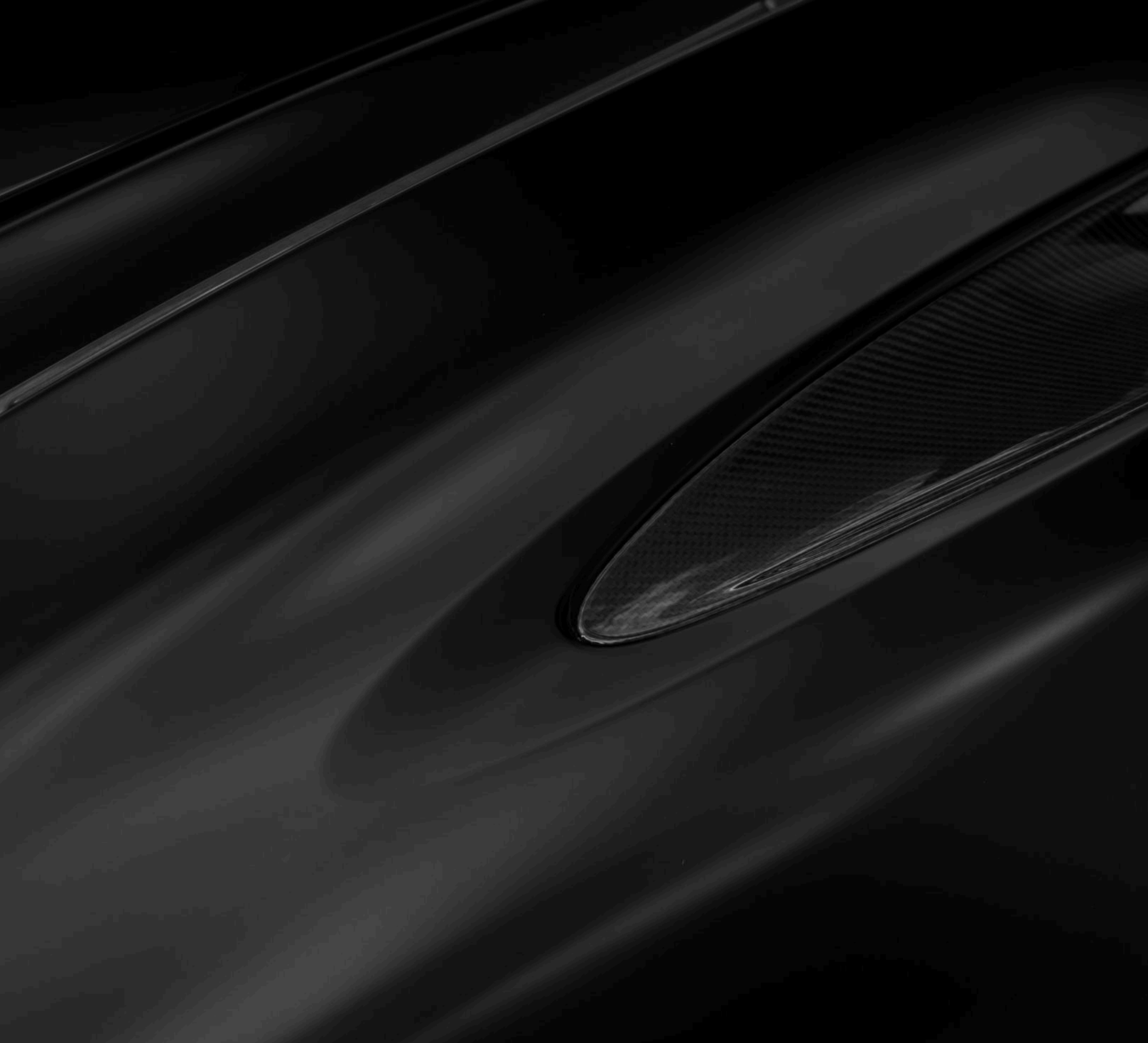
AADA AUSTRALIAN AUTOMOTIVE DEALER ASSOCIATION AutoGrab



# AutoGrab x AADA

Mid 2025 - Automotive Insights Report (AIR)

AADA and AutoGrab present the Australian Automotive Insights Report (AIR) for mid 2025. These reports aim to provide insightful data about the dynamic Australian retail used car market, which includes Dealer and Private listing data.

The document offers an in-depth analysis of market trends, pricing fluctuations, and consumer preferences, serving as a valuable resource for dealers, investors, and enthusiasts interested in the industry's current state and future prospects.

# Mid 2025 - Summary

01

## Supply Outpaced Demand

Overall, supply is rising far faster than demand. For the year to date to June 2025, vehicles listed for sale are up more than 30%, while sales have only edged up by around 2% over the same period.

This means a growing amount of stock is building in the market, which could start to put pressure on pricing and extend selling times in the second half on 2025.

Most of the supply increase is coming from Passenger vehicles and SUVs, and while SUVs are also driving the bulk of sales growth, Passenger car demand has softened noticeably. Light Commercial Utes are steady with modest growth.

02

## YTD 2025 Showed Slower Depreciation

Used-car retained values in 2025 are lower than 2024, but the decline month-to-month is more gradual, indicating a slower depreciation rate and a more stable market. Dealer days to sell remain steady, while private sales are taking longer.

