



Monthly Market Intelligence

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

DECEMBER 2025

 Autotrader

A strong finish to 2025 provides optimism for the car market in 2026

New car registrations

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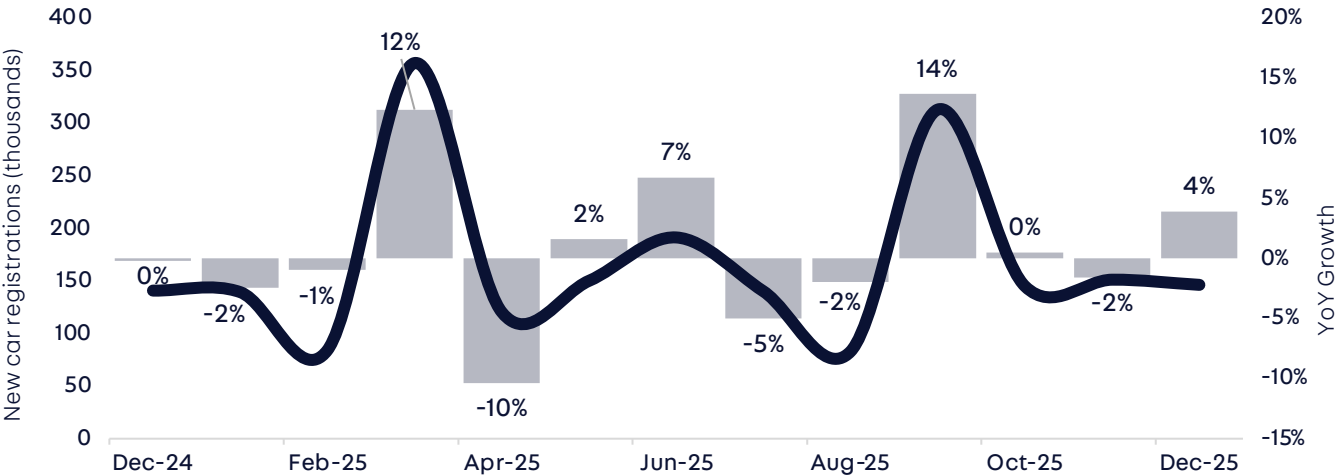
New car registrations increased by 4% in December, taking 2025 volumes above 2m units (+4% YoY) and marking the third consecutive year of growth. EVs once again saw a year-end surge, reaching 32% share in December, the only month to exceed the ZEV mandate. Nearly half a million EVs were registered across 2025, around 1 in 4 new cars. All buyer types recorded growth over the year, with private demand finishing strongly in December, up 16%, as 2025 followed a modest recovery from 2024.

146,249

New car reg. (SMMT)

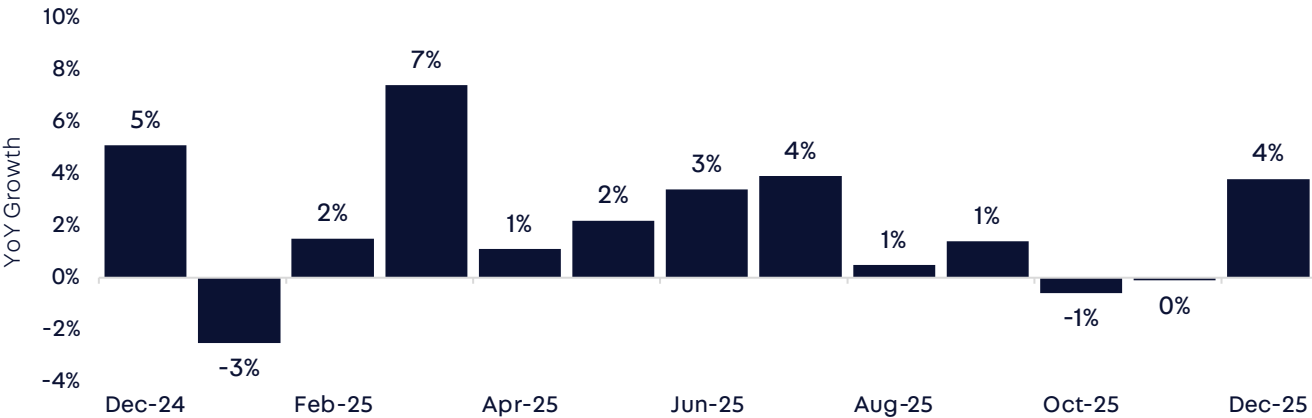
+3.9%

(VS. DEC 2024)



