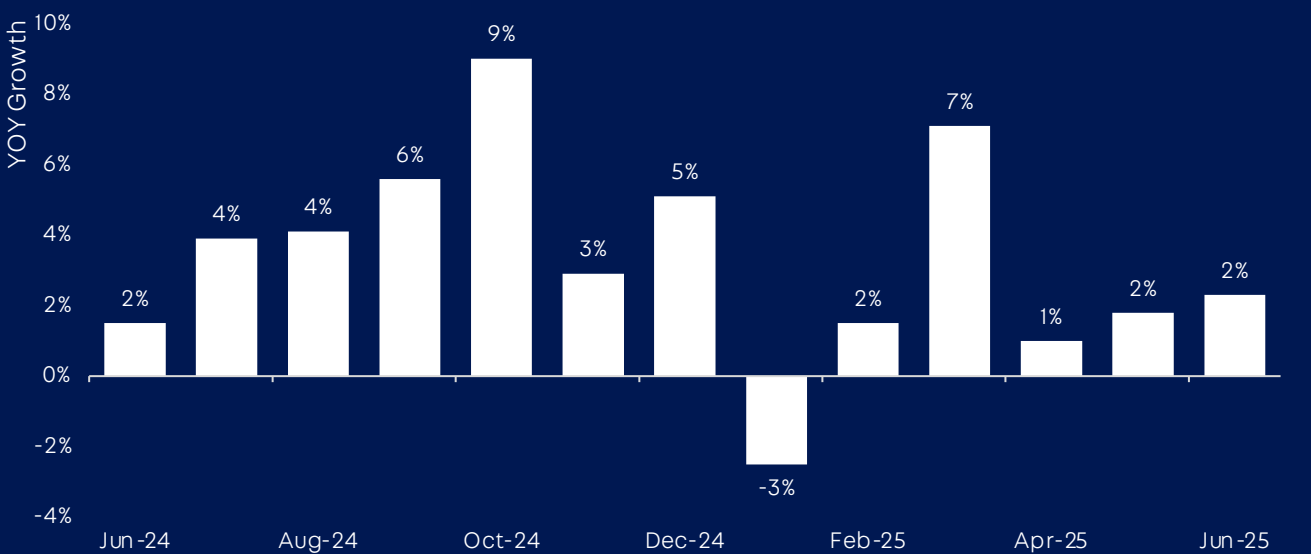
NEW CAR REGISTRATIONS

New car registrations in the first half of 2025 reached their highest level since 2019, with June marking the second consecutive month of growth—up 7% year-on-year. While fleet sales continued to dominate the market, private retail demand also outperformed the previous year, rising by 6%, supported by significant manufacturer discounting. Electric vehicle registrations increased by 35% compared to the first half of 2024; however, their market share remains at 22%, falling short of the 28% target set by the Zero Emission Vehicle (ZEV) mandate.



USED CAR SALES (YEAR-ON-YEAR)

