

Market Overview

Jayson Whittington
Chief Car Editor – Glass’s

January 2020

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1

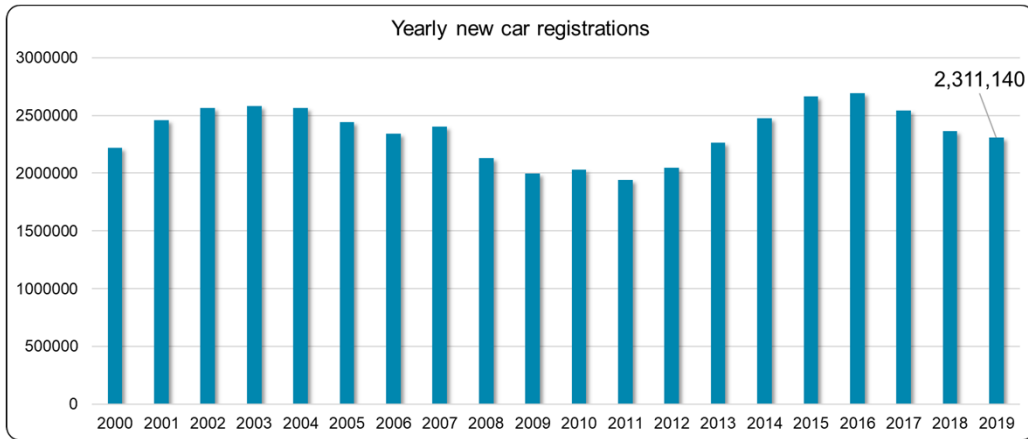
New Car Market

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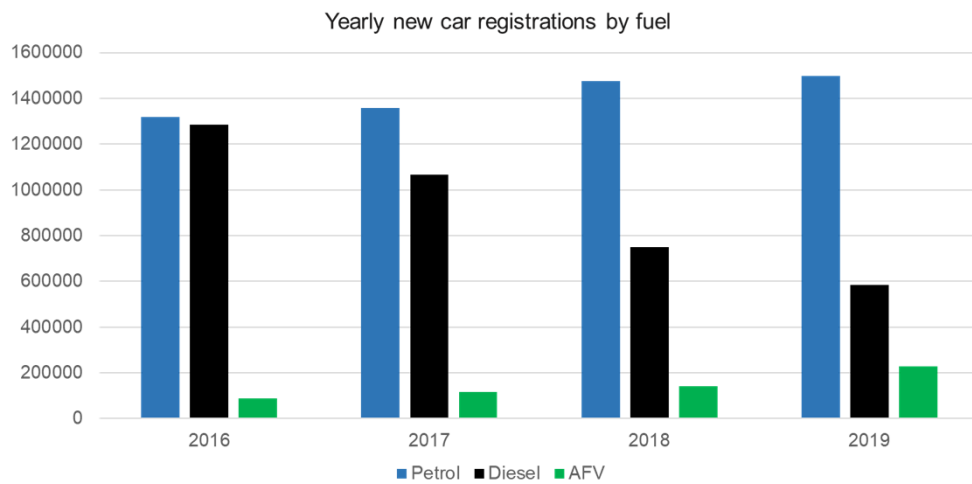
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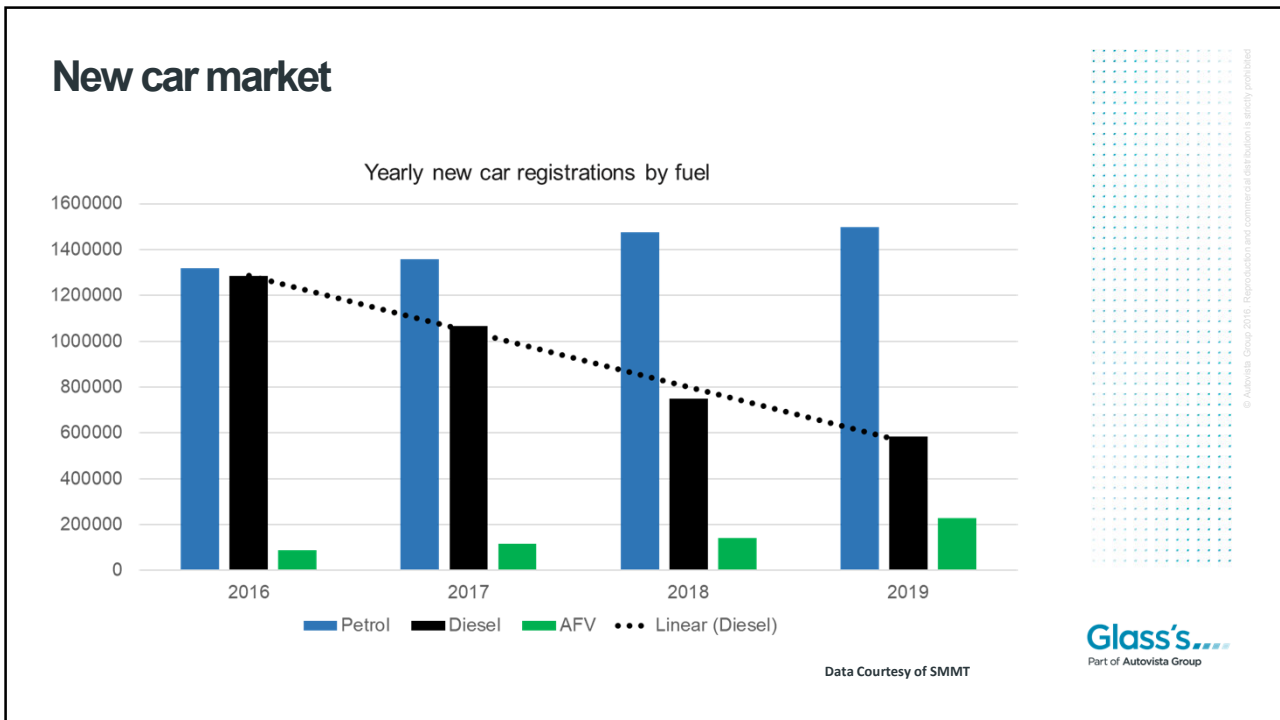
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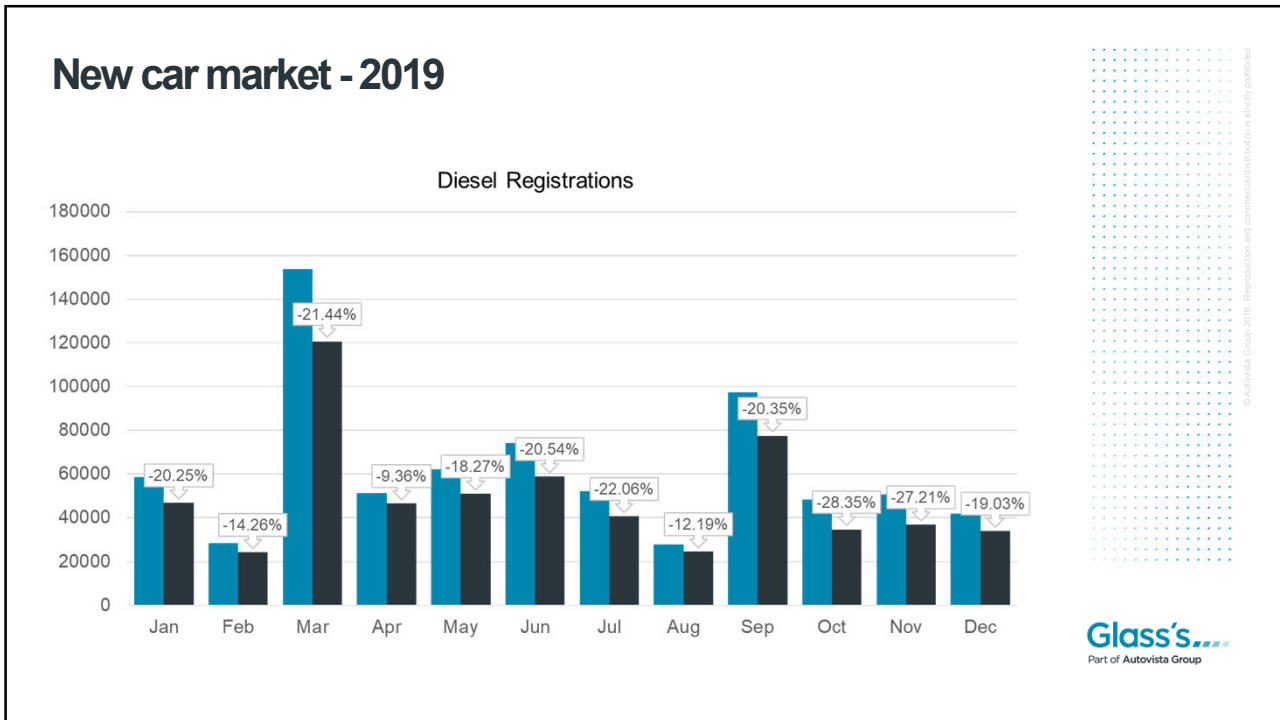
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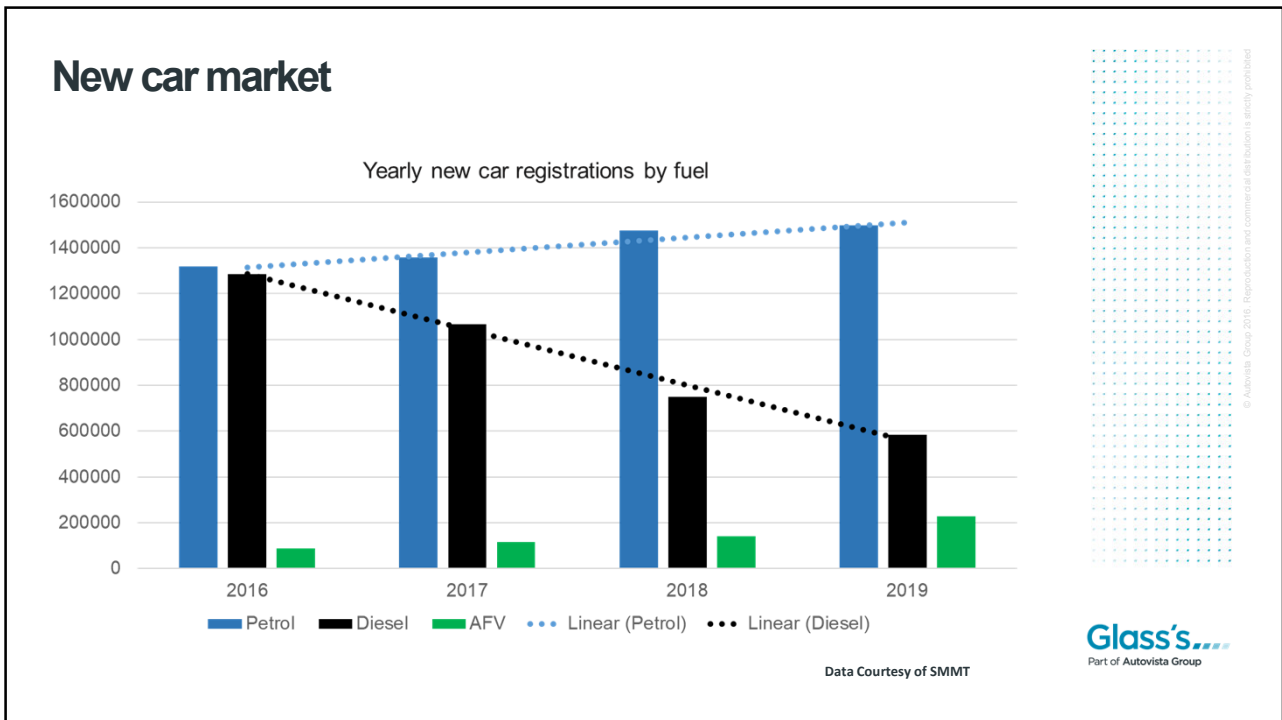
