Market Intelligence

8 June 2022

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CORPORATE PARTNERS

SOLERA Vehicle Claims Audatex

Glasurit | R-M — Brands of BASF – We create chemistry

BMS

CAPS — Connecting the industry ™

Copart

EMACS — Bodyshop Management Systems

Entegral

enterprise rent-a-car

INNOVATION GROUP

MIRKA

NATIONWIDE VEHICLE RECOVERY ASSISTANCE

S&G Response

SHERWIN WILLIAMS

PARTNERS

asTech — Driven by Repairify

The Green Parts Specialists

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Google Covid-19 Community Mobility Report

United Kingdom 04/06/22

Retail and recreation

-23%

compared to baseline

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

Supermarket and pharmacy

-3%

compared to baseline

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

Parks

+51%

compared to baseline

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

Public transport

-20%

compared to baseline

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

Workplaces

-14%

compared to baseline

Mobility trends for places of work.

Residential

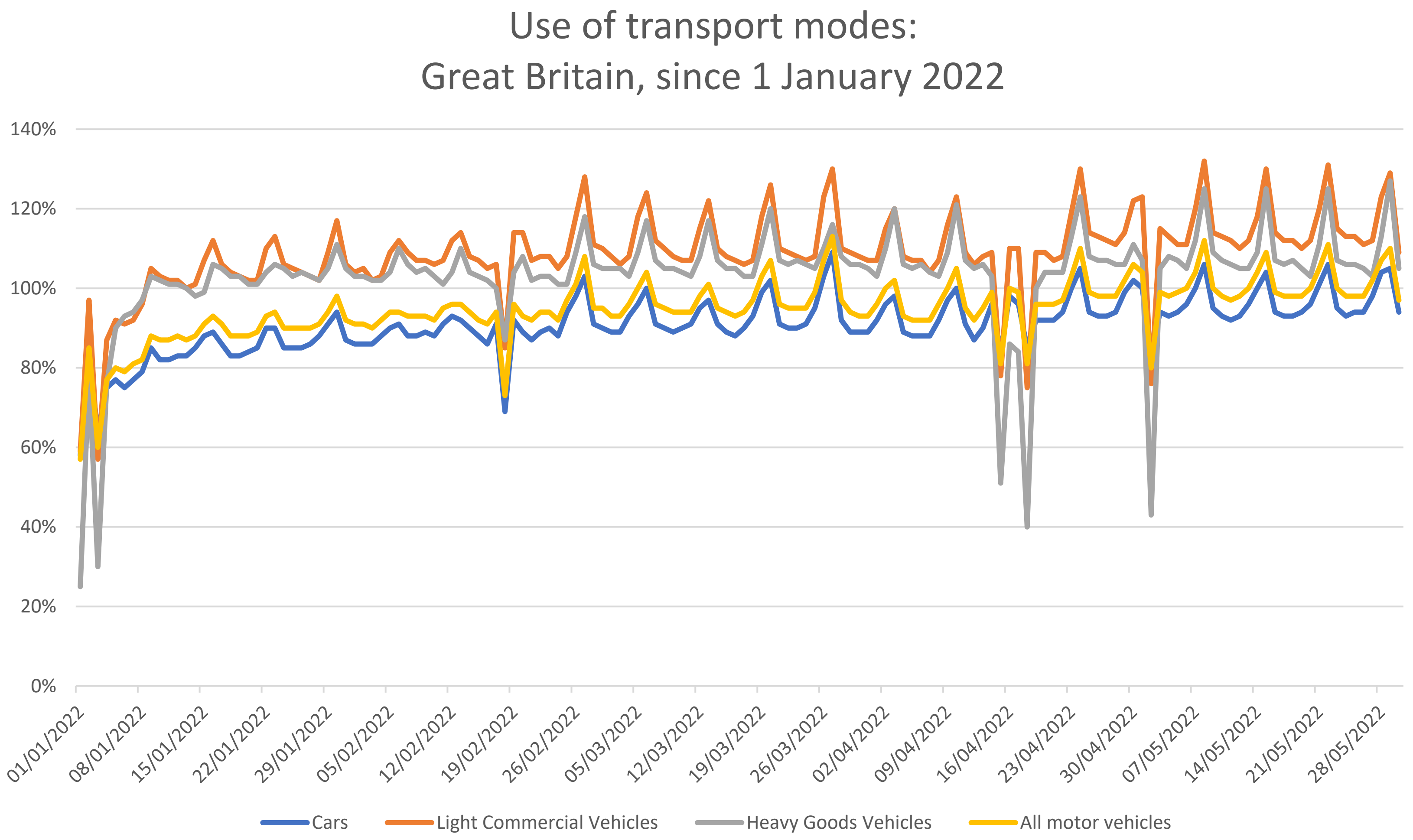
-0%

compared to baseline

Mobility trends for places of residence.