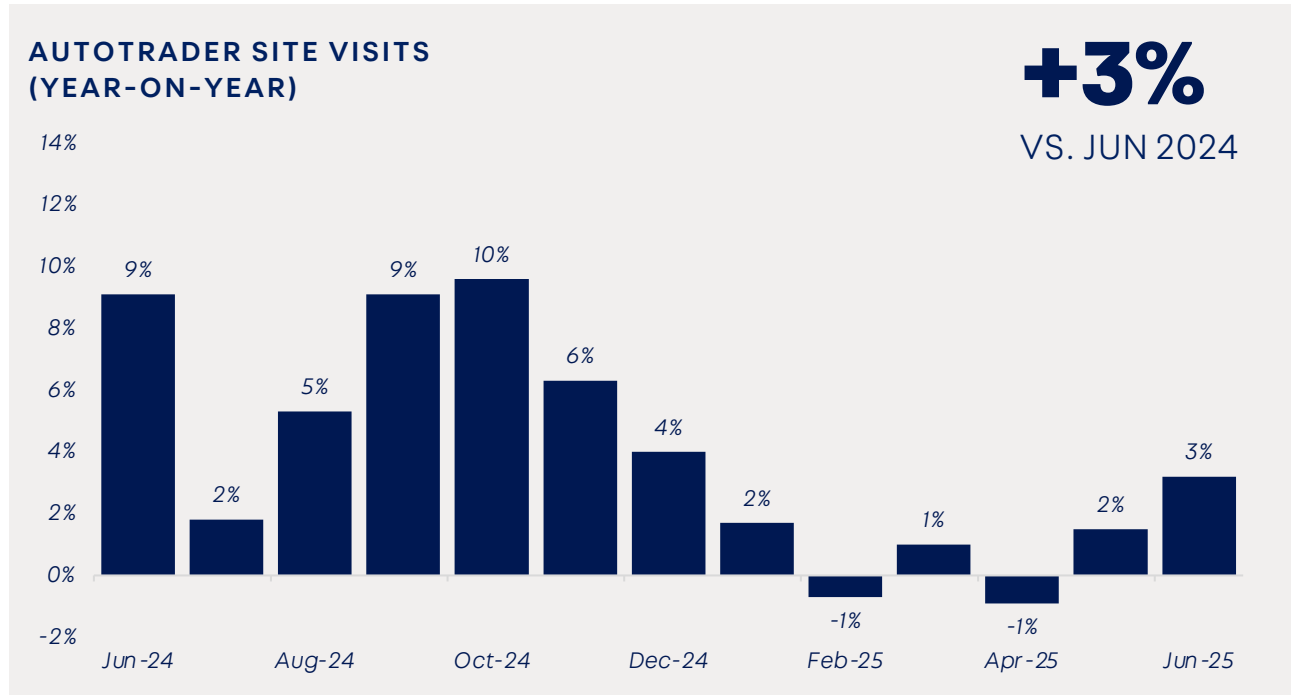
Used car transactions grew +2% compared to last year as a result of strong consumer interest; June capped off a strong H1, with sales 2.0% ahead of 2024 and now within 1% of 2019. Performances between Franchise and Independent retailers differed with Franchise sales down -1% versus last year, and Independent retailers continuing to see positive growth , increasing +6%.



*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.

