

AutoGrab x AADA

Annual 2025 – Automotive Insights Report (AIR)

AADA and AutoGrab present the Australian Automotive Insights Report (AIR) for 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.

2025 – Summary

01

Stable Used–Car Demand with a Strong Shift toward SUVs and Electric Vehicles

Total used car sales in 2025 are broadly in line with prior year at around 2.32 million units, but the mix has shifted noticeably.

SUVs continue to drive the market, up close to 10% year-on-year and offsetting a decline in Passenger cars. Electrified vehicles are also gaining momentum, with Hybrid and BEV volumes rising strongly.

02

Softer Prices, Faster Turnover and a More Balanced Used–Car Market in 2025

Used-car prices softened through 2025, with national weighted average RVs generally tracking below 2024, though the rate of decline eased in the second half.

Market liquidity improved, with Dealer days to sell lower compared to 2H2025, supported by more disciplined pricing and healthier stock turnover.

Private market conditions remained more volatile, but selling times were broadly shorter year-on-year, pointing to a more balanced market overall.

03

Used BEV Demand Strengths and Market Liquidity Improves

Sales remain concentrated around a small group of proven brands and models, led by Tesla, while BMW, BYD, Kia and Mercedes-Benz continue to gain share as buyer acceptance broadens beyond early leaders.

Performance varies sharply at a model level, with some legacy and value brands under pressure, while BEV depreciation continued to normalise in 2025, particularly for 2-year-old vehicles, as pricing expectations reset and the market matures.

Despite softer prices year-on-year, market liquidity improved, with shorter days to sell across most age bands, signalling healthier stock turnover.