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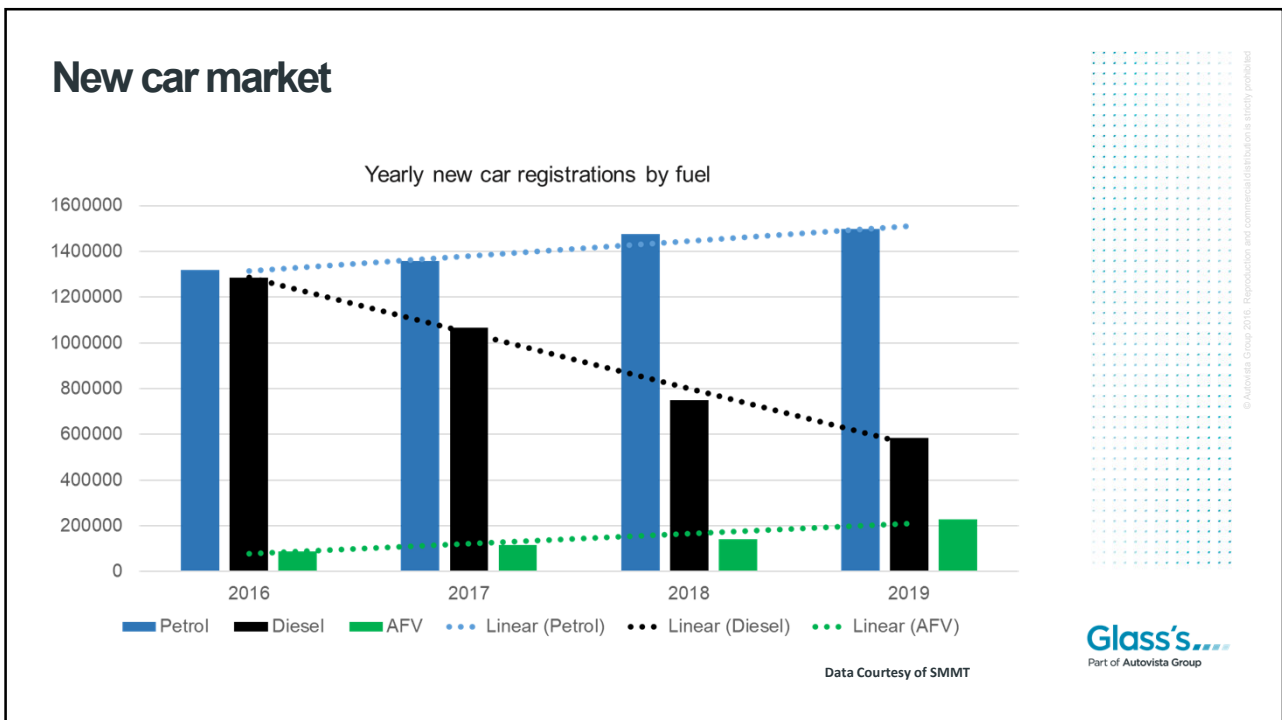
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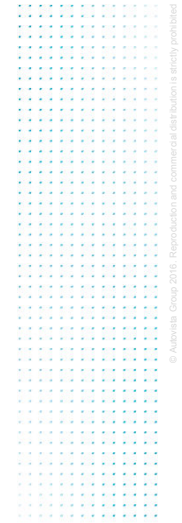
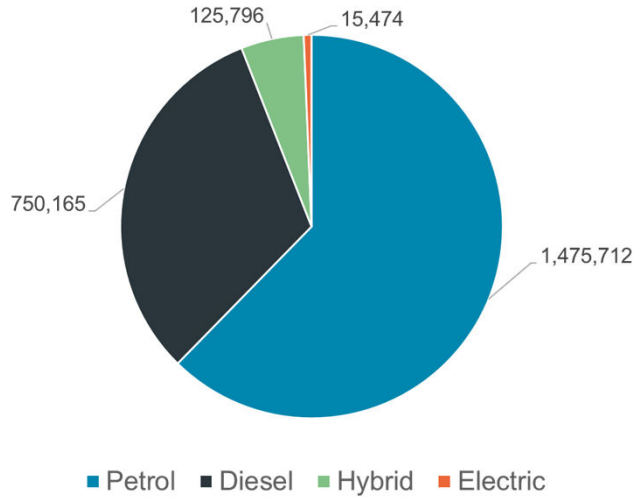
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8

New car market - 2018

New car registrations - fuel split



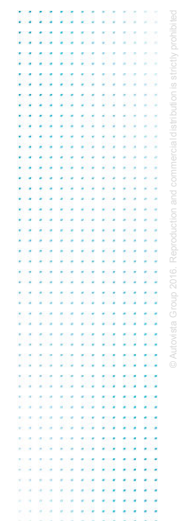
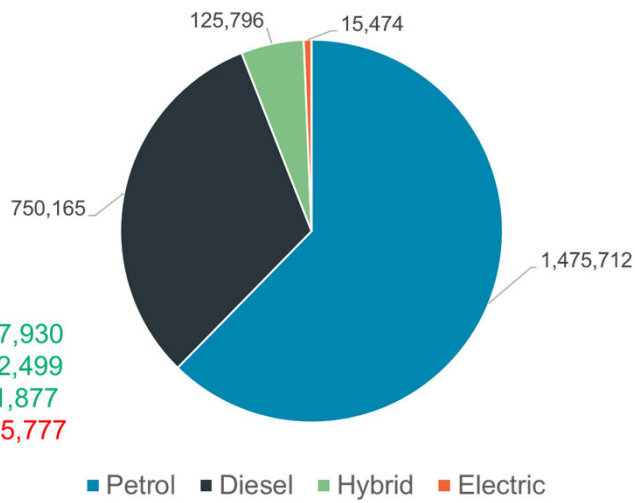
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New car market - 2018

