

Market View

For the latest insights from MOTORS.

Welcome to our monthly Market View for Commercial Vehicles. We have analysed activity across the MOTORS network to provide insights into stock, price and consumer demand. We compare this data over time periods so that you can spot emerging trends.



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Stock

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August 2024 at a glance

- Overall stock volumes have increased +3.09% MoM.
- Levels for vehicles under 2 years old rose by +6.7% MoM, more than double the monthly average.
- We also saw an increase across all mileage bands MoM, with those with under 20k miles on the clock up the most at +5.3%.

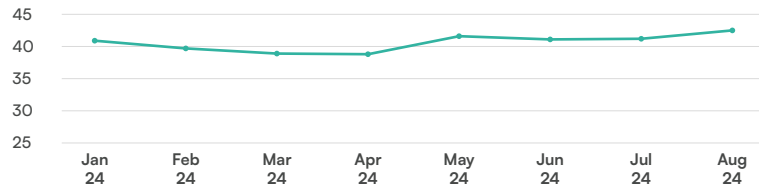
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Stock volume - by dealership

Overall stock volumes have increased +3.09% MoM.

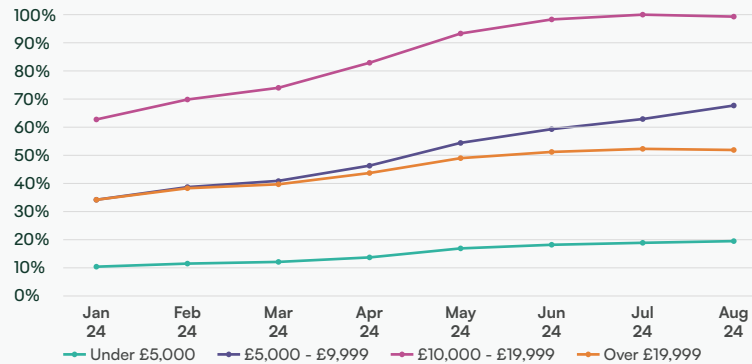
42.5

Jul 24: 41.2 MoM: +3.09%



Indexed stock volume - by price

Stock levels for vehicles priced £5k - £10k continue to increase the most and have almost doubled in quantity since the start of the year.

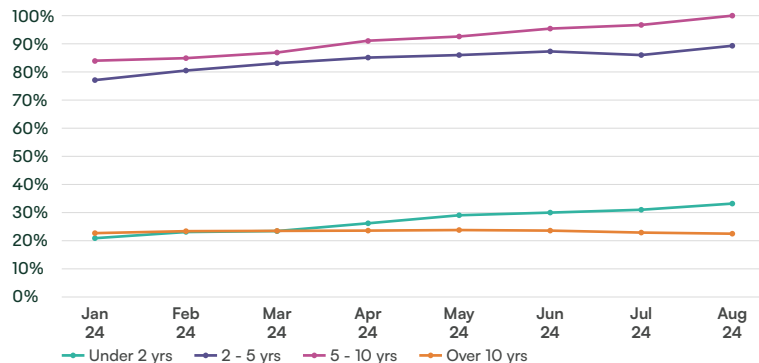


The biggest stock rises in August were for vehicles:

- Under 2 years old
- Priced £5k - £10k
- Under 20k miles

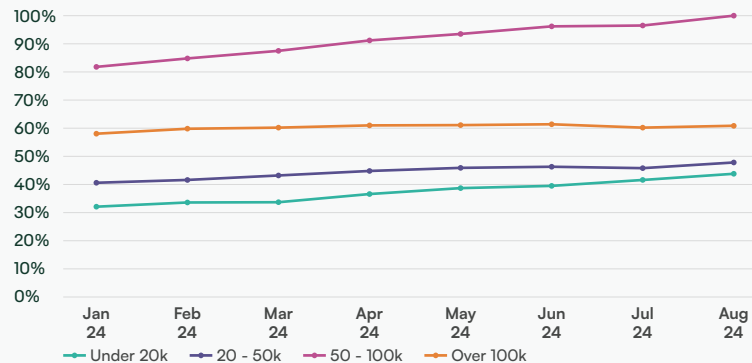
Indexed stock volume - by age

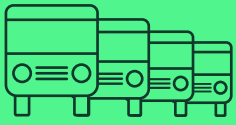
Stock levels for vehicles under 2 years old rose by +6.7% MoM - more than double the overall monthly rise of +3.09%.