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

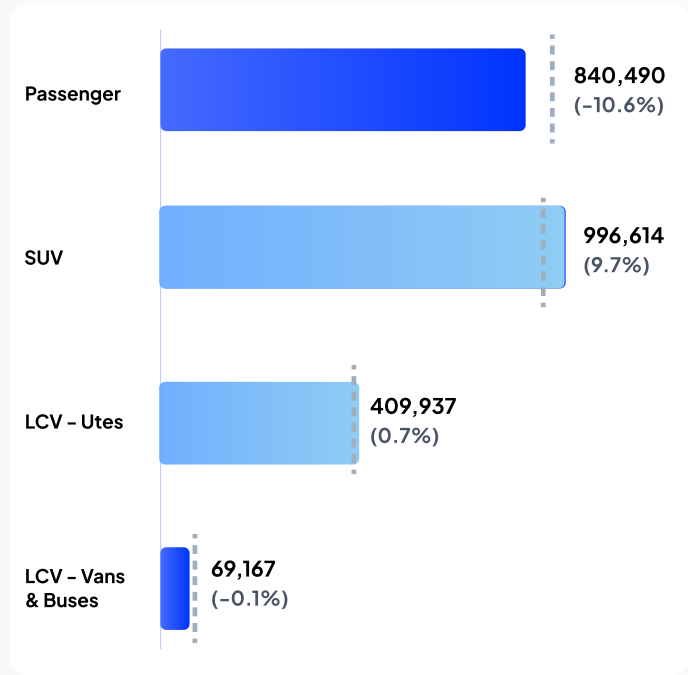


2025 – National Used Car Sales

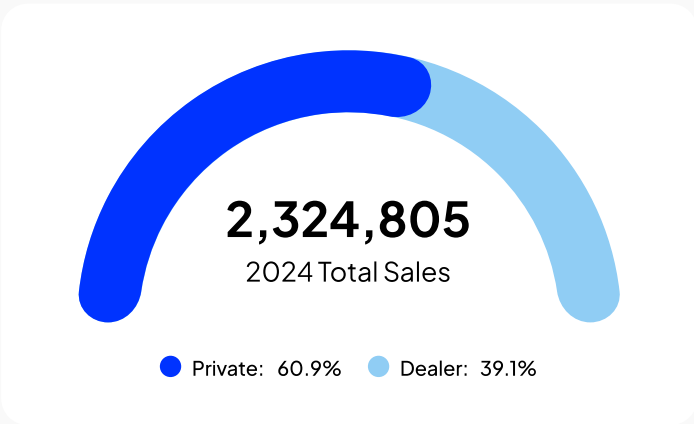
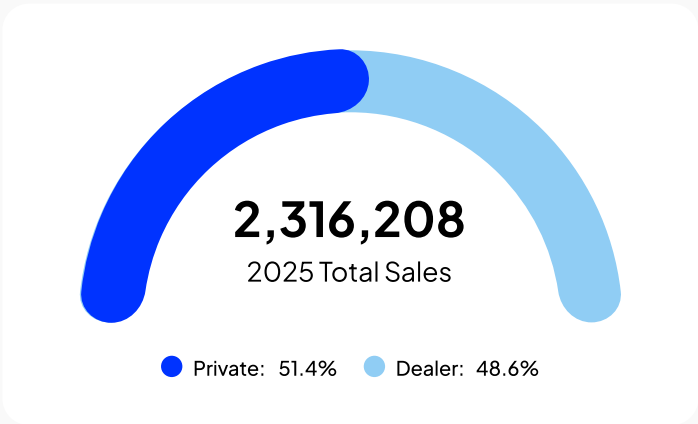
Monthly Sales

	2025 – Sales	2024 – Sales	Movement
Jan	171,007	181,612	▼ -5.8%
Feb	174,762	179,448	▼ -2.6%
Mar	200,566	184,054	▲ 9.0%
Apr	182,827	183,575	▼ -0.4%
May	192,692	191,625	▲ 0.6%
Jun	212,136	192,266	▲ 10.3%
Jul	206,216	214,588	▼ -3.9%
Aug	203,480	206,804	▼ -1.6%
Sep	200,916	209,102	▼ -3.9%
Oct	206,503	202,355	▲ 2.0%
Nov	193,266	197,652	▼ -2.2%
Dec	171,837	181,724	▼ -5.4

2025 vs. 2024 – Segment



2025 vs. 2024 – Seller Type



	Sales – Market Share	2025 – Sales	2024 – Sales	Movement – Sales
Petrol	61.4%	1,422,518	1,482,174	▼ -4.0%
Diesel	31.3%	725,203	725,250	▼ -0.0%
Hybrid	5.6%	128,914	91,516	▲ 40.9%
BEV	1.5%	33,610	20,460	▲ 64.3%
LPG	0.1%	3,013	2,966	▲ 1.6%
PHEV	0.1%	2,950	2,439	▲ 21.0%

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 – Sales

Top 20 Makes

	2025 Sales – Market Share	2025 – Sales	2024 – Sales	Movement
TOYOTA	15.6%	360,300	390,298	▼ -7.7%
MAZDA	8.3%	191,922	194,069	▼ -1.1%
FORD	8.1%	188,237	185,838	▲ 1.3%
HYUNDAI	8.0%	185,216	177,167	▲ 4.5%
MITSUBISHI	6.2%	142,676	139,494	▲ 2.3%
NISSAN	5.5%	127,424	128,503	▼ -0.8%
VOLKSWAGEN	5.3%	123,777	129,041	▼ -4.1%
HOLDEN	5.1%	118,800	138,229	▼ -14.1%
KIA	4.6%	106,536	92,082	▲ 15.7%
SUBARU	3.5%	81,513	75,287	▲ 8.3%
MERCEDES-BENZ	3.3%	76,037	71,399	▲ 6.5%
BMW	3.2%	73,150	68,765	▲ 6.4%
AUDI	2.4%	56,220	55,758	▲ 0.8%
HONDA	2.2%	51,296	60,813	▼ -15.6%
ISUZU	2.0%	46,645	42,107	▲ 10.8%
SUZUKI	2.0%	46,116	47,227	▼ -2.4%
MG	1.8%	40,998	41,244	▼ -0.6%
GWM	1.7%	38,426	29,455	▲ 30.5%
JEEP	1.5%	34,938	37,480	▼ -6.8%
LAND ROVER	1.2%	27,501	29,617	▼ -7.1%