Used car sales (Year-on-year)

December closed out a strong year for used car sales, with volumes up 4% in the month and 2025 ending 2% higher year-on-year. Both Franchise and Independent retailers achieved 4% sales growth in December, though Franchise growth was flat across the year due to ongoing 3-5-year-old supply constraints. Independents grew 4% in 2025. Petrol and diesel sales fell 3% and 11% respectively, while EVs saw the strongest growth, up 52% YoY.

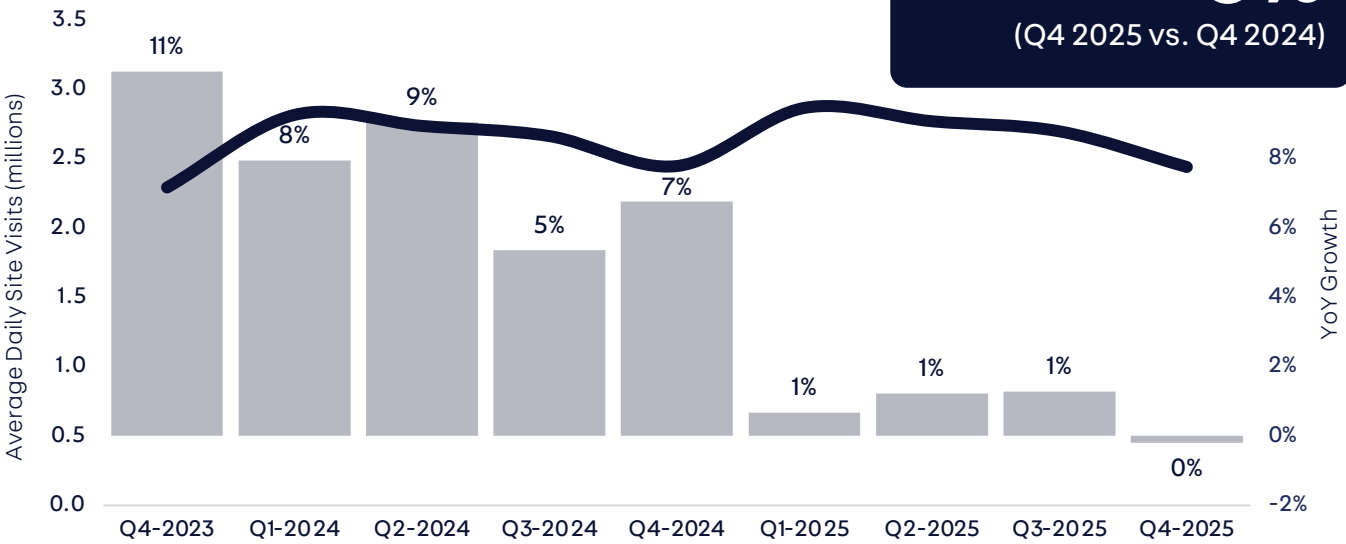


*Data based on vehicles removed from Autotrader. We assume that the vehicle is sold on the last day we saw it on our site. Strong historical correlation to official SMMT used car transactions and retailer data. Ongoing improvements to the data means historic figures may change slightly each month.

In the final quarter, car buying activity remained strong, finishing the year maintaining the record levels of site visits seen in 2024. On average, Autotrader saw 32 site visitors per second. Post-budget, GfK Consumer Confidence increased by 2 pts, and the Major Purchase Index rose 5 pts year-on-year, providing optimism into 2026.