Indexed stock volume - by mileage

Stock levels have increased across all mileage bands MoM, with those with under 20k miles on the clock up the most at +5.3%.





Stock

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August 2024 at a glance

- August saw big stock volume rises for Ford, with the Ranger up nearly +45% and the Transit Custom up over +10%.
- Only vehicles priced under £5k decreased in stock volumes MoM, all other price bands were up, with £5k - £10k leading the way at +16% MoM.
- Ford (+6.9%), Vauxhall (+6.9%), Mercedes-Benz (+5.4%) and Iveco (+9.7%), all saw significant MoM rises in stock levels.

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Indexed stock volume - top 9 makes

On average, stock levels increased by +2.7% MoM. Iveco saw the biggest increase at +9.7% and Ford stock levels are at their highest so far this year.

#	Make	Jul 24	Aug 24	MoM
1	Ford	93.5	100.0	+6.9%
2	Vauxhall	33.1	35.3	+6.9%
3	Volkswagen	31.4	31.3	-0.1%
4	Mercedes-Benz	20.9	22.1	+5.4%
5	Peugeot	21.1	20.9	-1.0%
6	Citroen	18.6	18.7	+0.8%
7	Renault	18.6	18.4	-1.2%
8	Nissan	8.5	8.3	-2.8%
9	Iveco	3.0	3.2	+9.7%

Indexed stock volume - selected makes/models

The most popular commercial vehicle - the Ford Transit Custom - saw a sharp increase in stock levels, up +10.08% MoM.

#	Make	Model	Jul 24	Aug 24	MoM
1	Ford	Transit Custom	90.8	100.0	+10.08%
2	Ford	Transit	74.3	78.6	+5.72%
3	Vauxhall	Vivaro	41.5	44.9	+8.25%
4	Mercedes-Benz	Sprinter	36.0	37.9	+5.18%
5	Volkswagen	Transporter	35.0	34.3	-1.87%
6	Ford	Transit Connect	29.3	30.8	+5.16%
7	Ford	Ranger	26.0	27.5	+5.75%
8	Vauxhall	Combo	24.8	26.6	+7.10%
9	Renault	Trafic	24.6	24.5	-0.59%
10	Citroen	Berlingo	23.6	24.1	+2.21%
11	Peugeot	Partner	23.6	23.6	+0.09%
12	Peugeot	Boxer	15.9	15.7	-1.36%
13	Volkswagen	Crafter	14.0	14.3	+1.74%
14	Renault	Master	13.1	13.2	+0.46%
15	Iveco	Daily	7.2	7.8	+8.46%

Ford tops all the tables (as it has done all year) with Transit Custom stock levels up over +10% MoM.

Indexed stock volume - selected makes/models

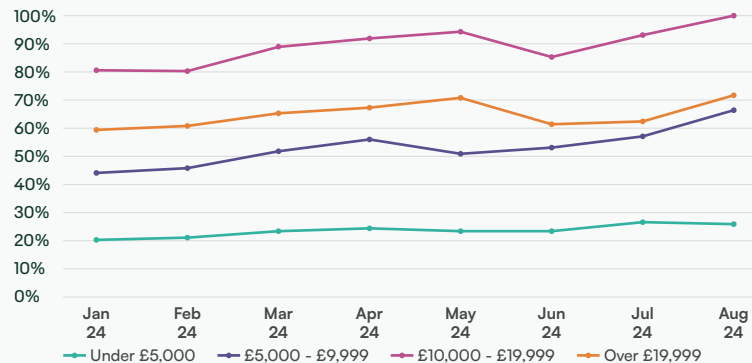
(2 - 5 yrs/50 - 100k miles)

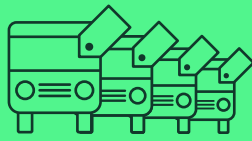
The Ford Ranger saw a jump in stock levels (+44.89% MoM), overtaking the VW Transporter and matching the Peugeot Partner volume levels.

