

Market View

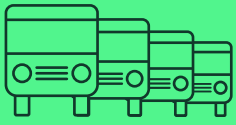
For the latest insights from MOTORS.

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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July 2024 at a glance

- Average stock levels per dealer were down -1.1% MoM, continuing the downward trend since May.
- Stock levels have been steadily increasing YTD. MoM those priced between £5,000 - £9,999 saw the biggest increase, up +6.1%..
- Stock levels for vehicles over 10 years old have fallen since May with July seeing a -3% MoM drop.

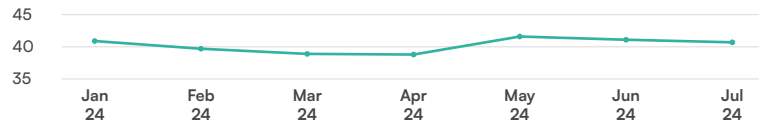
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Stock volume - by dealership

Average stock levels per dealer were down -1.1% MoM.

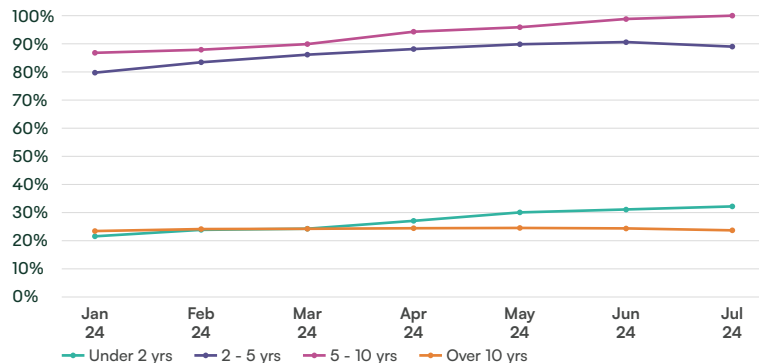


Stock levels have been decreasing MoM since May.



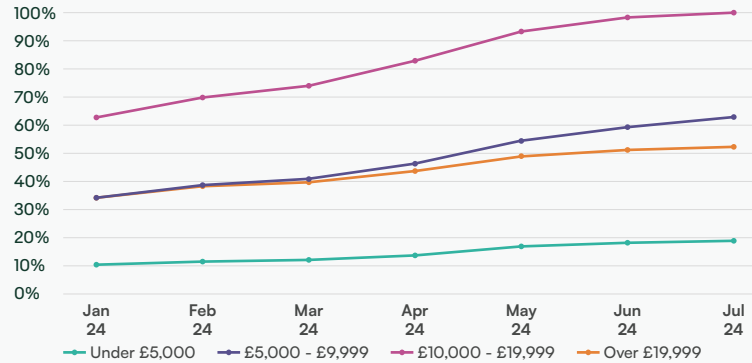
Indexed stock volume - by age

Stock levels for vehicles over 10 years old have fallen since May with July seeing a -3% MoM drop. Vehicles under 2 years old were up +3.8% MoM.



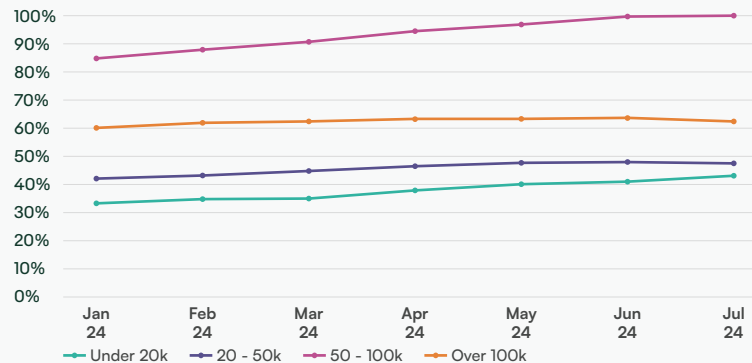
Indexed stock volume - by price

Stock levels have been steadily increasing YTD. MoM those priced between £5,000 - £9,999 saw the biggest increase, up +6.1%.

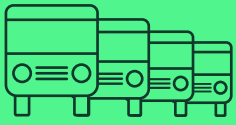


Indexed stock volume - by mileage

Vehicles with under 20k miles saw a +5.3% increase MoM whilst other mileage bands remained fairly flat.



Stock levels have increased steadily year to date.



Stock

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July 2024 at a glance

- With the market mostly seeing an increase in stock levels it's no surprise that sold volumes fell MoM, down on average, across all price bands by -15%.
- Ford topped the stock volume list by far whilst Renault - down in sixth - saw the biggest MoM increase, up +10.5%.
- The Renault Master saw the biggest stock volume increase, up +15.93% MoM.