Autotrader site visits

Average daily site visits, year-on-year



New car activity

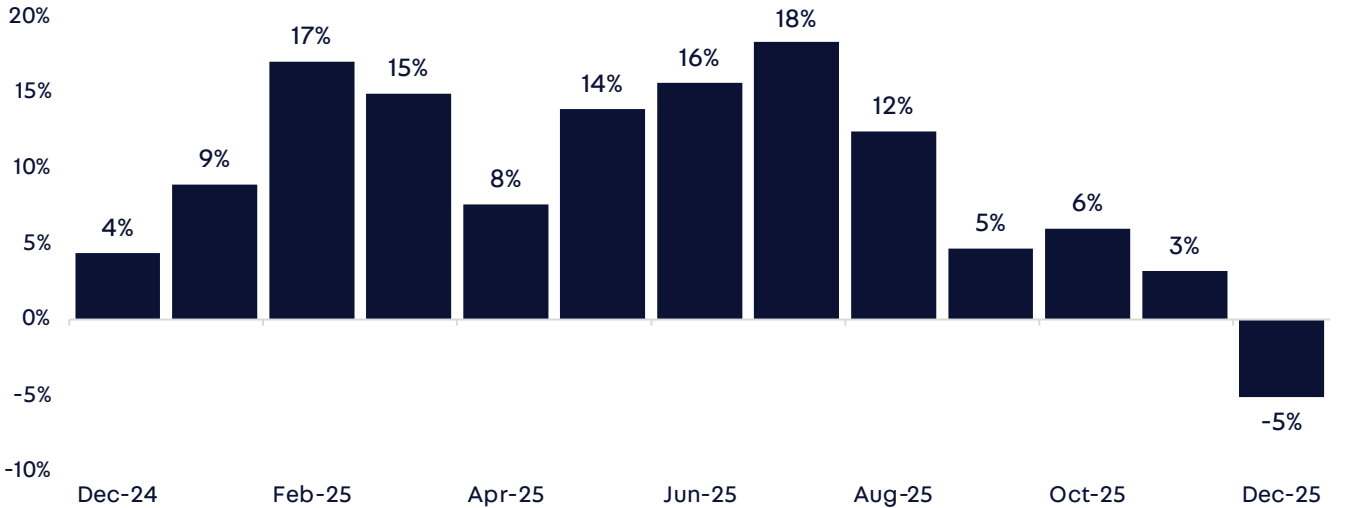
New car site visits rose 10% year-on-year in 2025, supported by increased marketing activity and stock increases – volumes increased 14% YoY. In a challenging market, discounts stayed high to stimulate demand, averaging 10% throughout the year. Buyers responded, with enquiry growth exceeding site visitor growth, up 12% on 2024.