#	Make	Model	Jul 24	Aug 24	MoM
1	Ford	Transit Custom	94.4	100.0	+5.93%
2	Ford	Transit	54.4	57.5	+5.68%
3	Vauxhall	Vivaro	43.3	47.9	+10.59%
4	Ford	Transit Connect	36.7	36.9	+0.48%
=5	Ford	Ranger	20.5	29.8	+44.89%
=5	Peugeot	Partner	26.8	29.8	+11.04%
6	Vauxhall	Combo	20.7	20.0	-3.21%
7	Volkswagen	Transporter	22.8	19.5	-14.33%
=8	Citroen	Berlingo	20.3	19.1	-6.14%
=8	Renault	Trafic	19.7	19.1	-2.89%

Indexed sold stock - by price

Only vehicles priced under £5k decreased in stock volumes MoM, all other price bands were up, with £5k - £10k leading the way at +16% MoM.





Price

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August 2024 at a glance

- Overall average commercial vehicle prices dropped by -1.6% MoM. Only those aged over 10 years saw a small increase, up +1.8% MoM.
- The top 9 makes saw prices decrease on average by -1.8% MoM. Only Ford (+0.1%) and Mercedes-Benz (+0.2%) had rises, albeit very small.
- Due to price changes, the Ford Transit Connect is now more expensive than The Renault Master.

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Average price

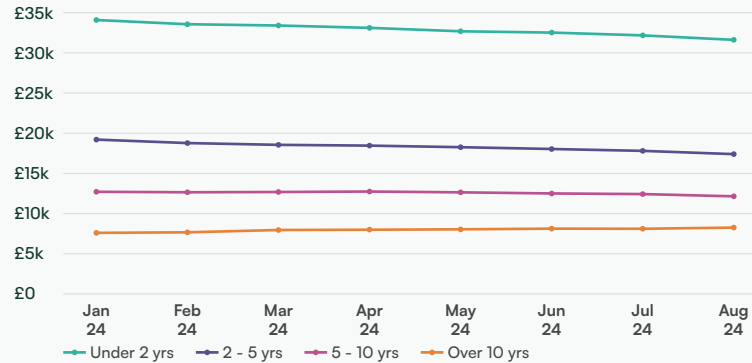
Overall average commercial vehicle prices dropped by -1.6% MoM.

£16,061

Jul 24: **£16,328** MoM: **-1.6%**

Average price - by age

The majority of vehicle prices were down MoM, with the exception of those aged over 10 years which saw a small increase, up +1.8%.



Average price - selected makes/models

In the mid-range price bracket, the Ford Transit Connect (£16,557 +2.23% MoM) became more expensive than its rival the Renault Master (£16,185 -4.53% MoM).

#	Make	Model	Jul 24	Aug 24	MoM
1	Volkswagen	Transporter	£27,646	£26,830	-2.95%
2	Ford	Ranger	£25,223	£25,524	+1.20%
3	Volkswagen	Crafter	£22,813	£22,264	-2.41%
4	Iveco	Daily	£17,521	£17,370	-0.86%
5	Ford	Transit	£17,613	£17,340	-1.55%
6	Ford	Transit Connect	£16,196	£16,557	+2.23%
7	Renault	Trafic	£16,762	£16,279	-2.88%
8	Renault	Master	£16,954	£16,185	-4.53%
9	Mercedes-Benz	Sprinter	£16,155	£15,883	-1.68%
10	Peugeot	Boxer	£15,532	£14,819	-4.59%
11	Vauxhall	Vivaro	£13,159	£13,290	+1.00%
12	Ford	Transit Custom	£10,963	£10,968	+0.04%
13	Citroen	Berlingo	£10,802	£10,446	-3.29%
14	Vauxhall	Combo	£9,788	£9,463	-3.32%
15	Peugeot	Partner	£8,876	£8,696	-2.03%

Average price - top 9 makes

The top 9 makes saw prices decrease on average by -1.8% MoM. Only Ford (+0.1%) and Mercedes-Benz (+0.2%) had rises, albeit very small.