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

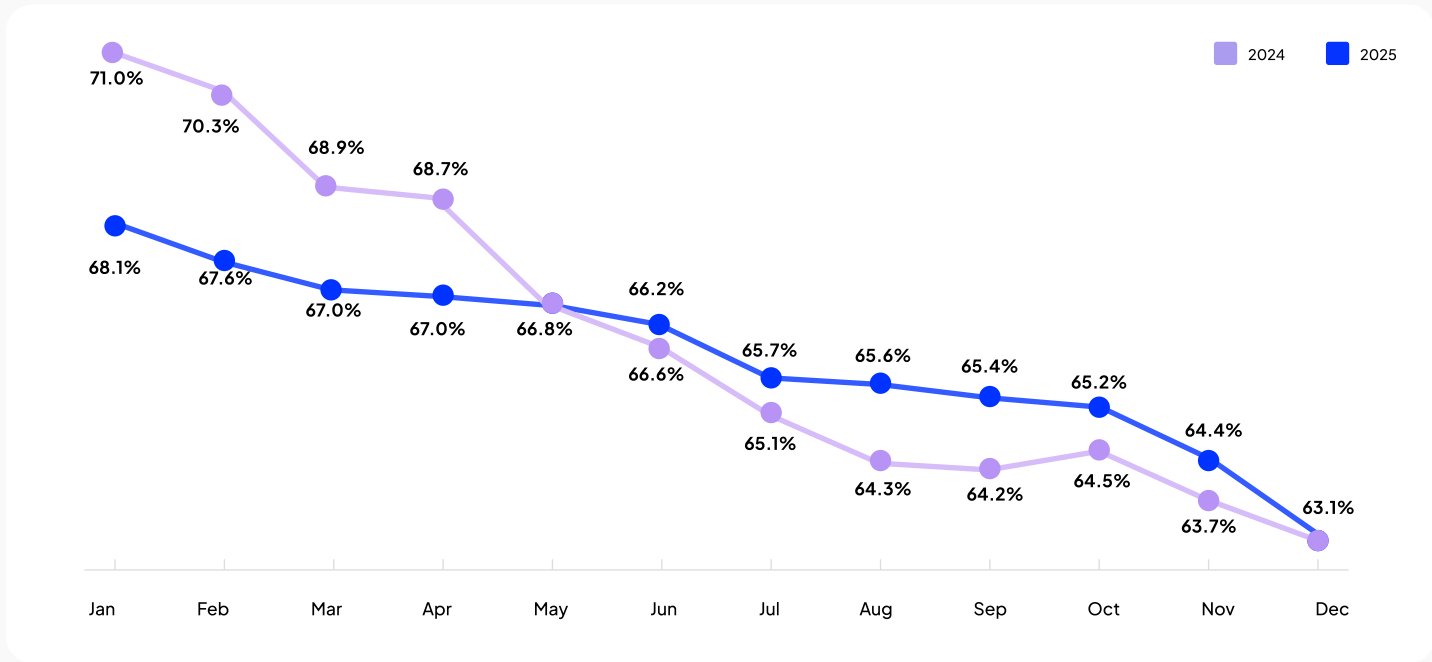
2025 – Sales
Top 20 Models

	2025 Sales – Market Share	2025 – Sales	2024 – Sales	Movement
FORD RANGER	4.0%	92,197	82,448	▲ 11.8%
TOYOTA HILUX	3.1%	71,120	72,015	▼ -1.2%
TOYOTA COROLLA	2.4%	54,518	61,745	▼ -11.7%
HYUNDAI I30	2.1%	48,488	48,907	▼ -0.9%
MAZDA 3	2.0%	45,173	52,194	▼ -13.5%
MITSUBISHI TRITON	1.9%	44,055	44,894	▼ -1.9%
MAZDA CX-5	1.8%	40,897	36,225	▲ 12.9%
NISSAN NAVARA	1.7%	38,310	39,692	▼ -3.5%
TOYOTA CAMRY	1.6%	37,148	44,525	▼ -16.6%
VOLKSWAGEN GOLF	1.6%	36,884	39,447	▼ -6.5%
TOYOTA RAV4	1.5%	34,921	38,108	▼ -8.4%
MITSUBISHI OUTLANDER	1.4%	32,919	35,428	▼ -7.1%
ISUZU D-MAX	1.4%	32,119	28,655	▲ 12.1%
TOYOTA LANDCRUISER	1.4%	31,902	30,066	▲ 6.1%
TOYOTA LANDCRUISER PRADO	1.4%	31,370	29,877	▲ 5.0%
NISSAN X-TRAIL	1.3%	30,878	28,714	▲ 7.5%
HYUNDAI TUCSON	1.3%	29,479	34,457	▼ -14.4%
HOLDEN COMMODORE	1.3%	28,972	28,583	▲ 1.4%
MAZDA BT-50	1.2%	28,545	26,345	▲ 8.4%
SUBARU FORESTER	1.0%	23,981	22,655	▲ 5.9%