03

## Strong Growth of BEVs Sales and Slower Depreciation Rate

BEVs sales have surged in 2025, reaching 1.1% market share YTD with 16,398 units sold, up 92.2% on last year, reflecting stronger adoption and broader model availability.

While BEVs Retained Values are lower than last year, the rate of depreciation in 2025 is slower compared to 2024. For example, 1-year-old BEVs eased from 84.5% to 82.0% by June, while in 2024 they fell more sharply from 94.8% to 83.7%. A similar pattern appears for 2-year-old BEVs (73.4% to 67.9%) and 3-year-old EVs (68.6% to 61.8%), indicating a more gradual softening of values this year.

Days to sell remain elevated, with 1-year-old BEVs at 78.2 days, 2-year-old at 57.8 days, and 3-year-old at 46.2 days, but the steadier depreciation suggests improving market confidence despite growing stock levels.

# Glossary

## For Sale
The level of available used cars listed online by Dealers and Private sellers is reported nationally at the time of reporting. A listing can remain available for sale across multiple months and will contribute to the 'For Sale' total monthly until sold. AutoGrab processes and deduplicates listings to identify and eliminate repetitions, ensuring that vehicles listed across multiple platforms are counted only once.

YTD For Sale represents the cumulative tally of distinct vehicle listings since the beginning of the year, aiding in the identification of the overall level of used car supply compared to previous corresponding period.

## Sales
Total vehicles delisted from online marketplaces, serving as a close proxy to actual sales and recorded monthly. The delisting count also reflects unique vehicles, as AutoGrab processes and deduplicates listings to identify and eliminate repetitions, ensuring that vehicles listed across multiple platforms are counted only once.

YTD Sales represent the cumulative tally of distinct vehicles delisted since the beginning of the year.

## Days to Sell:
Measures the duration (in days) between when a vehicle was first listed online to when it was delisted.

## Retained Value (RV%):
Measures how well a vehicle hold its value against the original Manufacturer's Suggested Retail Price (MSRP) when the vehicle was purchased brand new. RV of 30% represents that the vehicle was sold at 30% of its original MSRP.

This figure is reported as average by segment and age groups at each reporting period and provide a more stable pricing trend movement

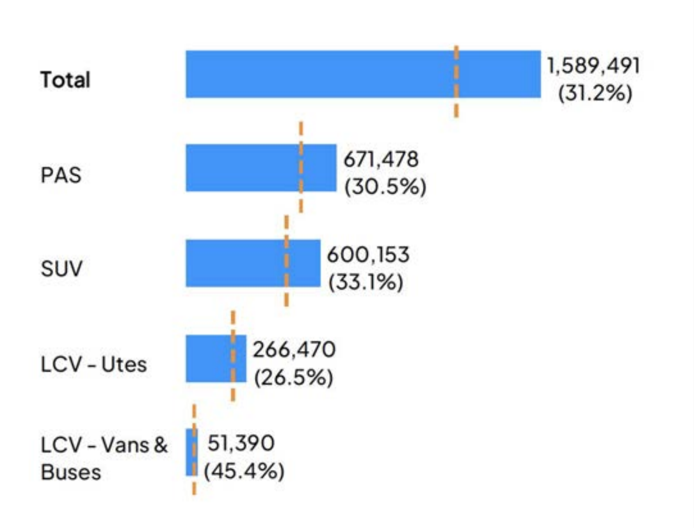
## Price Changes Statistic
Price Changes Statistic refers to the percentage of listings that have had at least one price changes before being delisted within a given period.

# 2025 YTD – For Sale

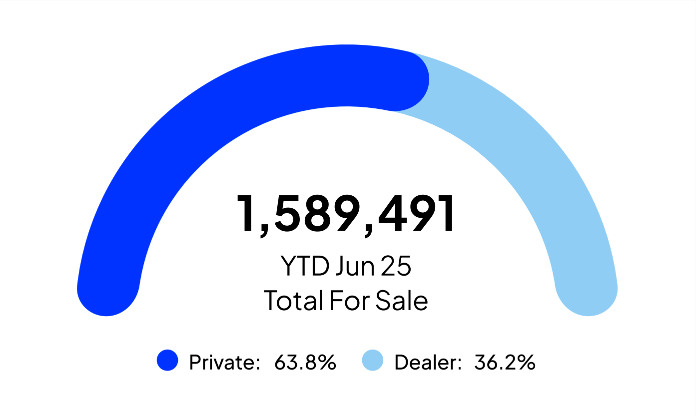
## Monthly For Sale

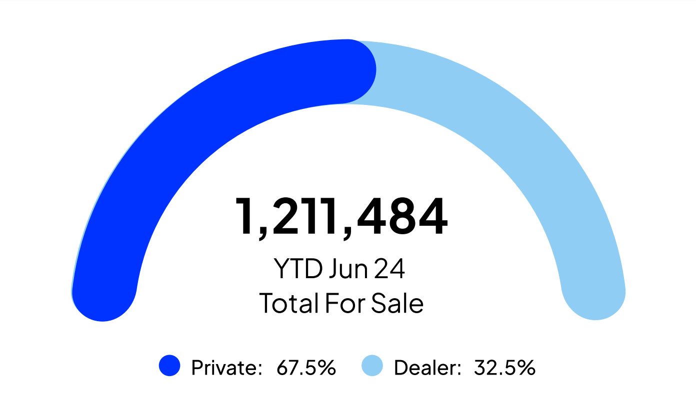
| | 2025 | 2024 | Movement |
|---|---|---|---|
| Jan | 333,386 | 282,713 | ▲ 15.2% |
| Feb | 327,433 | 286,329 | ▲ 12.6% |
| Mar | 311,933 | 287,620 | ▲ 7.8% |
| Apr | 310,054 | 276,719 | ▲ 10.8% |
| May | 326,205 | 296,542 | ▲ 9.1% |
| Jun | 330,278 | 302,848 | ▲ 8.3% |