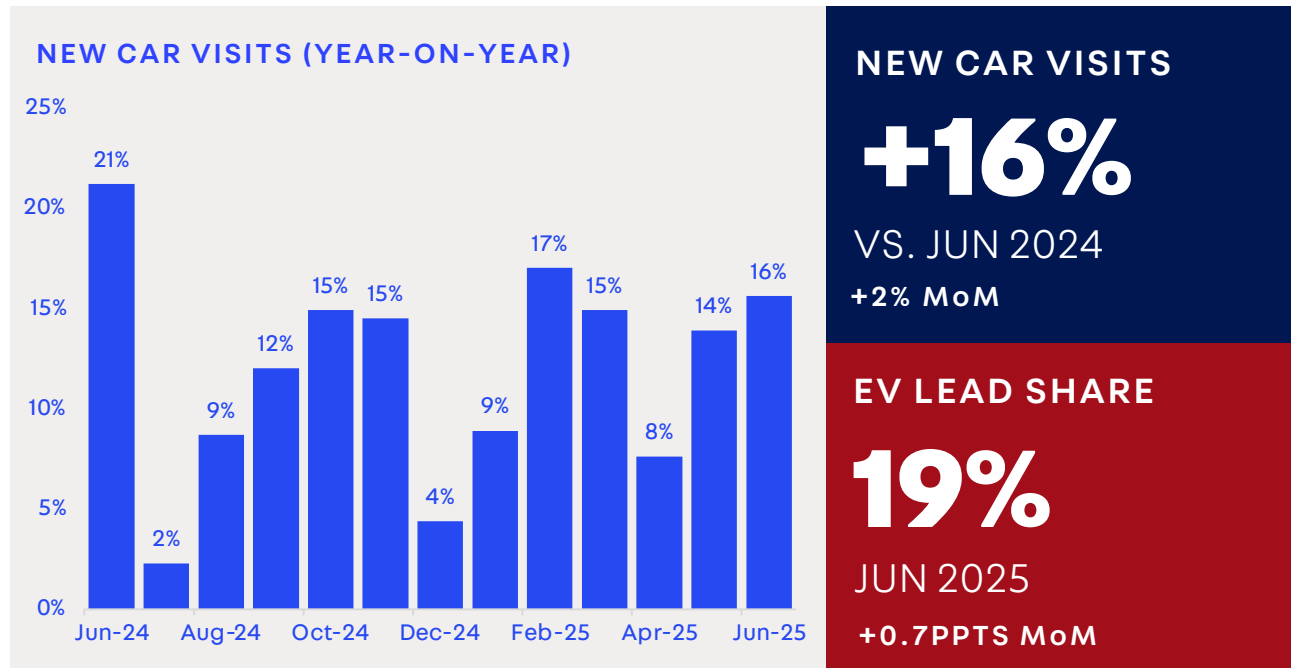
AUTOTRADER AUDIENCE

Site visits to Autotrader hit a new high for the month of June, reaching over 82 million and growing +3% compared to last year, resulting in a record H1. This was at the same time as GfK reported improved consumer sentiment and increased optimism in the economic outlook. The automotive market enters the second half of the year with robust activity, despite caution around tariff disputes and geopolitical tensions.



NEW CAR ACTIVITY

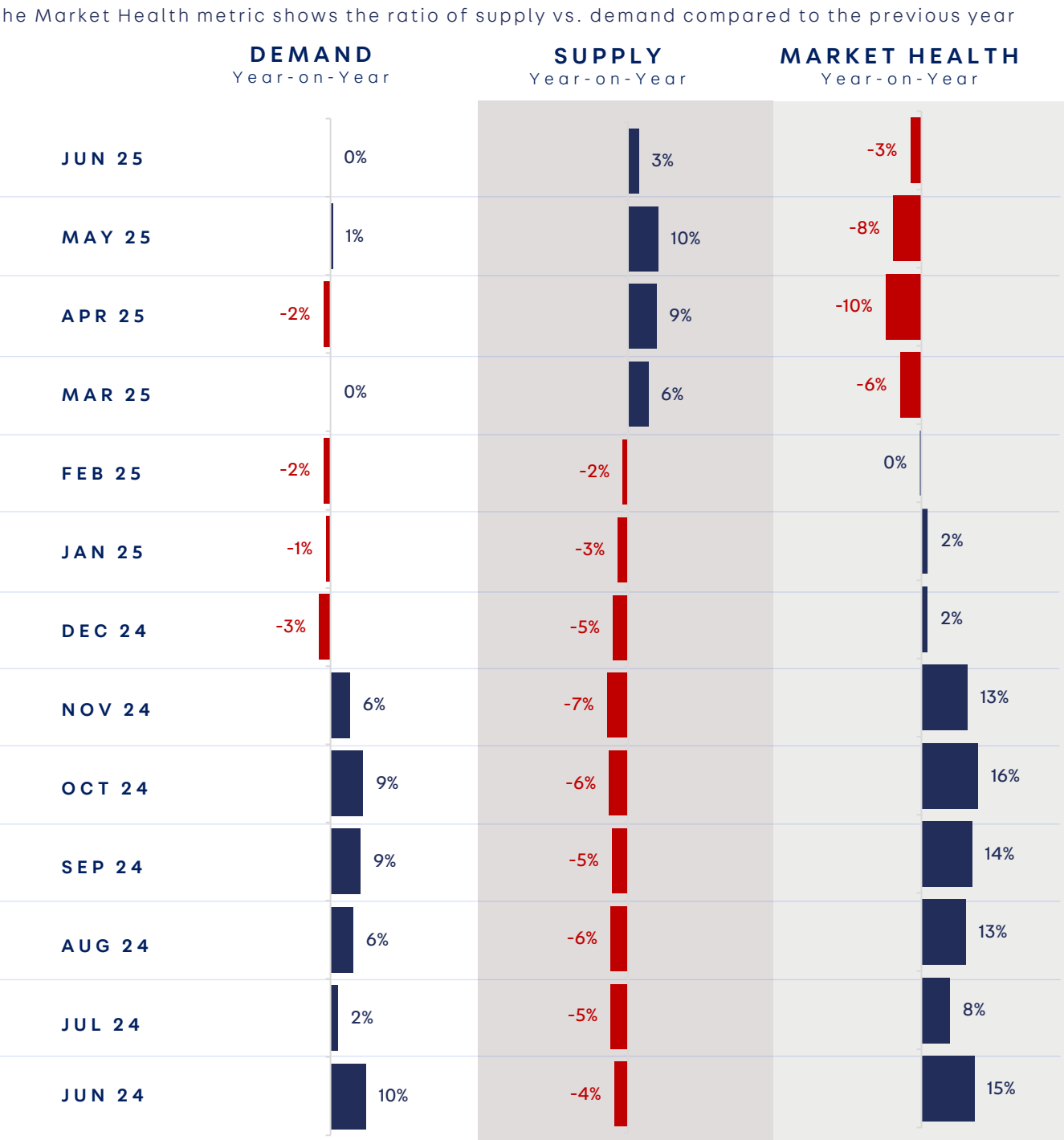
New car visits to Autotrader grew by +16% in June, coinciding with the number of new car stock surpassing 20,000. Retailers maintained their discounting strategies with the average reduction in RRP rising by 0.5% pts to 9.6%, further stimulating new car retail demand ahead of the next plate change in September. Electric vehicles accounted for a slightly higher proportion of new car leads, growing to 19% in June.