-5%
New car visits (vs. Dec 2024)
-13% MoM

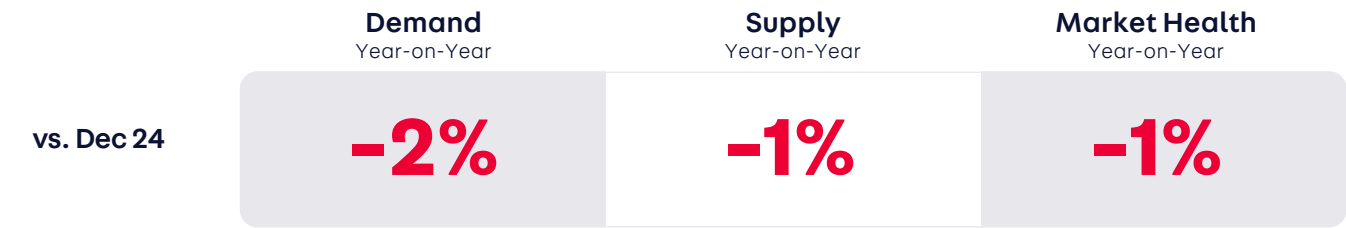
23%
EV Lead share
+1.3 ppts MoM

Autotrader new car visits

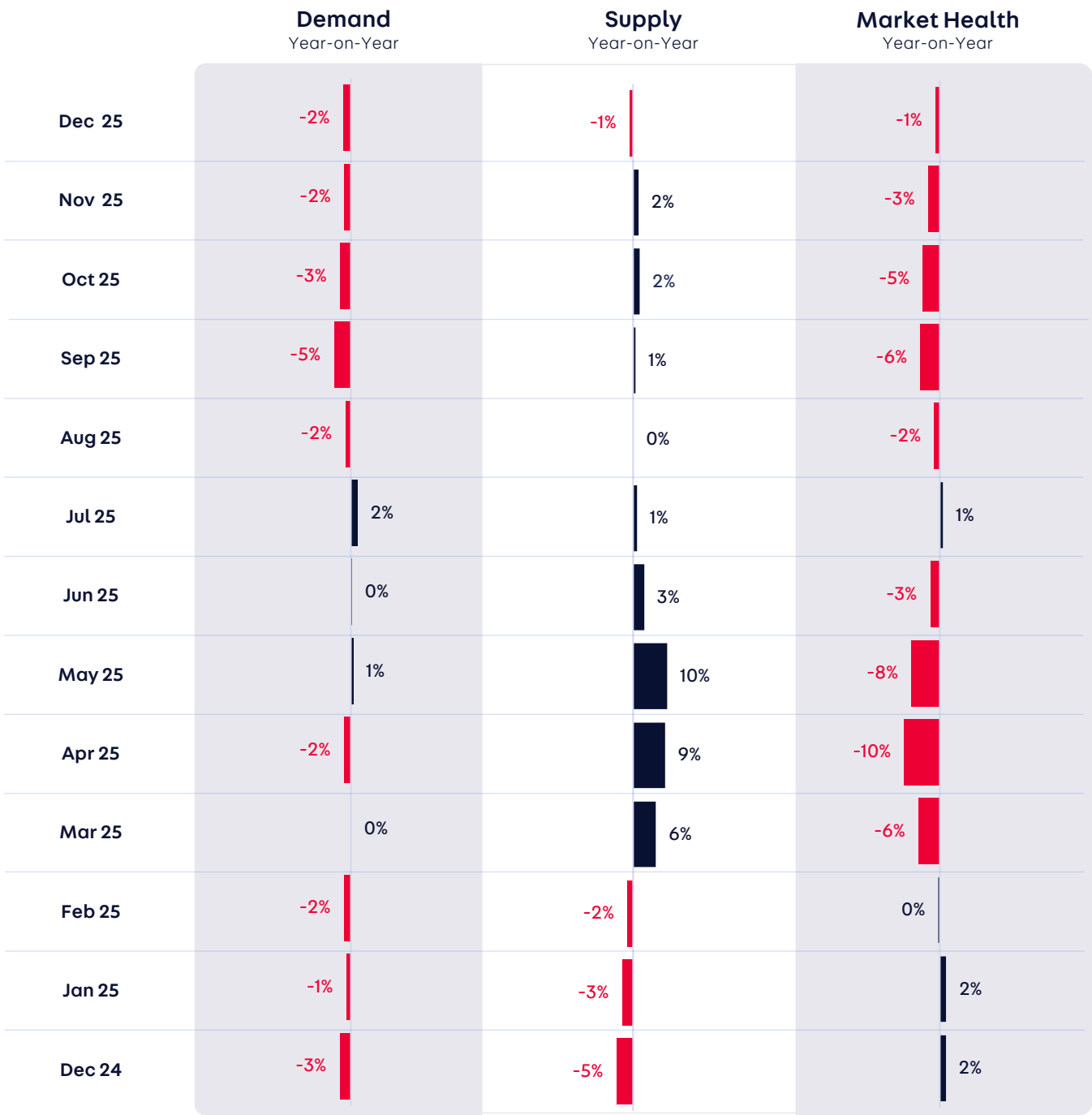
Year-on-year



December saw stable supply amid slightly softer YoY demand. Supply growth in cars under one year old continues to be supported by rising demand, while reduced supply in 5-10-year-olds (-5%) has been accompanied by easing demand (-4%). Electric cars continue to see growing demand, supported by strong supply, and remain the fastest-selling fuel type, averaging 30 days to sell versus 35 days for the overall market.