## YTD Jun 25 vs. YTD Jun 24 – Segment




## YTD Jun 25 vs. YTD Jun 24 – Seller Type




## YTD Jun 25 vs. YTD Jun 24 – Fuel Type

| | For Sale – Market Share | YTD Jun 25 – For Sale | YTD Jun 24 – For Sale | Movement – For Sale |
|---|---|---|---|---|
| **Petrol** | 67.6% | 1,074,502 | 780,891 | ▲ 37.6% |
| **Diesel** | 27.0% | 429,680 | 373,518 | ▲ 15.0% |
| **Hybrid** | 3.9% | 62,226 | 44,964 | ▲ 38.4% |
| **BEVs** | 1.1% | 17,914 | 9,484 | ▲ 88.9% |
| **LPG** | 0.2% | 3,188 | 1,508 | ▲ 111.4% |
| **PHEVs** | 0.1% | 1,981 | 1,119 | ▲ 77.0% |

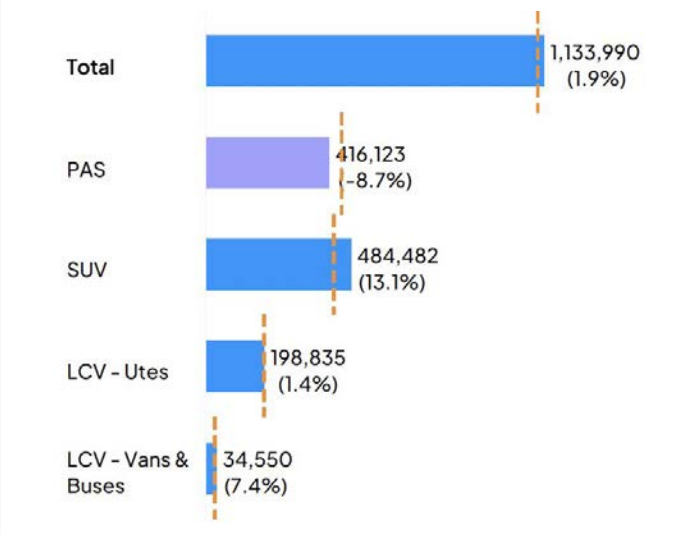
ⓘ Aggregate Private and Dealer data, excluding heavy commercial vehicles, demonstration models, used vehicles surpassing 15 years old, and write-offs. The YTD For Sale Volume depicts the distinct listings from both Private Sellers and Dealers since the beginning of the year.

# 2025 YTD – Sales

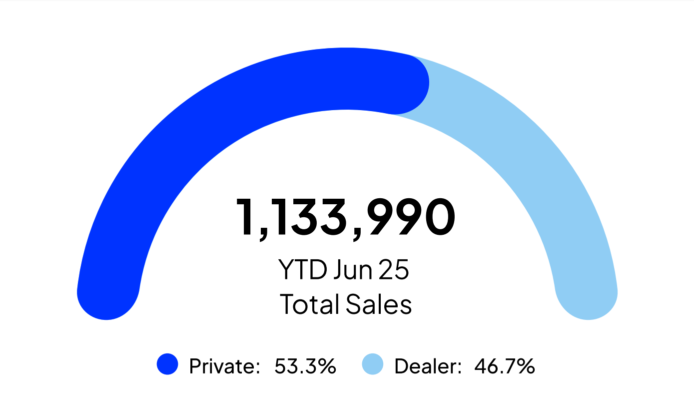
## Monthly Sales

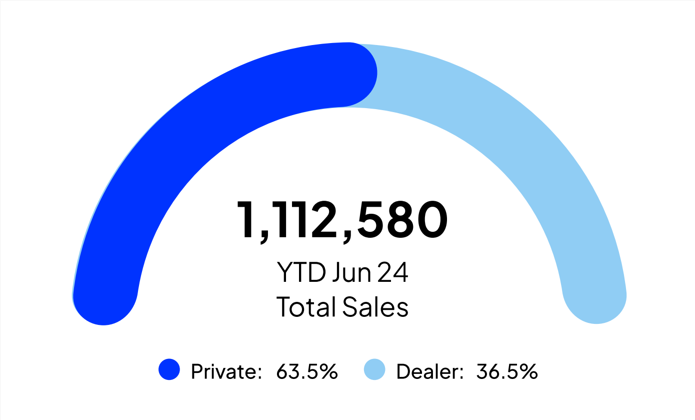
| | 2025 | 2024 | Movement |
|---|---|---|---|
| Jan | 171,007 | 181,612 | ▼ -6.2% |
| Feb | 174,762 | 179,448 | ▼ -2.7% |
| Mar | 200,566 | 184,054 | ▲ 8.2% |
| Apr | 182,827 | 183,575 | ▼ -0.4% |
| May | 192,692 | 191,625 | ▲ 0.6% |
| Jun | 212,136 | 192,266 | ▲ 9.4% |