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

USED CAR MARKET HEALTH

Used car supply continued to grow year-on-year in June, outpacing demand and resulting in year-on-year market health at -3%. However, flat demand in 2025 must be seen in the context of an extremely healthy 2024, as used car demand continues to soak up additional supply with cars selling every 29 days on average – quicker than the previous 3 years.



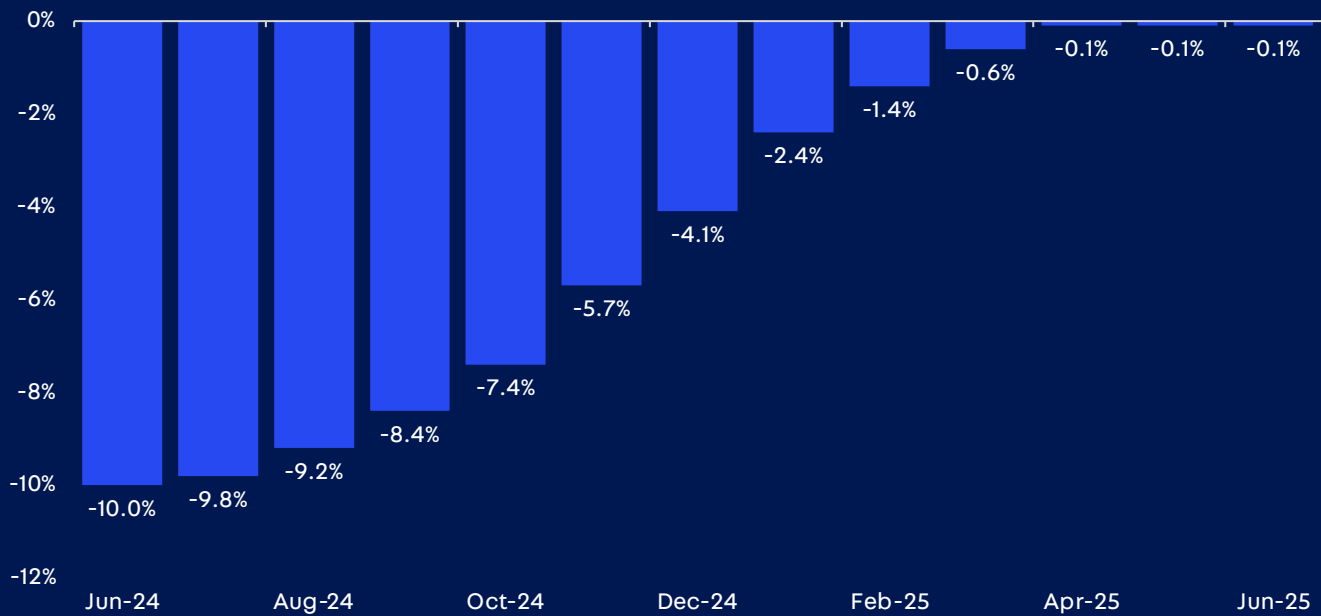
¹The increase in supply partly reflects a promotional campaign resulting in more vehicles being advertised on Autotrader

USED CAR RETAIL PRICE GROWTH

Used car retail prices have been flat year-on-year for 3 consecutive months, staying within -0.1% and entering a period of welcome stability. Beyond the headline movement, some segments saw vehicles increase in value compared to others. Whilst prices of 10-15 vehicles were up +4% year-on-year – because of limited supply and strong demand – the prices of under 1 year old cars were back -3%, coming under pressure from greater new car push activity by manufacturers. Used car prices should be supported by robust levels of consumer demand in the second half of the year.