Google

Department for Transport



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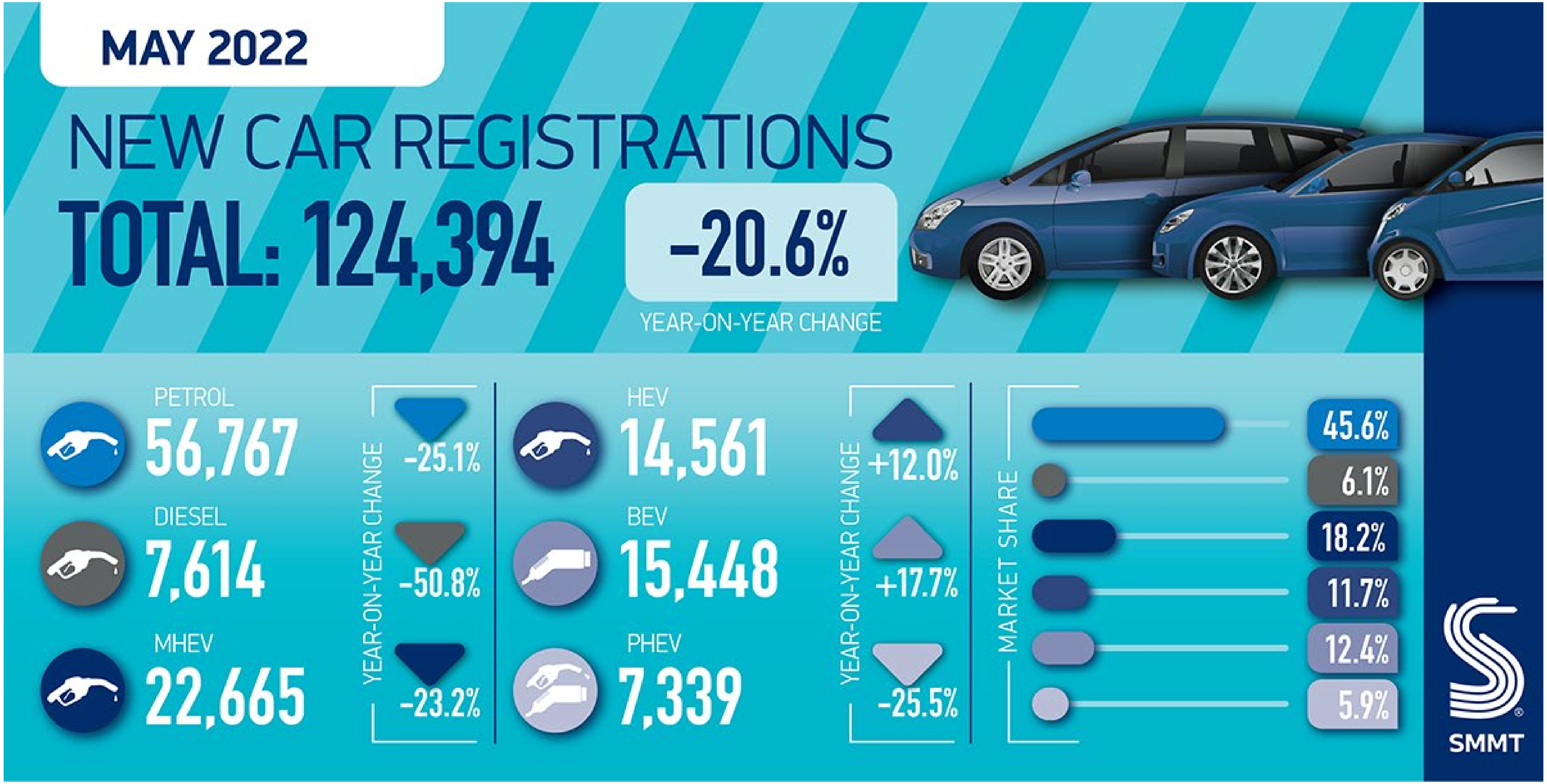