New car registrations - fuel split

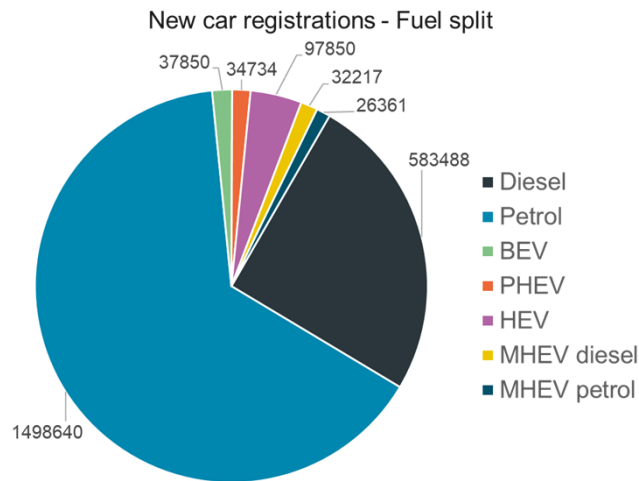


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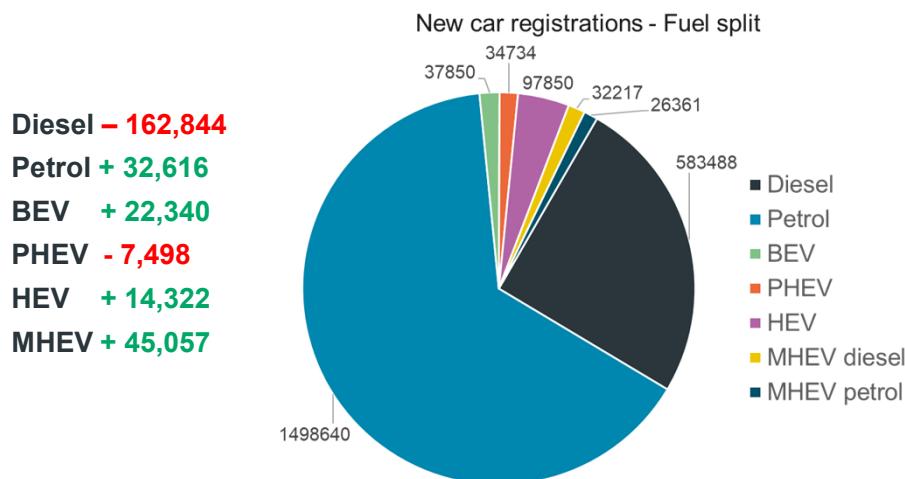
New car market - 2019



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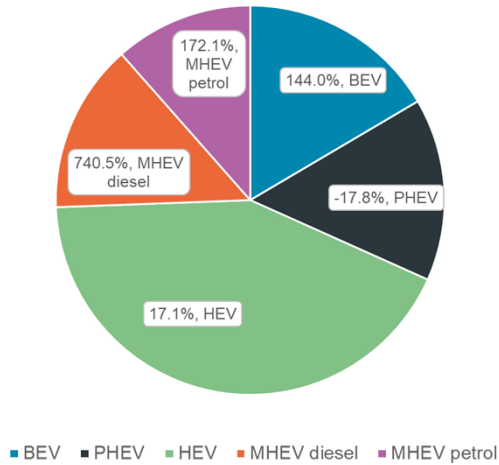
New car market - 2019



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New car market – Hybrid % change

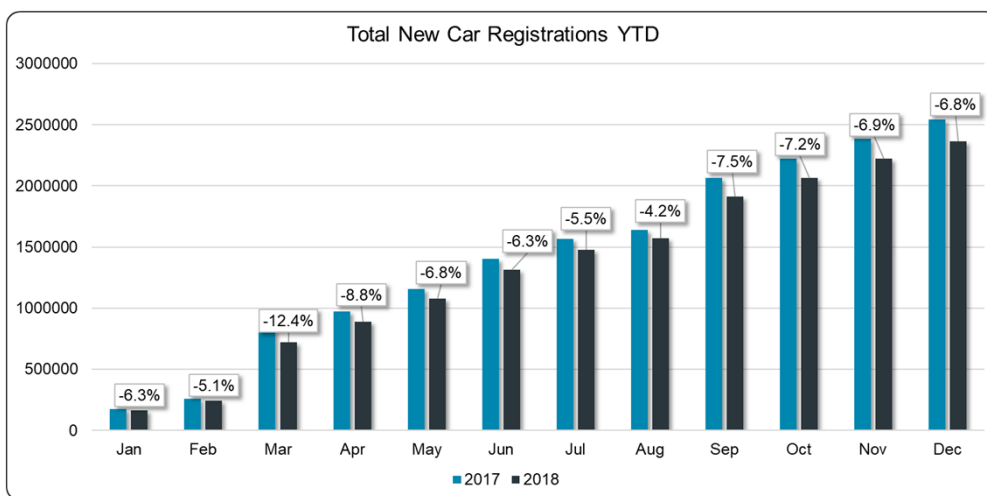


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New car market - 2018

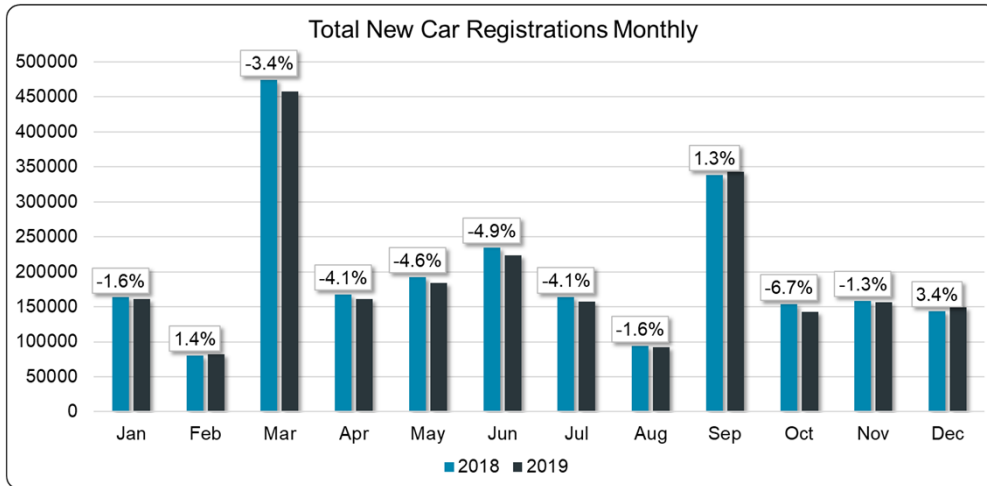


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New car market - 2019



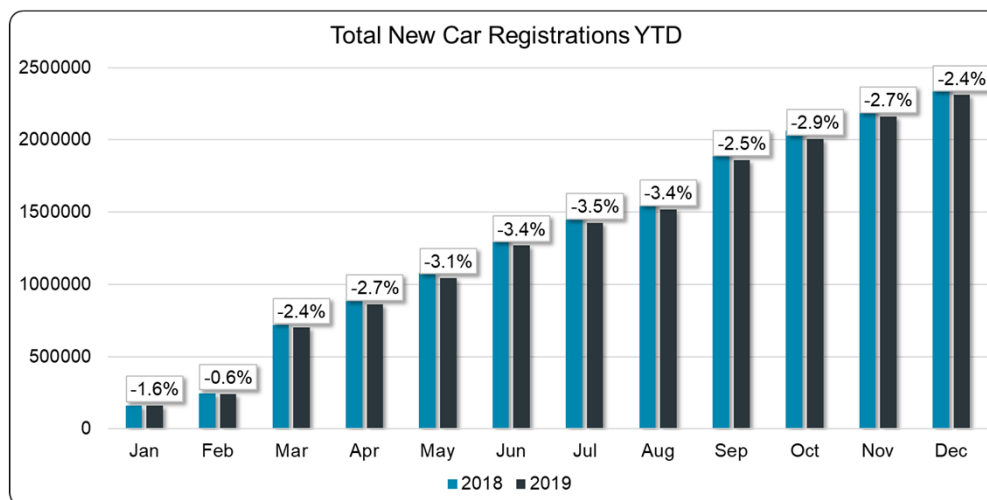
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New car market - 2019