YEAR-ON-YEAR USED CAR RETAIL PRICE GROWTH

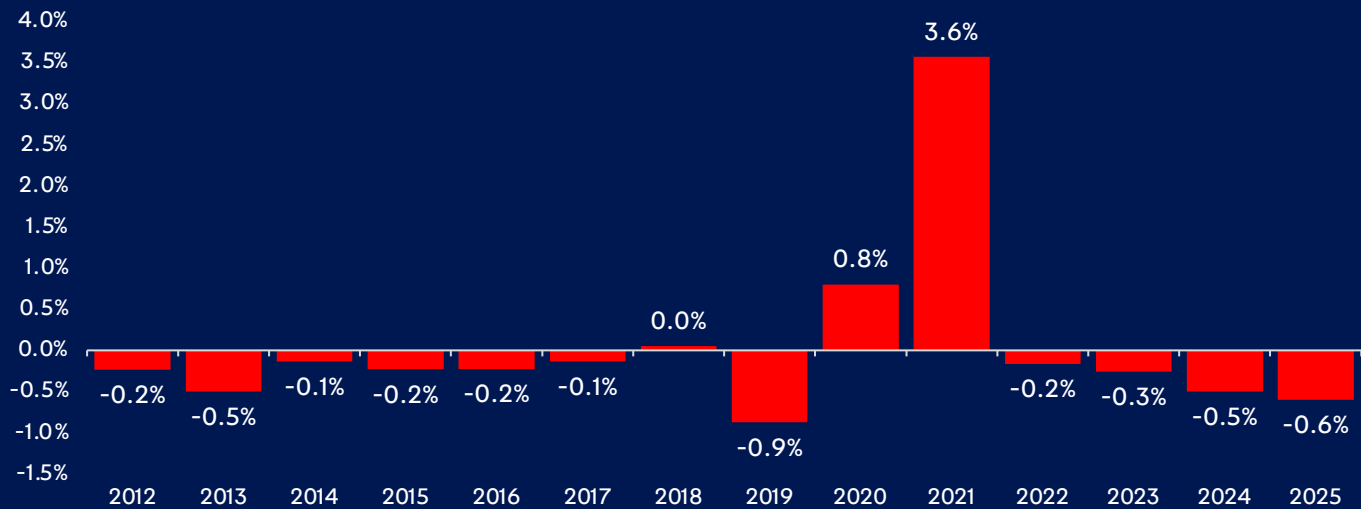
Like-for-Like Basis



On a month-on-month basis, used car retail prices fell -0.6% from May into June, moving close to seasonal norms. Most fuel types matched the market, with prices of petrol cars seeing a month-on-month decline of -0.5%, and electric cars now also in line after a period of steeper declines in prior months driven by growing supply.

