

Market Intelligence

11 May 2022

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Vehicle Claims
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EMACS
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asTech
Driven by Repairify.

The Green
Parts
Specialists

INDASA

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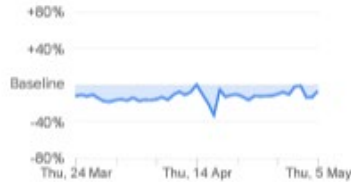
Google Covid-19 Community Mobility Report

United Kingdom 05/05/22

Retail and recreation

-7%

compared to baseline

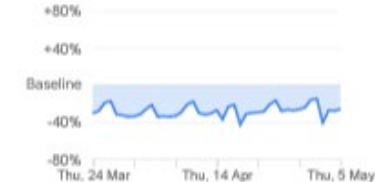


Mobility trends for places such as restaurants, cafés, shopping centres, theme parks, museums, libraries and cinemas.

Public transport

-26%

compared to baseline



Mobility trends for places that are public transport hubs, such as underground, bus and train stations.

Supermarket and pharmacy

+9%

compared to baseline



Mobility trends for places such as supermarkets, food warehouses, farmers markets, specialty food shops and pharmacies.

Workplaces

-23%

compared to baseline

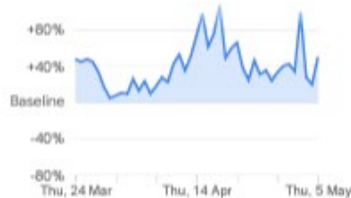


Mobility trends for places of work.

Parks

+50%

compared to baseline

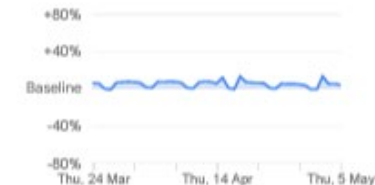


Mobility trends for places like national parks, public beaches, marinas, dog parks, plazas and public gardens.

Residential

+4%

compared to baseline



Mobility trends for places of residence.



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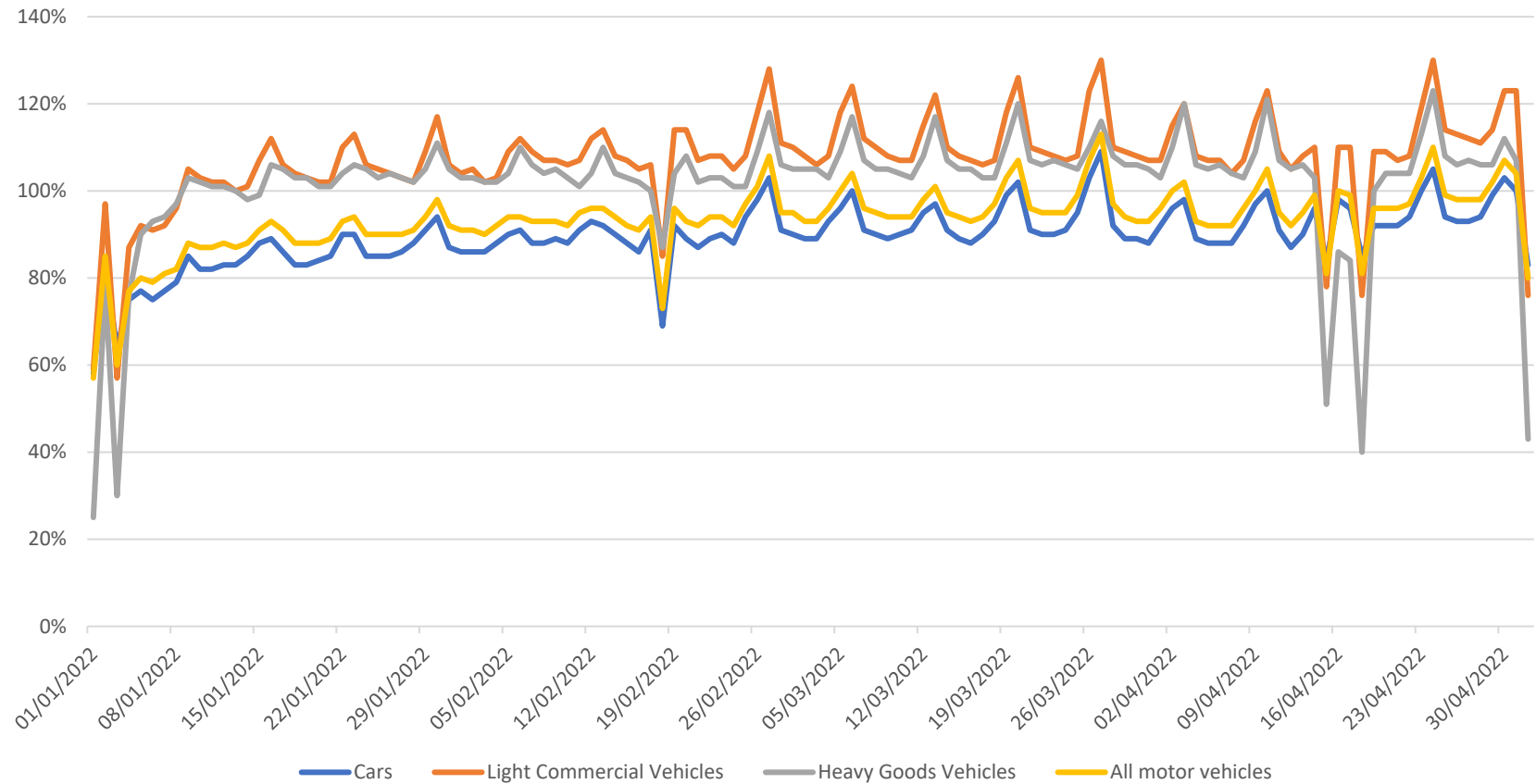
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Use of transport modes:
Great Britain, since 1 January 2022