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Indexed stock volume - top 9 makes

Ford topped the list by far whilst Renault - down in sixth - saw the biggest MoM increase, up +10.6%.

#	Make	Jun 24	Jul 24	MoM
1	Ford	100.0	99.0	-1.0%
2	Vauxhall	33.7	35.0	+3.9%
3	Volkswagen	33.0	33.2	+0.7%
4	Peugeot	22.7	22.4	-1.3%
5	Mercedes-Benz	22.0	22.1	+0.6%
=6	Renault	17.8	19.7	+10.6%
=6	Citroen	19.8	19.7	-0.5%
7	Nissan	9.2	9.0	-1.9%
8	Iveco	3.3	3.1	-3.8%

Indexed stock volume - selected makes/models

The Ford Transit Custom remained top despite a MoM fall of -2.13% while the Renault Master saw the biggest increase, up +15.93% MoM.

#	Make	Model	Jun 24	Jul 24	MoM
1	Ford	Transit Custom	100.0	97.9	-2.13%
2	Ford	Transit	79.6	80.1	+0.65%
3	Vauxhall	Vivaro	43.6	44.7	+2.51%
4	Mercedes-Benz	Sprinter	39.1	38.8	-0.79%
5	Volkswagen	Transporter	35.9	37.7	+4.98%
6	Ford	Transit Connect	30.9	31.6	+2.14%
7	Ford	Ranger	29.1	28.0	-3.81%
8	Vauxhall	Combo	24.8	26.7	+7.59%
9	Renault	Trafic	23.7	26.5	+11.99%
=10	Citroen	Berlingo	25.3	25.4	+0.29%
=10	Peugeot	Partner	24.8	25.4	+2.53%
11	Peugeot	Boxer	17.7	17.2	-3.22%
12	Volkswagen	Crafter	15.1	15.1	+0.34%
13	Renault	Master	12.2	14.1	+15.93%
14	Iveco	Daily	8.1	7.7	-4.11%

Commercial vehicle sales have dropped by -15% MoM.

Indexed stock volume - selected makes/models

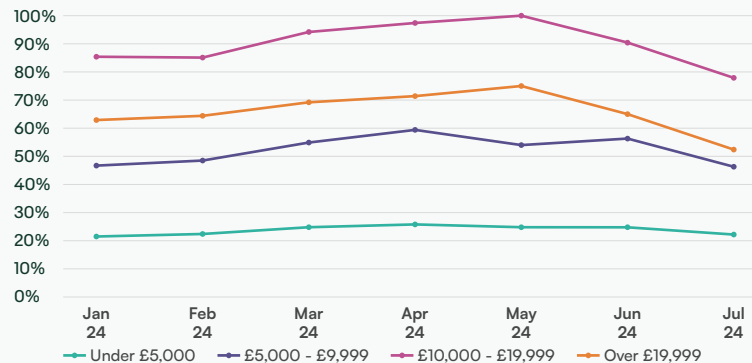
(2 - 5 yrs/50 - 100k miles)

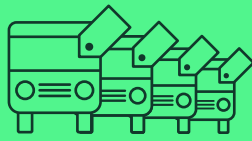
Mostly MoM stock increases for these selected makes and models with the exception of the Ford's Transit and Ranger models, both seeing a decline.

#	Make	Model	Jun 24	Jul 24	MoM
1	Ford	Transit Custom	97.3	100.0	+2.78%
2	Ford	Transit	52.9	57.6	+8.89%
3	Vauxhall	Vivaro	42.3	45.8	+8.46%
4	Ford	Transit Connect	40.1	38.9	-3.22%
5	Peugeot	Partner	27.6	28.4	+2.76%
6	Volkswagen	Transporter	23.9	24.1	+0.81%
7	Vauxhall	Combo	19.0	21.9	+15.66%
8	Ford	Ranger	23.5	21.8	-7.27%
9	Citroen	Berlingo	20.7	21.6	+4.21%
10	Renault	Trafic	19.6	20.8	+6.51%

Indexed sold stock - by price

With the market mostly seeing an increase in stock levels it's no surprise that sold volumes fell MoM, down on average, across all price bands by -15%.





Price

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July 2024 at a glance

- Average commercial vehicle prices dropped by -0.6% MoM.
- Prices for vehicles aged between 2 - 5 years old saw the biggest decline, down -1.3% MoM.
- Citroen saw the biggest MoM price drop (-2.7%) and Renault the biggest rise (+4.5%).