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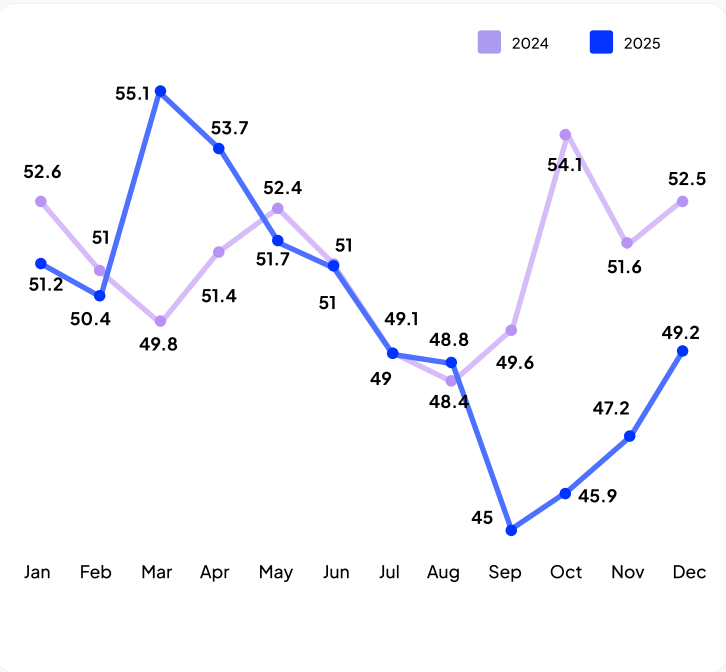
Used Car Price Trends