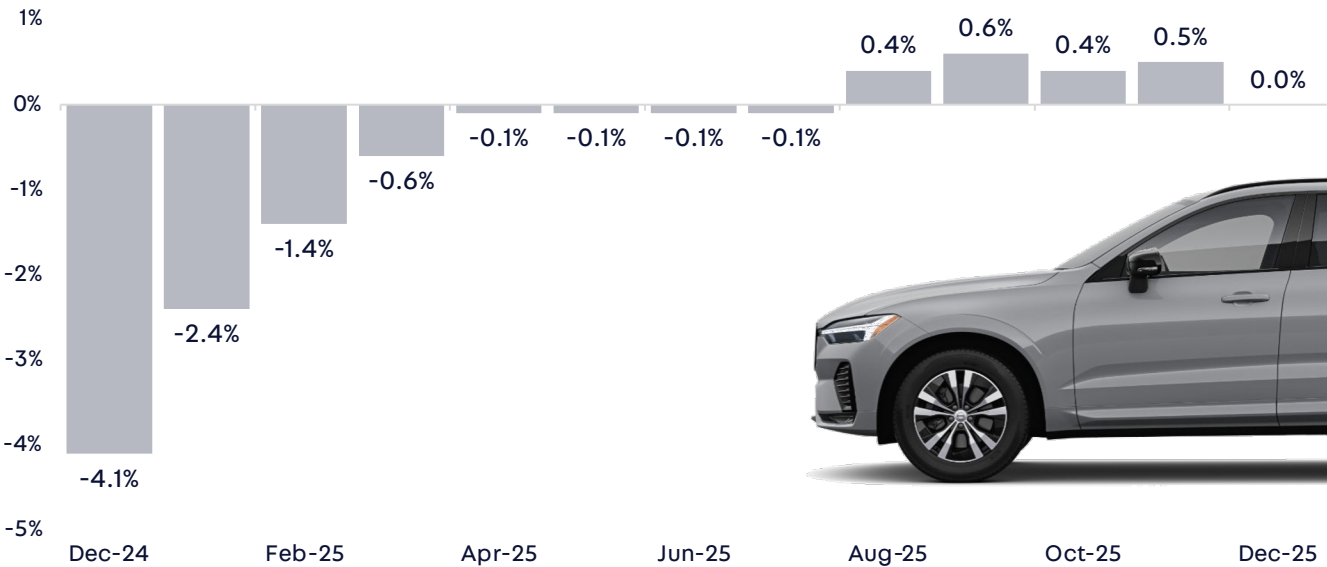
The Market Health metric shows the ratio of supply vs. demand compared to the previous year



Price stability defined the end of 2025 for used cars, flat overall year-on-year in December. Pricing strength continued to be concentrated in older cars, with 10-15-year-old up +8.5%, the ninth consecutive period of strong increases. In contrast, electric, full/mild hybrids and plug-in hybrids prices softened, driven by competitive pricing among younger returning stock.