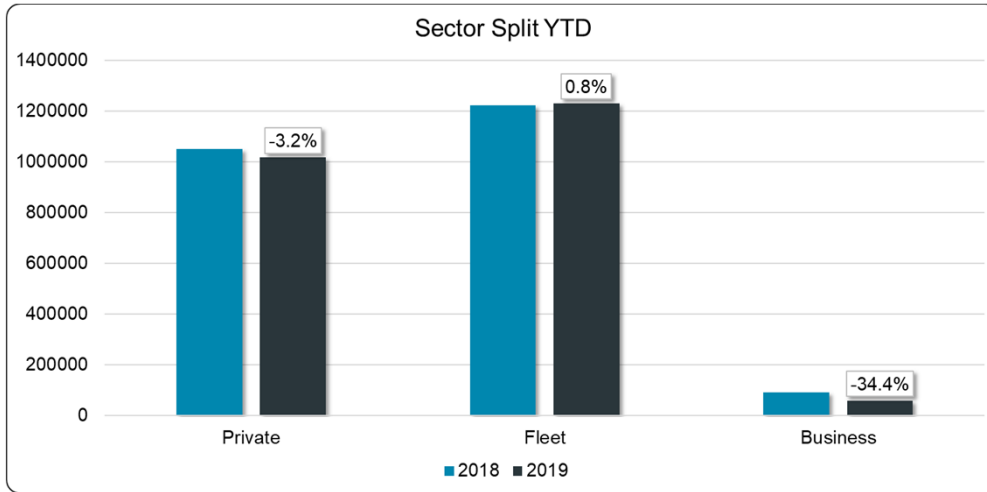
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New car market - 2019



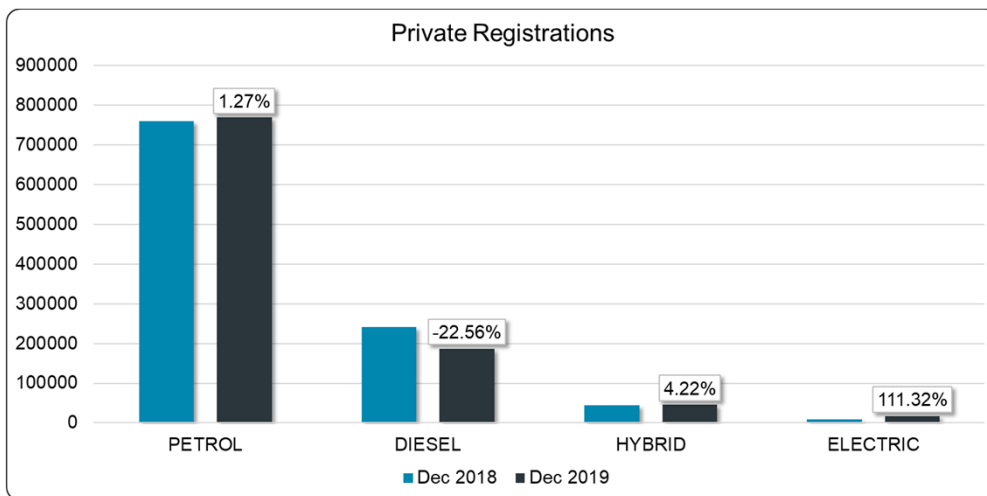
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New car market - 2019

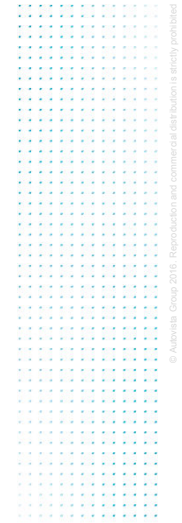
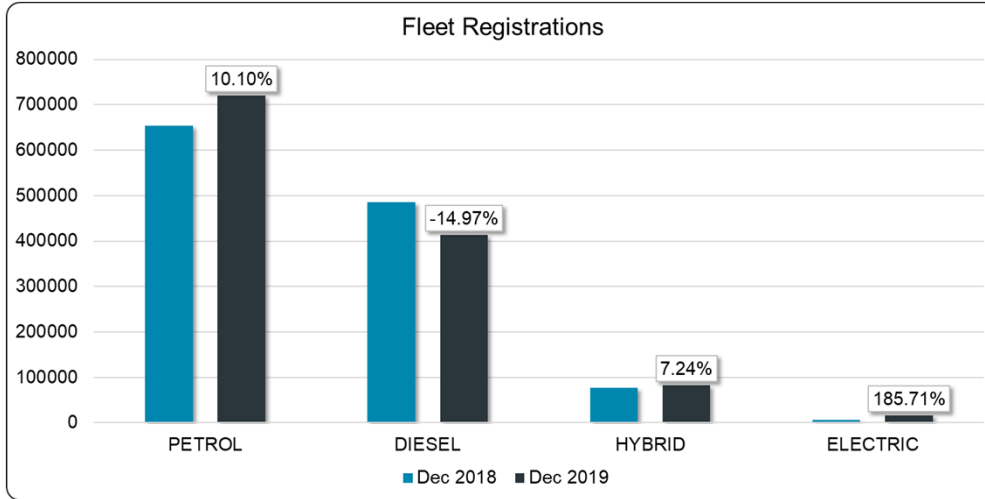


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New car market - 2019

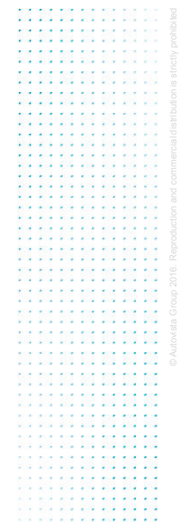
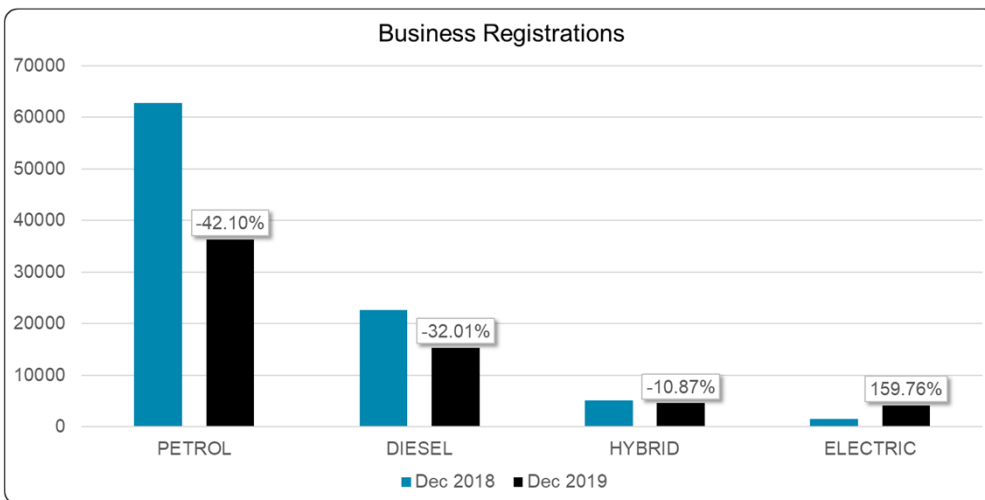


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New car market - 2019

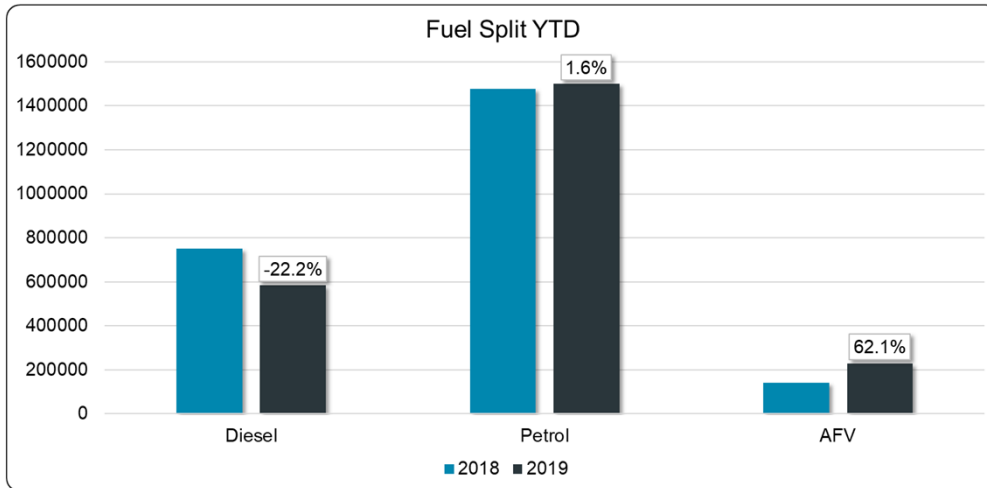


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New car market - 2019



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Fuel trends 2020?