APRIL 2022

NEW CAR REGISTRATIONS

TOTAL: 119,167

-15.8%

YEAR-ON-YEAR CHANGE



PETROL
54,633

DIESEL
6,725

MHEV
24,510

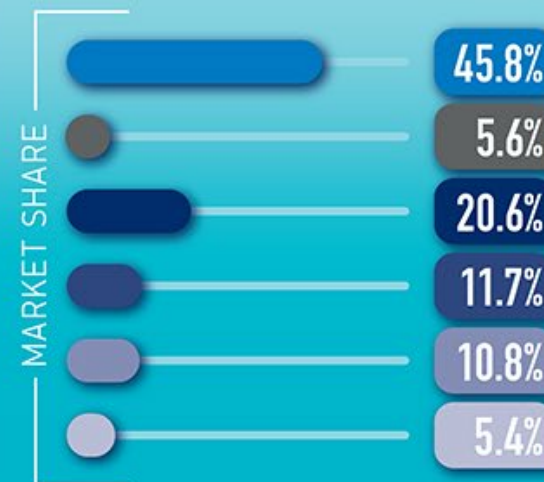
YEAR-ON-YEAR CHANGE
-23.2%
-52.0%
-5.2%

HEV
13,951

BEV
12,899

PHEV
6,449

YEAR-ON-YEAR CHANGE
+18.3%
+40.9%
-32.8%



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ILC

APRIL 2022

NEW LCV REGISTRATIONS

TOTAL: 21,597

-29.1%

YEAR-ON-YEAR CHANGE



PICKUPs

2,315



-44.0%

4X4s

122



-77.8%

VANS <2.0t

826



-48.2%

Vans >2.0-2.5t

2,122



-48.6%

Vans >2.5-3.5t

16,212



-19.1%

Rigids >3.5-6.0t

437



-20.3%

YEAR-ON-YEAR CHANGE



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Electric & alternatively fuelled vehicles

Year to date

	YTD 2022	YTD 2021	% change	Mkt share -22	Mkt share -21
Diesel	30,411	62,586	-51.4%	5.7%	11.0%
Petrol	232,402	280,385	-17.1%	43.3%	49.4%
MHEV diesel	25,103	41,582	-39.6%	4.7%	7.3%
MHEV petrol	73,474	62,009	18.5%	13.7%	10.9%
BEV	77,064	40,931	88.3%	14.4%	7.2%
PHEV	36,210	36,213	0.0%	6.7%	6.4%
HEV	62,063	43,397	43.0%	11.6%	7.7%
TOTAL	536,727	567,108	-5.4%		