National – Weighted Average RV%

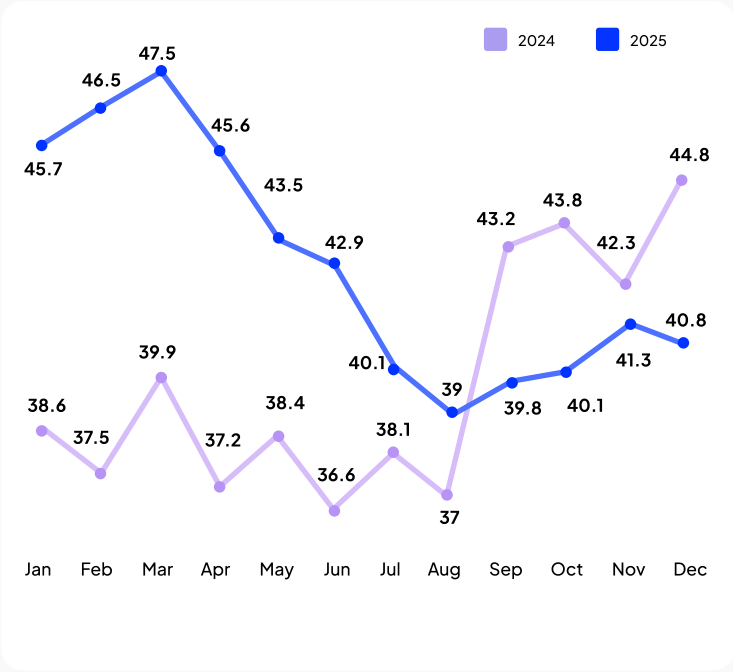


National – Weighted Average Days to Sell Trend

Dealer

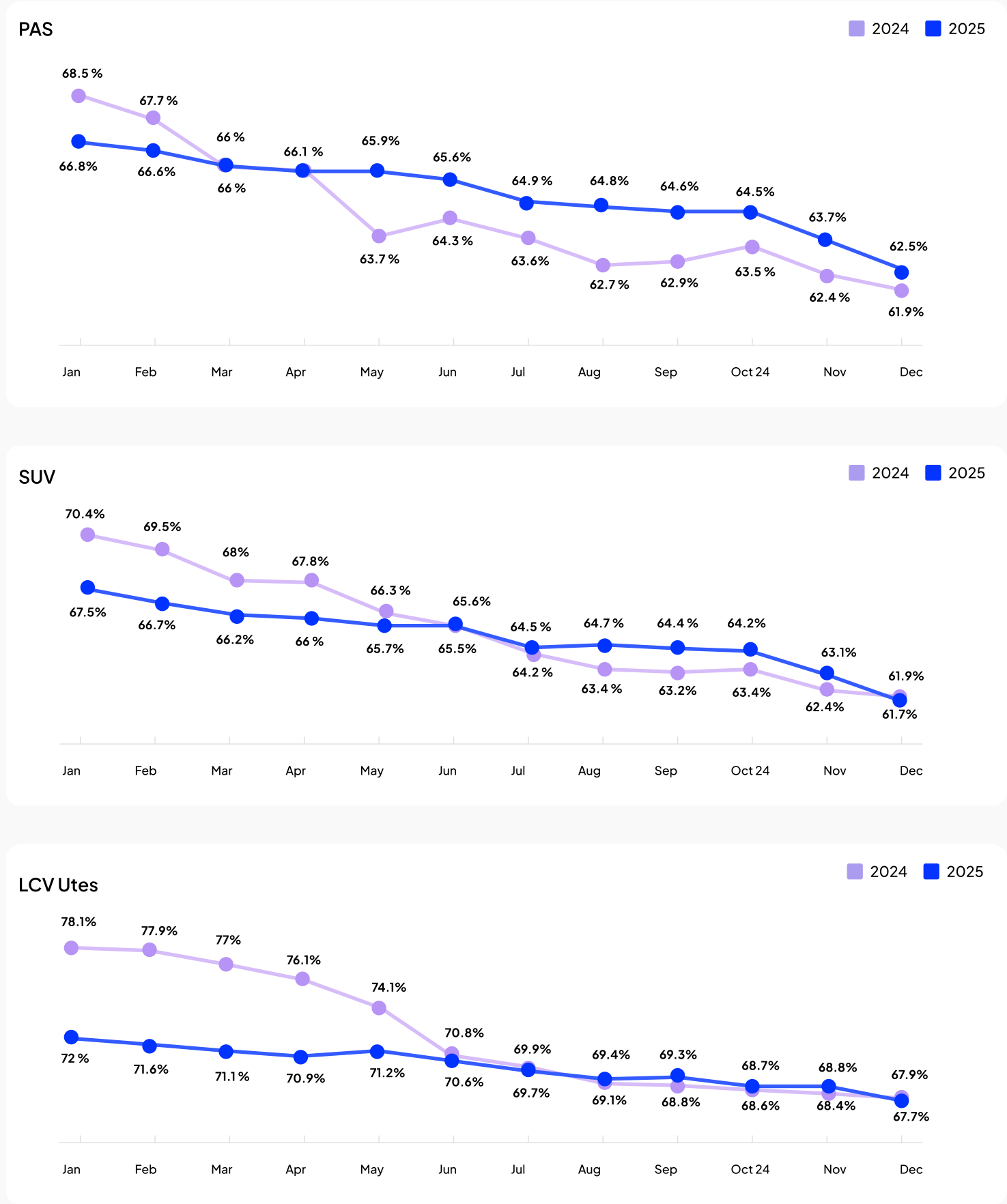


Private



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

Segment - Weighted Average RV%



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

2025 Sales – Top 10 BEV Makes

	Market Share	2025 – Sales	2024 – Sales	Sales – Movement
TESLA	32.6%	10,949	4,913	▲ 122.9%
BMW	9.5%	3,188	1,571	▲ 102.9%
MG	8.6%	2,894	3,821	▼ -24.3%
KIA	5.3%	1,797	1,546	▲ 16.2%
BYD	4.4%	1,478	684	▲ 116.1%
MERCEDES-BENZ	4.4%	1,465	1,173	▲ 24.9%
HYUNDAI	4.2%	1,413	1,342	▲ 5.3%
VOLVO	4.1%	1,382	934	▲ 48.0%
NISSAN	2.3%	773	1,211	▼ -36.2%
AUDI	2.2%	732	320	▲ 128.8%