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

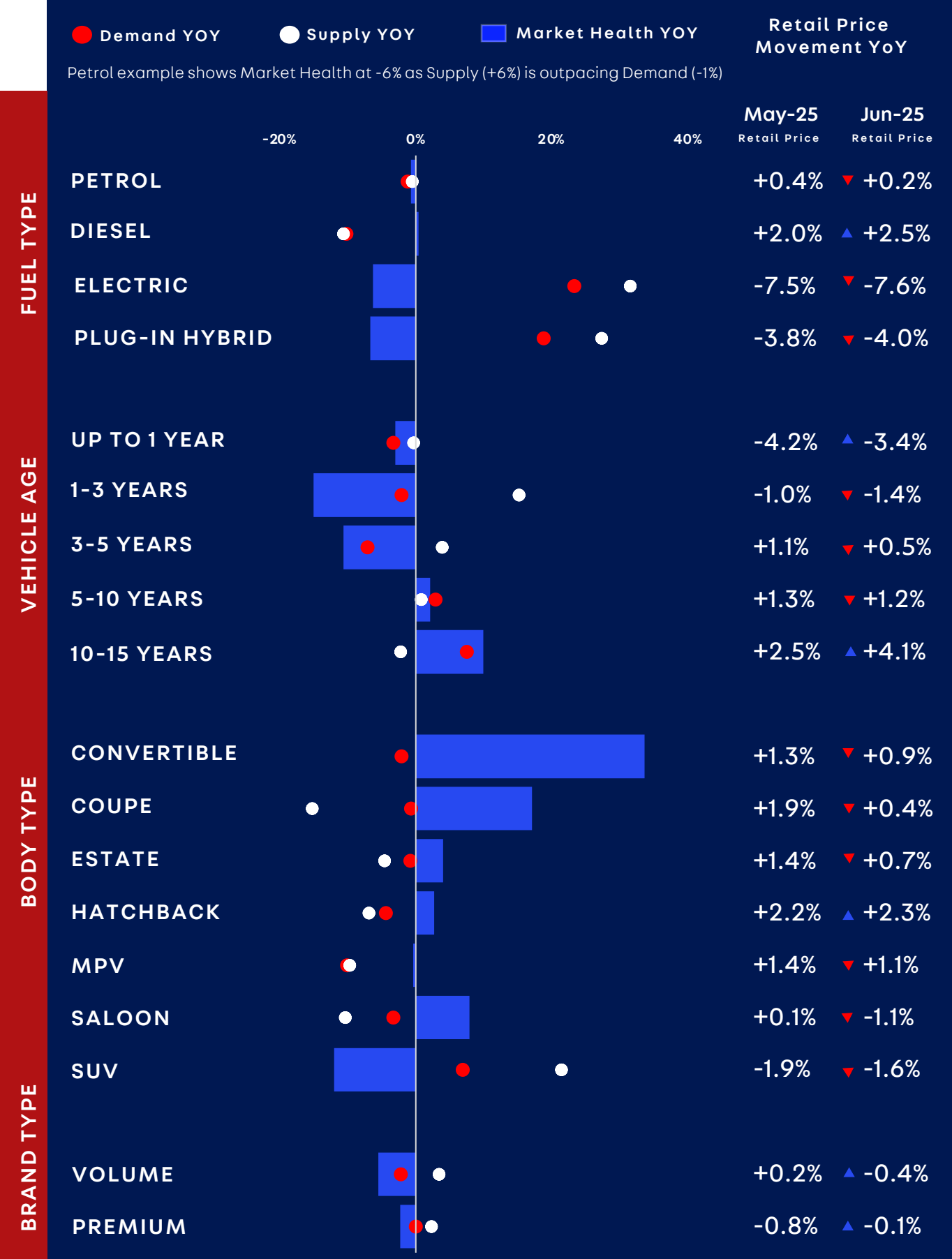
Like-for-Like Basis



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.