BEV - Battery Electric Vehicle; **PHEV** - Plug-in Hybrid Electric Vehicle; **HEV** - Hybrid Electric Vehicle,
MHEV - Mild Hybrid Electric Vehicle

SMMT
DRIVING THE
MOTOR INDUSTRY



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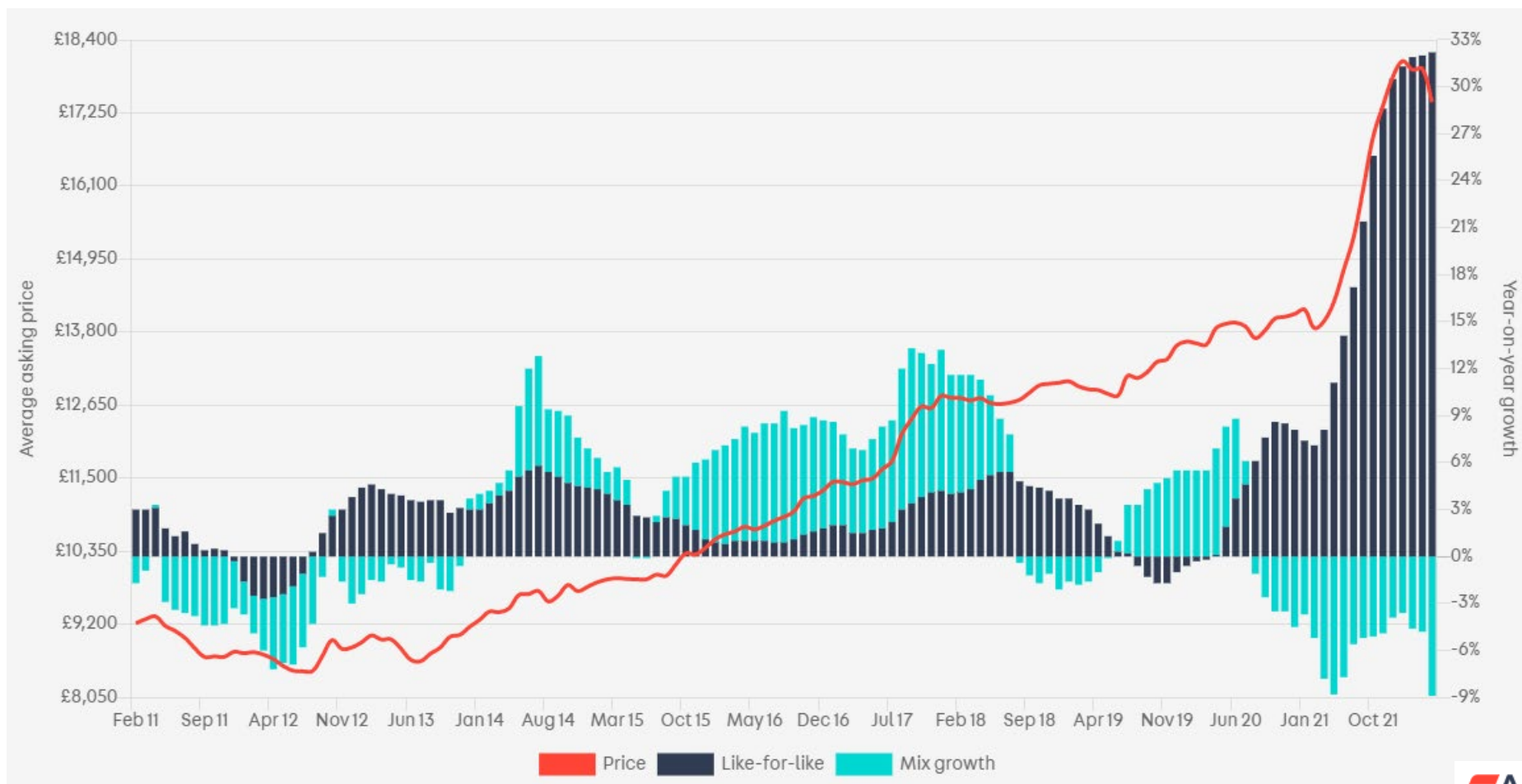
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Auto Trader Retail Price Index – whole market