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MAY 2022

NEW LCV REGISTRATIONS

TOTAL: 22,000 **-25.1%**

YEAR-ON-YEAR CHANGE

		YEAR-ON-YEAR CHANGE
PICKUPs	2,611	-26.9%
4X4s	77	-80.7%
VANS <2.0t	813	-53.4%
Vans >2.0-2.5t	2,636	-33.4%
Vans >2.5-3.5t	15,863	-19.4%
Rigids >3.5-6.0t	511	-15.1%

SMMT

Electric & alternatively fuelled vehicles

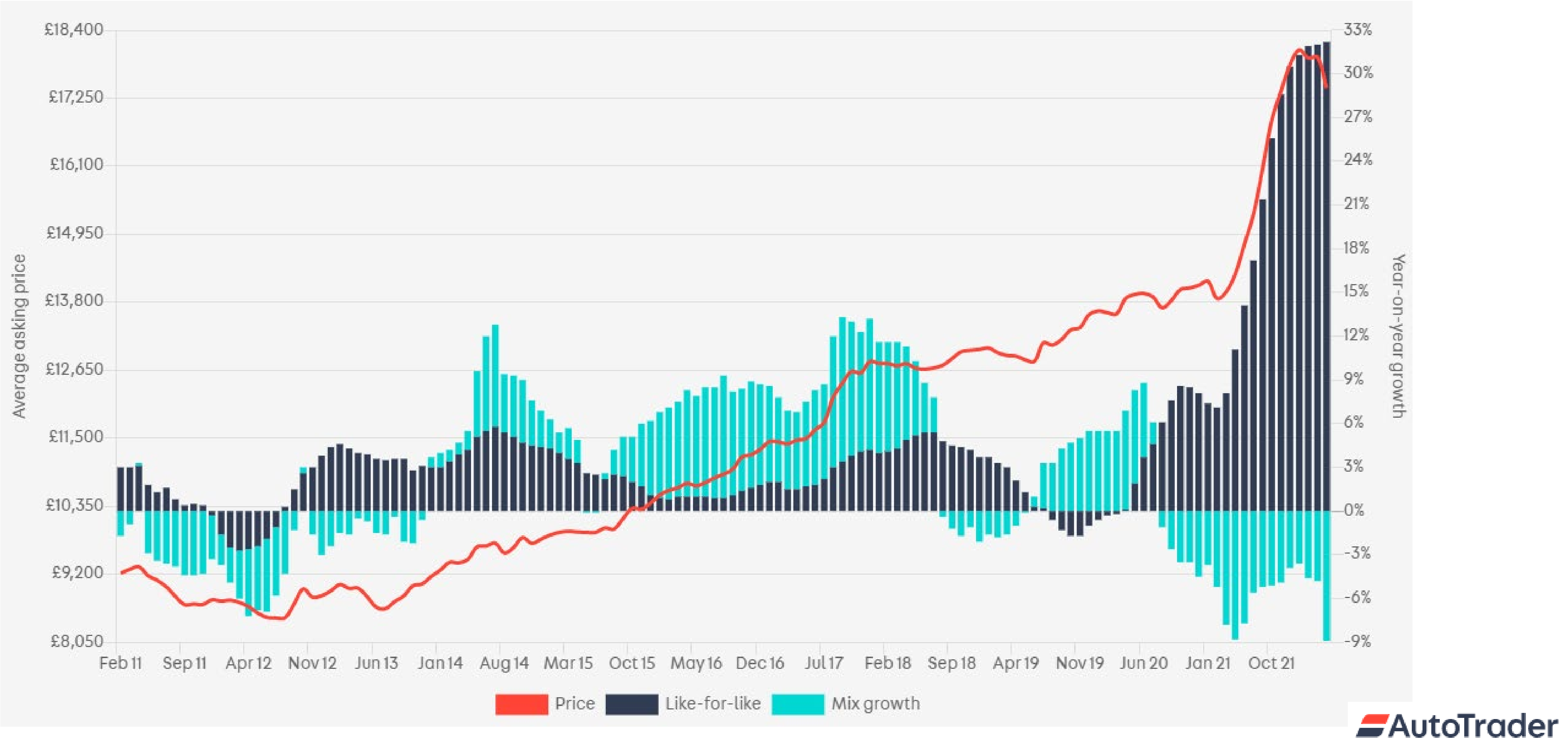
Year to date

	YTD 2022	YTD 2021	% change	Mkt share -22	Mkt share -21
Diesel	38,025	78,060	-51.3%	5.8%	10.8%