Year-on-year used car retail price growth

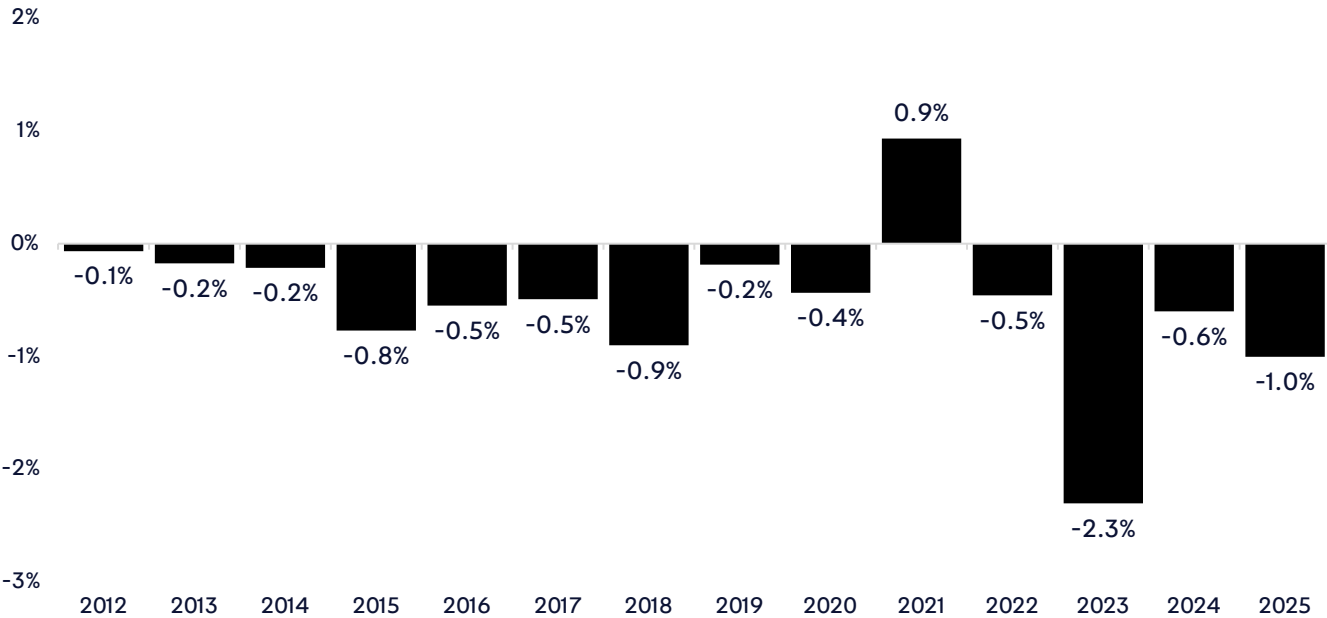
Like-for-like basis



On a month-on-month basis, used car prices declined by -1% in December, slightly lower than historic seasonal norms. In line with year-on-year patterns, older cars showed price resilience, while under-1-year-old cars dropped -2.1 MoM as nearly new stock increased. ICE cars outperformed the overall market, though petrol price movements were softer than their pre-pandemic norms.