AutoTrader

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Fuel prices

UK pump and wholesale fuel prices over time

Latest start-of-month prices in pence per litre for **unleaded petrol** and diesel



Errors and omissions excepted

Source: [RAC Fuel Watch](#) • [Embed](#)



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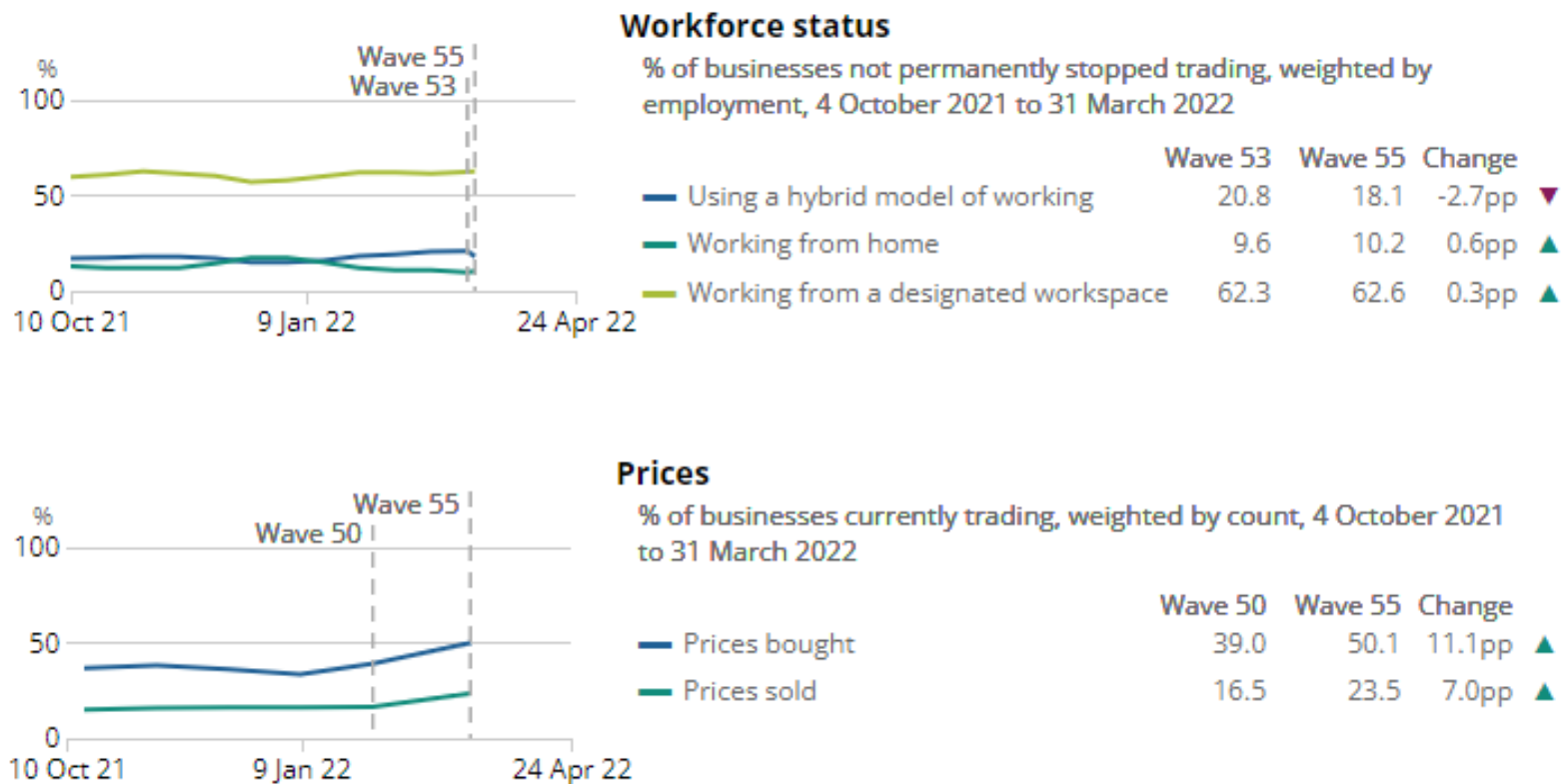
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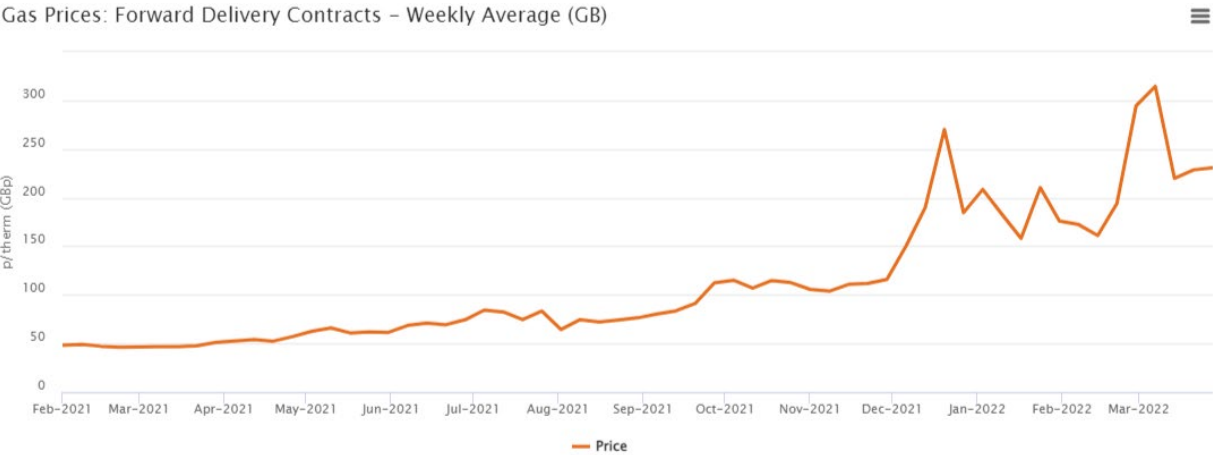
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Business insights and impact on the UK economy: 5 May 2022