Petrol	289,169	356,172	-18.8%	43.7%	49.2%
MHEV diesel	30,926	52,215	-40.8%	4.7%	7.2%
MHEV petrol	90,316	80,882	11.7%	13.7%	11.2%
BEV	92,512	54,051	71.2%	14.0%	7.5%
PHEV	43,549	46,068	-5.5%	6.6%	6.4%
HEV	76,624	56,397	35.9%	11.6%	7.8%
TOTAL	**661,121**	**723,845**	**-8.7%**		

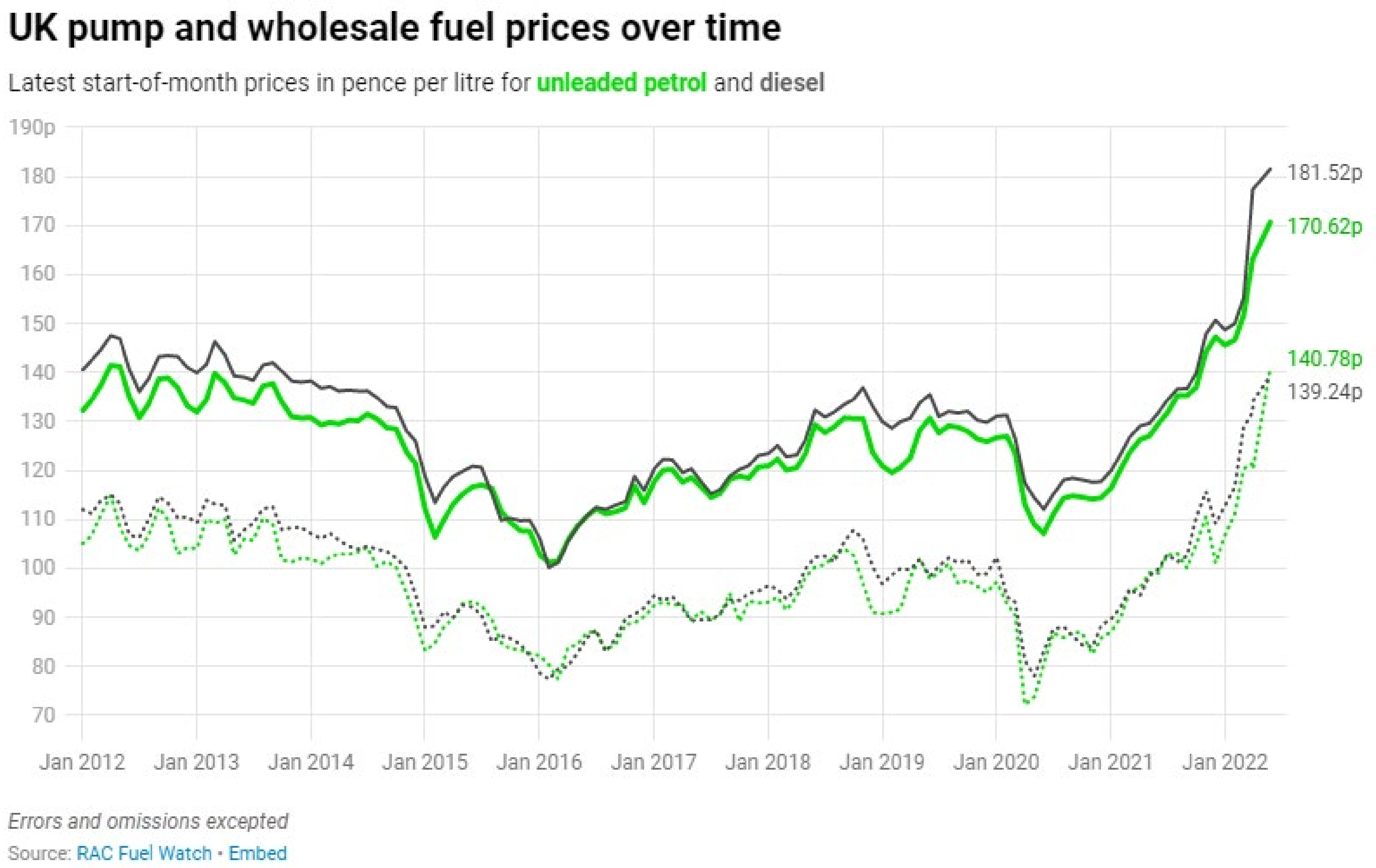
BEV - Battery Electric Vehicle; **PHEV** - Plug-in Hybrid Electric Vehicle; **HEV** - Hybrid Electric Vehicle, **MHEV** - Mild Hybrid Electric Vehicle