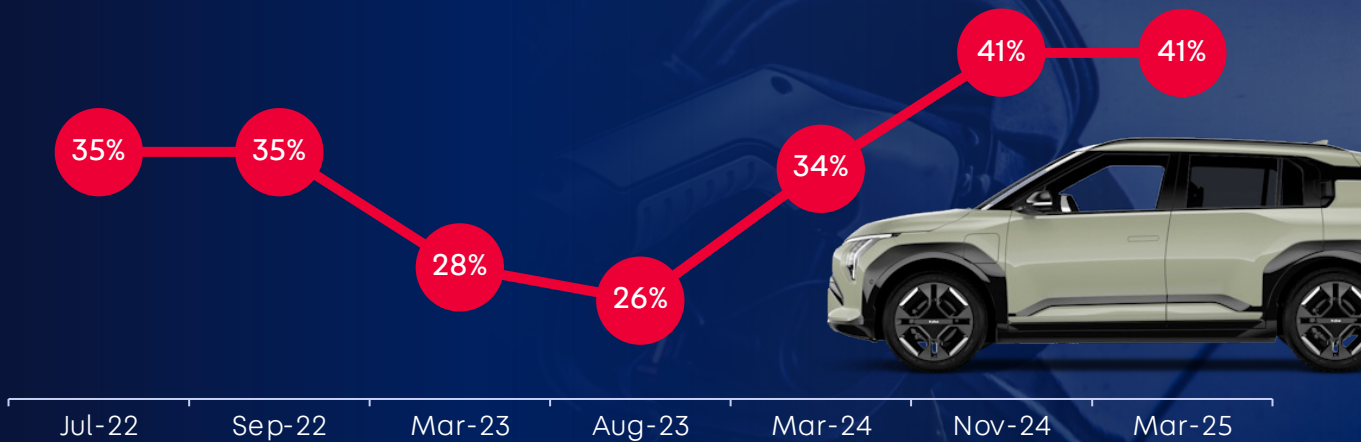
In focus this month

Is EV growth shifting to Used?

EV consideration is on the rise, with 41% of in-market car buyers saying they'll consider an EV – the joint highest level on record, highlighting a big opportunity for the industry to convert these considerers into buyers.

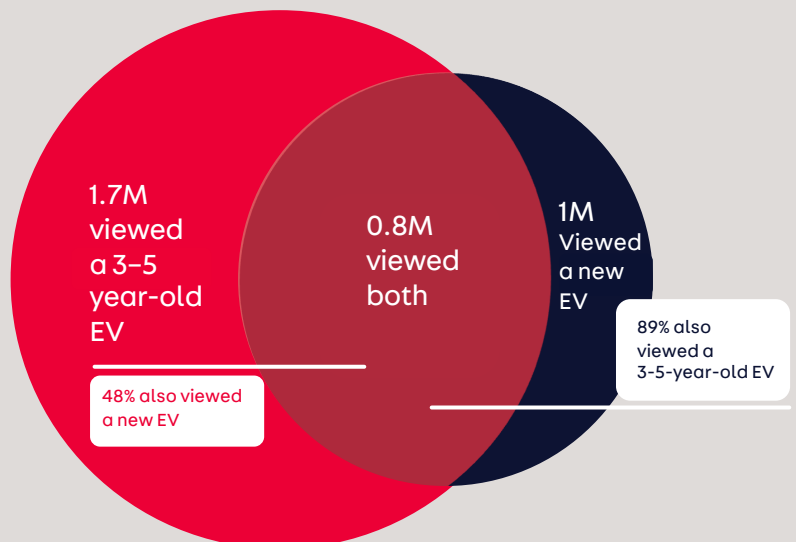
But the real question is: will they buy brand-new, or is the used market where the momentum is building?

% OF IN-MARKET BUYERS THAT WILL CONSIDER AN EV
Autotrader research



CROSS-CONSIDERATION OF EV BUYERS
Autotrader

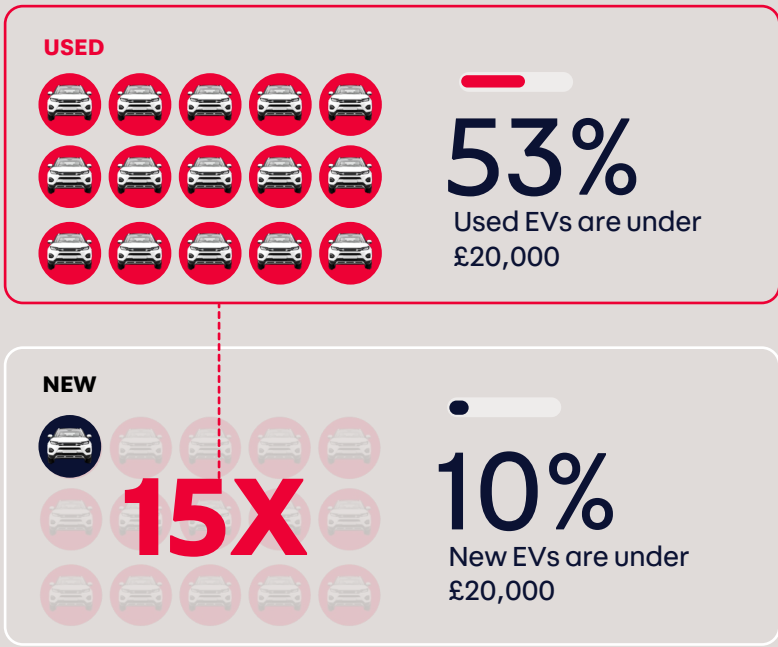
Based on the cross-shopping behaviour of in-market buyers on Autotrader, most new EV shoppers are also exploring used options – a trend driven by a growing supply of newer second-hand models offering great tech, longer range and more competitive pricing than in previous years.