## YTD Jun 25 vs. YTD Jun 24 – Segment




## YTD Jun 25 vs. YTD Jun 24 – Seller Type




## YTD Jun 25 vs. YTD Jun 24 – Fuel Type

| | Sales – Market Share | YTD Jun 25 – Sales | YTD Jun 24 – Sales | Movement – Sales |
|---|---|---|---|---|
| **Petrol** | 63.3% | 705,576 | 712,047 | ▼ -0.9% |
| **Diesel** | 31.1% | 351,602 | 349,706 | ▲ 0.5% |
| **Hybrid** | 4.3% | 57,131 | 40,010 | ▲ 42.8% |
| **BEVs** | 1.1% | 16,398 | 8,531 | ▲ 92.2% |
| **PHEVs** | 0.1% | 1,746 | 890 | ▲ 96.2% |
| **LPG** | 0.1% | 1,537 | 1,396 | ▲ 10.1% |

ⓘ Aggregate Private and Dealer data, excluding heavy commercial vehicles, demonstration models, used vehicles surpassing 15 years old, and write-offs. The YTD Sales Volume depicts unique listings from both Private Sellers and Dealers that have been delisted since the beginning of the year.

# 2025 YTD – Sales

## Top 20 Makes

| | 2025 Sales – Market Share | YTD Jun 25 – Sales | YTD Jun 24 – Sales | Movement |
|---|---|---|---|---|
| TOYOTA | 15.6% | 177,271 | 189,155 | -6.3% |
| MAZDA | 8.4% | 95,579 | 92,293 | 3.6% |
| HYUNDAI | 8.0% | 90,187 | 82,813 | 8.9% |
| FORD | 7.9% | 89,962 | 88,697 | 1.4% |
| MITSUBISHI | 6.1% | 69,720 | 66,021 | 5.6% |
| NISSAN | 5.6% | 63,647 | 61,550 | 3.4% |
| VOLKSWAGEN | 5.5% | 61,936 | 62,284 | -0.6% |
| HOLDEN | 5.0% | 56,921 | 69,332 | -17.9% |
| KIA | 4.5% | 51,453 | 40,293 | 27.7% |
| SUBARU | 3.5% | 39,551 | 34,778 | 13.7% |
| MERCEDES-BENZ | 3.3% | 37,438 | 37,340 | 0.3% |
| BMW | 3.2% | 35,883 | 33,102 | 8.4% |
| AUDI | 2.4% | 27,020 | 27,111 | -0.3% |
| HONDA | 2.2% | 24,960 | 29,187 | -14.5% |
| SUZUKI | 2.1% | 23,583 | 21,851 | 7.9% |
| MG | 2.0% | 22,906 | 18,841 | 21.6% |
| ISUZU | 2.0% | 22,201 | 18,405 | 20.6% |
| GWM | 1.8% | 20,429 | 12,238 | 66.9% |
| JEEP | 1.5% | 16,792 | 18,713 | -10.3% |
| LAND ROVER | 1.2% | 13,571 | 14,122 | -3.9% |

Aggregate Private and Dealer data, excluding heavy commercial vehicles, demonstration models, used vehicles surpassing 15 years old, and write-offs.