Month-on-month used car retail price growth: December

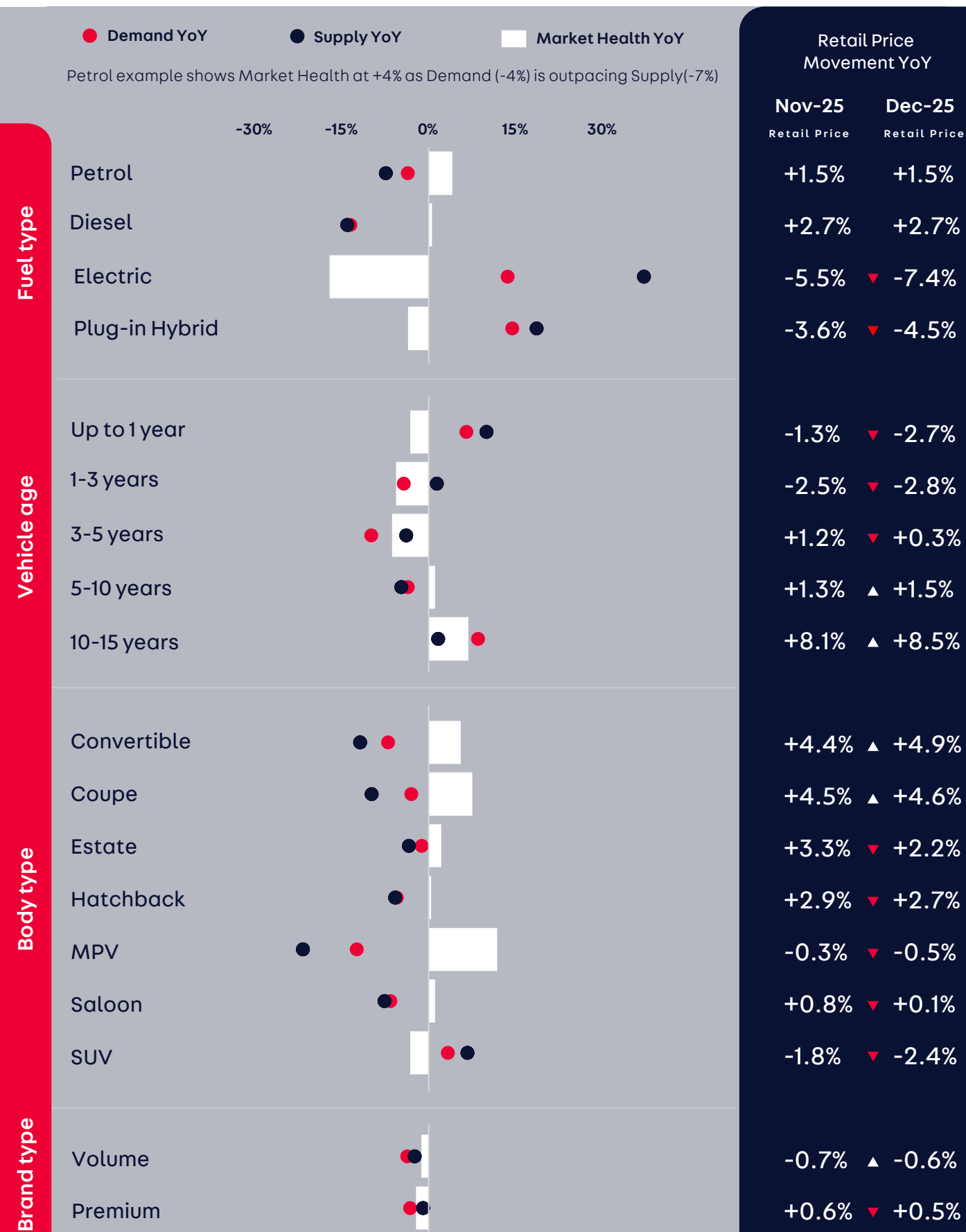
Like-for-like basis



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

Autotrader

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

2025 Wrapped: Shifting gears in auto retail

+2%

Used car sales year-on-year

31

Used cars days to sell

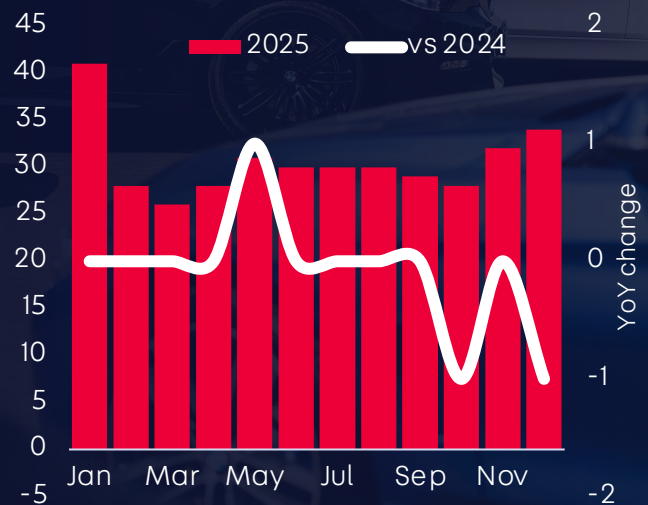
-0.2%

Average price year-on-year

1 Used car market stability

The used car market held steady in 2025 with site visitors interacting with adverts over 2 billion times in the year. Demand was just 1% below 2024's exceptional levels - underpinning a solid foundation for strong performances against key metrics and maintaining the new normal for days to sell.

Median days to sell



2 Competition for stock

Persistent shortages of 3-5-year-old vehicles intensified the competition for stock, squeezing Franchise retailers as Independents captured a larger share of sub-5-years-old cars.