#	Make	Jul 24	Aug 24	MoM
1	Volkswagen	£23,101	£22,484	-2.7%
2	Iveco	£17,503	£17,271	-1.3%
3	Ford	£16,865	£16,877	+0.1%
4	Mercedes-Benz	£15,627	£15,654	+0.2%
5	Renault	£15,606	£15,117	-3.1%
6	Nissan	£14,625	£14,390	-1.6%
7	Vauxhall	£12,143	£12,014	-1.1%
8	Citroen	£12,289	£11,933	-2.9%
9	Peugeot	£12,177	£11,767	-3.4%

Average price - selected makes/models (2 - 5 yrs/50 - 100k miles)

Only the Ford Ranger saw a price increase, up +0.59% MoM. All other makes/models were down with the Transit and Vivaro both down over 4%.

#	Make	Model	Jul 24	Aug 24	MoM
1	Volkswagen	Transporter	£21,971	£21,403	-2.59%
2	Ford	Ranger	£17,173	£17,273	+0.59%
3	Mercedes-Benz	Sprinter	£16,532	£16,141	-2.37%
4	Ford	Transit	£14,828	£14,201	-4.23%
5	Ford	Transit Custom	£14,129	£13,588	-3.83%
6	Renault	Trafic	£11,468	£11,382	-0.75%
7	Ford	Transit Connect	£10,575	£10,316	-2.45%
8	Vauxhall	Vivaro	£10,458	£9,963	-4.73%
9	Citroen	Berlingo	£8,141	£8,087	-0.66%
10	Peugeot	Partner	£8,066	£8,036	-0.37%
11	Vauxhall	Combo	£7,701	£7,612	-1.15%

Top 5 price movers by MoM increase and decrease

Increase

Make	Model	Age	Mileage	Avg price	MoM
Ford	Transit Connect	Over 10 yrs	Over 100k	£3,231	+2.0%
Citroen	Relay	Under 2 yrs	Under 20k	£25,172	+1.0%
Ford	Transit	Over 10 yrs	Over 100k	£5,252	+0.9%
Ford	Ranger	5 - 10 yrs	50 - 100k	£17,273	+0.8%
Ford	Transit	Over 10 yrs	50 - 100k	£7,687	+0.6%

Decrease

Make	Model	Age	Mileage	Avg price	MoM
Ford	Transit	5 - 10 yrs	20 - 50k	£19,409	-5.2%
Ford	Transit Custom	2 - 5 yrs	Over 100k	£12,578	-5.0%
Ford	Transit	Under 2 yrs	Under 20k	£33,000	-4.3%
Ford	Transit Custom	Under 2 yrs	Under 20k	£31,672	-4.2%
Ford	Transit Custom	2 - 5 yrs	Under 20k	£26,878	-3.8%



Demand



August 2024 at a glance

- August has seen an increase in ad views for half of the top 10 makes, with Mercedes-Benz seeing the biggest percentage increase (+8.2% MoM).
- 62% of listings of commercial vehicles are aged 3-8 years with 53% of ad views in the same band.
- August has seen the most commercial vehicle sales so far this year.

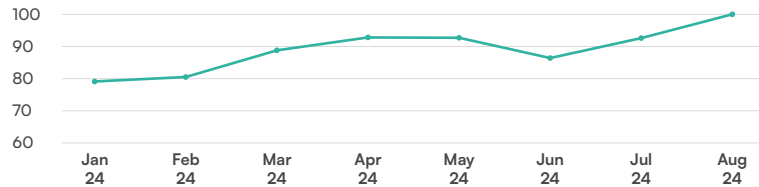
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Indexed total commercial vehicles sold

August has seen the most commercial vehicle sales so far this year which coincides with most vehicles seeing a price decrease.

100

Jul 24: **92.6** MoM: **+8.0%**



Ad views - top 10 makes

August has seen an increase in ad views for half of the top 10 makes, with Mercedes-Benz seeing the biggest percentage increase (+8.2% MoM).