# 2025 YTD – Sales

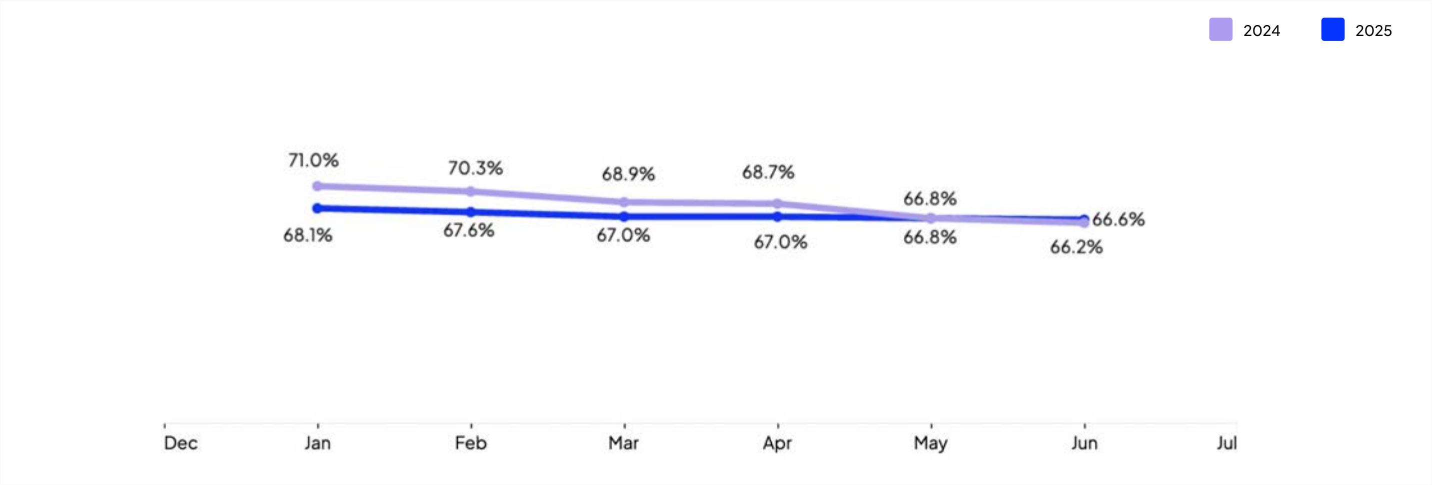
## Top 20 Models

| | 2025 Sales – Market Share | YTD Jun 25 – Sales | YTD Jun 24 – Sales | Movement |
|---|---|---|---|---|
| FORD RANGER | 3.8% | 43,030 | 38,804 | ▲ 10.9% |
| TOYOTA HILUX | 3.0% | 34,288 | 34,736 | ▼ -1.3% |
| TOYOTA COROLLA | 2.4% | 27,429 | 29,774 | ▼ -7.9% |
| HYUNDAI I30 | 2.1% | 23,746 | 22,626 | ▲ 5.0% |
| MAZDA 3 | 2.0% | 22,492 | 25,003 | ▼ -10.0% |
| MITSUBISHI TRITON | 1.9% | 21,517 | 21,409 | ▲ 0.5% |
| MAZDA CX-5 | 1.8% | 20,098 | 16,960 | ▲ 18.5% |
| NISSAN NAVARA | 1.7% | 19,107 | 19,065 | ▲ 0.2% |
| TOYOTA CAMRY | 1.6% | 18,592 | 22,174 | ▼ -16.2% |
| VOLKSWAGEN GOLF | 1.6% | 18,425 | 19,344 | ▼ -4.8% |
| TOYOTA RAV4 | 1.6% | 17,625 | 17,884 | ▼ -1.4% |
| MITSUBISHI OUTLANDER | 1.4% | 15,749 | 13,455 | ▲ 17.0% |
| TOYOTA LANDCRUISER | 1.4% | 15,633 | 17,616 | ▼ -11.3% |
| ISUZU D-MAX | 1.4% | 15,566 | 13,640 | ▲ 14.1% |
| NISSAN X-TRAIL | 1.3% | 15,260 | 13,705 | ▲ 11.3% |
| TOYOTA LANDCRUISER PRADO | 1.3% | 15,087 | 15,042 | ▲ 0.3% |
| HYUNDAI TUCSON | 1.3% | 14,485 | 11,944 | ▲ 21.3% |
| MAZDA BT-50 | 1.2% | 14,123 | 13,889 | ▲ 1.7% |
| HOLDEN COMMODORE | 1.2% | 13,755 | 17,049 | ▼ -19.3% |
| KIA SPORTAGE | 1.0% | 11,665 | 8,094 | ▲ 44.1% |

Aggregate Private and Dealer data, excluding heavy commercial vehicles, demonstration models, used vehicles surpassing 15 years old, and write-offs.