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Average price

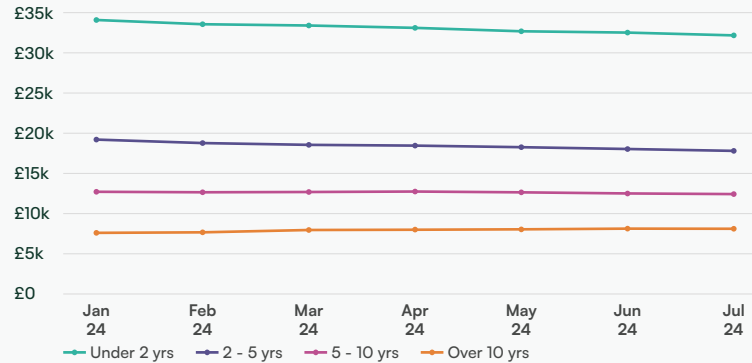
Average commercial vehicle prices dropped by -0.6% MoM.

£16,328

Jun 24: **£16,429** MoM: **-0.6%**

Average price - by age

Vehicles aged between 2 - 5 years old saw the biggest decline, down -1.3% MoM.



Average price - selected makes/models

The Renault Master saw the biggest price increase, up +5.10% MoM. The Vauxhall Combo dropped the most, down -2.30% MoM.

#	Make	Model	Jun 24	Jul 24	MoM
1	Volkswagen	Transporter	£27,655	£27,646	-0.03%
2	Ford	Ranger	£25,258	£25,223	-0.14%
3	Volkswagen	Crafter	£22,210	£22,813	+2.72%
4	Ford	Transit	£17,868	£17,613	-1.43%
5	Iveco	Daily	£17,182	£17,521	+1.98%
6	Renault	Master	£16,131	£16,954	+5.10%
7	Renault	Trafic	£16,407	£16,762	+2.17%
8	Ford	Transit Connect	£16,334	£16,196	-0.84%
9	Mercedes-Benz	Sprinter	£16,352	£16,155	-1.21%
10	Peugeot	Boxer	£15,599	£15,532	-0.43%
11	Vauxhall	Vivaro	£12,913	£13,159	+1.90%
12	Ford	Transit Custom	£11,168	£10,963	-1.83%
13	Citroen	Berlingo	£10,939	£10,802	-1.25%
14	Vauxhall	Combo	£10,019	£9,788	-2.30%
15	Peugeot	Partner	£8,995	£8,876	-1.33%

Average price - top 9 makes

Prices remained flat MoM, up just +0.2% for the top 9 models. Citroen saw the biggest drop (-2.7%) and Renault the biggest rise (+4.5%).

#	Make	Jun 24	Jul 24	MoM
1	Volkswagen	£22,914	£23,101	+0.8%
2	Iveco	£17,279	£17,503	+1.3%
3	Ford	£17,112	£16,865	-1.4%
4	Mercedes-Benz	£15,687	£15,627	-0.4%
5	Renault	£14,936	£15,606	+4.5%
6	Nissan	£14,443	£14,625	+1.3%
7	Citroen	£12,627	£12,289	-2.7%
8	Peugeot	£12,351	£12,177	-1.4%
9	Vauxhall	£12,200	£12,143	-0.5%

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

All but one make/model fell in price MoM with the biggest faller the Renault Trafic, down -3.39%. The Ford Ranger bucked the trend, up +0.81%.

#	Make	Model	Jun 24	Jul 24	MoM
1	Volkswagen	Transporter	£22,626	£21,970	-2.90%
2	Ford	Ranger	£17,034	£17,172	+0.81%
3	Mercedes-Benz	Sprinter	£16,652	£16,532	-0.72%
4	Ford	Transit	£15,170	£14,828	-2.25%
5	Ford	Transit Custom	£14,158	£14,129	-0.20%
6	Renault	Trafic	£11,870	£11,467	-3.39%
7	Ford	Transit Connect	£10,619	£10,574	-0.42%
8	Vauxhall	Vivaro	£10,787	£10,458	-3.05%
9	Citroen	Berlingo	£8,148	£8,140	-0.08%
10	Peugeot	Partner	£8,085	£8,065	-0.24%
11	Vauxhall	Combo	£7,892	£7,700	-2.43%

Top 5 price movers by MoM increase and decrease

Increase

Make	Model	Age	Mileage	Avg price	MoM
Ford	Ranger	5 - 10 yrs	20 - 50k	£21,372	+4.4%
Vauxhall	Vivaro	Under 2 yrs	Under 20k	£28,042	+4.3%
Volkswagen	Transporter	2 - 5 yrs	Over 100k	£18,817	+3.4%
Peugeot	Expert	2 - 5 yrs	20 - 50k	£16,220	+3.1%
Ford	Transit	2 - 5 yrs	Under 20k	£27,712	+2.2%