Year-on-year sales growth

4.0%

Franchise

Independent

-0.5%

Franchise share of stock
1-5-year-old vehicles



2024

70%

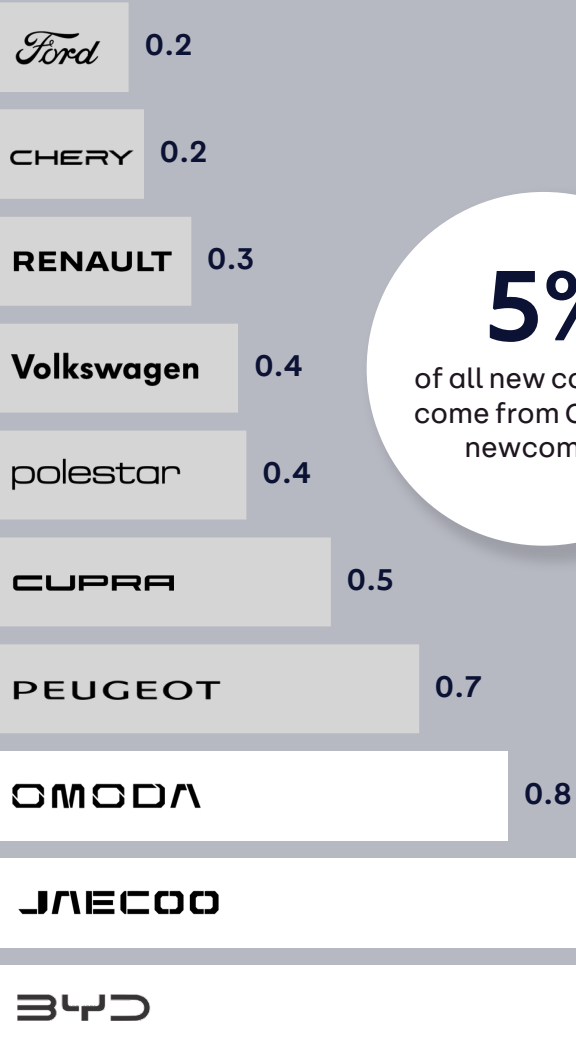


2025

68%

As a result, Franchise sales softened while Independents continued to grow.

Leading brands by market share growth
Ppts. SMMT

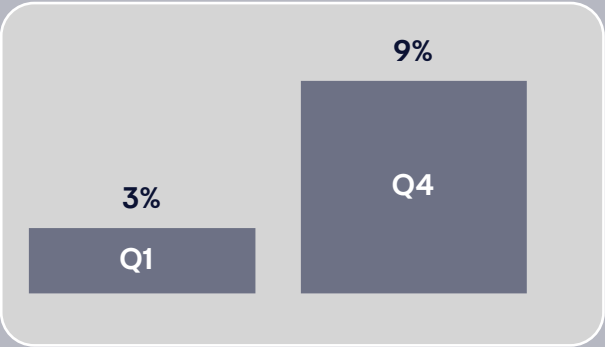


5%
of all new car sales
come from Chinese
newcomers

Competition for buyers

3

New entrants share of new car registrations
2025. SMMT



Competition for buyers intensified. Six brands entered the UK in 2025 with new arrivals quickly gaining 6% share of all new car sales - building on the strong foundations set by MG to total 10% share across all Chinese brands.

BYD, JAECOO and Omoda posted the strongest market share gains.

2 New heights for electric

Demand for electric cars continued to grow, with EVs accounting for over one in seven enquiries for used cars under 5 years old. This sustained interest helped stabilise used EV performance, with 1 in 5 Independent retailers now stocking them amid growing confidence.

EVs accounted for one in five new car enquiries, driven by strong incentives including manufacturer discounts and the Electric Car Grant.

Price competition in the market and the arrival of 12 sub-£30k models reduced the EV price premium to 17%.



+52%
EV sales YoY

+28%
Demand

30
Days to sell

+26%
New car regs YoY

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 Autotrader Insight