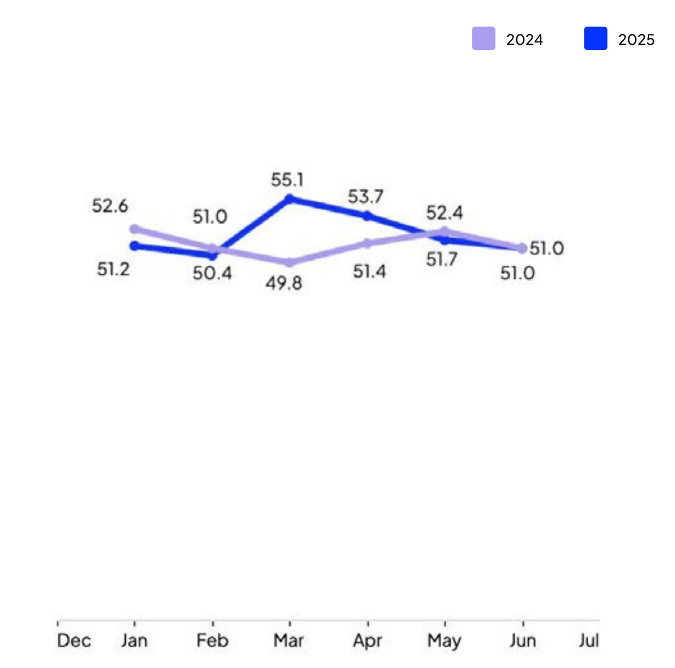
# Used Car Price Trends

## National – Weighted Average RV%

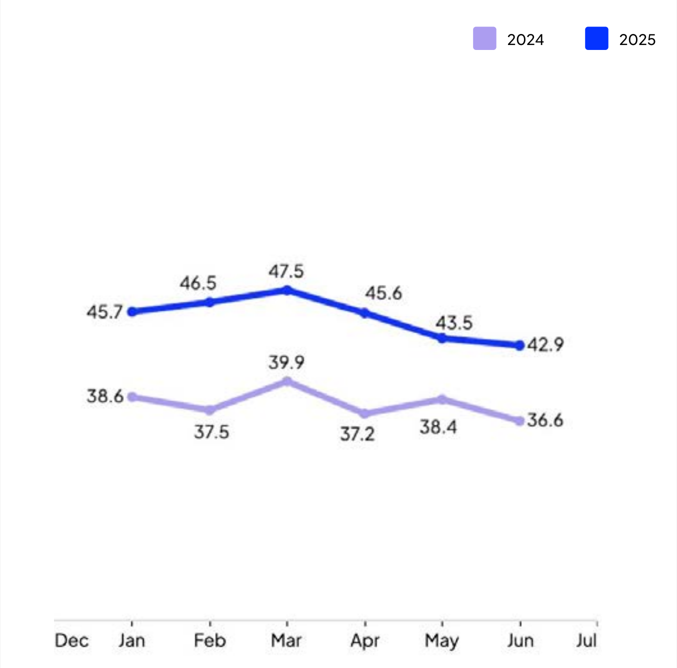



## National – Weighted Average Days to Sell Trend

### Dealer

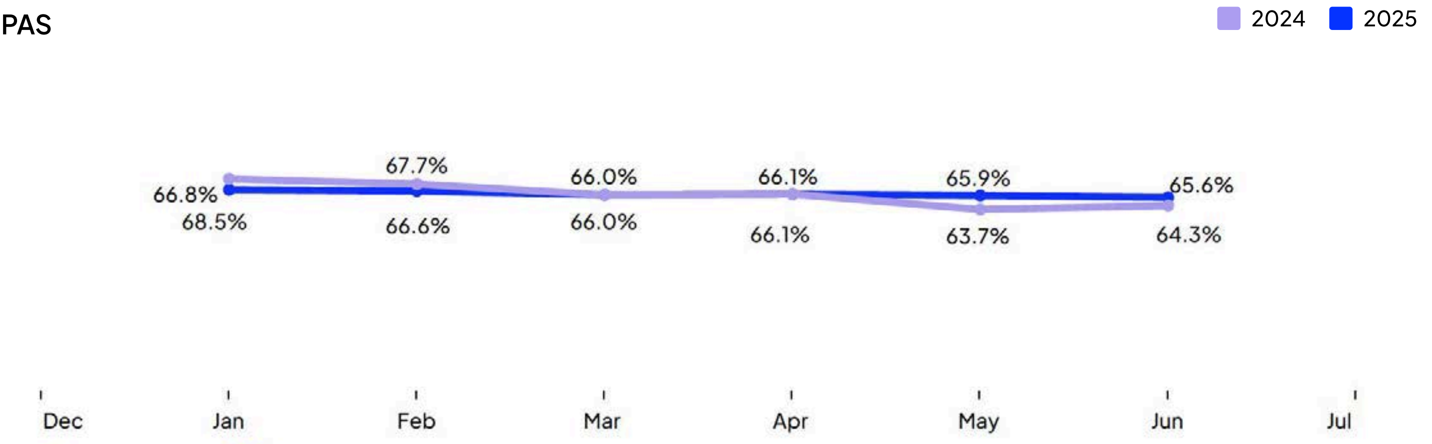



### Private

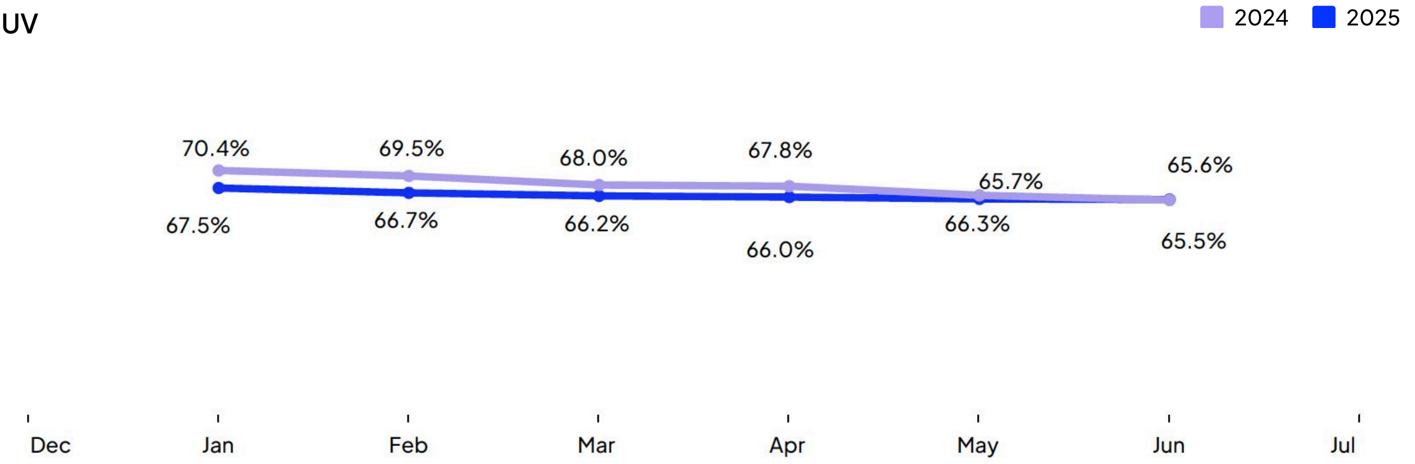


## Segment – Weighted Average RV%

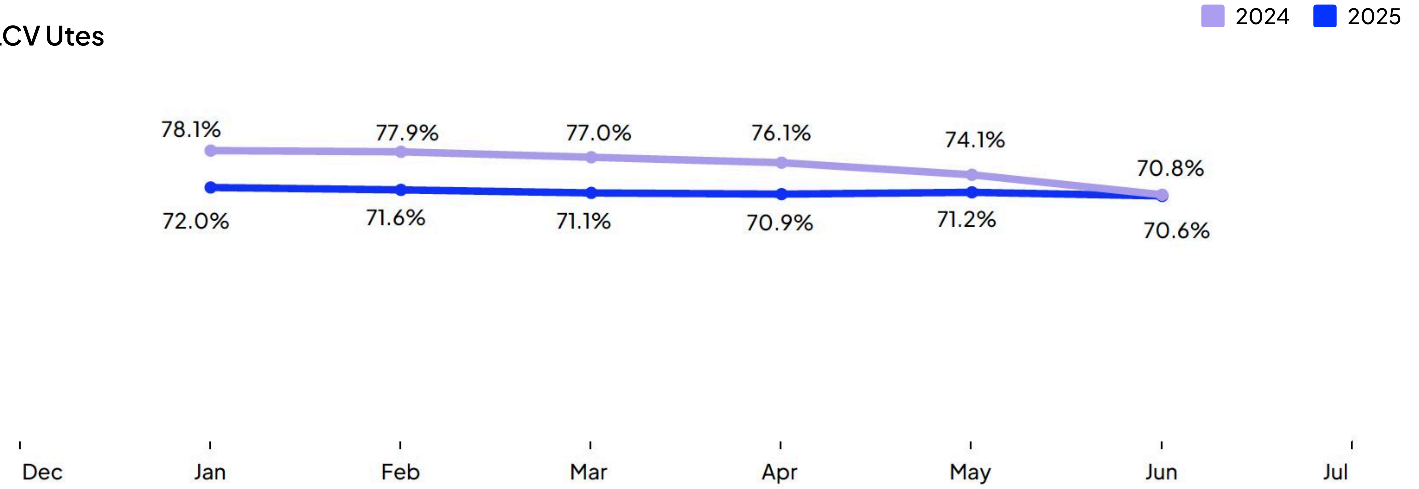
### PAS




### SUV




### LCV Utes




Aggregate Private and Dealer data, excluding heavy commercial vehicles, demonstration models, used vehicles surpassing 10 years old, and write-offs.