Improving consumer choice and more cross-shopping means the used EV market now offers significant runway for growth. Used EVs now generate 15 times more enquiries than new, 60% of which are on cars under £20,000.

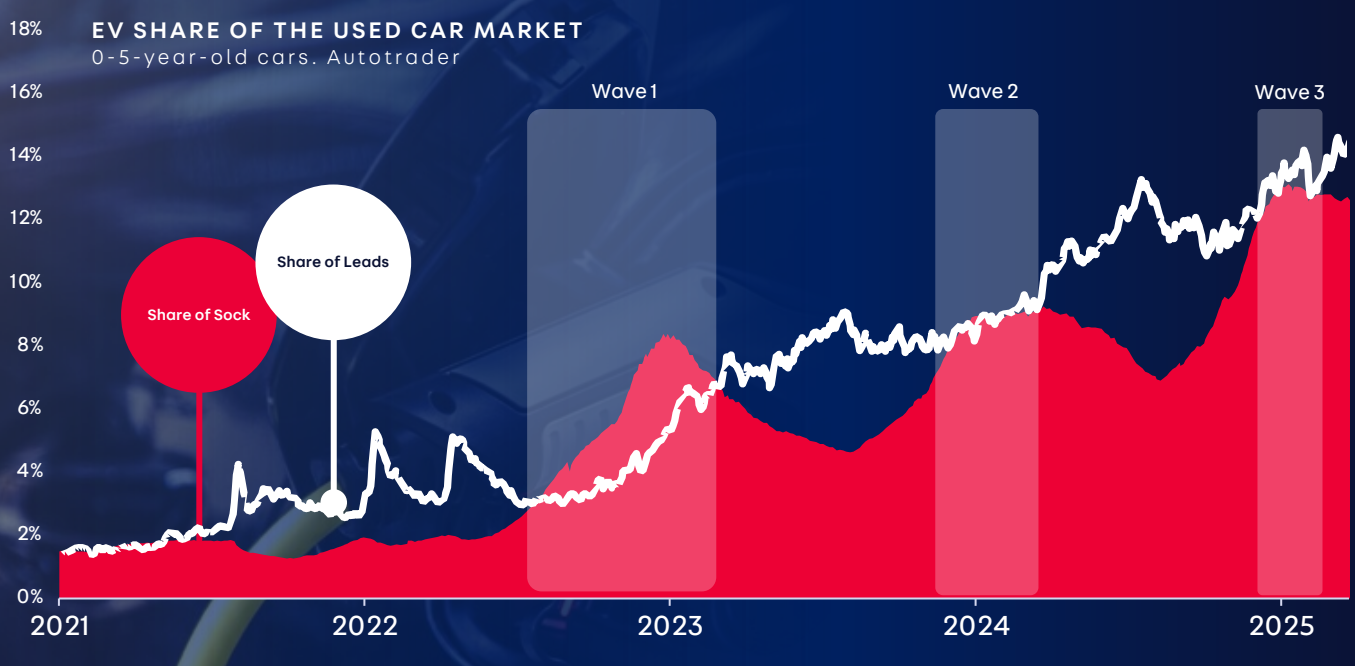
While good news for retailers selling used EVs, the difference in retail demand may pose a threat to the progress of new electric cars sales.

ENQUIRIES SENT ON EVS
June-2025. Autotrader



Whilst the used market represents the big opportunity for EV growth, demand must keep pace with supply - which has been returning in waves at the end of each year - to stabilise prices and build confidence across the industry.

Achieving this requires converting the 41% of drivers who are considering EVs into actual buyers. That shift will depend on coordinated efforts from retailers, OEMs, charge point operators, and Government to address consumers' biggest concerns.



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 Autotrader Insight