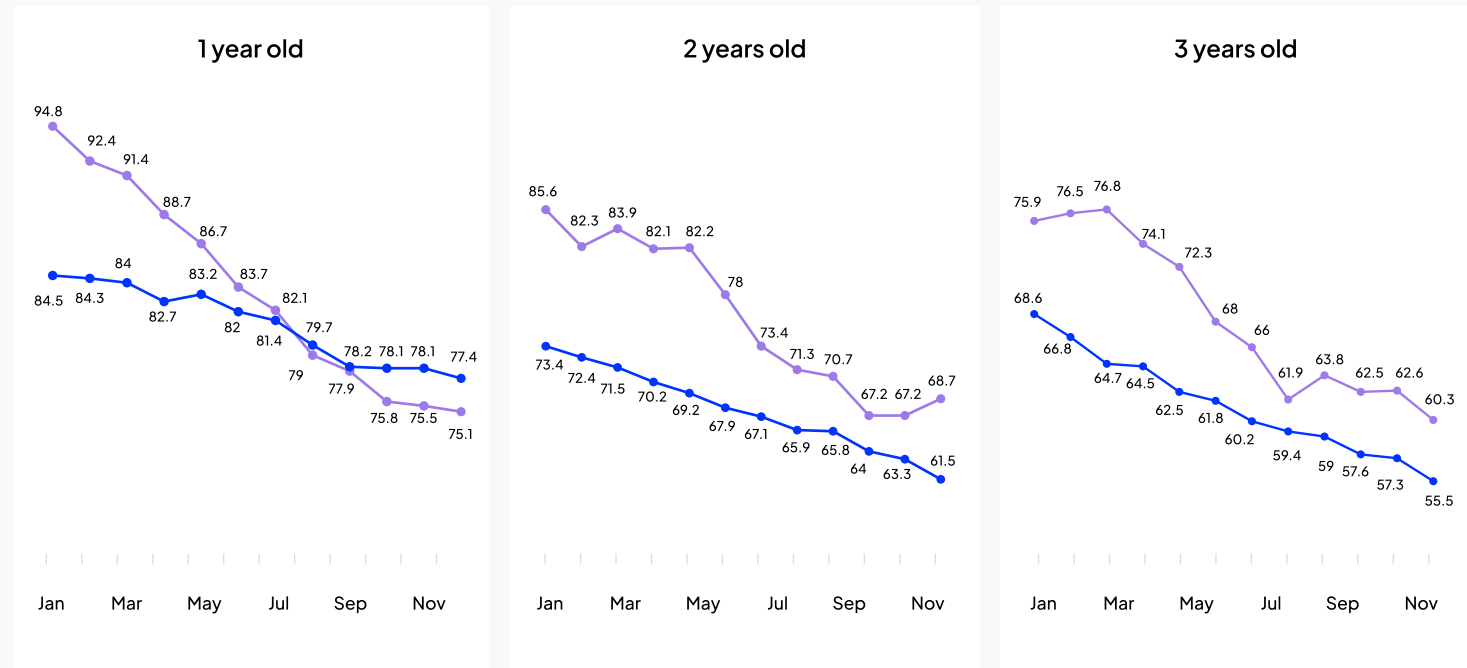
2025 Sales – Top 10 BEV Models

	Market Share	2025 – Sales	2024 – Sales	Sales – Movement
TESLA MODEL 3	19.0%	6,394	3,341	▲ 91.4%
TESLA MODEL Y	12.0%	4,041	1,052	▲ 284.1%
MG MG4	5.2%	1,737	2,694	▼ -35.5%
BYD ATTO 3	2.9%	964	543	▲ 77.5%
KIA EV5	2.9%	960	912	▲ 5.3%
BMW IX1	2.8%	953	310	▲ 207.4%