#	Make	Jul 24	Aug 24	MoM
1	Ford	63.8	63.5	-0.5%
2	Volkswagen	38.0	40.3	+5.9%
3	Mercedes-Benz	19.3	20.9	+8.2%
4	Vauxhall	13.5	13.3	-1.6%
5	Peugeot	9.9	10.0	+1.5%
6	Renault	9.0	8.8	-2.9%
7	Nissan	8.7	8.2	-5.3%
8	Citroen	7.6	7.1	-6.7%
9	Mitsubishi	6.0	6.1	+1.2%
10	Iveco	3.5	3.6	+2.7%

Ad views - by price

Listings priced £10k - £20k dominate at 40%, with 60% of ad views split evenly between the £5k - £10k and £10k - £20k price bands.

Price range	% of avg listings		% of avg ad views	
	Jul 24	Aug 24	Jul 24	Aug 24
Under £5,000	8.7%	8.3%	20.3%	20.5%
£5,000 - £9,999	22.3%	22.4%	29.2%	29.4%
£10,000 - £19,999	42.2%	39.9%	31.3%	30.5%
Over £19,999	31.3%	29.5%	19.2%	19.6%

Ad views - by age

62% of listings of commercial vehicles are aged 3-8 years with 53% of ad views in the same band.

Age range	% of avg listings		% of avg ad views	
	Jul 24	Aug 24	Jul 24	Aug 24
Under 6 mths	5.2%	5.5%	1.9%	2.0%
6 mths - 1 yr	3.3%	3.4%	1.3%	1.3%
1 - 2 yrs	4.6%	4.7%	2.5%	2.6%
2 - 3 yrs	5.6%	5.7%	3.6%	3.5%
3 - 4 yrs	17.0%	16.9%	10.2%	10.4%
4 - 5 yrs	13.7%	13.8%	10.5%	10.8%
5 - 6 yrs	15.0%	15.3%	13.3%	13.8%
6 - 8 yrs	16.6%	16.3%	19.1%	18.3%
8 - 10 yrs	9.3%	9.2%	14.3%	14.1%
Over 10 yrs	9.7%	9.2%	23.4%	23.2%

Ad views - top 10 makes/models

No change MoM for the top 6. The Toyota Hilux has dropped to 9th for the first time this year whilst the Vito and Vivaro both move up one place.

#	Make	Model	Jul 24 ranking	MoM change
1	Ford	Transit Custom	1	0
2	Volkswagen	Transporter	2	0
3	Ford	Transit	3	0
4	Ford	Ranger	4	0
5	Mercedes-Benz	Sprinter	5	0
6	Ford	Transit Connect	6	0
7	Vauxhall	Vivaro	8	+1
8	Mercedes-Benz	Vito	9	+1
9	Toyota	Hilux	7	-2
10	Mitsubishi	L200	10	0

Commercial vehicles sold - top 10 makes/models

YTD the top 3 have been the same, while the VW Transporter moves into 4th for the first time. The Renault Trafic is the biggest MoM mover, up from 10th to 7th.

#	Make	Model	Jul 24 ranking	MoM change
1	Ford	Transit Custom	1	0
2	Ford	Transit	2	0
3	Vauxhall	Vivaro	3	0
4	Volkswagen	Transporter	5	+1
5	Ford	Ranger	4	-1
6	Mercedes-Benz	Sprinter	6	0
7	Renault	Trafic	10	+3
8	Ford	Transit Connect	7	-1
9	Vauxhall	Combo	8	-1
10	Peugeot	Partner	11	+1

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About MOTORS eBay and Gumtree Joint Package

The MOTORS eBay and Gumtree Joint Package is a powerful advertising solution for retailers of motorbikes, scooters, commercial vehicles, and campers/caravans.

By simultaneously providing access to eBay and Gumtree marketplaces, retailers can reach millions of potential customers in a time-efficient and cost-effective way.

MOTORS has over 15 years of experience connecting vehicle retailers with buyers and is owned by O3 Industries and Novum Capital.

For more information, please visit www.dealer.motors.co.uk