## 2025 YTD Sales – Top 10 BEVs by Makes

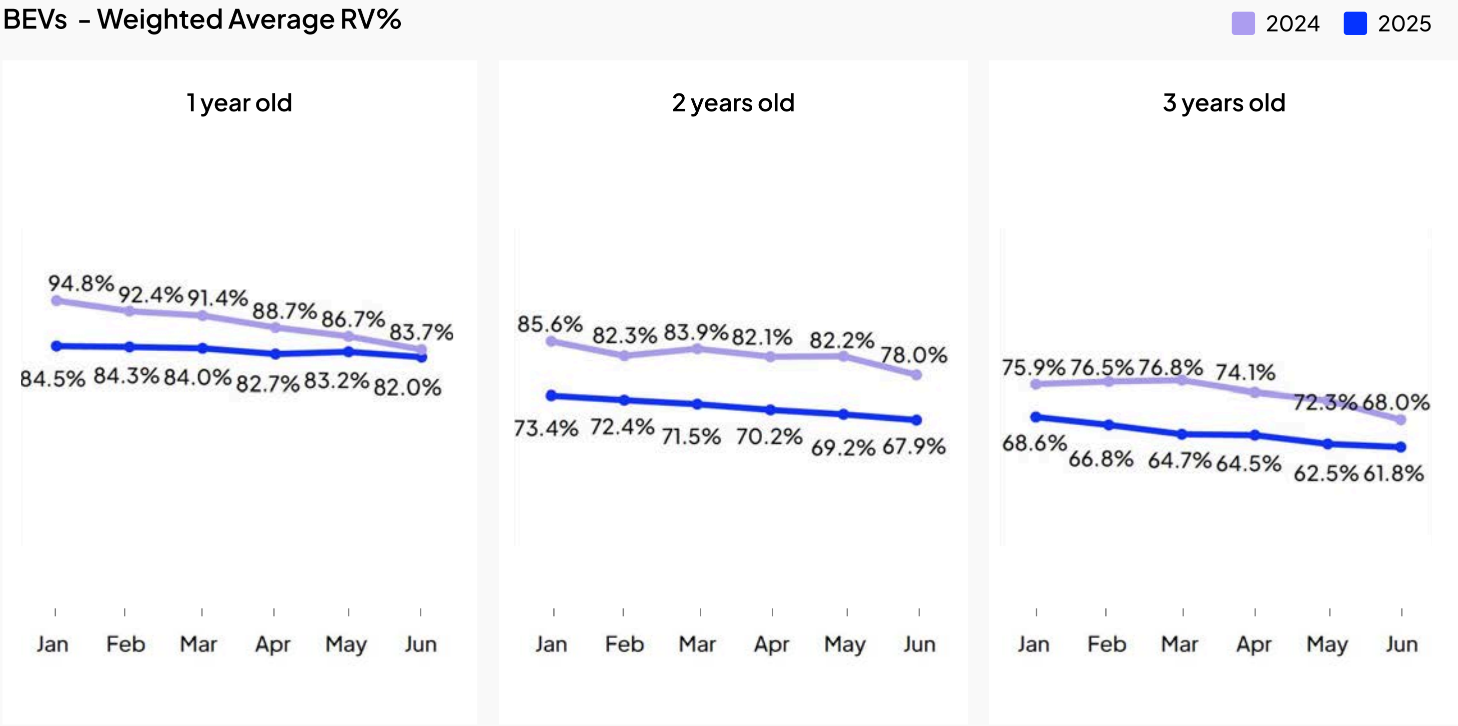
| | Market Share | YTD Jun 25 – Sales | YTD Jun 24 – Sales | Sales – Movement |
|---|---|---|---|---|
| TESLA | 24.1% | 3,947 | 2,314 | ▲ 70.6% |
| BMW | 11.2% | 1,829 | 571 | ▲ 220.3% |
| MG | 10.5% | 1,724 | 1,777 | ▼ -3.0% |
| MERCEDES-BENZ | 5.5% | 909 | 364 | ▲ 149.7% |
| KIA | 5.5% | 908 | 733 | ▲ 23.9% |
| VOLVO | 5.0% | 826 | 359 | ▲ 130.1% |
| HYUNDAI | 4.4% | 726 | 545 | ▲ 33.2% |
| BYD | 3.9% | 643 | 278 | ▲ 131.3% |
| NISSAN | 2.8% | 461 | 547 | ▼ -15.7% |
| AUDI | 2.6% | 421 | 166 | ▲ 153.6% |