- **Diesel - decline**
 - should decline at a much slower rate
 - reach a stable volume
 - underpinned by a core of customers for whom the fuel type is the best overall solution
 - RDE2 improved BIK rates



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Fuel trends 2020?

• BEV – On the increase

- CAFE (Corporate Average Fuel Economy) targets
- Zero BIK rate
- Better technology
- Better looking design
- Improved awareness



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Fuel trends 2020?

• Hybrid – On the increase

- Seen as alternative for diesel
- Low BIK rates – Plug-in
- Good BIK rates – Self-charging plus decent fuel economy
- Mild hybrid



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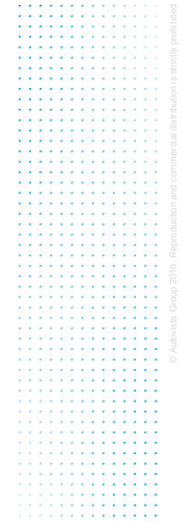
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Fuel trends 2020?

- **Petrol – Stability**

- Private sales falling – will impact petrol
- More mild hybrids coming to market
- More hybrids coming to market will affect fleet sales



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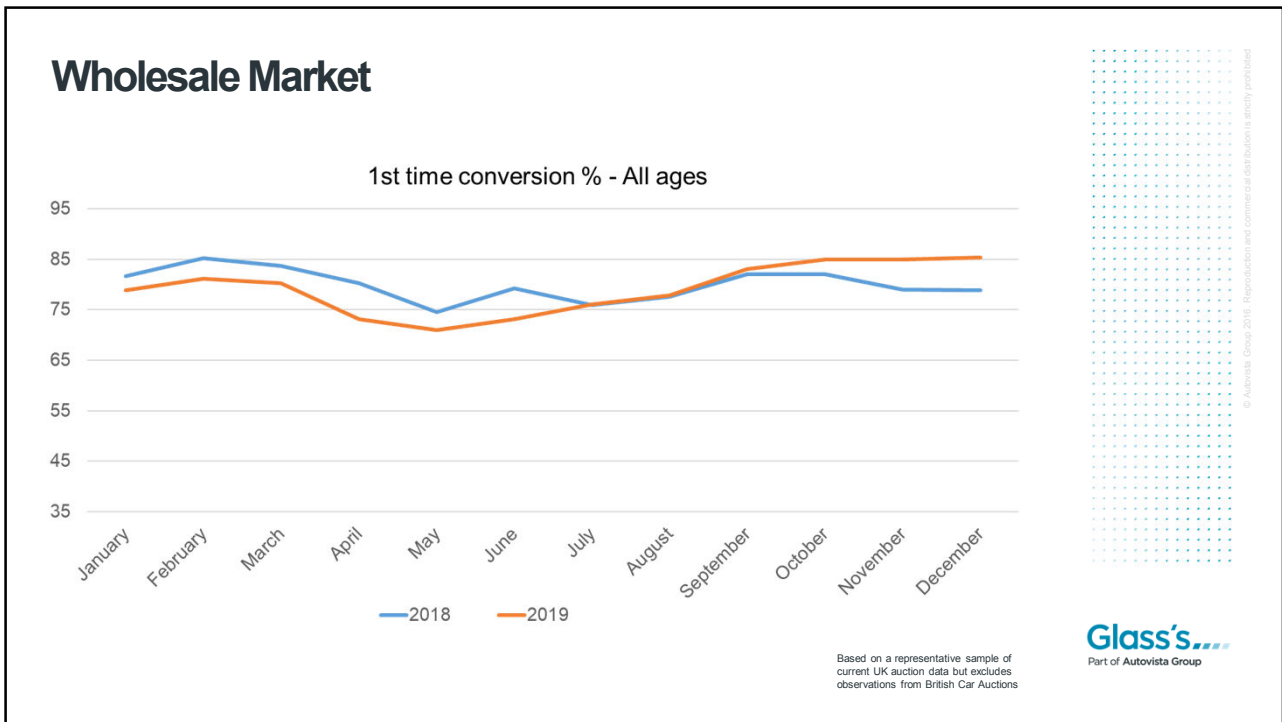
Used Market Overview