Decrease

Make	Model	Age	Mileage	Avg price	MoM
Volkswagen	Transporter	2 - 5 yrs	Under 20k	£27,181	-7.5%
Ford	Tourneo Custom	5 - 10 yrs	50 - 100k	£20,825	-6.0%
Citroen	Berlingo	Over 10 yrs	Over 100k	£3,374	-4.8%
Peugeot	Partner	5 - 10 yrs	Over 100k	£5,317	-4.3%
Vauxhall	Vivaro	2 - 5 yrs	50 - 100k	£12,900	-4.0%



Demand



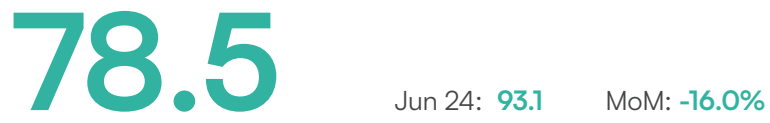
July 2024 at a glance

- Ad views have declined across the board this month with an average drop amongst the top manufacturers of -11.1%.
- Ford is the manufacturer with the most ad views and Iveco the least.
- Over 70% of listings are for vehicles priced over £10k.

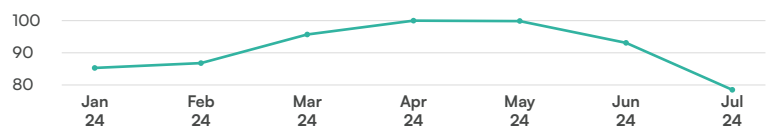
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Indexed total commercial vehicles sold

Sales of commercial vehicles was down -16.0% MoM.



Sales have continued to fall since the peak of April and May.



Ad views - top 10 makes

Ad views have declined across the board this month with an average drop amongst the top manufacturers of -11.1%.

#	Make	Jun 24	Jul 24	MoM
1	Ford	69.2	62.4	-9.8%
2	Volkswagen	40.0	37.1	-7.4%
3	Mercedes-Benz	21.0	18.9	-10.1%
4	Vauxhall	16.1	13.1	-18.7%
5	Peugeot	11.2	9.6	-14.4%
6	Renault	9.9	8.8	-11.8%
7	Nissan	9.2	8.6	-6.7%
8	Citroen	8.7	7.5	-13.9%
9	Mitsubishi	6.3	6.0	-5.4%
10	Iveco	4.1	3.6	-13.2%

Ad views - by price

Over 70% of listings are priced over £10k, while 60% of ad views are for vehicles in the £5k - £20k bracket.

Price range	% of avg listings		% of avg ad views	
	Jun 24	Jul 24	Jun 24	Jul 24
Under £5,000	8.4%	8.4%	25.6%	20.2%
£5,000 - £9,999	20.9%	21.0%	28.6%	28.8%
£10,000 - £19,999	40.6%	40.4%	29.4%	31.4%
Over £19,999	30.1%	30.2%	16.4%	19.6%

Ad views - by age

62% of listings have commercial vehicles aged 3 - 8 years with 46% of page views coming from vehicles aged 5 - 10 years.

Age range	% of avg listings		% of avg ad views	
	Jun 24	Jul 24	Jun 24	Jul 24
Under 6 mths	5.2%	5.2%	1.8%	1.9%
6 mths - 1 yr	2.9%	3.3%	1.4%	1.3%
1 - 2 yrs	4.6%	4.6%	2.5%	2.6%
2 - 3 yrs	5.8%	5.6%	3.5%	3.6%
3 - 4 yrs	17.6%	17.0%	10.1%	10.1%
4 - 5 yrs	13.5%	13.7%	10.5%	10.5%
5 - 6 yrs	15.0%	15.0%	13.1%	13.3%
6 - 8 yrs	16.3%	16.6%	19.3%	19.2%
8 - 10 yrs	9.0%	9.3%	14.3%	14.3%
Over 10 yrs	10.0%	9.7%	23.5%	23.2%

Ad views - top 10 makes/models

The VW Transporter has knocked the Ford Transit off the number two spot for the first time this year. No change at the top with the Ford Transit Custom.

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

Commercial vehicles sold - top 10 makes/models

The top 3 sold commercial vehicles have remained in their current positions YTD. The VW Transporter moves into fourth for the first time this year.

#	Make	Model	Jun 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	Ford	Transit Connect	7	0
8	Vauxhall	Combo	10	+2
9	Citroen	Berlingo	8	-1
10	Renault	Trafic	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