## 2025 YTD Sales – Top BEVs by Models

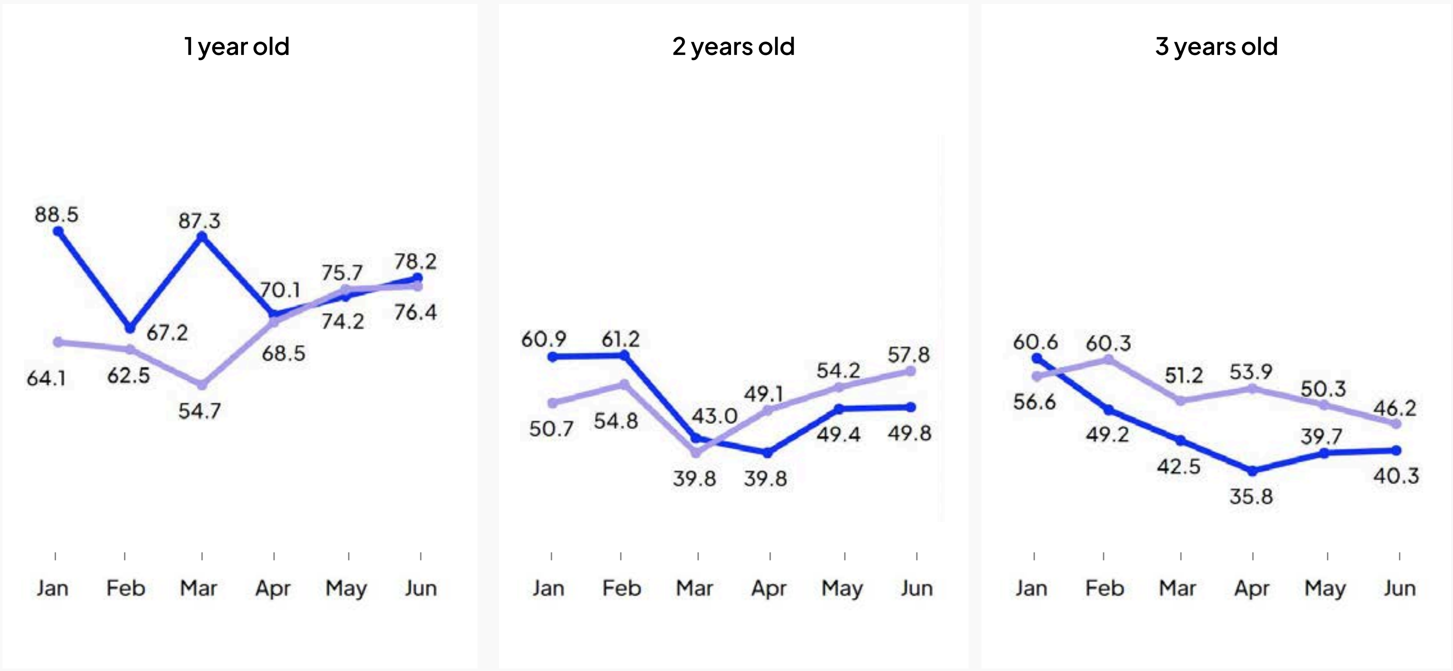
| | Market Share | YTD Jun 25 – Sales | YTD Jun 24 – Sales | Sales – Movement |
|---|---|---|---|---|
| TESLA MODEL 3 | 14.2% | 2,325 | 1,584 | ▲ 46.8% |
| TESLA MODEL Y | 8.6% | 1,413 | 473 | ▲ 198.7% |
| MG MG4 | 7.1% | 1,166 | 1,142 | ▲ 2.1% |
| BMW IX1 | 3.3% | 536 | 79 | ▲ 578.5% |
| KIA EV5 | 3.0% | 487 | - | - |
| BYD ATTO 3 | 2.8% | 460 | 255 | ▲ 80.4% |
| NISSAN LEAF | 2.8% | 454 | 509 | ▼ -10.8% |
| BMW IX2 | 2.5% | 409 | 16 | ▲ 2,456.3% |
| MERCEDES-BENZ EQE | 2.3% | 373 | 77 | ▲ 384.4% |
| HYUNDAI KONA | 2.2% | 363 | 377 | ▼ -3.7% |

## BEVs – Weighted Average RV% and Days to Sell

### BEVs - Weighted Average RV%




### BEVs - Weighted Average Days to Sell




Aggregate Private and Dealer data, excluding heavy commercial vehicles, demonstration models, used vehicles surpassing 10 years old, and write-offs.