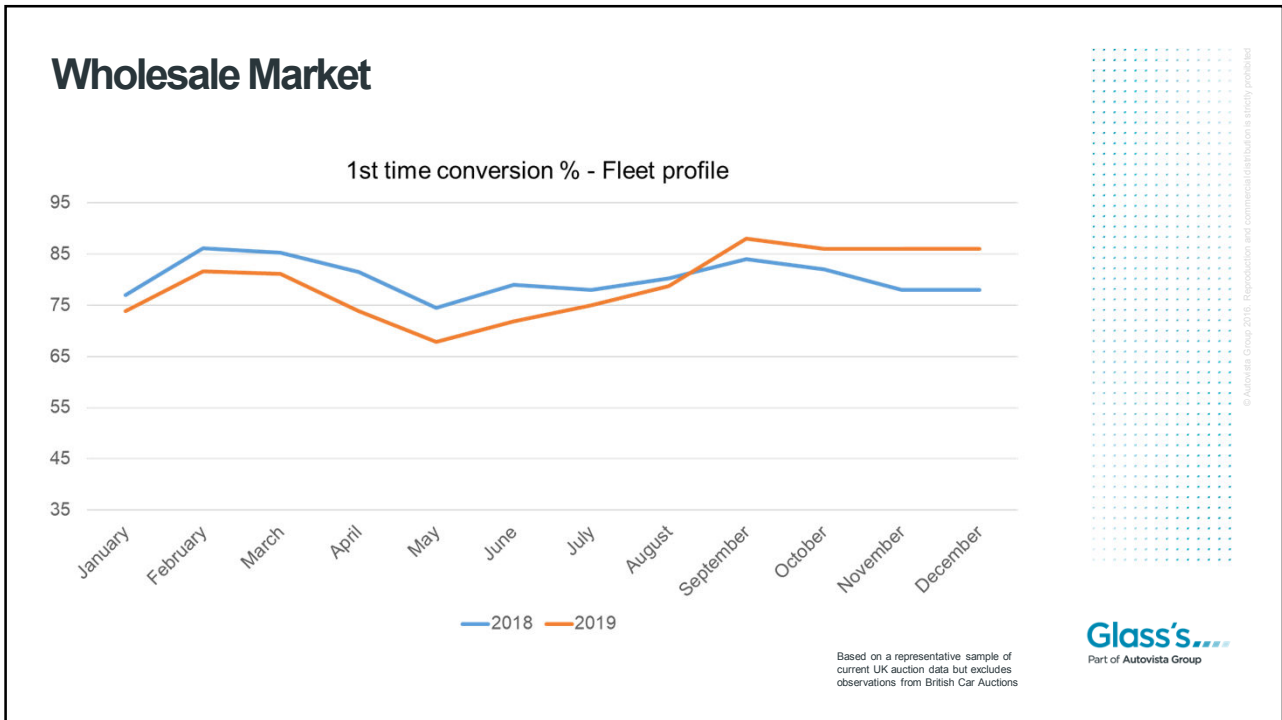
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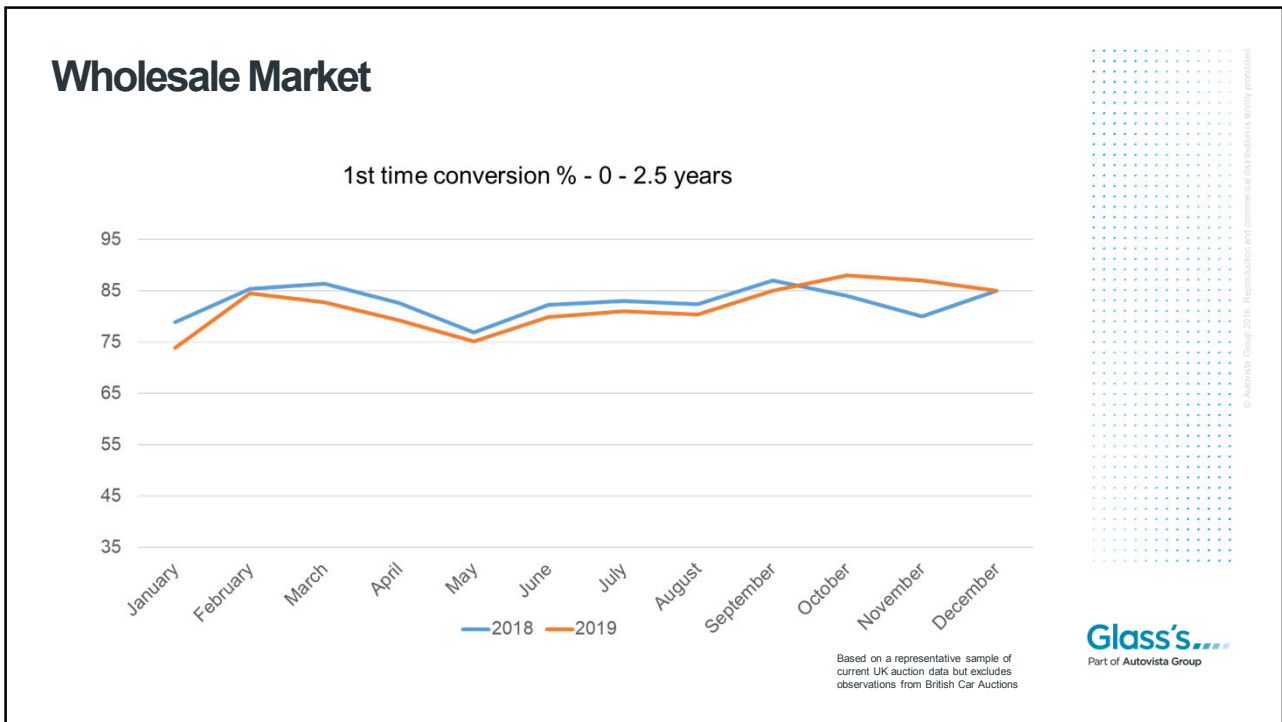
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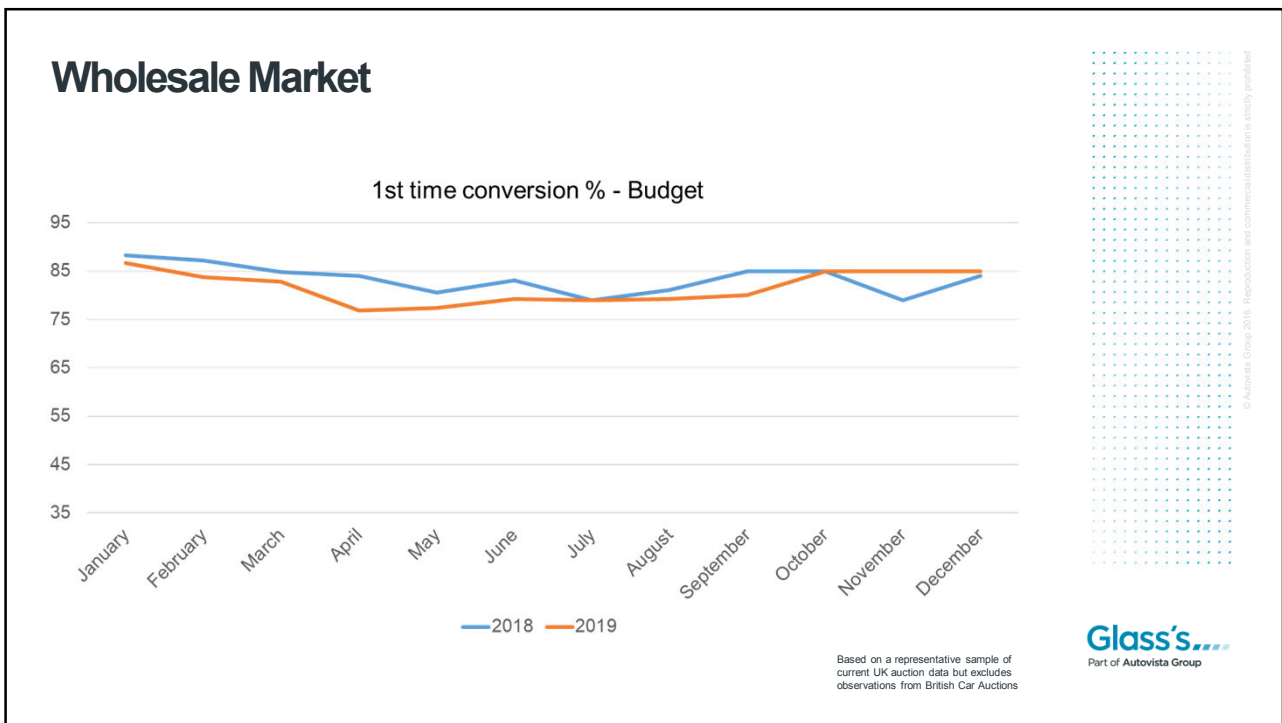
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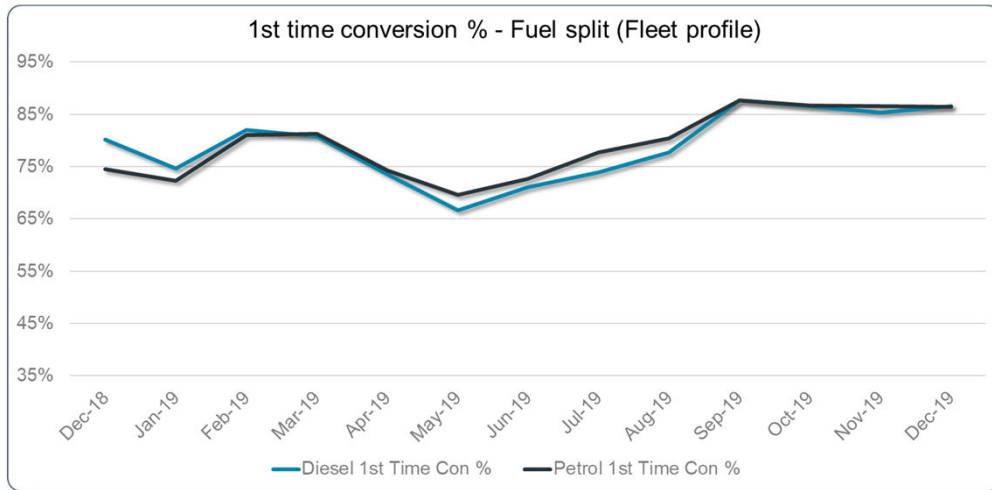


29



30

Wholesale Market

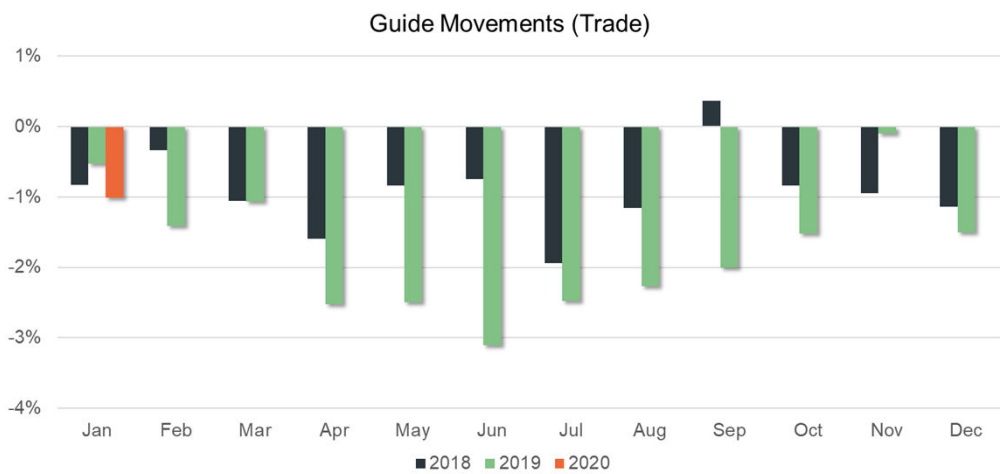


Based on a representative sample of current UK auction data but excludes observations from British Car Auctions