SMMT DRIVING THE MOTOR INDUSTRY

Auto Trader Retail Price Index – whole market



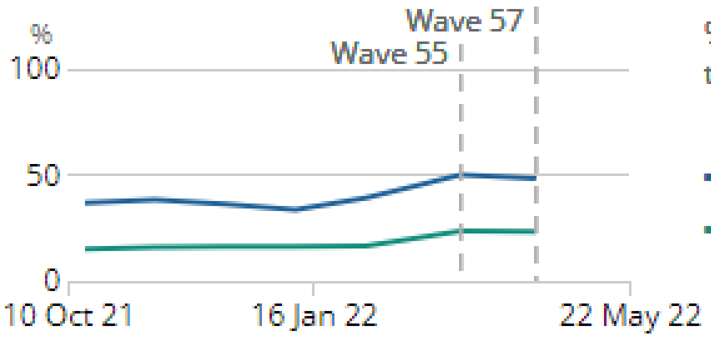
Fuel prices


UK pump and wholesale fuel prices over time
Latest start-of-month prices in pence per litre for unleaded petrol and diesel
190p
180
170
160
150
140
130
120
110
100
90
80
70
181.52p
170.62p
140.78p
139.24p
Jan 2012
Jan 2013
Jan 2014
Jan 2015
Jan 2016
Jan 2017
Jan 2018
Jan 2019
Jan 2020
Jan 2021
Jan 2022
Errors and omissions excepted
Source: RAC Fuel Watch • Embed

Business insights and impact on the UK economy: 1 June 2022

Prices

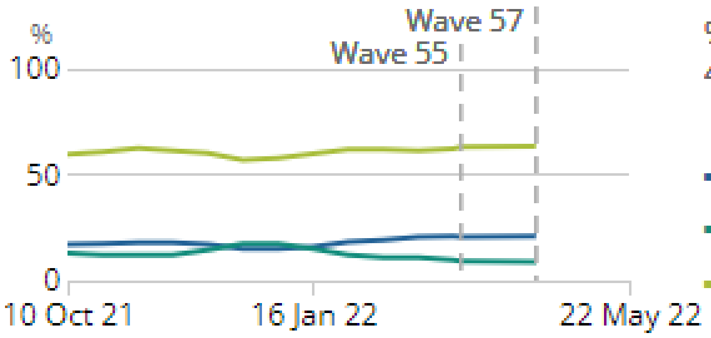
% of businesses currently trading, weighted by count, 4 October 2021 to 30 April 2022



	Wave 55	Wave 57	Change
Prices bought increased	50.1	48.2	-1.9pp ▼
Prices sold increased	23.5	23.2	-0.3pp ▼