Energy data and research



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“

May has arrived with a further rise in CPI (consumer prices index) and RPI (retail prices index), together with a fall in repair volumes (largely as a result of school holidays and public holidays) – which equates to an increased cost of production on reducing work levels (on average and not impacting everyone the same way as significant work in progress still exists).

Every month the Trend Tracker report brings new records, in terms of the cost of living and cost of production – highest Inflation in 30 years / highest interest rates since 2009 – driven mainly by the cost of fuel and energy. Both the Office for National Statistics and Bank of England are rapidly changing their forecasts as each month surpasses previous predictions – ONS believe further increases out to 8.7% by Q4 2022, a further two points from where it is now, then a gradual drop back to the target of two per cent.

Road traffic data from the department of transport shows an average of 94% Vs March 2020 which, together with reduced vehicle use as a result of rising fuel prices, is keeping repair volumes somewhere between 82-88% of 2019 levels – a number fast becoming the ‘new normal’ we all talked about during the pandemic. Whilst afternoon commuting patterns are like pre-pandemic, morning rush-hours can vary by day with the continued hybrid-working model being in place. This fall in vehicle use / repair volumes together with increased cost of production, could accelerate consolidation in the market with already some large acquisitions announced in the last few weeks.

Vehicle production levels have dropped by 27% Vs April 2021; a 41% decline in exports; and car manufacturing down 33% year-on-year with Mike Hawes, CEO SMMT asking for: 'Urgent action to protect the competitiveness of UK manufacturing'. This is not surprisingly leading to continued low car sales which are 15% down year-on-year (remembering last year was very low) with Hawes adding: 'Accelerating the transformation of the new car market and the carbon savings demanded of road transport in such difficult times requires not just the resolution of supply issues, however, but a broader package of measures that encourages customer demand and addresses obstacles, the biggest of which remains charging anxiety'. As a result, the SMMT has also revised forecasts reducing its 2022 predictions to 1.7m cars expected to be registered this year. Used car values are reducing slightly, but vary by model and fuel type. The expected drop may slow if new car production cannot recover quicker.

Finally, as mentioned at the out-set, repair volumes dropped in April as a result of the holidays and fuel prices changing driving habits, whilst repair costs remain at circa eight to nine per cent year-on-year increase; despite April being a quieter month, cycle times and, in particular, lead times remain a problem with circa 30 days for mobile repairs not an uncommon wait period.

We continue to keep our finger on the pulse as all these market factors change.

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