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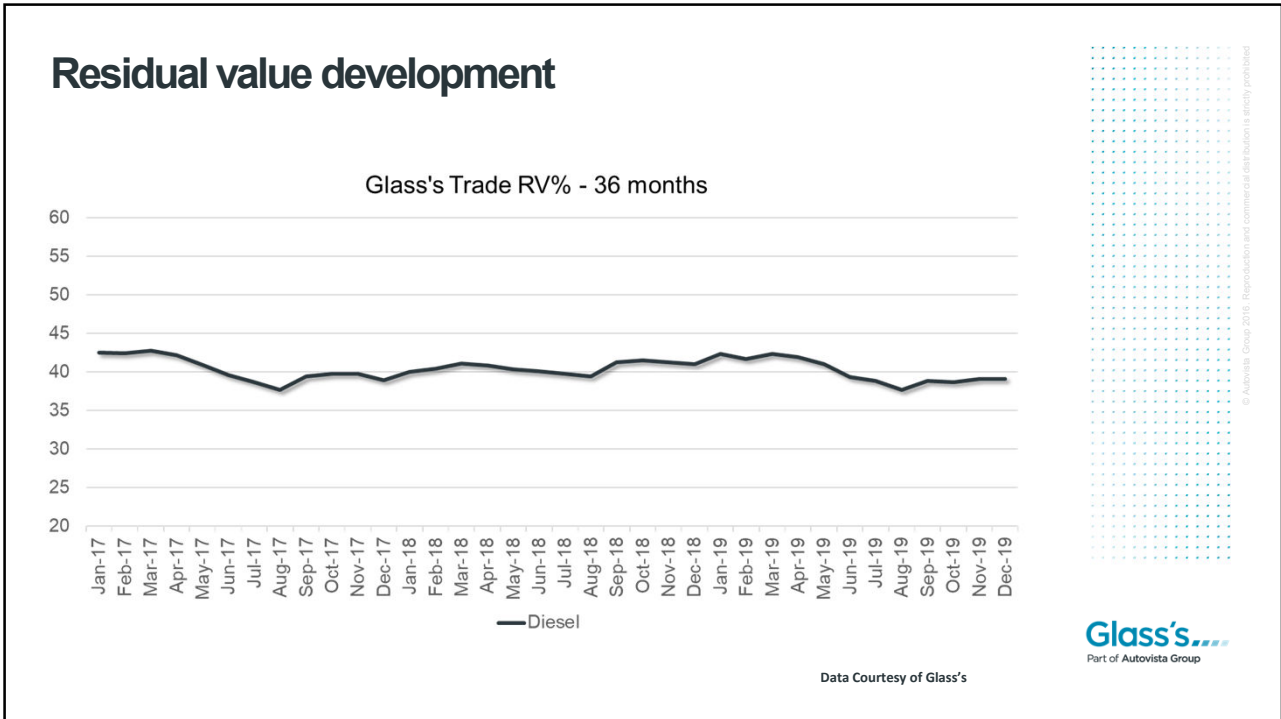
31