NISSAN LEAF	2.3%	759	1,142	▼ -33.5%
BMW I4	1.9%	638	428	▲ 49.1%
MG ZS	1.9%	624	1,126	▼ -44.6%
HYUNDAI KONA	1.8%	603	860	▼ -29.9%

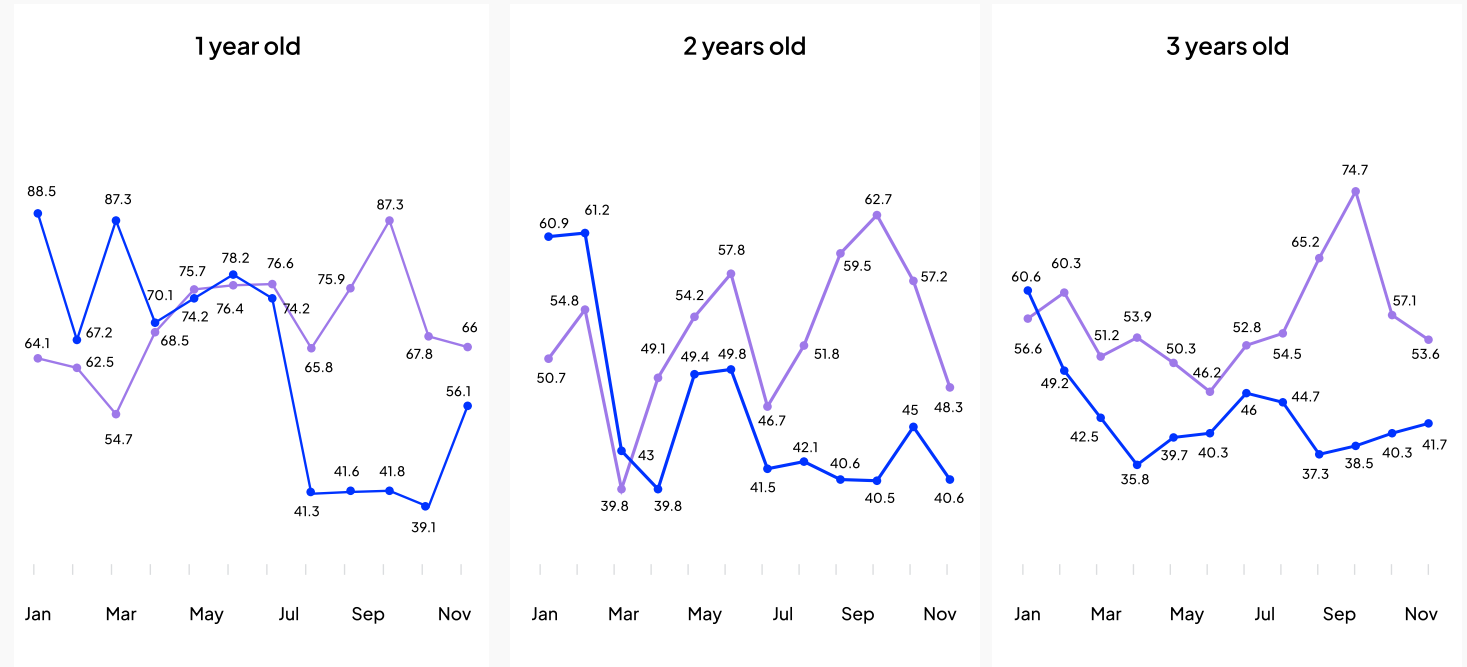
BEV – Weighted Average RV% and Days to Sell

BEV – Weighted Average RV%

2024 2025



BEV – 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.