Workforce status

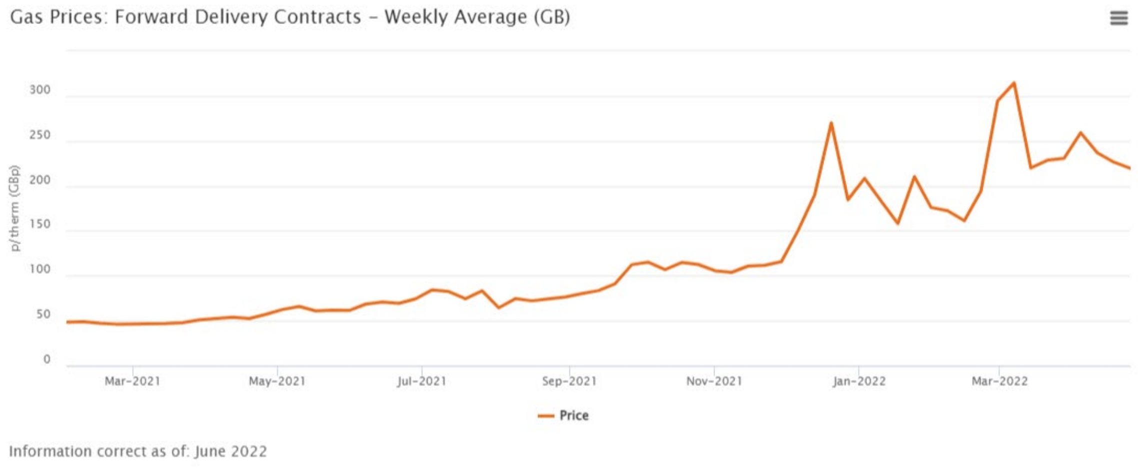
% of businesses not permanently stopped trading, weighted by count, 4 October 2020 to 30 April 2022

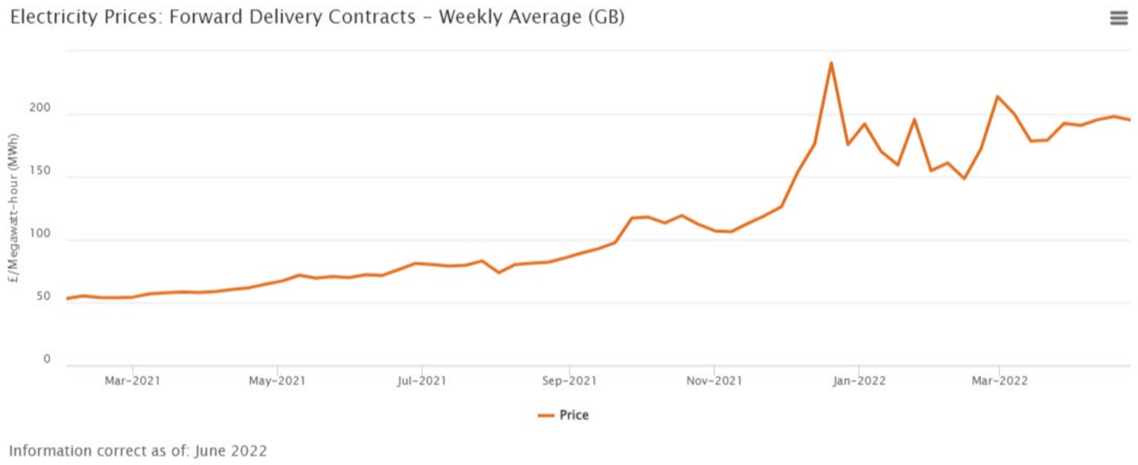


	Wave 55	Wave 57	Change
Using a hybrid model of working	20.5	21.0	0.5pp ▲
Working from home	9.1	8.7	-0.4pp ▼
Working from a designated workspace	63.1	63.4	0.3pp ▲

Office for National Statistics

Energy data and research





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Paul Sell,
Associate Director,
Trend Tracker

Trend Tracker™

"We remain in a period of significant change across the industry with several challenges to tackle, but these challenges are becoming predictable (for now anyway):

- Inflation continuing to increase, likely to climb to circa 10%, along with interest rates (predicted to also rise) to try to tackle this. Driven from various supply issues - the invasion of Ukraine, energy costs (predicted to rise again in October) and fuel costs consistently at all-time high prices.

- At the same time EVs continue to grow marketshare in a suppressed new car market, which is keeping used car values high (dropping slightly), leading to continued issues with mobility and some parts availability.

- As a result, the new ways of working that have been put in place recently to adapt to these issues will continue in the foreseeable future, pre-diagnosing damage and parts requirements to try to manage the extended lead times, optimise the 'off road time' and manage customer expectations.

- While repair volumes continue to track at 82-85% of pre-pandemic levels which we predict to stay in the short-term"

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