Residual value development

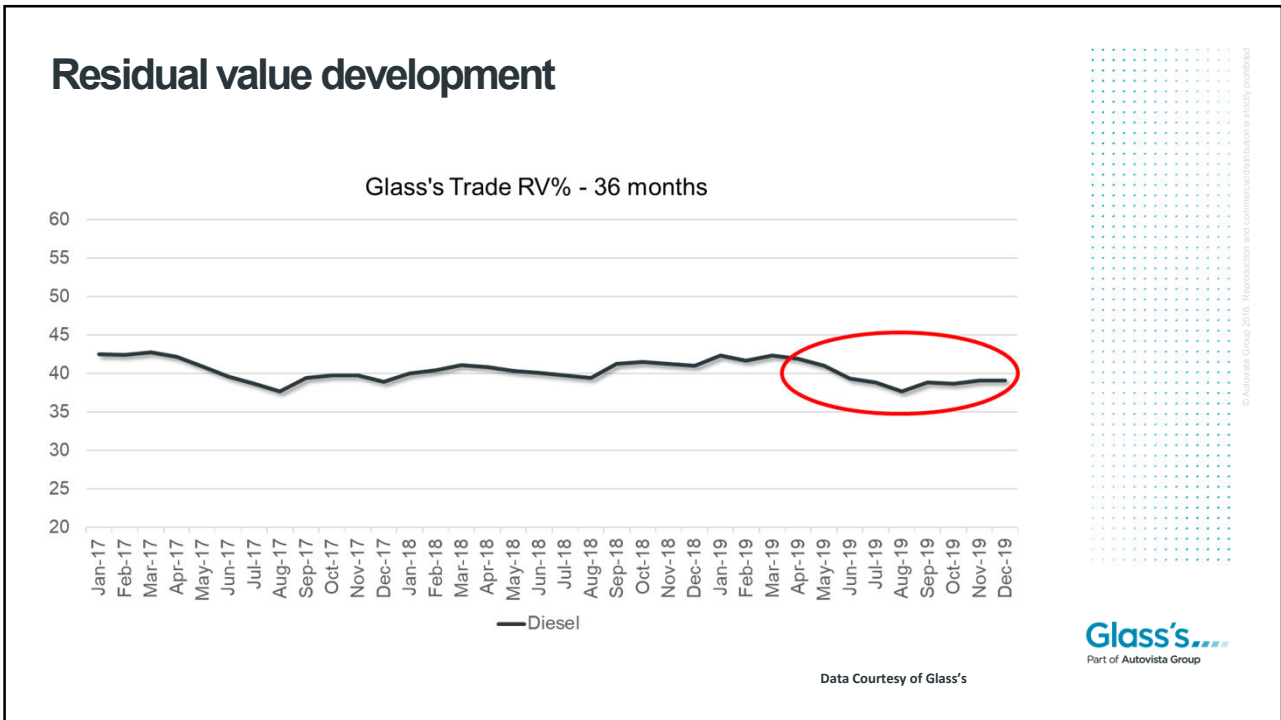


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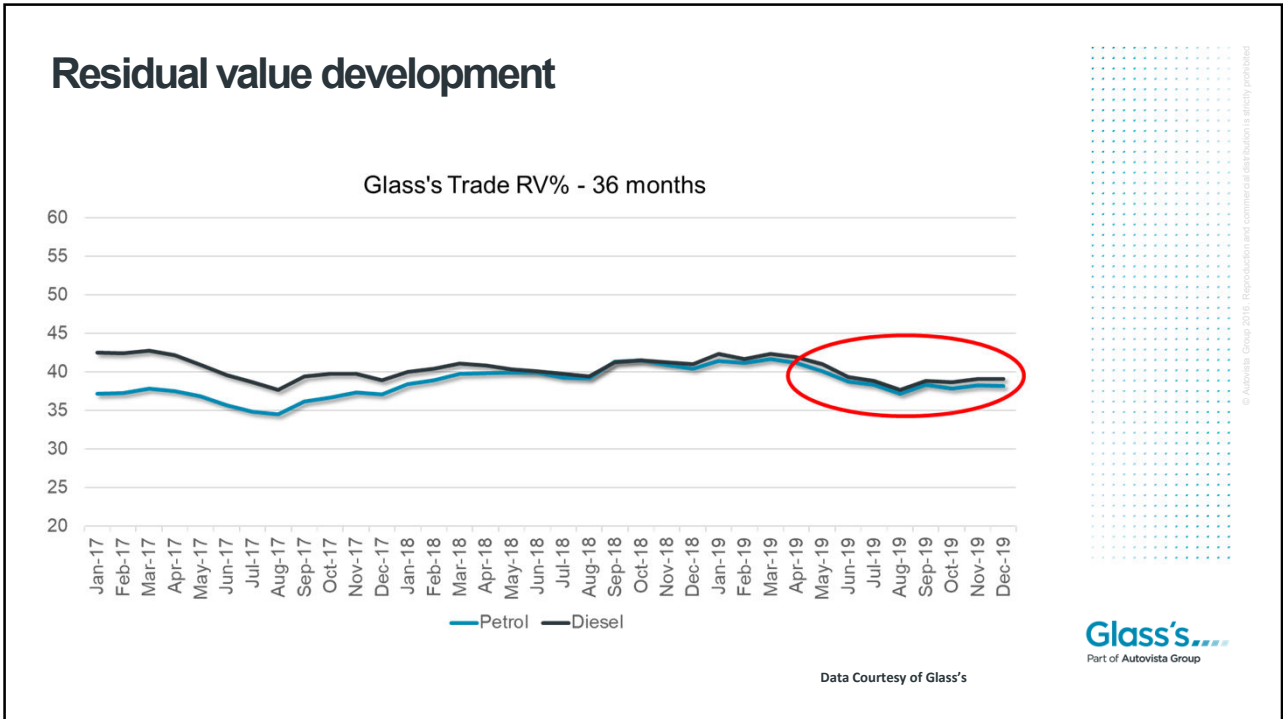
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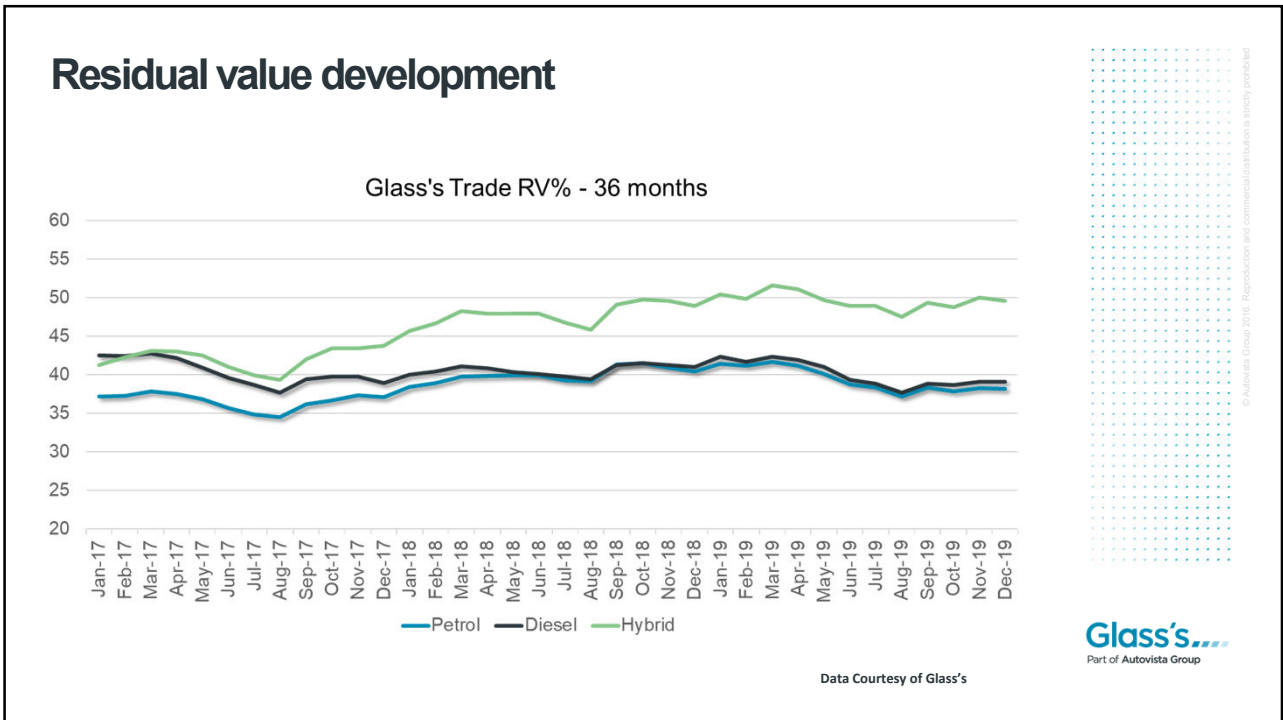
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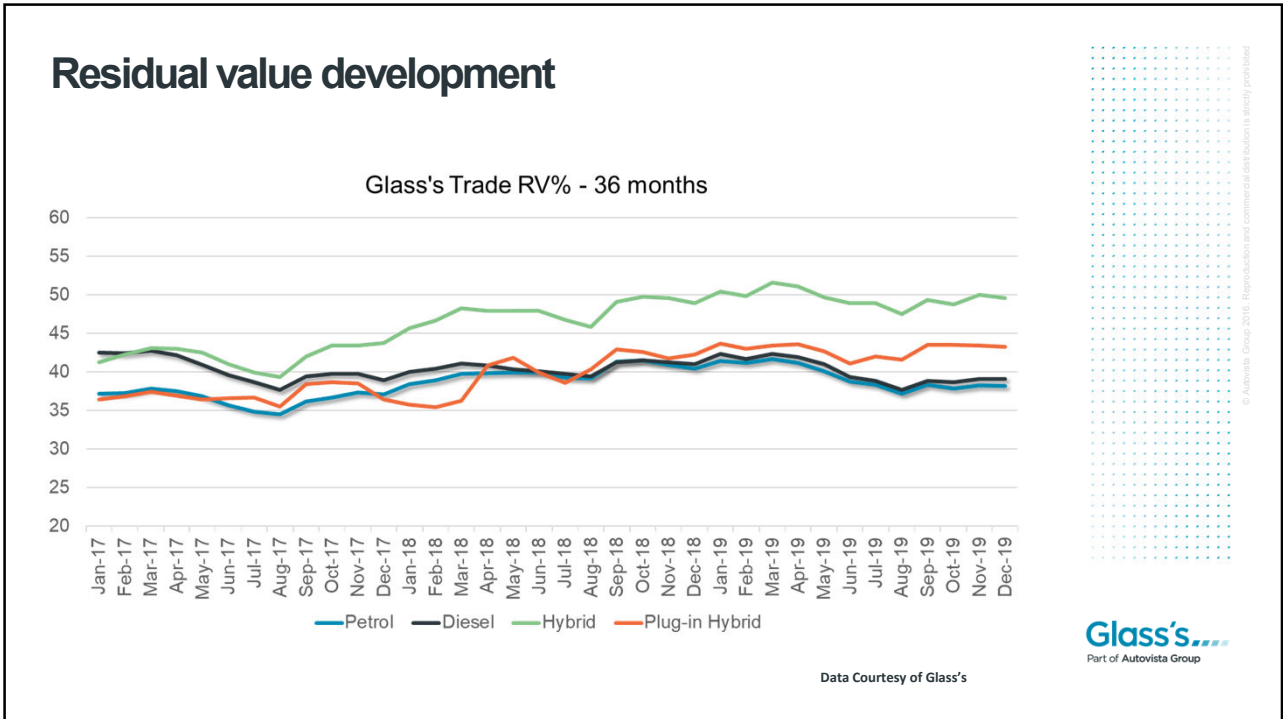
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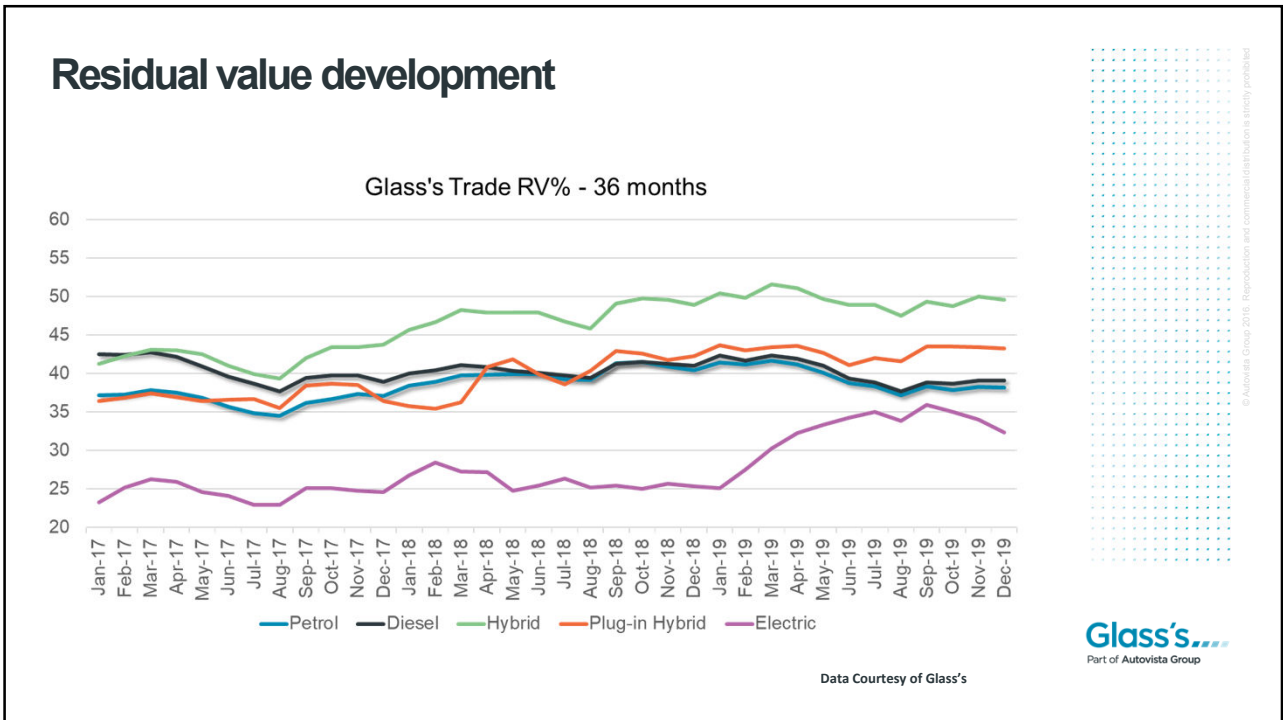
35



36



37



38

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